



A 13 point pre-upgrade checklist for a *SharePoint 2013 migration*

This checklist has been created by Professional Advantage, a Microsoft Gold Certified Partner for Collaboration and Content (SharePoint), please contact us for all your SharePoint enquiries.

This checklist has been designed to help you understand best practice approaches in any migration to Microsoft SharePoint 2013. It is intended to be a useful tool in helping you perform a thorough and effective evaluation of your organisations' requirements from a business collaboration tool and how to maximise the success of your migration.

This guide is not a comprehensive listing of processes to follow when implementing SharePoint 2013.

Please contact us for more information.



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SharePoint 2013 pre-upgrade checklist

An upgrade typically does not solve problems already existing in your environment. Therefore, it is important the environment is fully functioning before you consider upgrading.

1. Review & document current configuration

Ensure all configuration information such as web applications, timer jobs, site collections, service applications such as search and user profile configuration and content database settings are captured. This will ensure nothing is missed and will help facilitate disaster recovery through the migration process if necessary.

Microsoft have provided a great worksheet to help with this process: <http://go.microsoft.com/fwlink/?LinkId=252097>

Perform a full farm backup of your environment prior to upgrading. That way, you can recover your environment if you must roll back from an upgrade attempt.

2. Create an inventory of customisations in the environment

Detail an inventory of all server side customisations including solutions, features, web parts, event handlers, search and profile customisations, master pages, page layouts and CSS files.

3. Determine how to handle customisations

Once customisations have been identified they need to be evaluated. By determining if the customisation is still valuable you can look to keep, replace or discard the customisation during the migration.

4. Remove unused content and customisations

Remove any unused site collections and web applications from the farm. If you have extended a web application to another zone and are not using it, unextend the web application again.

IMPORTANT! Deactivate any custom features before removing the underlying solutions!

Not doing so will leave the databases in an invalid state which can cause the upgrade process to fail. Review the Health Analyser reports and fix any customisation errors that are captured there.

5. Install and update to the latest SharePoint Software Service Packs

Update your SharePoint 2010 servers to the latest Service Pack (currently SP1). This will ensure that your databases are up to date. Thoroughly test the Service Pack to ensure no unforeseen problems have caused your sites to become corrupted.

6. Review upgrade best practices

To ensure a smooth upgrade from SharePoint 2010 to SharePoint 2013, review the upgrade planning best practices as detailed on Microsoft TechNet. A majority of these are listed in this checklist.

7. Review supported and unsupported upgrade paths

SharePoint 2013 only supports the database attach upgrade path. This means that a migration from a standalone installation to a complete farm is now supported. Downgrading editions is still not supported, i.e. moving from SharePoint 2010 Enterprise to 2013 Standard, or from Standard to Foundation.



8. Test, test, test

To ensure you are fully prepared for the final upgrade, perform at least one trial upgrade. Preferably several ones. This will identify bottlenecks in the hardware configuration, space requirements for logs and data files, timings on database upgrades and site collection upgrades and will allow you to establish and test a comprehensive test protocol.

9. Plan for capacity and performance

SharePoint is resource hungry. You will know that from your SharePoint 2010 experiences. Certain new features such as the News Feed are particularly memory hungry. Upgrading the databases and site collections will temporarily grab extra space on the data and log drives. Make sure you have at least 50% extra free space on the data drives and the same free space on the log drive. Pre-grow the transaction logs on production based on the findings from the trial upgrade on the test farm. That will speed up the upgrade process and minimise timeouts.

10. Estimate the performance impact

In SharePoint 2013 the 'databases attach' does not include upgrading the individual site collections. This means that the site collections can run in native 2010 mode while attached to a 2013 farm. This greatly reduces the impact for sites which might have complex customisations as they will still work as if on a 2010 farm.

11. Consider refreshing the underlying systems

As you will have to build a complete new farm from scratch to upgrade ("migrate") anyway, start with the latest product offerings.

SharePoint 2013 now supports Windows Server 2012 and SQL Server 2012 (SP1). Using these systems will ensure you set yourself up for the years to come without needing to worry about upgrading your database platform on a running SharePoint farm. It also means you will be able to take full advantage of the advanced Business Intelligence capabilities built into SQL Server 2012 Enterprise such as PowerView for SharePoint.

12. Clean up your environment

By cleaning up content that is no longer useful or valid you can significantly reduce migration time and effort. Furthermore a migration is an excellent time to address the way data is structured and analyse growth rates to future proof the environment.

13. Contact Professional Advantage

Specialising in intranet development and design, document management, records management and content management, our experience spans a wide range of projects and organisations across many industries. In any upgrade Professional Advantage can help your organisation in a number of ways, including; defining your business case & priorities, design and layout creation, governance & information architecture planning, project delivery, optimising existing intranet projects and user training and support.



The Professional Advantage phased SharePoint upgrade offering

Upgrading to SharePoint 2013 and migrating potentially critical business information and processes is a daunting and complex undertaking for many organisations.

It requires in-depth analysis and detailed scoping and planning of an upgrade project. Professional Advantage can assist from the beginning, delivering planning, budgeting and project management, right through to the end, a successful, operative SharePoint 2013 environment providing you with award winning support and assistance for your newly migrated SharePoint 2013 environment.

The Professional Advantage SharePoint 2013 migration difference:



- ☑ Tested and proven phased upgrade framework and documentation that minimises risk and ensures migration success.
- ☑ A dynamic and flexible SharePoint consulting team with years of product experience and migration exposure.
- ☑ Microsoft best practice installation framework ensures scalability, reliability and compatibility.
- ☑ Experienced Enterprise Architects specialising in the creation and documentation of change management and communication planning.
- ☑ Dedicated Infrastructure and Services team with a multitude of experience in technology and hardware upgrade, procurement and configuration; including but not limited to: Exchange, SQL, Windows Server, Virtualisation, TMG and Domain Services.
- ☑ End to End documentation of all SharePoint farm components and configuration.
- ☑ A Visual Design and Integration team with focused experience in designing and delivering for SharePoint.

Minimise upgrade risk with our proven framework. Contact us for a free SharePoint 2013 upgrade analysis session with an experienced consultant.

About us

Professional Advantage is one of Australia's most awarded solutions providers, with over 20 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.

For more information

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