

**DocAve™ 4.1 Advanced Feature:
SharePoint® 2003 to MOSS 2007
Migrator Module**

White Paper

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Executive Summary

Microsoft® Chairman Bill Gates referred to Microsoft Office SharePoint® Server (MOSS) 2007 as a critical part of its “collaboration” and “People-Ready” business. Microsoft Corporation likened it as the engine of a “New World of Work”; a business environment and economy characterized by collaboration. Even if you do not share their grand visions, it’s hard to deny that the latest version of *SharePoint* software is a huge improvement over its predecessor. Features such as enterprise-wide portal, search, business intelligence, business process management, and Web content and enterprise record management are all major enhancements and each might be tempting enough for existing users to consider an upgrade.

DocAve™ 4.1’s Migrator module, part of the DocAve 4.1 platform from *AvePoint®*, is a powerful tool that was designed to import content from various data stores into the *SharePoint* environment. It benefits from the *DocAve* 4.1 platform’s highly efficient and reliable backbone for data transfer and is unique in its ability to migrate data at the item level while retaining all of the relevant metadata.

The latest source and destination data stores for the module are *SharePoint Portal Service 2003* and *MOSS 2007* respectively. There are two versions of the *SharePoint* Migrator module:

- *SharePoint Migrator for SPS 2003 to MOSS 2007*
- *SharePoint Migrator for SP2001 to SPS 2003*

Both versions enable the migration of data at different level from the source. From site, sub-site and down to individual documents, they allow *SharePoint* Administrators planning flexibility with a gradual phasing out the earlier version at the pace of the individual business.

This white paper is written for IT Professionals who are responsible for helping companies plan and execute the migration of data related to the *SharePoint* platform. The migration may be centrally planned and managed, but unlike other solutions in the market, the DocAve Migrator offers companies the option to support multiple versions of *SharePoint* as collaboration options during the transition phase. Collaboration among project teams and individual business units are still recommended, but the scale, time, and other exact requirements of the migration will be controlled by the enterprise.

DocAve 4.1 represents the “first-in-market” item level operation management solutions for *MOSS 2007*. With the release of the *SharePoint* Migrator module, which complements DocAve’s Backup, Disaster Recover, Archiving, and Auditing modules, AvePoint continues to offer the most complete and technologically advanced operations management solutions in the SharePoint market.

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Introduction

The release of the Microsoft Office 2007 system is often characterized by the Microsoft corporation as being more than just an upgrade of business productivity software, it's the company's instrument for a "new world of work"- a business environment and economy characterized by collaboration; a worldwide network of customers, partners, and suppliers; internal and external, integrated by a pervasive network and a set of common data formats. And at the core of this collaborative platform is Microsoft Office SharePoint Server (MOSS) 2007, a highly scalable, robust, and flexible engine.

Microsoft Chairman Bill Gates refers to MOSS 2007 as a critical part of its "collaboration" and "People-Ready" business. Even if you do not share the whole grand vision, it's hard to deny that the upgrade contains numerous improvements in a well integrated package. Features such as enterprise-wide portal, search, business intelligence, business process management, and Web content and enterprise record management are all major enhancements and each might be tempting enough for existing users to consider an upgrade.

That brings us to one of the delicate area of the switch - content migration. Namely what happens to all the data currently being housed within our existing version of SharePoint software? Is there a way to migrate site, sub-site, list, list-item, folders, or even individual documents? Can this migration be done in such a way that all the relevant metadata, such as securities, authors, and attributes, are maintained? If you have previously looked into this question, you probably already know that there isn't any native solution from Microsoft.

The SharePoint Migrator module, a component of the DocAve 4.1 platform from AvePoint, is a powerful tool that is complementary to DocAve's other Backup, Disaster Recover, and Data Management solutions. It was designed as a processor of content from different data stores into SharePoint. With the latest release, MOSS 2007 is natively supported. The DocAve 4.1 platform is now capable of interpreting SharePoint 2003 content for inserting into the MOSS 2007 environment.

The DocAve 4.1 platform represents the "first-in-market" item level operation management solutions for MOSS 2007. With the release of the MOSS 2007 enabled Migrator module, AvePoint continues to offer the most complete and technologically advanced operations management solutions in the SharePoint market.

Architectural Overview

AvePoint's SharePoint Migrator module benefits from the DocAve platform's architectural backbone for highly efficient and reliable data transfer. The latest feature of the module is the ability to interpret backup data from SharePoint 2003 and translate them for use in MOSS 2007. Like previous versions, the translation process is a collaboration of two DocAve client modules (one for export and the other for import) and the conversion process retains all metadata associated with the previous version¹.

