

# Direct Migration from SharePoint 2003 to SharePoint 2010

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It's Easy with Quest Migration Manager for SharePoint

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# Abstract

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Many organizations that are planning to implement the new SharePoint 2010 release are still running SharePoint 2003. Because there is no direct upgrade path from SharePoint 2003 to 2010, these organizations have to take a complex “two-hop” upgrade approach, moving existing infrastructure and content first to SharePoint 2007 and then to SharePoint 2010.

Quest Migration Manager for SharePoint enables organizations to avoid this interim transition to SharePoint 2007. It enables direct, granular migration of SharePoint 2003 content to SharePoint 2010, preserving settings, versions, metadata, and security permissions. This technical brief details how to use Quest Migration Manager for SharePoint to migrate SharePoint 2003 sites directly to a new SharePoint 2010 server.

# Introduction

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Even though Microsoft has introduced its next version of the SharePoint platform, SharePoint Server 2010, many companies have not upgraded from SharePoint 2003 to SharePoint 2007. According to a survey of existing customers conducted by Quest Software in early 2010, nearly 20 percent of respondents had SharePoint 2003 in active service, and many of these organizations plan to migrate their existing SharePoint assets to SharePoint 2010.

As it does with other server products, Microsoft provides an upgrade path only from the most recent previous version of the platform to SharePoint 2010. That is, the server farm needs to be running SharePoint 2007 SP2 to be upgraded either in place of or using the database attach upgrade method. Therefore, upgrading a SharePoint 2003 farm to SharePoint 2010 requires a “two-hop” process - moving existing infrastructure and content first to SharePoint 2007 and then to SharePoint 2010. The changes in SharePoint 2010 system requirements (such as all 64-bit) make migration an even bigger challenge.

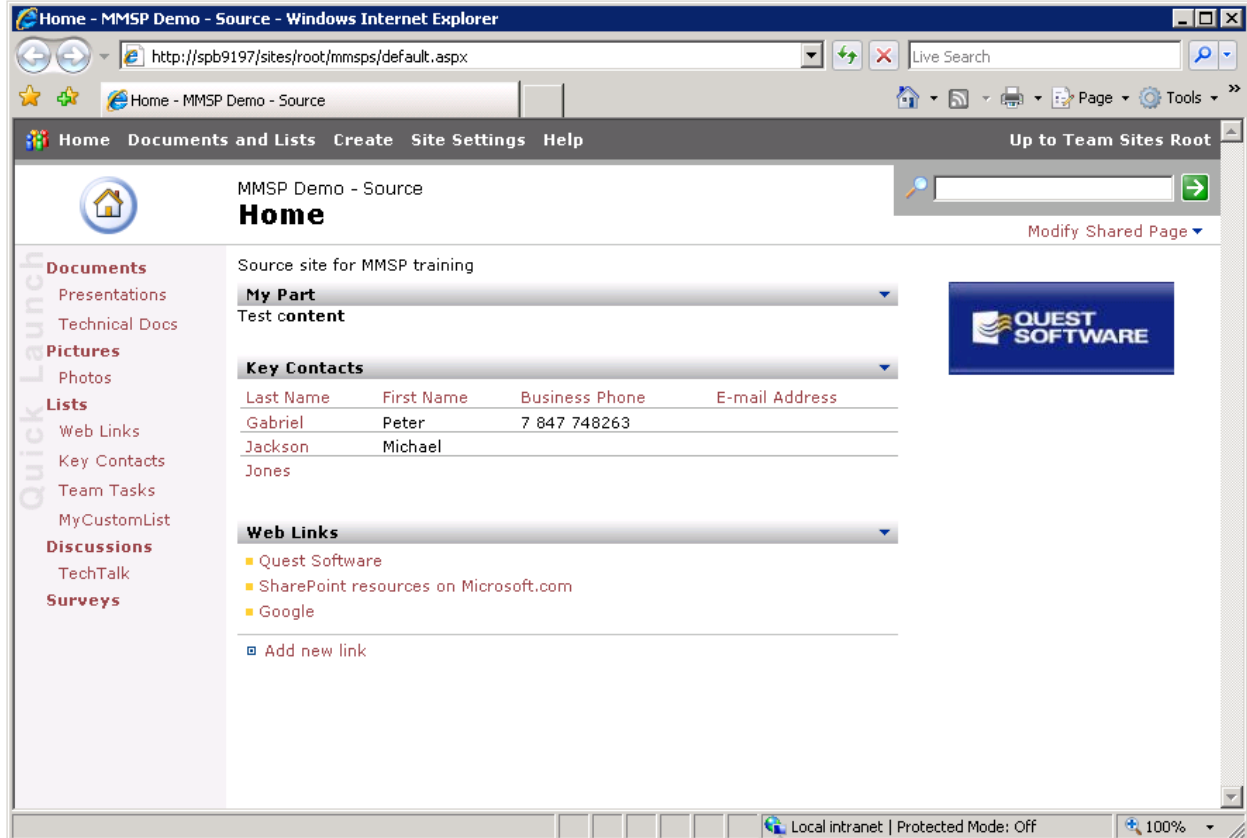
Quest Migration Manager for SharePoint alleviates this problem by enabling direct migration of SharePoint 2003 sites, lists, documents, permissions, and other settings to SharePoint 2010. With Quest Migration Manager for SharePoint you can:

- Migrate SharePoint 2003 sites, including content and security settings, to the SharePoint Server 2010 or SharePoint Foundation 2010
- Reorganize and rationalize existing SharePoint 2003 site structure during migration
- Synchronize post-migration changes of the source SharePoint 2003 site content to the target sites to make sure no data is lost while users are switching to the new version
- Manage the migration project in a Web browser using pre-migration assessments, migration job controls, real-time progress reporting and scheduling.

This technical brief explains how to use Migration Manager for SharePoint to migrate SharePoint 2003 sites directly to a new SharePoint 2010 server.

