

SharePoint 2003 to SharePoint Server 2007 RTM Gradual Upgrade Demo – Part 2

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This is part 2 of my White Paper on doing a Gradual Upgrade from SharePoint 2003 to Moss2007. In Part 1 I showed you how to Upgrade the actual servers and get the 3 SharePoint Servers into the new Moss farm.

In This white paper we will upgrade the site collections and also migrate the My Sites to the new Farm.

There was also be an additional white paper that will cover changes made to customized sites and how to configure the Search service so that the two Upgraded Web Servers serve queries correctly and received the propagated Index from the application server that is doing the Indexing of the content in SQL. Check the Web Site downloads page for that white paper.

After Part 1 this is the current environment of the Upgraded servers

Server Type	Role	Software
Root Domain Controller	DC , Mail Server	Windows 2003 SP1 Exchange 2003 SP2
SQL Server	Database server	SQL 2000 SP4
SharePoint Server	Index / Job	Windows 2003 SP1 SharePoint Portal Server 2003 SP2 SharePoint Server 2007 Enterprise
SharePoint Server	Web Front End 1	Windows 2003 SP1 SharePoint Portal Server 2003 SP2 SharePoint Server 2007 Enterprise
SharePoint Server	Web Front End 2	Windows 2003 SP1 SharePoint Portal Server 2003 SP2 SharePoint Server 2007 Enterprise

In the previous demo we had finished Configuring the Servers in the farm. The next step is to start the site upgrade process.

1. Launch the Office SharePoint 3.0 Central Administration Site
2. Go to the Operations page
3. Scroll down to the Migration section and click Site Content Upgrade Status
4. You should now see the screen below that shows you your URL portal that needs Upgrading.

The screenshot shows the Office SharePoint 3.0 Central Administration Site. The browser address bar displays `http://wfe1:21565/_admin/GradualUpgrade.aspx`. The page title is "Central Administration" and the user is logged in as "System Account". The navigation menu includes "Home", "Operations", and "Application Management". The main content area is titled "Site Content Upgrade Status" and contains a table with the following data:

URL for Previous Version	URL for New Version	Next Action
http://portal.trainsbydave.com/		Begin upgrade

Below the table, there is a "Next Action" link labeled "Begin upgrade". The left sidebar contains a "Server Farm Configuration Not Complete" warning, a "View All Site Content" link, and a "Recycle Bin" link. The "Actions" menu includes "Site Content Upgrade Status" and "Finalize Upgrade".

If you get an message telling you that nothing associated with the farm can be upgraded then you may need to change the URL in your browser to the first server that was upgraded , ie. WFE1 in my case as WFE2 may not yet have all the information it needs. For example change the URL to `http://wfe1:21565/_admin/gradualupgrade.aspx`

5. Click Begin Upgrade
6. You will now be asked to complete information for the creation of the Web Application that will host the SharePoint 2003 Portal URL for redirects. In my case I chose to use `portal03.trainsbydave.com`. The reason for this is that the new Moss farm will be using `portal.trainsbydave.com`.

It is important to note that if users have created shortcuts on their desktops or network places or in the browser that they will not work and the users must be made aware of this.

- Now fill in the Port number, host header value and also I chose to create a new Application Pool to host this Web Application. Use a domain name and account that has create DB rights and SQL server admin role in SQL as well as being a local administrator on all SharePoint Servers.

Central Administration > Operations > Site Content Upgrade Status > Set Target Web Application

Set Target Web Application

Warning: this page is not encrypted for secure communication. User names, passwords, and any other information will be sent in clear text. For more information, contact your administrator.

Server Farm Configuration Not Complete

See [administrator task list](#) for more information

View All Site Content

Central Administration

- Operations
- Application Management

Shared Services Administration

Recycle Bin

Actions

- Site Content Upgrade Status
- Finalize Upgrade

Web Application to Upgrade

Upgrading Web Application:

New URL for Original Content

Upgrade will relocate the existing SharePoint Web application to a new IIS site, and create the newer version at the original location. The IIS site the existing web application is moved to must have a new port or domain name.