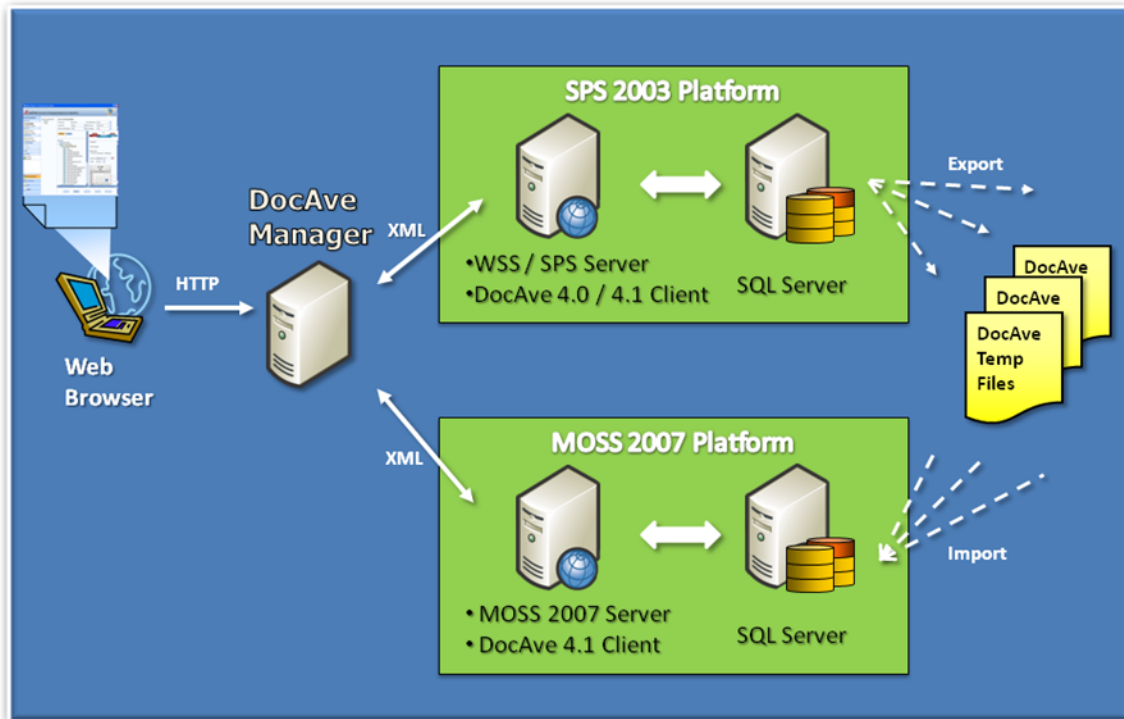


Figure 1: DocAve 4.1 SharePoint Migrator Architecture

The top DocAve Client (on SPS 2003) depicted in Figure 1 extracts data from a SPS 2003 environment and persists them into a file system (local or networked) for temporary storage via DocAve's Enterprise Backup module. The bottom DocAve Client (on MOSS 2007) in turn uses the SPS 2003 to MOSS 2007 Migrator module to convert the 2003 data format into a format recognizable by MOSS 2007. It will then utilize the MOSS 2007 restore module to insert the data into the MOSS 2007 environment. The SPS 2003 to MOSS 2007 migration process allows administrators to perform this process easily in real time, while maintaining all of the meta-data, securities, layout, and version histories.

¹ Due to the architectural differences between the two versions, some items will appear slightly after migration, please see the section on planning strategies for more details

The DocAve Manager centrally administers the entire process so DocAve administrators can view and act upon any error conditions raised by the client modules. The client communicates with the DocAve Manager via lightweight XML control messages over TCP/IP sock connections and one manager can control multiple clients.

Item-level Migration

As with the rest of the DocAve platform of products, the SharePoint Migrator module is able to preserve 4 levels of data fidelity during the migration process:

Item	The most basic form of the migrated data are the items themselves. These could be Documents, Announcements, Attachments, Contacts, Calendar Entries, Tasks, etc...
Metadata	The second level of information preserved is the metadata associated with the items. It could be the size of the document, the last modified time, or the name or e-mail of the original author. It can also be information that is in the header of the file or used by the application to associate with the file.
Location Structure	The third level of migrated information is the location structure within the source application. The migration process will logically carry over the folder, list, or site structure across the different versions of SharePoint, from a 2003 to a 2007 SharePoint environment.
Access Control	Lastly, user access controls will be preserved during the migration. Permissions will be carried over from SharePoint 2003 to 2007 if they are both connected to the same Active Directory server or the same trusted zone.