# Migrating SharePoint 2003 Sites to SharePoint 2010

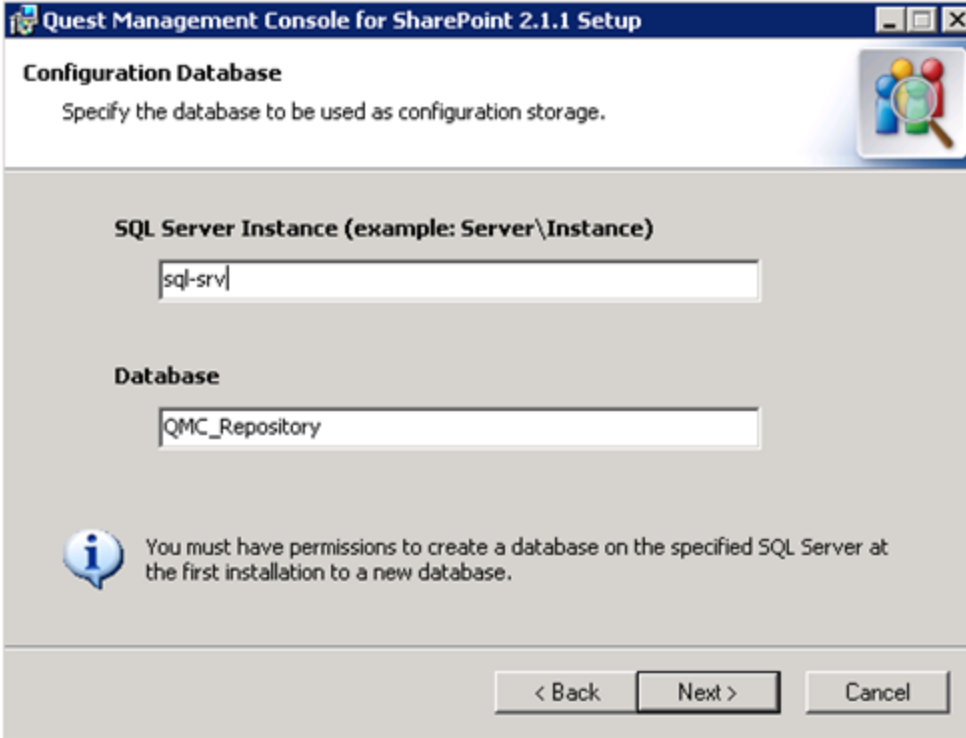
Let's look at a sample migration. Suppose you are running a SharePoint Server 2003 farm with multiple site collections. You have just deployed a new SharePoint Server 2010 server farm and now you need to gradually migrate your sites to the new farm.



## Installing Migration Manager

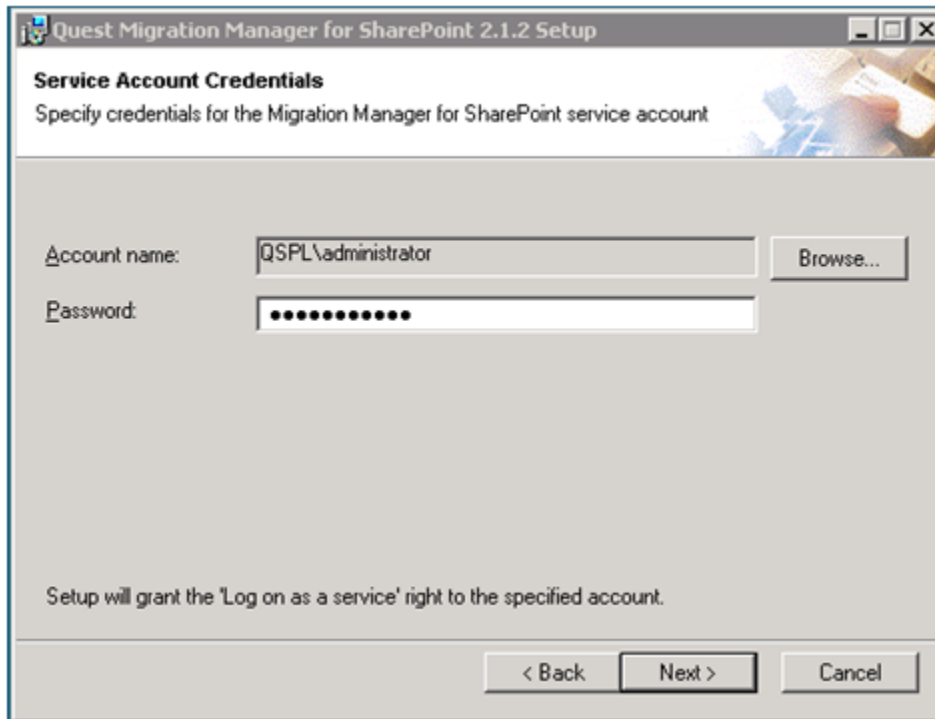
You can install Migration Manager for SharePoint on any member server of your SharePoint 2010 farm. It is a best practice to use the server with least workload or provision a dedicated front-end for migration work.

During setup, the product installer creates an SQL database to store its configuration. Specify your SQL server computer and the database name on the **Configuration Database** screen:

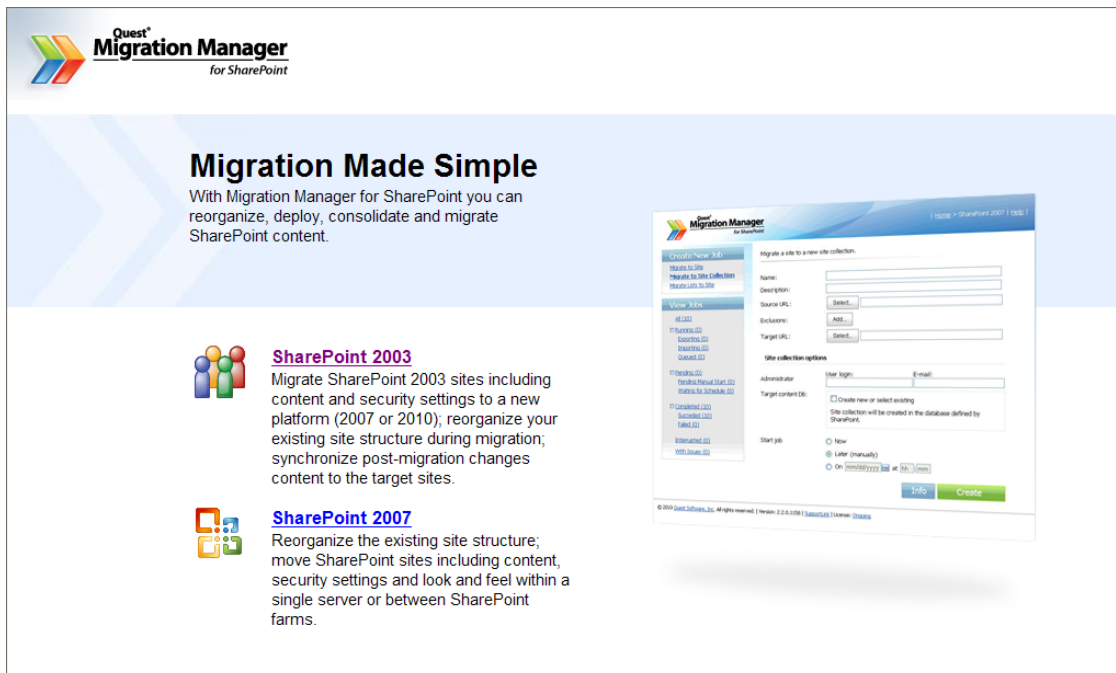


The screenshot shows a Windows-style dialog box titled "Quest Management Console for SharePoint 2.1.1 Setup". The main heading is "Configuration Database" with a sub-instruction: "Specify the database to be used as configuration storage." Below this, there are two input fields: "SQL Server Instance (example: Server\Instance)" containing "sql-srv" and "Database" containing "QMC\_Repository". An information icon with a blue 'i' is followed by the text: "You must have permissions to create a database on the specified SQL Server at the first installation to a new database." At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

On the **Service Account Credentials** screen, you will be prompted for a service account for Migration Manager. This elevated account is used by the tool's system components and needs full access to the SharePoint server farms.



The Getting Started Web page opens automatically at the end of the installation:

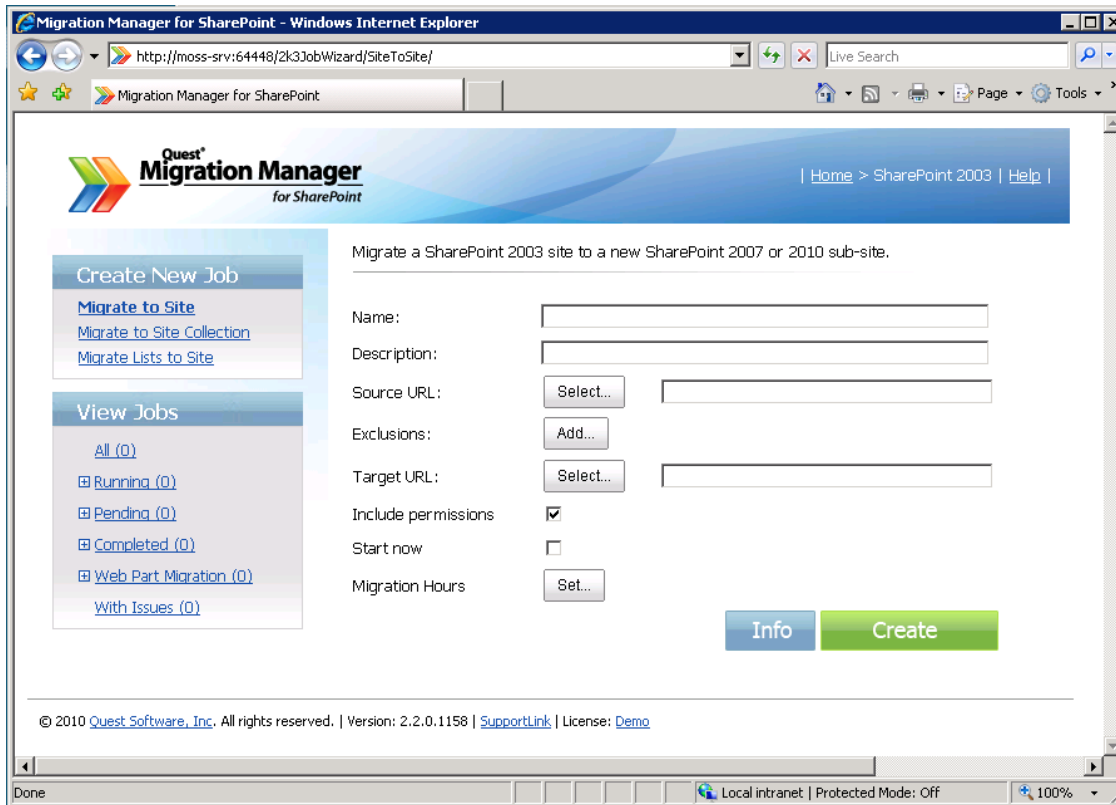


You can use the Migration Manager Web Access URL in the browser address string to access the tool remotely.

