

Audio will be computer-based. Please
make sure your speakers are turned up!



Planning to Upgrade to SharePoint 2010 Today!

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Quest Software

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Who is SharePoint Joel?



- 8+ Year SharePoint Veteran
 - 5 Years in MS IT & Online
 - 2 Years in SharePoint Product Team
 - 1 year independent
 - Quest Sr. SharePoint Architect
- Quest SharePoint Architect & Product Strategy

Preparing For Upgrade

What can you do now to get ready

Learn

- Read about SP2 and PreUpgradeChecker Technet info & Upgrade documentation. Watch Sneak Peak Videos...

Prepare

- Install SP2 Update or later - use pre-upgrade checker command. Create Config.XML for custom site definitions

Test

- Implement copy of environment (Hyper V) proof of concept with current/upgraded customizations and run PreUpgradeChecker

Implement

- Move or upgrade environment to 64 bit Windows Server 2008 + 64bit hardware, operating system, including 64 bit SQL 2005 or greater (64bit SQL 2008 recommended)

Validate

- In copy of environment in 64 bit Hyper V Windows Server 2008 and run upgrade when bits are available

SharePoint 2010 System Requirements

- SharePoint boxes:
 - 64 bit Windows Server 2008 RTM or R2
- SQL Server:
 - 64 bit SQL 2005 & 2008
- <http://blogs.msdn.com/sharepoint/archive/2009/05/07/announcing-sharepoint-server-2010-preliminary-system-requirements.aspx>

Client Desktop Preparations

- “A standards based browser such as Internet Explorer 7, Internet Explorer 8 or Firefox 3.x will be required to author content.”
- Standards based browsers for Authoring
 - IE 7+, Firefox 3+
 - Better support for Safari
 - **No support for IE 6!**
- No better time to visit your desktop standards for Office with the release of **Windows 7** and consider plans for Office 2010 and Office Web Applications
- <http://blogs.msdn.com/sharepoint/archive/2009/05/07/announcing-sharepoint-server-2010-preliminary-system-requirements.aspx>

Update your MAC & Non PC's !

- Office 2008 for MAC SP2 – SharePoint Integration for editing files
- Firefox support for NON PC systems
- Increased Safari support

- <http://www.microsoft.com/presspass/press/2009/jul09/07-20macofficesp2pr.msp>

Developer Desktop Experience

- You just rolled out Visual Studio 2008? Plans for 2010...
- Should you be buying 64 bit mandatory desktops now? YES!
- Dev Environment
 - Remote
 - VM/image
 - Local development
- See PDC and #MIX09 info on VS 2010, VSTS 2010 and SharePoint 2010
- @katriendg VS2010 will have full debugging experience for SharePoint, yeah some people will be happy! **#mix09**

Revisit Information Architecture

- Optimize Large Lists
 - Lists over 5000 not optimized
 - Limit View max Item
 - Indexed columns
 - Optimized query/view
- Optimize Database & Site Structure
 - Reduce Databases to less than 100GB
 - Split large content databases
 - Split really large site collections
- Archive Unused/Unneeded Site Collections
- Reduce dependencies on unused templates, features, and site definitions

Prepare Overview

- Prepare Server, Client Desktop/Laptops (PC, MAC & Mobile)
- Document environment
- Revisit Farm and Network structure
- Review Hardware End of Life, plan for upgrade capacity disk space, memory, processor
- Identify Customizations
- Plan upgrade strategy *
- Farm/Topology/Services upgrade order/plan *
- Operations Steps *
- Downtime limits / mitigation plan
- Communication Plan
- Schedule *

* Will depend on further disclosure information on upgrade & testings with bits

Identify Customizations

- Hunting for Customizations
 - Binaries (_layouts, pages, features, 12 hive- Custom Site Definitions)
 - Installation Dir
 - GAC
 - Homedir
 - Solutions
 - Add/Remove Programs
- Don't forget
 - Timer jobs
 - Event receivers
 - HTTP handlers & IIS customizations
- Third Party ISV & SI installations: Revisit Maintenance Agreements - Work with third-party for upgrade guidance

Tools to help identify customizations

- Windiff
- Beyond Compare
- SPDiag (SharePoint Admin ToolKit)
- PreUpgradeCheck
- Mike Watson's – Quest Deployment Advisor 1.0

Cleanup

- Orphaned sites, lists, objects
- Remove Old Stale, Unused sites and site collections
- Remove Locks
- Fix Variations (SP2)
- Remove Missing/Unused features (check dependencies)
- Add features that are missing that should be there
- Finalizing upgrade for Gradual Upgrade
- Cleaning up legacy upgrade issues (customizations/unghosting)
- Reset to Site Definition”
 - Returns page to layout in site definition reset all pages from site settings
 - Within SharePoint Designer you can reset a single page

Service Offering Considerations

- Do you want to support X new features *
- Planning for training before you roll it out
- Are you planning a Sandbox for IT to learn the technology
- Are you planning a Pilot environment to help flush out business requirements
- Have you communicated with the stakeholders your plans to upgrade?
- Are you going to run concurrent both environments for some period of time? What about URLs?
- Planning to revisit look & feel