HTTP requests for all content will be redirected to the proper domain, throughout the gradual upgrade process.

You must supply either a new port or a new host header to use for the URL.

Port:

Host Header:

Application Pool for New Web Application

The Web application you will be upgrading to must use an application pool that is unique from the original application pool.

The application pool defines the account and credentials that will be used by the upgraded Web application.

You can choose an existing application pool, or create a new one.

Use existing application pool

Create new application pool

Application pool name:

Select a security account for this application pool

Predefined

Configurable

User name:

Password:

- Select to restart IIS automatically so that the other Servers in the Farm get the changes made with the new web application.
- Choose NTLM or Kerberos for your Authentication mechanism. Don't use Kerberos if you have not configured your Service Principal Name yet. See KB article <http://support.microsoft.com/?kbid=832769>.
- Select Automatic database name selection unless you want to be specific for the names the Migration uses for the Portal Server 03 databases.
- Specify a new SSP database for hosting my sites and profiles
- Specify the location you wish to put your index files. The default may not be ideal especially if you need to put your indexes on a larger drive on say the E Drive.

<p>Reset Internet Information Services</p> <p>Use this section to allow SharePoint to restart IIS on other farm servers. The local server must be restarted manually for the process to complete. If this option is not selected and you have more than one server in the farm, you must wait until the IIS web site is created on all servers, and then run "isreset /noforce" on each Web server. The new IIS site will not be usable until that is completed.</p>	<input checked="" type="radio"/> Restart IIS Automatically <input type="radio"/> Restart IIS Manually
<p>Security Configuration</p> <p>Kerberos is the recommended security configuration to use with Integrated Windows authentication. Kerberos requires the application pool account to be Network Service or special configuration by the domain administrator. NTLM authentication will work with any application pool account and the default domain configuration.</p>	<p>Authentication provider:</p> <input type="radio"/> Negotiate (Kerberos) <input checked="" type="radio"/> NTLM
<p>Content Databases</p> <p>By default, upgrade will manage the creation of new database. This is the recommended approach.</p> <p>If you need to provide matching database names, choose "Manually set database names". You will be prompted for database names before they are created.</p>	<input checked="" type="radio"/> Automatic database name selection <input type="radio"/> Manually set database names
<p>SSP Database Settings</p> <p>Specify names for the SSP and Search databases that will host user profile, audience, and search configuration data upgraded from SharePoint Portal Server 2003. If you specify the name of an existing database, it must not contain schema or data.</p>	<p>SSP Database Name <input type="text" value="SSP1_db"/></p> <p>Search Database Name <input type="text" value="SSP1_Search_db"/></p>
<p>Index Server</p> <p>Select the index server which will crawl content in all Web applications associated with this SSP.</p> <p>Specify the path on the index server where the indexes will be located.</p> <p>Note: Changing the index server will reset the index. To move the index without a reset STSAdm must be used.</p>	<p>Index Server <input type="text" value="APPLICATION"/></p> <p>Path for index file location <input type="text" value="C:\Program Files\Microsoft Office Serv"/></p>
<p style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p>	

13. Click Ok once you are happy with your choices.

You can now choose which site collections you wish to migrate to the New Moss Farm.

Central Administration > Operations > Site Content Upgrade Status > Site Collection Upgrade

Site Collection Upgrade

Use this page to select site collections to be upgraded. Settings and other options are available from the Actions list below

Total number of sites selected: 0 Web Application: <http://portal.trainsbydave.com/>

Content Database: CorpPort2_SITE_Pair URL Search: Search all databases

- URL
- /
- /partners/CombinedKnowledge
- /partners/Mindsharp
- /personal/bill
- /personal/penny
- /personal/steve
- /sites/coursedev
- /sites/training

Total number of sites selected: 0

Test Migrating just One site collection and measure the total db size against how long it will take. This will allow you to gauge how long the other site collections will take to Migrate.