# Creating a Migration Job

## Creating the Job

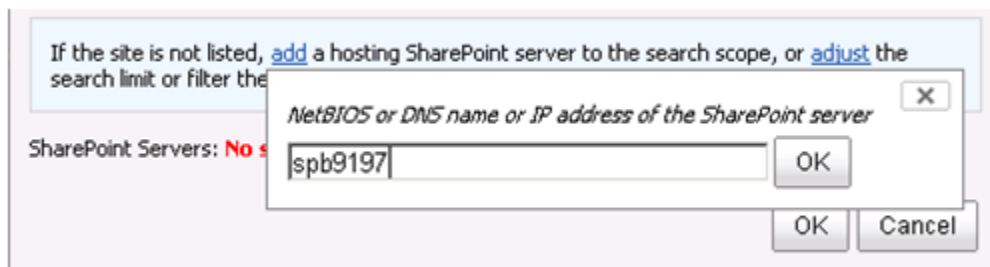
Click on the **SharePoint 2003** link on the start page to go to the SharePoint 2003 module:



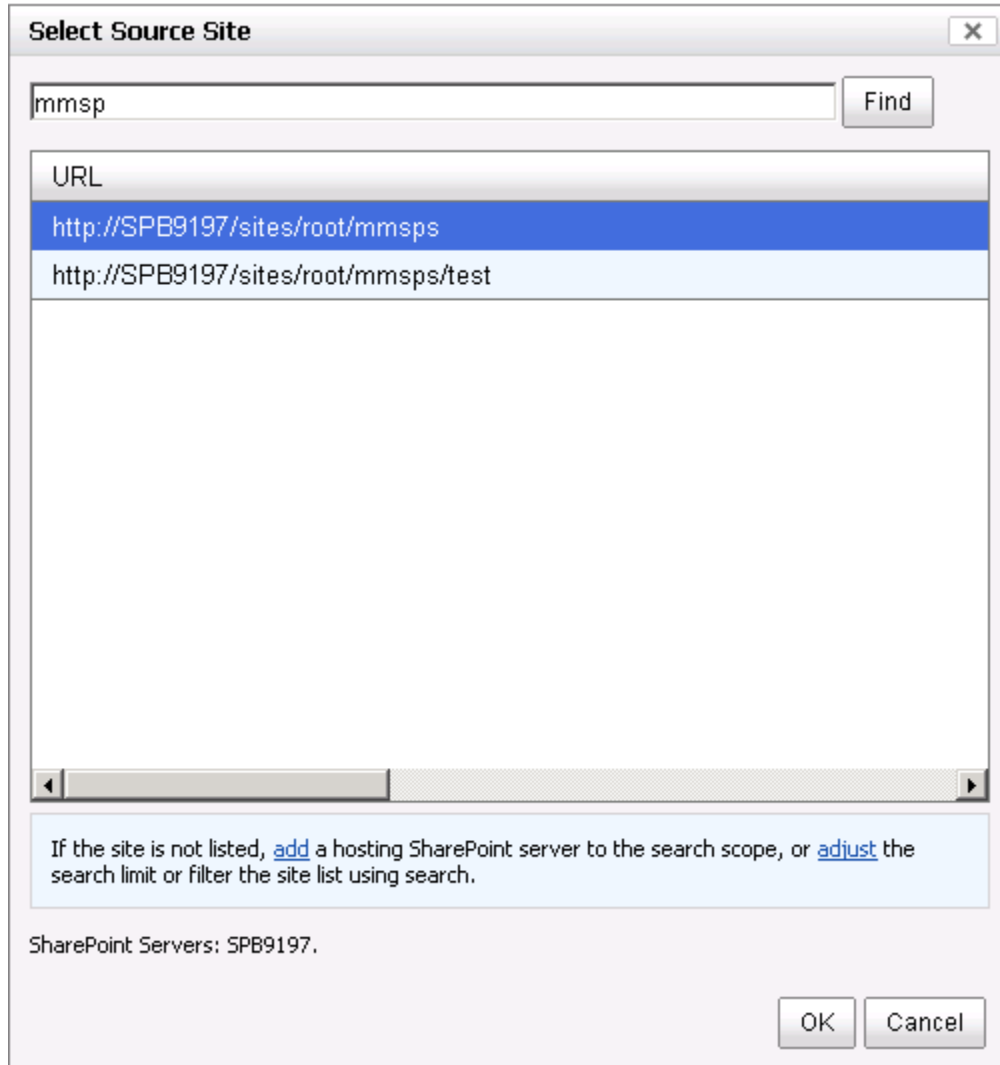
Select the **Migrate to Site** option in the Create New Job panel to configure a migration job. Give the job a descriptive name and description.

## Selecting a Site to Migrate

Click the **Select...** button next to **Source URL** to open the **Select Source Site** window. Since Migration Manager does not recognize your SharePoint 2003 server yet, no sites will be listed. Click the **Add** link in at the bottom of the screen to add the SharePoint 2003 server farm to the tool:



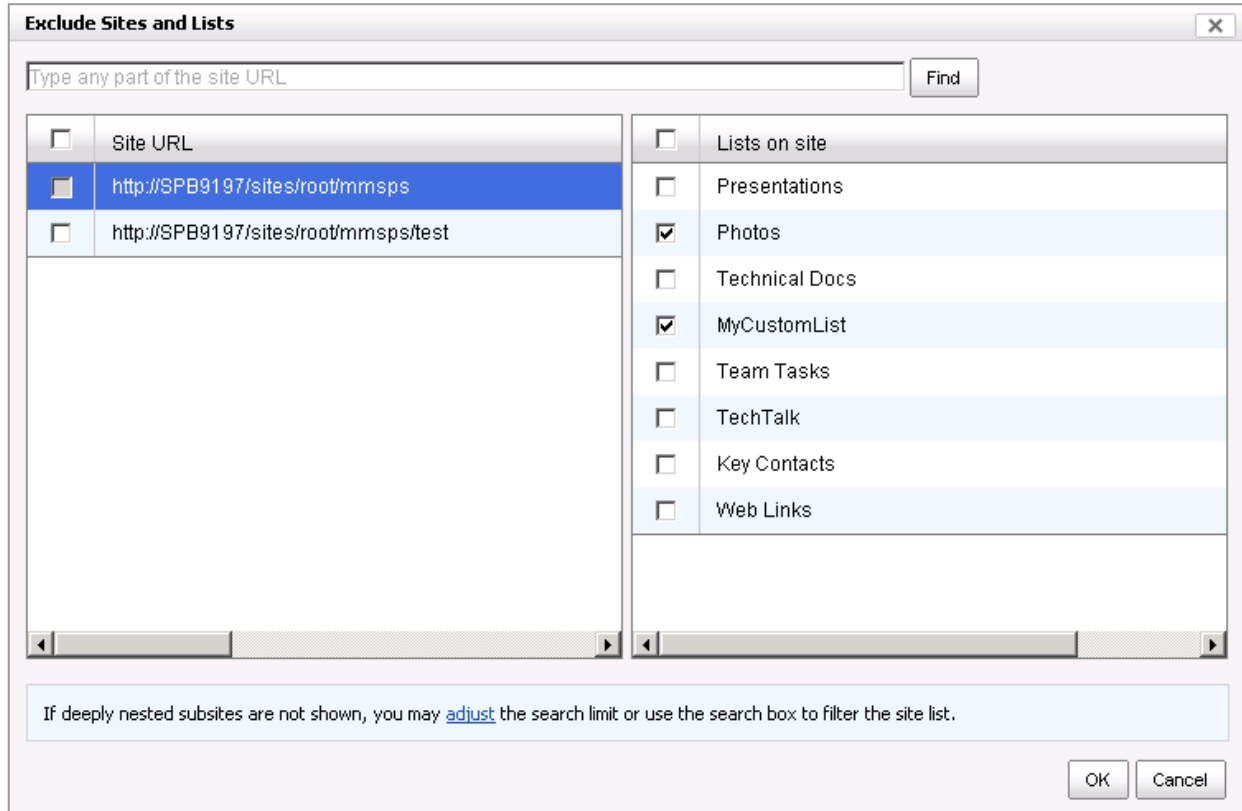
In a few moments, Migration Manager will complete scanning the server farm and populate the site list. By default, a few top sites are listed. Type in any part of the source site URL into the search box and click **Find** to filter the site list. Then select the source site and click **OK**:



## Excluding Sub-sites from the Migration Job

Suppose the selected site includes some unused or outdated sub-sites and lists that you do not want to migrate to SharePoint 2010. You can use exclusions to skip them from the migration job.

Click **Add...** in the Exclusions area and check the sub-sites and lists to exclude from migration:



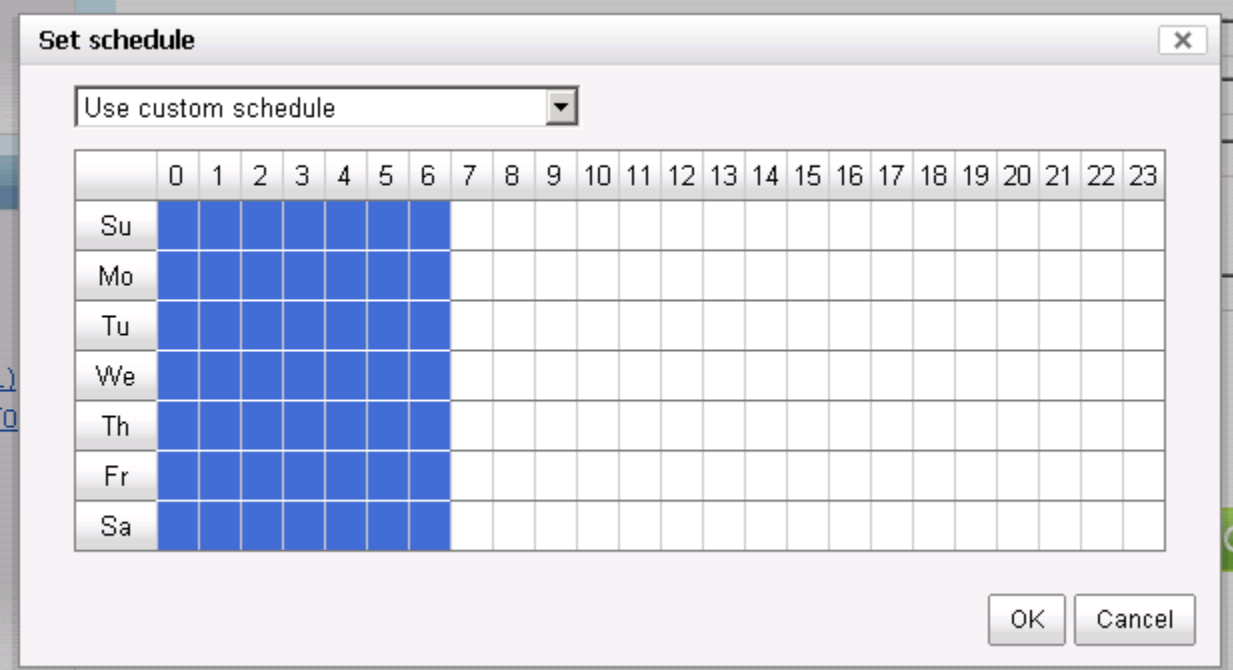
## Specifying the Destination

Next you need to specify the destination on the SharePoint 2010 server.

Click **Select...** next to **Target URL** to open the Select Target Site screen. Note that Migration Manager discovered the local SharePoint 2010 server farm automatically. Choose the intended parent site for the migrated site.

## Restricting when the Migration Can Run

By default, migration jobs run uninterrupted from start to finish. If you want to restrict your migration tasks to run only during off-hours to limit impact on your users, click the **Migration Hours Set** button to open the migration job schedule. Blue hour slots designate times when migration is allowed. Adjust the schedule by toggling the desired hour slots or use one of the pre-defined schedule templates.



The "Set schedule" dialog box features a dropdown menu at the top set to "Use custom schedule". Below it is a 7x24 grid representing the days of the week and hours of the day. The days are labeled Su, Mo, Tu, We, Th, Fr, and Sa. The hours are labeled 0 through 23. The cells for hours 0 through 6 are highlighted in blue for all days, indicating that migration is allowed during these hours. The cells for hours 7 through 23 are white, indicating migration is not allowed. At the bottom right of the dialog are "OK" and "Cancel" buttons.