Centralized Management

DocAve users can use the web-based GUI to control the SPS 2003 to MOSS 2007 Migrator module from anywhere within their network (or even across firewalls via TCP/IP port tunneling), and gather data within or across different SharePoint environments.

Co-existence of both Platforms

A key advantage of Migrator is its ability to allow businesses to migrate their data from a SharePoint 2003 environment to MOSS 2007 at a gradual pace. Because data (and metadata) can be extracted from the SQL database at the item level, the migration process can be phased logically since both platforms can co-exist in the interim. Individual silos of the business can choose a convenient time in the phase schedule to perform the extraction independent of other silos.

Planning Considerations

Due to technology differences between SharePoint 2003 and SharePoint 2007, following are best practice considerations for your migration strategy:

- When migrating sites from SharePoint 2003 to SharePoint 2007, customized layouts and webparts must first be installed in their respective galleries within the new SharePoint 2007 environment for them to be properly carried over.
- In SharePoint 2003 there are areas and subareas, but there aren't any concepts of areas or subareas in SharePoint 2007. Folders, document libraries, and documents existing in SharePoint 2003 areas and subareas can be migrated over granularly as previously mentioned, however, the structure of areas and subareas itself cannot be migrated into a SharePoint 2007 environment.
- Since the usage of Discussion Board Lists changed significantly from 2003 to 2007(2007 has flat instead tree structure), the current version of DocAve SPS 2003 to MOSS 2007 Migrator module does not retain the original structure during the migration of those items.
- Similar to Discussion Boards, Survey lists changed significantly from 2003 to 2007, currently the DocAve SPS 2003 to MOSS 2007 Migrator module does not support migration of Survey lists.
- Two of the major changes in MOSS 2007 are customization and workflow engine. Therefore, list event handler and customized application/workflow logic are not handled by the Migrator module.

SPS 2003 to MOSS 2007 Migrator Module Specifications

Requirements

The basic requirements for SPS 2003 to MOSS 2007 Migrator module are remote access to the source SharePoint server and local destination SharePoint server.

The general requirements for SPS 2003 to MOSS 2007 Migrator module are:

- SPS 2003 or WSS v2 Server with Service Pack2 (Source)
- MOSS 2007 or WSS v3 Server (Destination)
- DocAve client module on both machines

(Please note that the source SharePoint 2003 server and target SharePoint 2007 server on the same machine is not supported in production. This is due to DocAve's limitation that multiple DocAve Agents cannot be installed on the same production SharePoint server)

Specifications

In addition to the ability to retain the 4 level of data fidelity from the source content (Item, Metadata, Structure, and Security), the *SPS 2003 to MOSS 2007 Migrator module* is also able to do the following:

- Automatically generate the content type for the customized list
- Carry over List columns
- Convert an appropriately formatted SPS 2003 site into new SP2007 site.
- Convert Portal Area to the sub-site

Migration Methods

The content of SharePoint 2003 environments can be migrated granularly in many ways into SharePoint 2007, two are recommended as follows:

1. Migrate granular SPS 2003 content to a MOSS 2007 environment

From a source SPS 2003 server, select content at a granular level (documents, document libraries, folders, lists, webs) and select a destination MOSS 2007 site or sub-site for the data to go, and start the migration process. This allows SharePoint administrator granular control over what content is migrated into the new MOSS 2007 environment, restructuring folders/lists and webs can also be done this way.

2. Migrate entire SPS 2003 sites with all content underneath to a MOSS 2007 environment

From a source SharePoint 2003 server, select a site or multiple sites and select a destination SharePoint 2007 web application, and start the migration process. In the destination SharePoint 2007 web application, the new sites will be created automatically under the same name and content underneath the SharePoint 2003 site will be migrated in its entirety over to the newly created SharePoint 2007 site.