Pre-Upgrade Checker Command

Gather data on your SharePoint 2007 SP2 SharePoint farm

- Reports farm and server data
 - Identifies useful farm information:
 - Servers, databases, AAM
 - Site definitions, features, language packs
 - Identifies current or potential issues
 - Data orphans
 - CAML views/CAML content types
 - Modified content databases
- Modes
 - Local server + farm databases (default)
 - Local server only
- Note: Makes no changes to environment/data

Running PreUpgradeCheck

STSADM –help preupgradecheck

- –[rulefiles <rule file name>]
- –[listrulefiles]
- –localonly

Rules

- MOSS – OssPreUpgradeCheck.xml
- WSS – WssPreUpgradeCheck.xml
- CustomRules – CustomCheck.xml

Put custom rules in "%commonserverfiles%/Microsoft Shared/web server extensions/12/config/preupgradecheck

Default: Full farm, run all rules

Syntax:

- stsadm -o preupgradecheck
 - Will run full farm all rules
- Stsadm –o preupgradecheck –localonly
 - Will run on one server and all rules in preupgradecheck folder

Sample Preupgradecheck.exe

```
Administrator: Command Prompt
C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN>stsadm -o preupgradecheck

Processing configuration file: OssPreUpgradeCheck.xml
  SearchContentSourcesInfo... Information Only
  SearchInfo... Information Only
Processing configuration file: WssPreUpgradeCheck.xml
  ServerInfo... Information Only
  FarmInfo... Information Only
  UpgradeTypes... Information Only
  SiteDefinitionInfo... Information Only
  LanguagePackInfo... Information Only
  FeatureInfo... Information Only
  AamUrls... Information Only
  LargeList... Information Only
  CustomListViewInfo... Information Only
  CustomFieldTypeInfo... Information Only
  CustomWorkflowActionsFileInfo... Passed
  ModifiedWebConfigWorkflowAuthorizedTypesInfo... Information Only
  ModifiedWorkflowActionsFileInfo... Passed
  DisabledWorkFlowsInfo... Passed
  OSPrerequisite... Passed
  WindowsInternalDatabaseMigration... Passed
  WindowsInternalDatabaseSite... Passed
  MissingWebConfig... Passed
  ReadOnlyDatabase... Passed
  InvalidDatabaseSchema... Passed
  ContentOrphan... Passed
  SiteOrphan... Passed
  PendingUpgrade... Passed
  InvalidServiceAccount... Passed
  InvalidHostName... Passed
  SPSearchInfo... Information Only

Operation completed successfully.
```

Learning from PreUpgradeCheck

```
C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN>stsadm -o preupgradecheck
```

```
Processing configuration file: OssPreUpgradeCheck.xml
  SearchContentSourcesInfo... Information Only
  SearchInfo... Information Only
Processing configuration file: WssPreUpgradeCheck.xml
  ServerInfo... Information Only
  FarmInfo... Information Only
  UpgradeTypes... Information Only
  SiteDefinitionInfo... Failed
  LanguagePackInfo... Information Only
  FeatureInfo... Failed
  AppUrls... Information Only
  LargeList... Passed
  CustomListViewInfo... Information Only
  CustomFieldTypeInfo... Passed
  CustomWorkflowActionsFileInfo... Passed
  ModifiedWebConfigWorkflowAuthorizedTypesInfo... Information Only
  ModifiedWorkflowActionsFileInfo... Passed
  DisabledWorkFlowsInfo... Passed
  OSPreerequisite... Failed
  WindowsInternalDatabaseMigration... Passed
  WindowsInternalDatabaseSite... Passed
  MissingWebConfig... Passed
  ReadOnlyDatabase... Passed
  InvalidDatabaseSchema... Passed
  ContentOrphan... Passed
  SiteOrphan... Passed
  PendingUpgrade... Passed
  InvalidServiceAccount... Passed
  InvalidHostName... Passed
  SPSearchInfo... Information Only
```

```
Operation completed successfully.
```

```
Please review the results at C:\Program Files\Common Files\Microsoft Shared\Web
Server Extensions\12\Logs\PreUpgradeCheck-20090623-115211-250.htm.
```

```
C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN>_
```



DEMO PreUpgradeCheck

Reference:

- Information Only: Search content sources and start addresses
- Information Only: Informational rule to list the Office Server Search topology information
- Information Only: Servers in the current farm
- Information Only: The components from this farm
- Information Only: Supported upgrade types
- Information Only: Site Definition Information
- Information Only: Language pack information
- Information Only: Feature Information
- Information Only: Alternate Access Mapping Url(s) within the current environment that should be considered when upgrading.
- Information Only: Lists and Libraries
- Information Only: Customized list views that will not be upgraded.
- Information Only: Customized field types that will not be upgraded.
- Information Only: Modified authorized types for workflow in web.config
- Information Only: Informational rule to list the Windows SharePoint Services Search topology information