In my test I am going to Migrate the Site Collections used for the /partners and /sites URL's and I am going to leave the /personal sites and run that after the Team Sites have successfully been migrated.

14. Tick the boxes for you chosen Site Collections
15. Click Upgrade Sites
16. You will then get a screen showing you the database size , number of site collections and also the source and destination databases.
17. Click Upgrade Sites again

The screenshot shows the 'Sites Selected for Upgrade' page in Central Administration. The breadcrumb trail is: Central Administration > Operations > Site Content Upgrade Status > Site Collection Upgrade. A yellow banner at the top reads 'Sites Selected for Upgrade'. Below this, a text block explains that a timer job will be created to start the upgrade process. A table lists the selected site collections:

You have chosen to upgrade the following:	
Number of site collections:	5
Storage used originally:	26 MB
Originating database:	CorpPort2_SITE
Target database:	CorpPort2_SITE_Pair

At the bottom right, there are two buttons: 'Upgrade sites' and 'Cancel'. On the left sidebar, there is a warning: 'Server Farm Configuration Not Complete' and a list of actions including 'Site Content Upgrade Status' and 'Finalize Upgrade'.

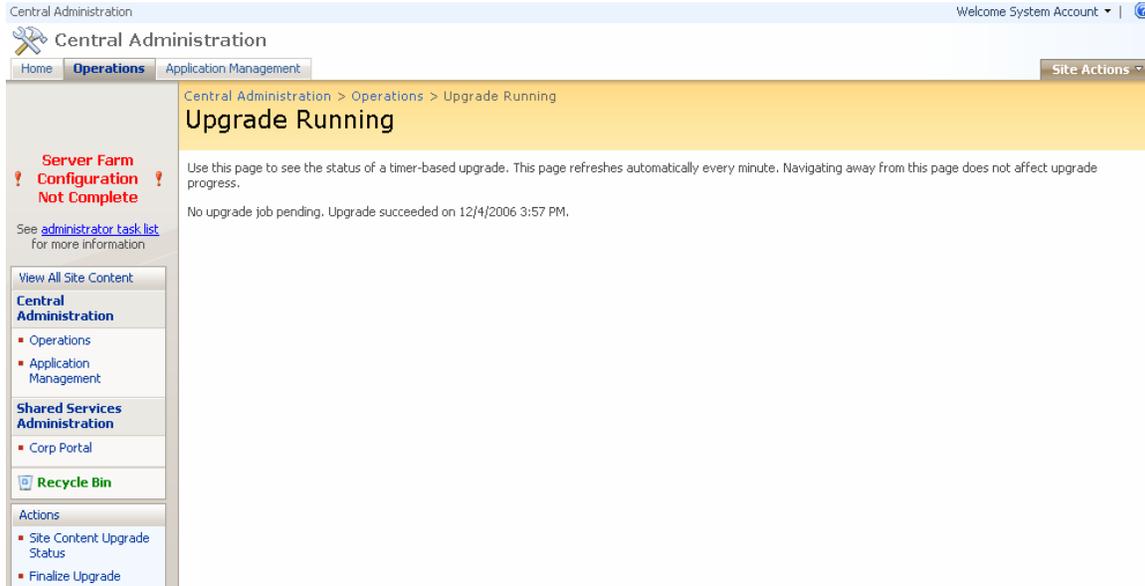
18. You should now get a progress screen as the Migration steps take place

The screenshot shows the 'Upgrade Running' page in Central Administration. The breadcrumb trail is: Central Administration > Operations > Upgrade Running. A yellow banner at the top reads 'Upgrade Running'. Below this, a text block explains that the page refreshes automatically every minute. A table shows the current status of the upgrade:

Status	Job in progress
Mode	Side-By-Side
Elapsed Time	00:00:51.4963984
Starting object	SPMigratableSiteCollection Parent=SPManager
Current object	
Current action	
Step within the action	0
Total steps in this action	0
Server	WFE1