SPS 2003 to MOSS 2007 Migrator Module Sample Walkthrough

- The media server is installed on a machine named ***konami***
- The SharePoint Front-End Web server machine name is ***avepoint75***
- There is a backup plan named ***Test01***
- Test01 is an item-level backup of an entire document library in SharePoint Portal Server 2003 or Windows SharePoint Services 2.0

1. In the navigation bar, expand the *Migrators* section and click on "*SPS 2003 to MOSS 2007*"

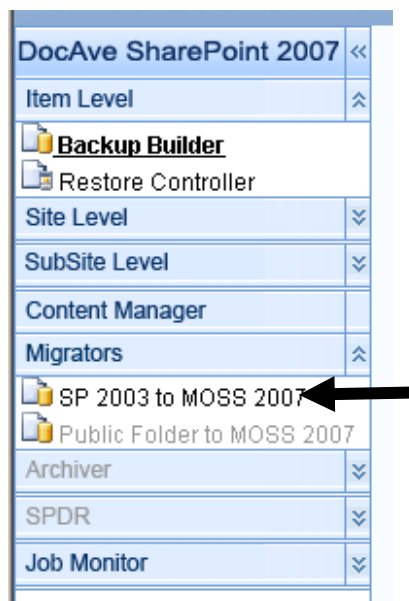


Figure 1.1 - SPS 2003 to MOSS 2007

- Click and expand the backup data tree structure. Drill down to the folder with backup plan name – *Test01*

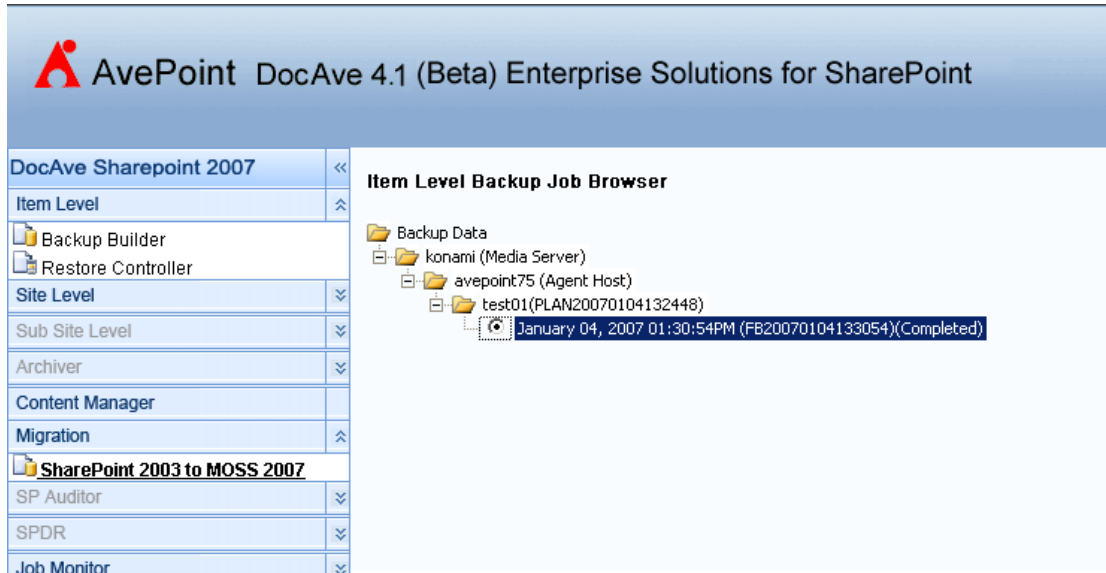


Figure 1.2 – Backup data from SPS 2003

- Select the Document Library to see all the files underneath. Select the files to be migrated by checking the box next to the item. As an option, the end user can also select Property and Security accordingly to copy them to MOSS 2007 new environment.

Property: Selecting this box will copy all the metadata; for example information about site creation and modification.

Security: Selecting this box will copy all the security permissions; for example the users that can access a particular site.