SharePoint Pre-Upgrade Check Report

- Information & Configuration Information
 - Content Sources & Start addresses
 - Topology +(SSPs), WSS Search Topology
 - Servers (Not including SQL)
 - Upgrade Types
 - AAMs, Large Lists & Libraries
- Important (Customizations & Dependencies)
 - Site Definition (Listed & Missing)
 - Installed Language Pack
 - Features
 - Custom List Views & Custom Field Types, Web.Config entries

SharePoint Products and Technologies Pre-Upgrade Check Report

Start time: Tuesday, June 23, 2009 11:52:12 AM
End time: Tuesday, June 23, 2009 11:53:46 AM

Information Only

Information Only : Search content sources and start addresses

The following is a list of the content sources and start addresses for each shared service provider in the farm.

SSP Name = SharedServices

Content Sources =

Content source "Local Office SharePoint Server sites" contains a total of 9 items from the following start addresses

- <http://www.perktime.org/>
- <http://search.perktime.org/>

This is an informational rule for upgrade planning. For more information about this rule, see KB article 957409 in the rule article list at <http://go.microsoft.com/fwlink/?LinkID=120257>.

Information Only : Informational rule to list the Office Server Search topology information

The Office Server Search topology in this farm consists of the following components:

1 shared service providers.

SSP Name = SharedServices

Index Server = homesvr

IndexSize = 4716700 bytes

Items In Index = 20

SSP DB Name = homesvr \ SharedServices_DB

SSP DB Size = 11730944 bytes

Search DB Name = homesvr \ SharedServices_Search_DB

SSP DB Size = 134348800 bytes

This is an informational rule for upgrade planning. For more information about this rule, see KB article 957408 in the rule article list at <http://go.microsoft.com/fwlink/?LinkID=120257>.

Information Only : Servers in the current farm

The following is a list of all the servers that has Sharepoint installed in the current farm. This list does not include dedicated SQL servers.

- homesvr

The preupgrade checker needs to be run on each of these servers in order to get a complete list of issues that might affect upgrade. For more information about this rule, see KB article 954758 in the rule article list at <http://go.microsoft.com/fwlink/?LinkID=120257>.

Information Only : The components from this farm

This sharepoint software currently running on this farm is 12.0.0.6421. The farm contains the following components:

- 1 servers
- 3 web applications
- 4 content databases, approximately total size = 9161015296 bytes
- 11 Site collections

For more information about this rule, see KB article 954759 in the rule article list at <http://go.microsoft.com/fwlink/?LinkID=120257>.

Information Only : Supported upgrade types

The current farm supports the following upgrade types:

- Inplace Upgrade
- Content Database Attach

For more information about this rule, see KB article 954760 in the rule article list at <http://go.microsoft.com/fwlink/?LinkID=120257>.

Information Only : Site Definition Information

x Find: pete Next Previous Highlight all Match case

Done



Other SP2 Enhancements for Preparing

- Read-only databases (v3 SP2)
- . On farms that are running Office SharePoint Server 2007 with SP2 or Windows SharePoint Services 3.0 with SP2, the site collection associated with a read-only content database is set to be read-only automatically, and the user interface is modified so that users cannot perform tasks that require writing to the database.

<http://technet.microsoft.com/en-us/library/dd793608.aspx>

- Parallel content database upgrades
 - Parallel upgrade farms (v3)
- stsadm -o enumallwebs
- stsadm -o enumallwebs -databasename sharepoint_site_content_db
- stsadm -o variationsfixuptool
- Stsadm –o deletesite
 - -Force: the -force parameter is new in **SP2** and allows you to delete orphaned site collections. In order to run the command, you need the GUID for the site collection. You can get this from either running the enumallwebs command as described above and looking for any site collections where InSiteMap="False".
- Stsadm –o deleteweb
 - -Force: the -force parameter is new with **SP2** and allows you to delete orphaned webs in the same way you can delete orphaned sites with deletesite -force as shown above

What We Currently Know about SharePoint 2010 Upgrade Based on SP2 Preupgradecheck & Sneak Peak

Supported Upgrade Methods: PreUpgradeCheck

- In Place
- Database Attach

See Richard Riley's ITPRO Sneak Peak Video clip on Visual Upgrade

- http://sharepoint.microsoft.com/2010/Sneak_Peek/Pages/IT-Pro-Video.aspx

Dev Assets & Customizations?