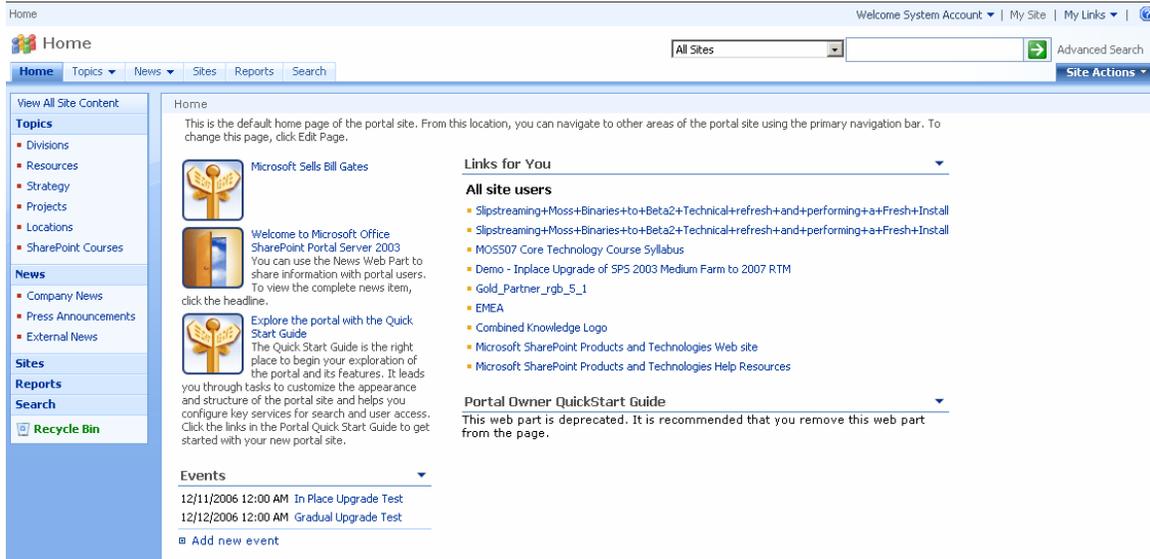
On the left sidebar, the 'Server Farm Configuration Not Complete' warning is still present, and the 'Site Content Upgrade Status' action is highlighted.

19. Once complete you will see a screen indicating that there is no Upgrade Job Pending



20. Lets now test the migration by going to the original URL which in my case was <http://portal.trainsbydave.com>.

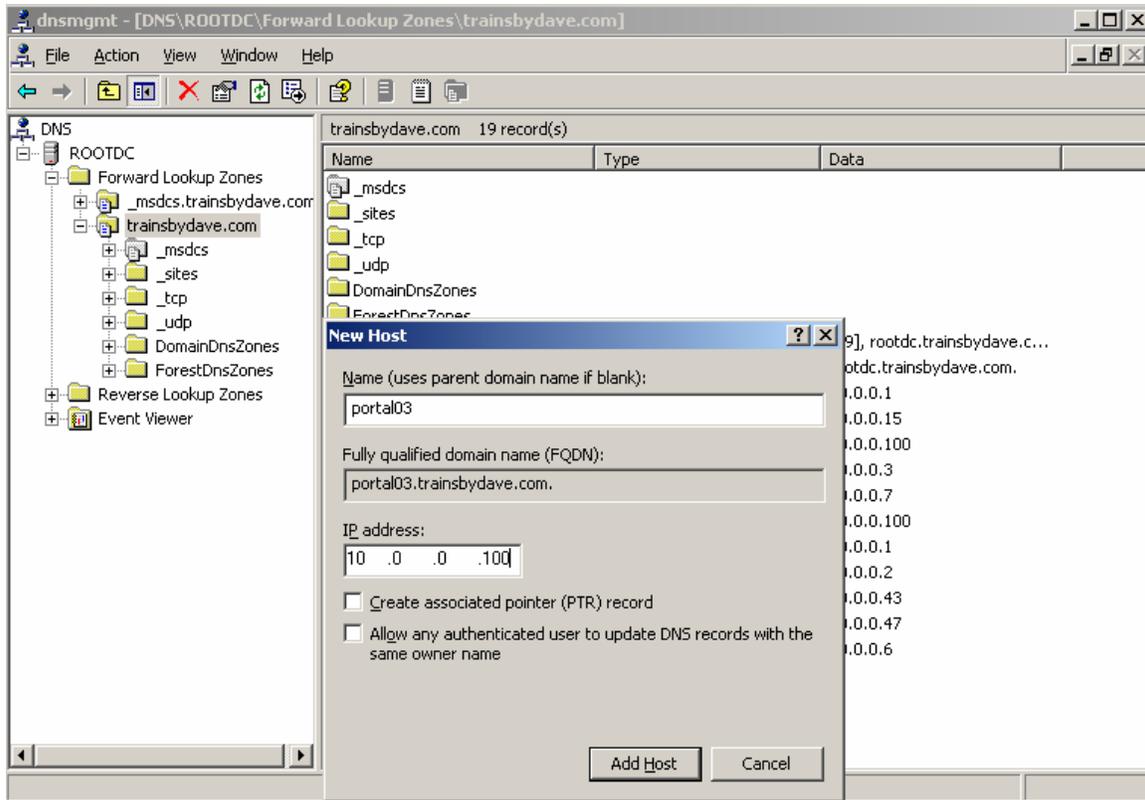
It may take a while to load as this is the first time the page has been loaded and will be cached. If you get a timeout error – click on ‘ Go Back to Site’