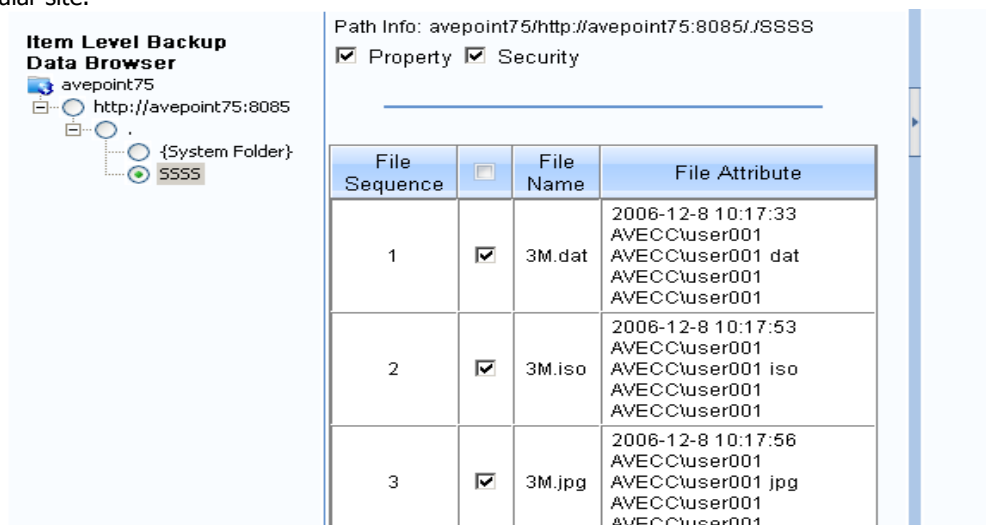


Figure 1.3 – Detailed data browsing of backup data

4. Select the destination by clicking on the drop down box by Destination Agent. From the drop down box the end user will see the list of possible Destination Agents (MOSS 2007 agents). Once an agent is selected, the data tree browser will populate.
5. In figure 1.4, a root site in MOSS 2007 was selected to contain the Document Library named SSS from SPS 2003.

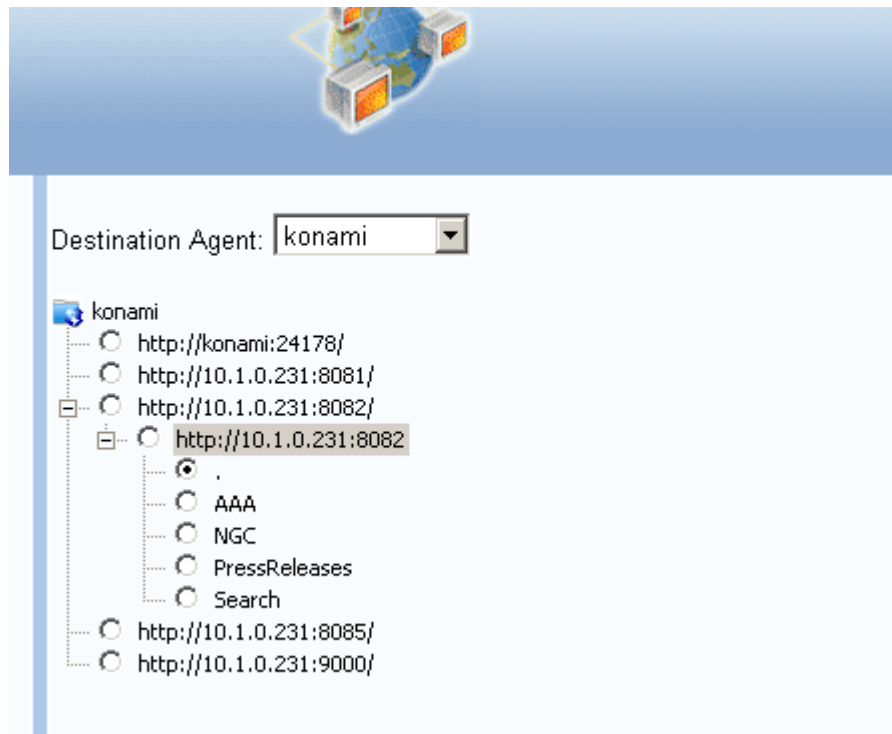


Figure 1.4 - Selecting destination path on MOSS 2007

6. Now, click on the GO button to run the migration process to copy (move) the entire Document Library from SPS 2003 to a MOSS 2007 root site.

Summary

The Migrator module from the DocAve 4.1 platform is a powerful tool. It is complementary to DocAve's data backup modules to help IT administrators effectively manage the migration of data into their ever growing SharePoint environments. Like all modules in the DocAve platform, the migrator module can be purchased separately or as a part of the enterprise suite bundle.

With this tool, administrators can now migrate granular data from previous versions of SharePoint into their current SharePoint environment via simple "point & click" operations; preserves metadata, securities, and folder structure; and processes the actual data copying procedures in real time so businesses can set SharePoint platform conversion schedules at their own pace. Due the increasing importance of business data hosted on SharePoint, the DocAve Migrator module addresses the critical business needs of platform co-existence while avoiding production environment down time during the process of data migration.

The DocAve 4.1 platform represents the "first-in-market" item level operation management solutions for MOSS 2007. With the expanding product portfolio of granular full fidelity SharePoint data back, contentment management, archiving, auditing, and disaster recovery solutions, AvePoint looks to solidify DocAve's position as the premiere operations management product platform within the SharePoint market space.