	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Su	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	
Mo	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	
Tu	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	
We	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	
Th	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	
Fr	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	
Sa	Blue	Blue	Blue	Blue	Blue	Blue	Blue																	

## Starting the Job

If you want to start the job immediately, check the **Start Now** option; otherwise, you will need to start it manually later. Then click **Create**:

Migration Manager for SharePoint - Windows Internet Explorer

http://mss10:62268/2k3JobWizard/

Quest Migration Manager for SharePoint

Home > SharePoint 2003 | Help

Create New Job

- Migrate to Site
- Migrate to Site Collection
- Migrate Lists to Site

View Jobs

- All (0)
- Running (0)
- Pending (0)
- Completed (0)
- Web Part Migration (0)
- With Issues (0)

Migrate a SharePoint 2003 site to a new SharePoint 2007 or 2010 sub-site.

Name:

Description:

Source URL:

Exclusions:

URL	Title
http://SPB9197/sites/root/mmmps/Photos	Photos
http://SPB9197/sites/root/mmmps/Lists/MyCustomList	MyCustomList

Target URL:

Include permissions

Start now

Migration Hours

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Trusted sites | Protected Mode: Off | 100%

# Tracking Migration Progress

You can use the **View Job** panel on the left to track your migration jobs. You can see all jobs, or use one of the filtered views for easy access to running, pending, or completed jobs only. Click the job name in the job list to go to the Job Details page:

### Create New Job

- [Migrate to Site](#)
- [Migrate to Site Collection](#)
- [Migrate Lists to Site](#)

### View Jobs

- [All \(1\)](#)
- Running (1)**
  - [Initial Migration \(0\)](#)
  - [Post-migration Sync \(1\)](#)
  - [Waiting for Schedule \(0\)](#)
- Pending (0)
- Completed (1)
- Web Part Migration (0)
- [With Issues \(0\)](#)

### Running jobs

Name	Description	Progress
<a href="#">sps2mss</a>		38/38 objects

The Job Details page shows the job's properties and progress. The job controls on the page enable you to start, pause or delete the job, modify its schedule, compare the source and target sites, and check any migration issues.



The job statistics are not updated automatically. Hit F5 to update the page in your browser.

When the ETA field reads Migration completed, the initial content migration for the job is complete:

General	Migration Pairs	Advanced
Name	sps2mss	
Description		
Source URL	<a href="http://SPB9197/sites/root/mmsps">http://SPB9197/sites/root/mmsps</a>	
Target URL	<a href="http://MSS10/sites/root/mmsps">http://MSS10/sites/root/mmsps</a>	
Include permissions	yes	
Started	yes	
Objects migrated/total	38/38 objects	
ETA	Migration completed	
Issues	0	
Created	04/13/10 17:24:25	
Completed	04/13/10 17:26:03	
Last updated	12/11/07 14:54:32	

The job is also listed in the Completed job view:

The screenshot shows the Quest Migration Manager for SharePoint interface. At the top, there is a navigation bar with the Quest Migration Manager logo and the text "for SharePoint". On the right side of the navigation bar, there are links for "Home > SharePoint 2003 | Help |".

Below the navigation bar, there are two main sections: "Create New Job" and "View Jobs".

The "Create New Job" section contains three links: "Migrate to Site", "Migrate to Site Collection", and "Migrate Lists to Site".

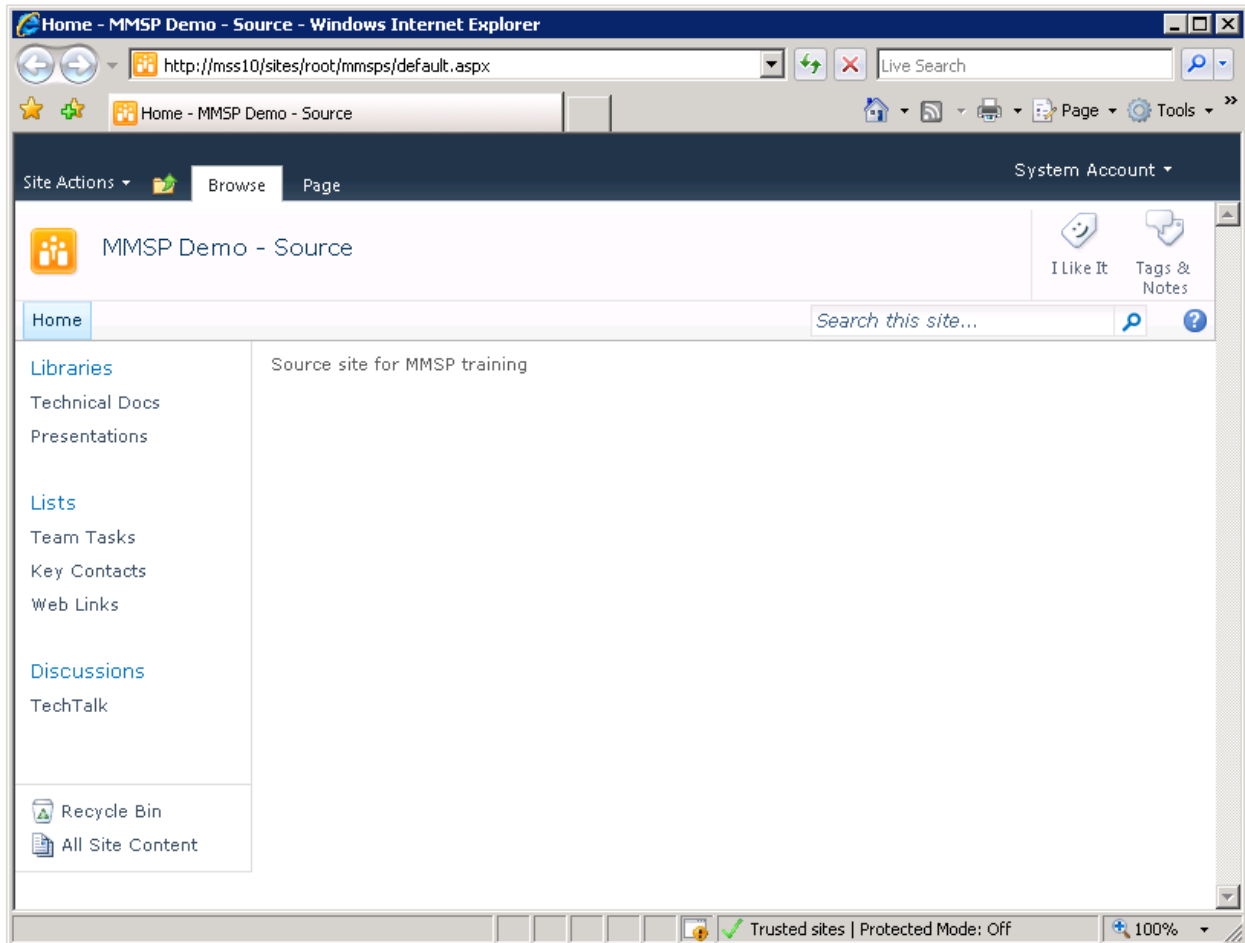
The "View Jobs" section contains a list of job status filters: "All (1)", "Running (1)", "Pending (0)", "Completed (1)", "Completed Successfully (1)", "Completed with Issues (0)", "Web Part Migration (0)", and "With Issues (0)".