Examples	
Site Template	Features
Custom Web Part	Solutions
Event Handler	Content Types
Un-ghosted Page	Master Pages
Themes and Style sheets	User Controls
Custom Site Definition	Jquery assets
Code or pages in /_Layouts	List Definition
Inclusions/Exclusions	AAMs
Add-ons Workflow, Server Controls	Third -Party Solutions

Reference on Logs

- Preupgradecheck HTML Report, XML Summary
- B2B upgrade logs ULS & Preupgradecheck Log files
 - Logs are in
 \Program Files\Common Files\Microsoft Shared\
 Web Server Extensions\12\Logs
 - %temp%
- Worker process logs
- Watch the Event Viewer

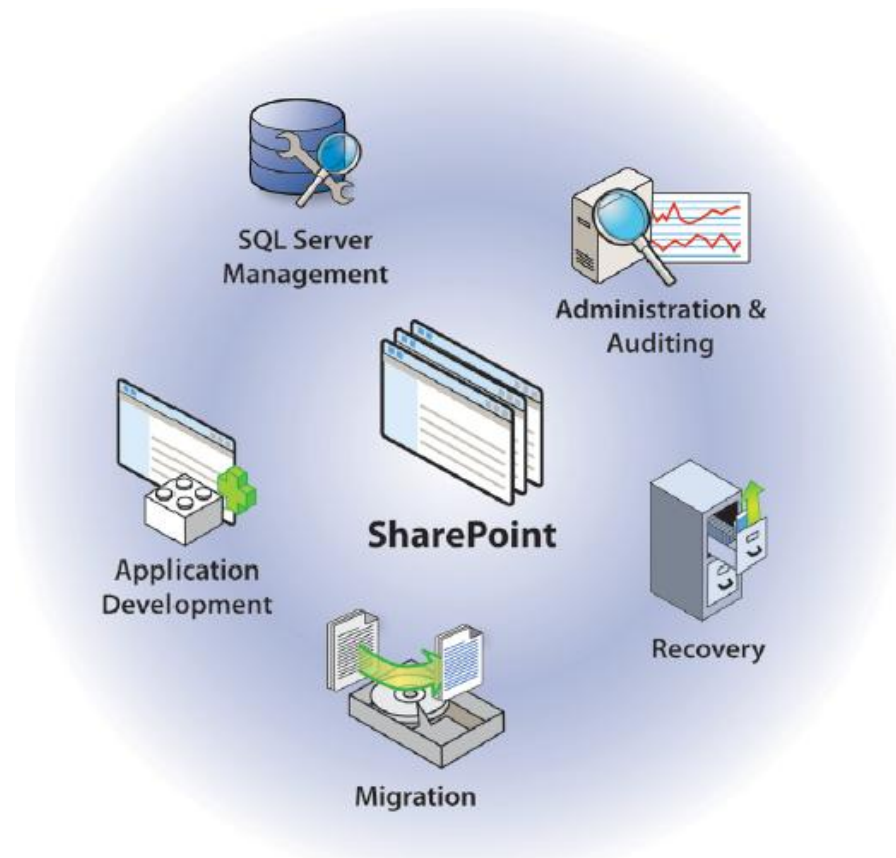
Next Steps!

- Create a Hyper V 2008 64 bit copy of your environment with all customizations with SP2
- Run PreUpgradeCheck on HyperV environment
- Cleanup data and structures
- Test upgrade with Tech Preview or Public Beta (When available)
- Set Governance Policies around supportability today to manage (features/site definitions) WSPs & **features** over site definitions