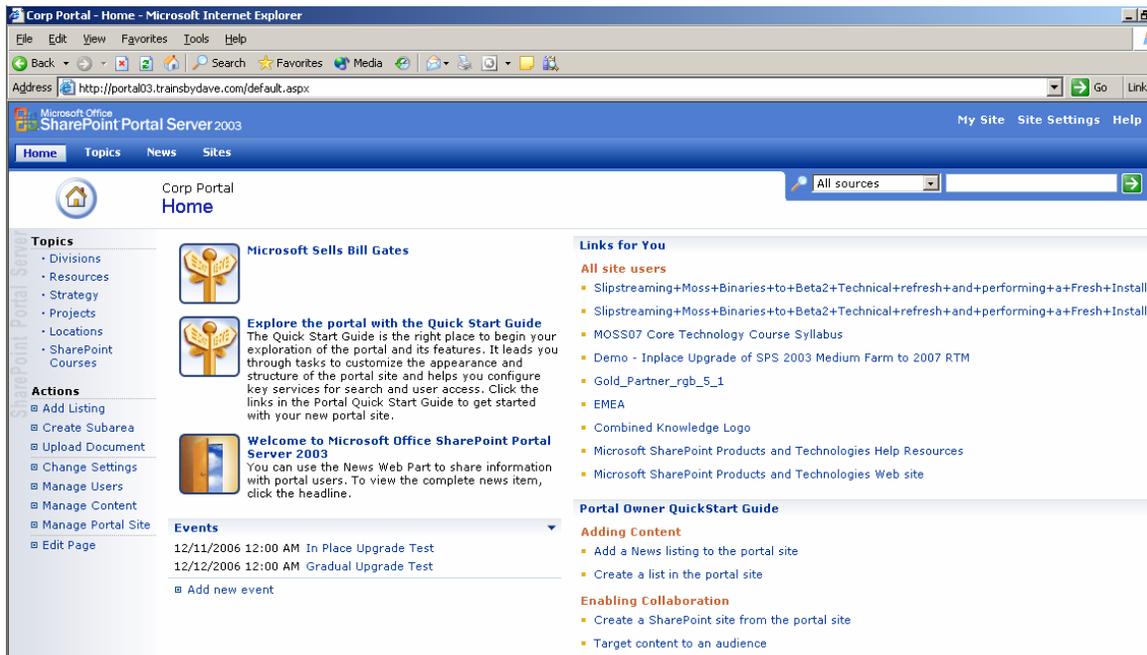
21. You should now have your original Portal but in the Moss Template.