Below the "View Jobs" section, there is a heading "Jobs completed successfully" followed by a table with the following data:

Name	Description	Progress	ETA	Issues	Last Updated
<a href="#">sps2mss</a>		38/38 objects	Migration completed	0	12/11/07 14:54:32

# Migrating Web Parts

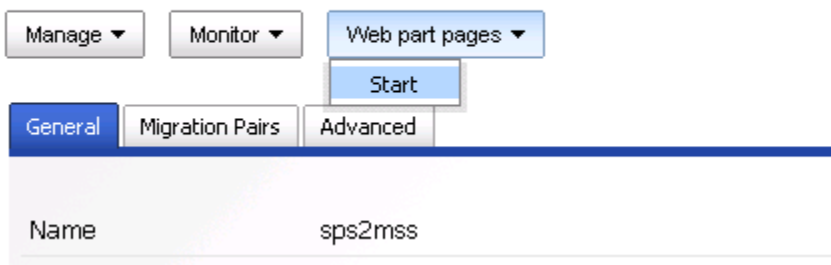
If you check the target site now, you will see that the content has been moved over, but the home page of the site is missing the Web parts from the original site:



To migrate the Web parts from the original site, you need to start the Web part page migration for the migration job.

On the Job Details page, click **Start** from the **Web part** pages pull-down menu to initiate migration of Web part pages:

This page displays job detailed information



The Web part page migration process enumerates all Web part pages in the scope of the migration job (both the site home pages and custom web part pages in document libraries) and maps Web parts from each source page to the target site. The Web Part Page Migration screen gives you visibility into the migration process:

The screenshot displays the 'Web Part page migration' screen in the Quest Migration Manager for SharePoint. The interface includes a navigation sidebar on the left with options like 'Create New Job' and 'View Jobs'. The main content area shows a summary of the migration job, including its name, status, and progress. Below this is a table listing the source and target URLs for various web parts, all of which have a status of 'Succeeded'.

**Web Part page migration Summary:**

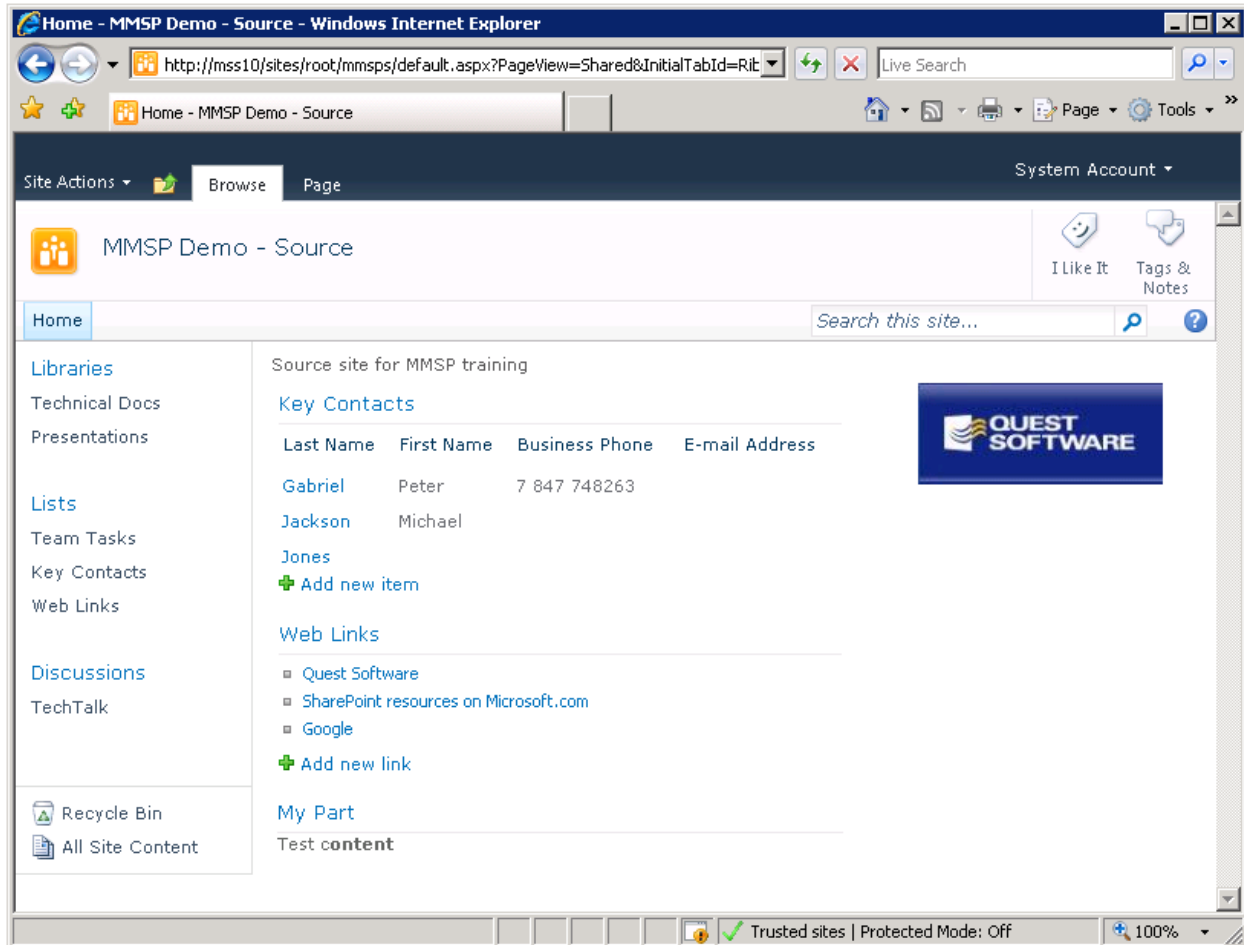
- Migration Job: [sps2mss](#)
- Running on: MSS10
- Status: Completed
- Progress: 100%
- Last Time Updated: Tue Apr 13 18:51:51 2010
- Issues: 0