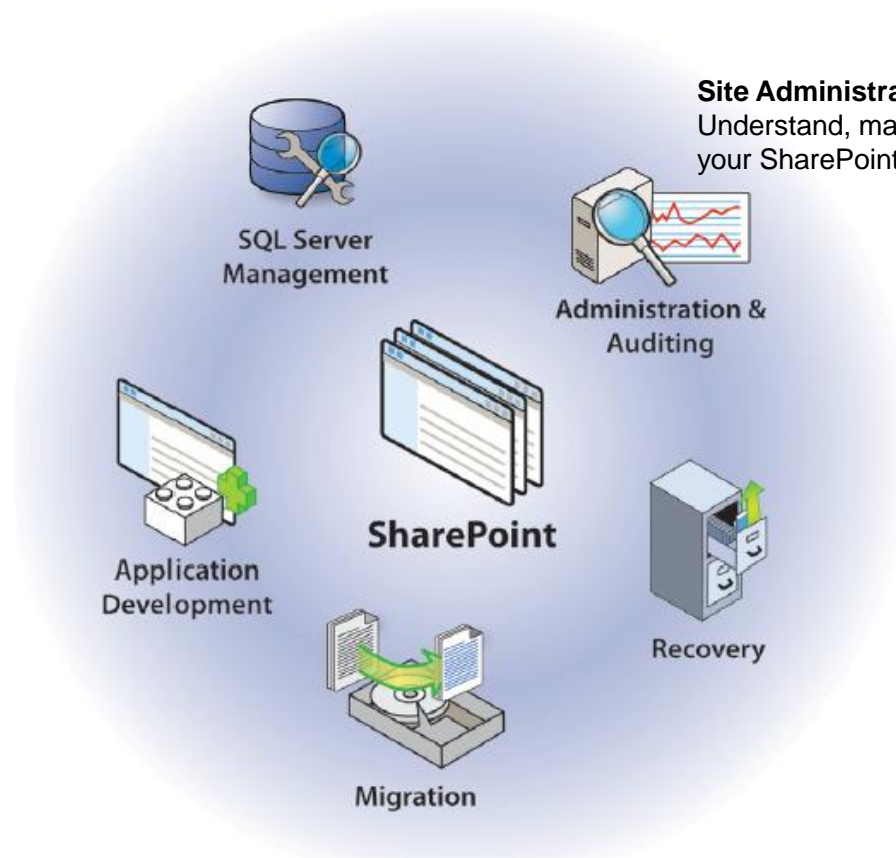
Reference: Cleaning up Orphaned Objects

- KB 918743 and KB 918744
- stsadm -o databaserepair -url http:/site -databasename
- stsadm -o databaserepair -url http://site -databasename
DatabaseName –deletecorruption
- Config DB orphans KB 918742
- Windows SharePoint Services Config DB orphans