Notice that on my page one of the old web parts from SharePoint 2003 has been depreciated. You will need to delete the web part from the page.

22. In order to get correct DNS name resolution to your old SharePoint 2003 environment you now need to add an entry to DNS (or host file entry) that resolves to the new redirected URL that Moss is using. This is the same URL that we entered in step 7.



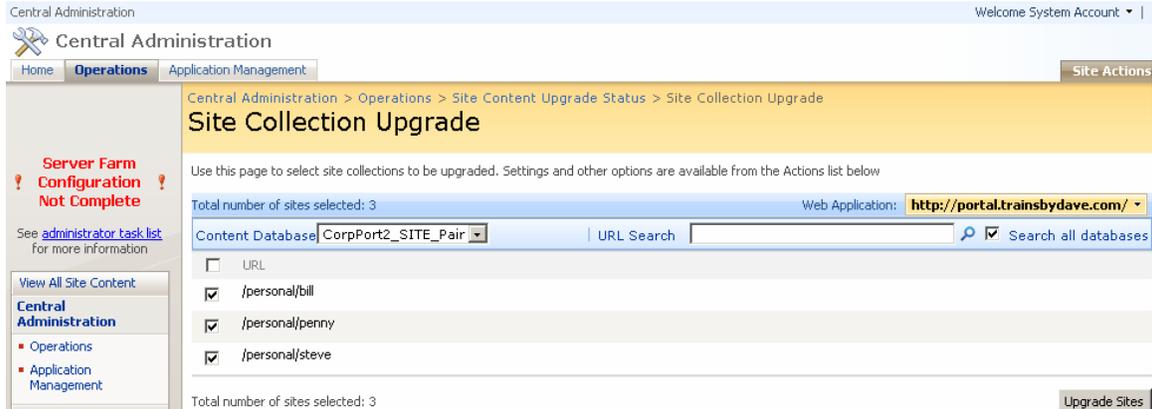
23. You can now test access to your SharePoint 2003 portal by typing the redirected URL. In my case this was <http://portal03.trainsbydave.com>