**Migration Job Details Table:**

Source	Target	Status
<a href="http://SPB9197/sites/root/mmmps/test/default.aspx">http://SPB9197/sites/root/mmmps/test/default.aspx</a>	<a href="http://MSS10/sites/root/mmmps/test/default.aspx">http://MSS10/sites/root/mmmps/test/default.aspx</a>	Succeeded
<a href="http://SPB9197/sites/root/mmmps/test/Document Library">http://SPB9197/sites/root/mmmps/test/Document Library</a>	<a href="http://MSS10/sites/root/mmmps/test/Document Library">http://MSS10/sites/root/mmmps/test/Document Library</a>	Succeeded
<a href="http://SPB9197/sites/root/mmmps/default.aspx">http://SPB9197/sites/root/mmmps/default.aspx</a>	<a href="http://MSS10/sites/root/mmmps/default.aspx">http://MSS10/sites/root/mmmps/default.aspx</a>	Succeeded
<a href="http://SPB9197/sites/root/mmmps/Presentations">http://SPB9197/sites/root/mmmps/Presentations</a>	<a href="http://MSS10/sites/root/mmmps/Presentations">http://MSS10/sites/root/mmmps/Presentations</a>	Succeeded
<a href="http://SPB9197/sites/root/mmmps/Technical Docs">http://SPB9197/sites/root/mmmps/Technical Docs</a>	<a href="http://MSS10/sites/root/mmmps/Technical Docs">http://MSS10/sites/root/mmmps/Technical Docs</a>	Succeeded

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When Web part migration completes, check your target site and confirm that the home page now has the same Web parts as the original site:



## Post-Migration Synchronization

As a migration job completes the initial content deployment, it enters the post-migration synchronization phase. While in this state, the job tracks changes to the source content (additions, modifications, and deletions) and updates the target site accordingly. To see a list of jobs doing post-migration synchronization, choose the **Running > Post-Migration Sync** sub-view:







To see how synchronization works, add a new contact to the source Contacts list:

MMSP Demo - Source

## Key Contacts

Key external contact people

 New Item	 Filter	 Edit in Datasheet	 Import Contacts
 Last Name	First Name	Company	
Gabriel	Peter	Greenhouse Gas Works	
 Jackson	Michael		
Jones			
Kutcher 	Ashton		


Migration Manager will pick up your update shortly and transfer it to the target site. The Last Updated property of a migration job indicates the time of the change that the migration job synchronized last:

Jobs doing post-migration synchronization

Name	Description	Progress	ETA	Issues	Last Updated
<a href="#">sps2mss</a>		38/38 objects	Migration completed	0	04/14/10 15:57:12

Now check the target site to see that the new contact has been synchronized to the target Contacts list:

## Key Contacts

Last Name	First Name	Business Phone	E-mail Address
Gabriel	Peter	7 847 748263	
Jackson	Michael		
Jones			
Kutcher 	Ashton		
 Add new item			

In addition to new items and documents, Migration Manager automatically synchronizes item modifications and deletions, as well as new sites, lists and libraries.

Synchronization will continue until you stop or delete the corresponding migration job. This typically happens when you cut over your users to the new site in SharePoint 2010 and ensure that all pending updates have been synched up.

# About Quest Migration Manager for SharePoint

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Direct migration of SharePoint 2003 server farms to SharePoint 2010 is not the only capability of Migration Manager for SharePoint. The tool also offers a rich set of features for SharePoint 2007; for example, you can:

- Migrate and consolidate SharePoint 2003 and SharePoint 2007 servers
- Reorganize SharePoint 2007 site structure to streamline information access
- Optimize content storage
- Enhance recovery time objectives

Migration Manager Web Access allows for remote migration configuration and monitoring. Migration tasks can be scheduled to minimize impact of resource-intensive migration activities on business users.

You can learn more about Migration Manager for SharePoint and download a trial version from the Quest Software web site at <http://www.quest.com/migration-manager-for-sharepoint/>.

# About the Author

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Alexander Kirillov is a Quest product manager for Microsoft SharePoint migration products. Since joining Quest in 2004, he has held a variety of positions, including software analyst to development program manager.

Alexander currently works with Quest customers and partners, as well as various groups inside Quest, to determine best practices and product direction for Quest Migration Manager for SharePoint and Quest Public Folder Migrator for SharePoint.

Alexander holds a master's degree in automatic control systems from Baltic State Technical University in Saint Petersburg, Russia.

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