 - Remove and then reattach the content databases on the virtual server
- **DON'T** forget **PREPARETOMOVE STSADM** for **MOSS** when detaching databases

Quest Solutions for SharePoint



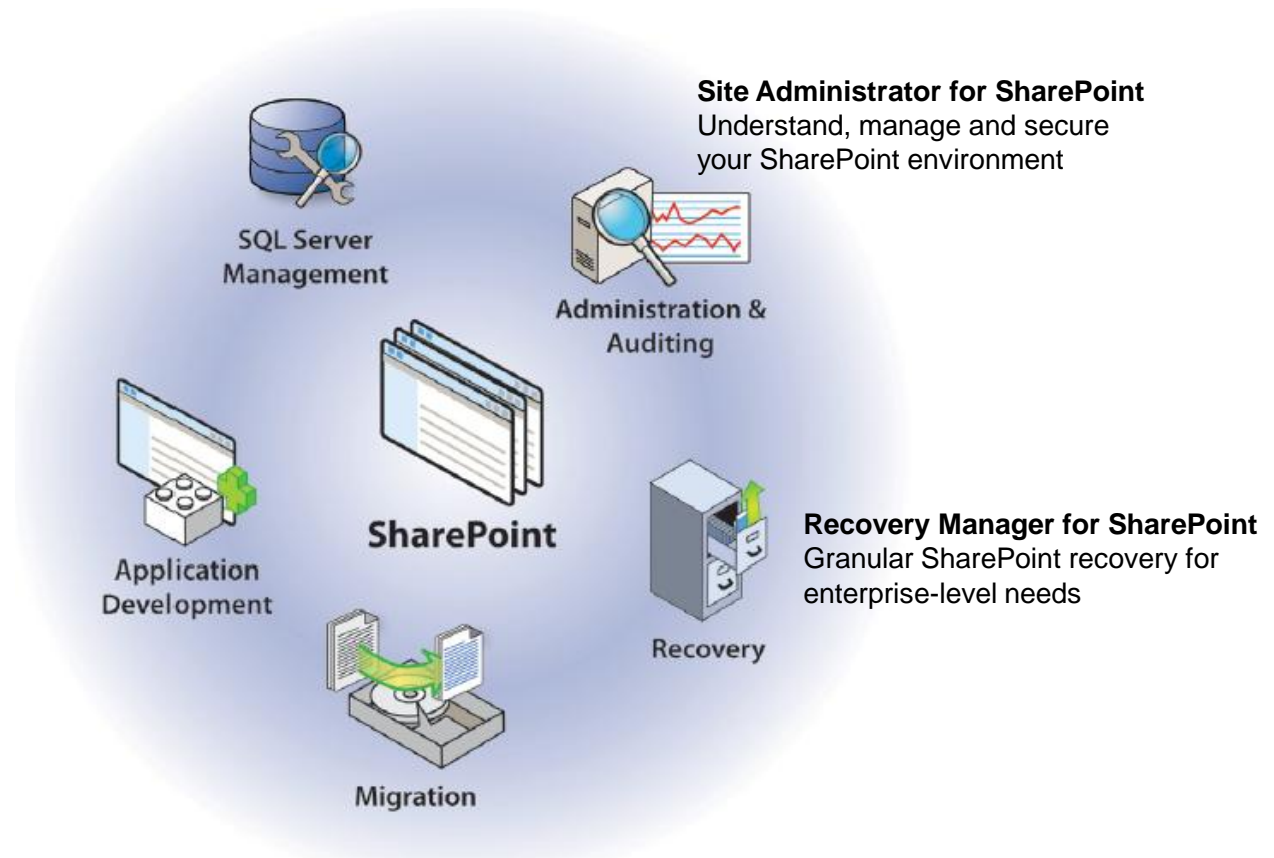
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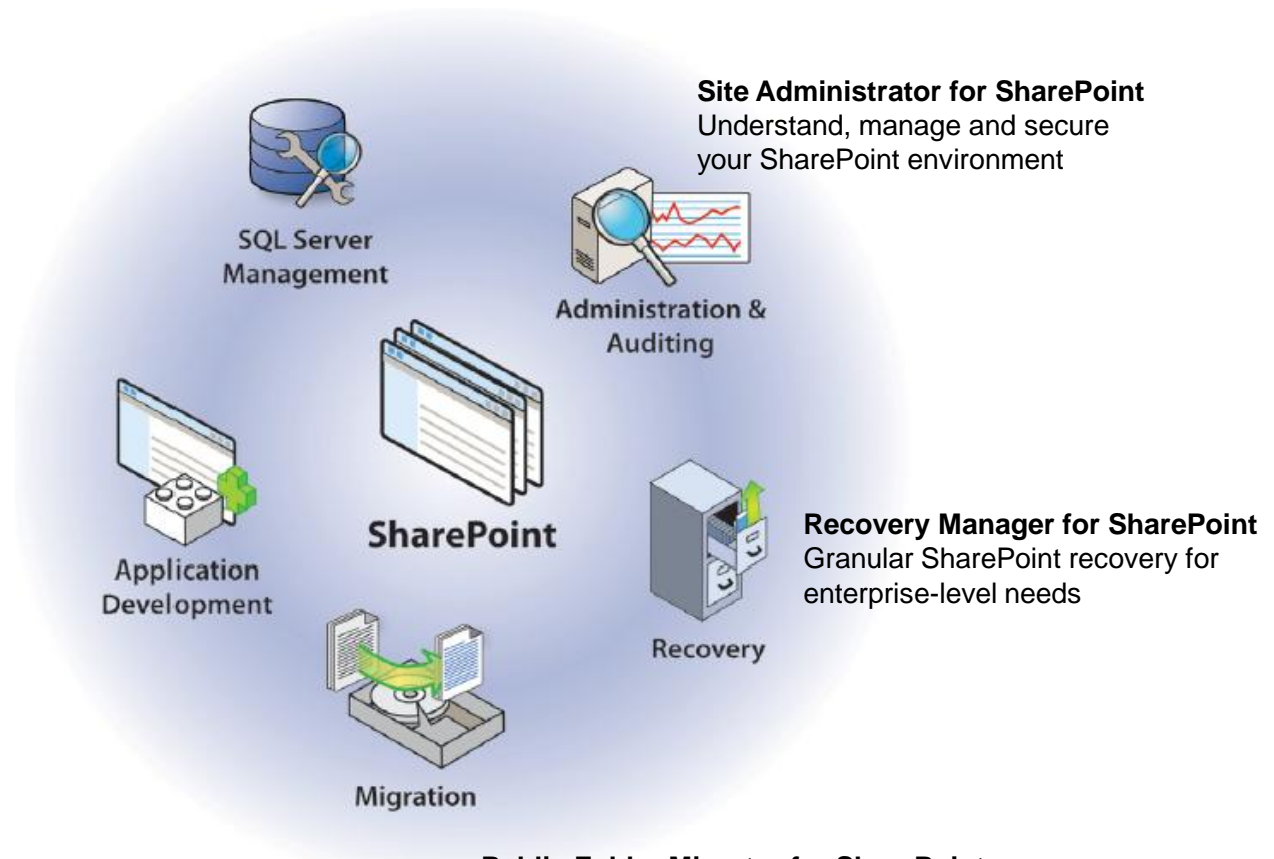
Site Administrator for SharePoint