Lets now Upgrade the Personal Sites to the Moss Farm

24. Go back to Central Administration – Operations and click Site Content Upgrade Status again.

25. Now select the three My Sites under the /personal URL

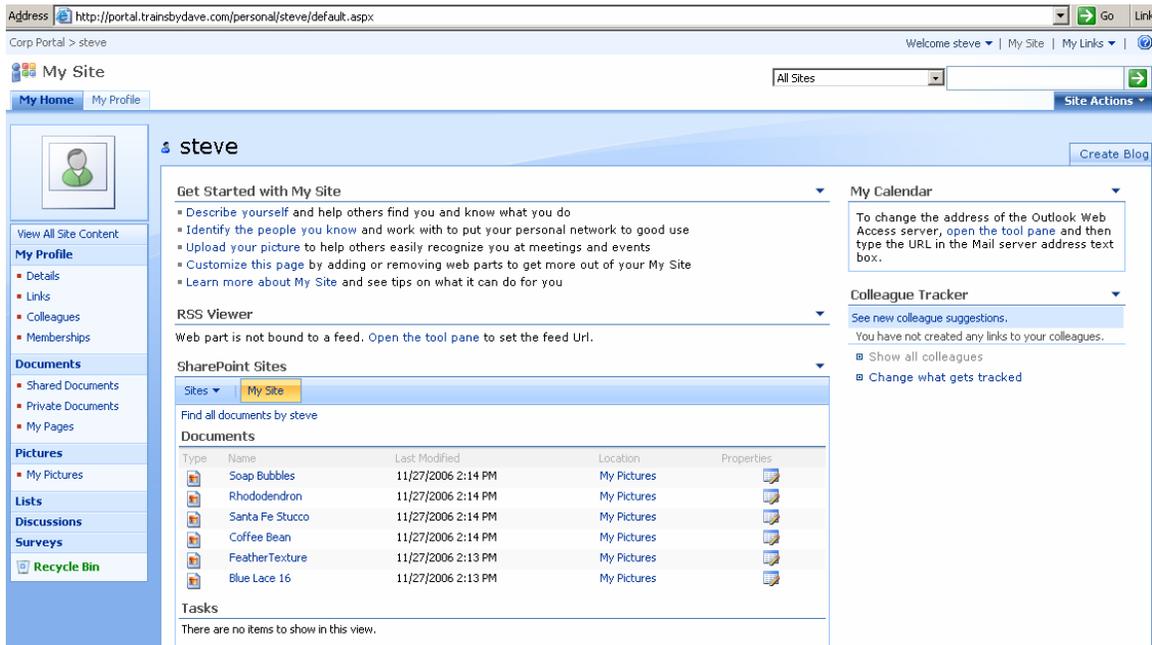


The screenshot shows the 'Site Collection Upgrade' page in Central Administration. The breadcrumb trail is 'Central Administration > Operations > Site Content Upgrade Status > Site Collection Upgrade'. The page title is 'Site Collection Upgrade'. Below the title, there is a message: 'Use this page to select site collections to be upgraded. Settings and other options are available from the Actions list below'. The 'Total number of sites selected: 3' is displayed. The 'Web Application' is set to 'http://portal.trainsbydave.com/'. The 'Content Database' is set to 'CorpPort2_SITE_Pair'. There is a search box for 'URL Search' and a checkbox for 'Search all databases'. A list of sites is shown with checkboxes: 'URL' (unchecked), '/personal/bill' (checked), '/personal/penny' (checked), and '/personal/steve' (checked). The 'Total number of sites selected: 3' is repeated at the bottom. An 'Upgrade Sites' button is visible in the bottom right corner.

26. Click Upgrade Sites

27. Wait for the Upgrade Job to complete

28. Wait a short while, now go to your client and test accessing you're my Site.
This may take a while to appear due to the first time it has been accessed.
Notice you're my Site is now a SharePoint 2007 page.



The screenshot shows the 'My Site' page for a user named 'steve'. The address bar shows 'http://portal.trainsbydave.com/personal/steve/default.aspx'. The page title is 'My Site'. The user's name 'steve' is displayed. The page is divided into several sections: 'Get Started with My Site' (with a list of tasks), 'RSS Viewer' (with a message 'Web part is not bound to a feed'), 'SharePoint Sites' (with a table of documents), 'My Calendar' (with a message 'To change the address of the Outlook Web Access server...'), and 'Colleague Tracker' (with a message 'See new colleague suggestions...'). The 'Documents' table has the following data:

Type	Name	Last Modified	Location	Properties
Image	Soap Bubbles	11/27/2006 2:14 PM	My Pictures	
Image	Rhododendron	11/27/2006 2:14 PM	My Pictures	
Image	Santa Fe Stucco	11/27/2006 2:14 PM	My Pictures	
Image	Coffee Bean	11/27/2006 2:14 PM	My Pictures	
Image	FeatherTexture	11/27/2006 2:13 PM	My Pictures	
Image	Blue Lace 16	11/27/2006 2:13 PM	My Pictures	

The 'Tasks' section at the bottom shows 'There are no items to show in this view.'

Once you are happy that all your Site Collections are upgraded and you no longer need access to your SharePoint 2003 Farm you need to Finalize the Upgrade which will delete the redirect relationship with the SharePoint 2007 and SharePoint 2003 Farms. You should only do this once you are happy that all migrations are complete.

To Finalize the Upgrade

29. Go into Central Administration – Operations page
30. Click finalize Upgrade
31. Confirm the message

You are done.

The final side that needs configuring is the actual configuration of the SharePoint 2007 farm and the templates used by the customized sites from the SharePoint 2003 environment. One of the first areas that need addressing early is the Search and I will cover this in a separate whitepaper available on the website.

Any comments are greatly appreciated for this white paper and I hope you found it useful.

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