Understand, manage and secure your SharePoint environment

Quest Solutions for SharePoint



Quest Solutions for SharePoint



Site Administrator for SharePoint

Understand, manage and secure your SharePoint environment

Administration & Auditing

Recovery Manager for SharePoint

Granular SharePoint recovery for enterprise-level needs

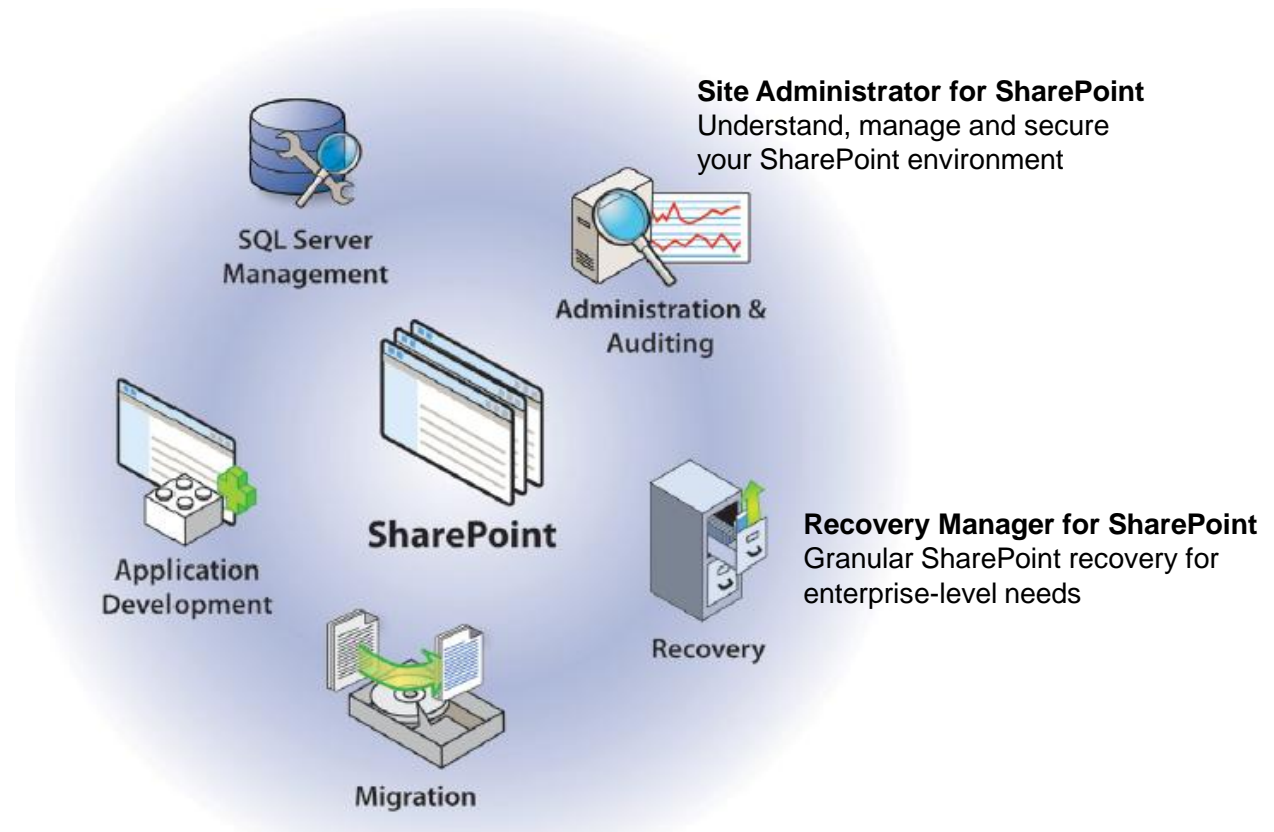
Public Folder Migrator for SharePoint

Exchange Public Folders to SharePoint migration

Notes Migrator for SharePoint

Notes application content to SharePoint migration

Quest Solutions for SharePoint



Site Administrator for SharePoint

Understand, manage and secure your SharePoint environment

SQL Server Management

Administration & Auditing

Application Development

SharePoint

Recovery

Recovery Manager for SharePoint

Granular SharePoint recovery for enterprise-level needs

Migration

Migration Manager for SharePoint

SharePoint to SharePoint migration

File Migrator for SharePoint

File shares to SharePoint migration

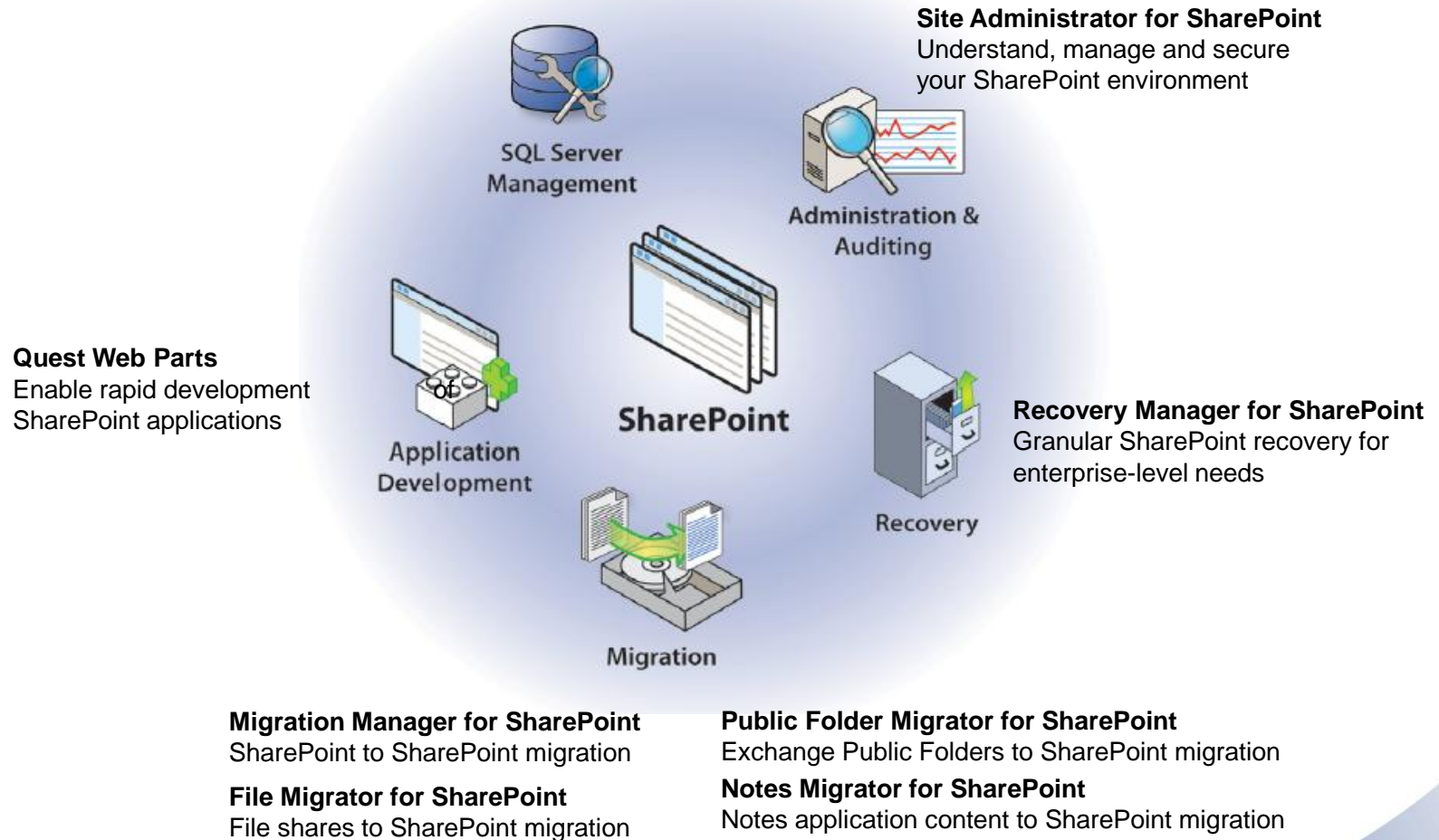
Public Folder Migrator for SharePoint

Exchange Public Folders to SharePoint migration

Notes Migrator for SharePoint

Notes application content to SharePoint migration

Quest Solutions for SharePoint



Quest Solutions for SharePoint

Quest SQL Server Solutions

Maximize SQL Server performance while simplifying tasks and providing visibility and control



Site Administrator for SharePoint

Understand, manage and secure your SharePoint environment



Quest Web Parts

Enable rapid development SharePoint applications



SharePoint



Recovery Manager for SharePoint

Granular SharePoint recovery for enterprise-level needs



Migration

Migration Manager for SharePoint

SharePoint to SharePoint migration

File Migrator for SharePoint

File shares to SharePoint migration

Public Folder Migrator for SharePoint

Exchange Public Folders to SharePoint migration

Notes Migrator for SharePoint

Notes application content to SharePoint migration

Thank You!



References

- Migration and Upgrade Information for SharePoint Developers
 - <http://msdn2.microsoft.com/en-us/office/aa905505.aspx>
- Migration and Upgrade Information for SharePoint Server (IT Pros)
 - <http://technet.microsoft.com/en-us/sharepointserver/bb421259.aspx>
 - Upgrade Documentation
 - <http://technet2.microsoft.com/Office/en-us/library/396c85d9-4b86-484e-9cc5-f6c4d725c5781033.msp?mfr=true>
 - Upgrade Toolkit for Windows SharePoint Services Sites and Templates Guide
 - <http://www.microsoft.com/technet/solutionaccelerators/collaboration/default.msp>
 - Upgrade in WSS SDK
 - <http://msdn2.microsoft.com/en-us/library/ms460185.aspx>
- Fix your Orphans HotFixes
 - repair content databases in Windows SharePoint Services <http://support.microsoft.com/kb/918744>
 - Spsadm.exe command line tool that you can use to clean up orphaned items in the configuration database in SharePoint Portal Server 2003 <http://support.microsoft.com/kb/918742/>

References

- **Supportability**

- 2003 Best Practices to ensure upgradeability <http://msdn2.microsoft.com/en-us/library/ms916859.aspx>
- KB Article on Site Definition Supportability in 2003 <http://support.microsoft.com/Default.aspx?id=898631>
- Supported and unsupported scenarios for working with custom site definitions and custom area definitions in Windows SharePoint Services and in SharePoint Portal Server 2003 <http://support.microsoft.com/kb/898631/en-us>

- **Community Tools**

- **SharePoint Configuration Analyzer** <http://www.microsoft.com/downloads/details.aspx?FamilyID=918f8c18-89dc-4b47-82ca-34b393ea70e1&DisplayLang=en>
- **SharePoint Utility** <http://www.microsoft.com/sharepoint/downloads/components/detail.asp?a1=724>
 - **Managing SharePoint Products and Technologies Performance at Microsoft**
<http://www.microsoft.com/technet/itshowcase/content/spsperfnote.msp#ETKAE>
- **Microsoft SQL Server Report Pack for Microsoft Office SharePoint Portal Server 2003**
<http://www.microsoft.com/downloads/details.aspx?FamilyID=49159368-544b-4b09-8eed-4844b4e33d3d&DisplayLang=en>

- **Blogs**

- **Resources and Recommendations for Upgrading Site Definitions and Site Templates**
<http://blogs.msdn.com/joelo/archive/2007/01/03/resources-and-recommendations-for-upgrading-site-definitions-and-site-templates.aspx>
- **Upgrade Content IT Pros may not have seen** <http://blogs.msdn.com/joelo/archive/2006/12/06/upgrade-content-it-pros-may-not-have-seen.aspx>
- **Other Upgrade Topics from Joel's Blog** <http://blogs.msdn.com/joelo/archive/tags/Upgrade/default.aspx>