



Upgrade Toolkit for Windows SharePoint Services Sites and Templates


European Microsoft SharePoint Conference 2007

February 12th to 14th, 2007
Convention Center
Hotel Estrel, Berlin, Germany




Session Objectives
Upgrade Toolkit for WSS Sites and Templates

- Technology Overview
 - Problem statement
 - Solution accelerator objectives
- Solution Concept
 - Solution accelerator components
 - Solution workflow




Problem Statement
Upgrade Toolkit for WSS Sites and Templates

- Upgrade process for site and template customization requires large amounts of manual labor
- Must either redesign templates on a 3.0 environment, or revert back to base site definition and reset UI customizations.
- Some functionality might not be enabled upon upgrade, including some Windows SharePoint Services 3.0 functionality

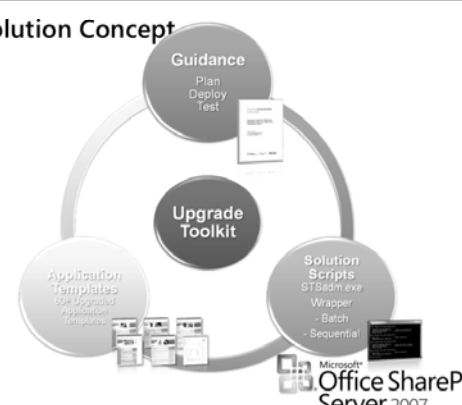



Solution Objectives
Upgrade Toolkit for WSS Sites and Templates

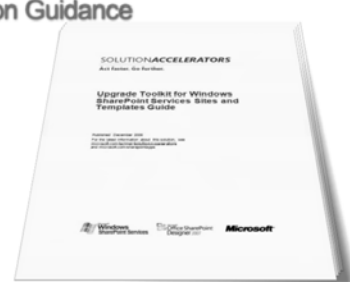

- To provide IT professionals with guidance to facilitate the upgrade of customized WSS 2.0 sites and site templates to function in a WSS 3.0 environment
- To provide IT pros with a set of tools to help streamline the site and site template upgrade process
- To provide a set of upgraded application templates for Windows SharePoint Services based on those currently published for WSS 2.0 on TechNet



Solution Concept

Solution Components
Solution Guidance

MICROSOFT
© 2006 Microsoft Corporation. All rights reserved. Microsoft, Windows, Office, and SharePoint are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

The information herein is for informational purposes only and represents the current view of Microsoft Corporation as of the date of this presentation. Because Microsoft must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information provided after the date of this presentation.

MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED OR STATUTORY, AS TO THE INFORMATION IN THIS PRESENTATION.

Solution Components Solution Guidance

- Helps IT pros understand how site and site template upgrade fits their overall Windows SharePoint Services upgrade strategy
- Provides step-by-step planning, deploying and testing guidance for site and template upgrade process
 - Outlines steps to take prior to and after the Windows SharePoint Services upgrade process



Solution Components Solution Guidance

- Table of Contents
 - Ch 1- Introduction
 - Ch 2- Planning Your Template Upgrade
 - Ch 3- Preparing a Site Template Based on a Customized Site Definition
 - Ch 4- Stage 1: Before Upgrading to WSS 3.0
 - Ch 5- Stage 3: After Upgrading to WSS 3.0
 - Ch 6: The Upgraded Application Templates for WSS
 - Ch 7: Troubleshooting
- Appendix: Glossary



Solution Components Solution Scripts



Solution Components Solution Scripts

- Set of command-line scripts that leverage common stsadm.exe commands
- Streamlines template upgrade process
 - Allows for the batch execution of commands
 - Allows for the sequential execution of commands



Solution Components Solution Scripts

MigStart.cmd	• "A wrapper" to MigInstStp.cmd and MigMakeSite_1.cmd scripts.
MigInstStp.cmd	• Deploys WSS 2.0 .stp files to destination WSS 2.0 server.
MigMakeSite_1.cmd	• Instantiates sites from deployed site templates on WSS 2.0 server.
MigPostUpgradeWrapper.cmd	• Wrapper script runs the MigDepNew.cmd and MigMakeSite_2.cmd scripts.
MigDepNew.cmd	• Redeploys the new WSS 3.0 site templates on WSS 3.0 server.
MigMakeSite_2.cmd	• Instantiates sites from redeployed site templates on WSS 3.0 server.
MigCleanUpWrapper.cmd	• Runs the DelSite.cmd and DelStp.cmd scripts.
DelSite.cmd	• Deletes upgraded WSS 2.0 sites no longer needed in the WSS 3.0 server.
DelStp.cmd	• Deletes original instantiated WSS 2.0 site templates still on post-migrated WSS 3.0 server.

Solution Components Upgraded Application Templates



MICROSOFT, the Microsoft logo, Office, Office SharePoint Server, and Windows are registered trademarks and/or trademarks in the U.S. and/or other countries.

The information herein is for informational purposes only and represents the current view of Microsoft Corporation as of the date of this presentation. Because Microsoft must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information provided after the date of this presentation.

MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED OR STATUTORY, AS TO THE INFORMATION IN THIS PRESENTATION.

Solution Components Upgraded Application Templates

- Designed to meet the requirements of specific business processes or tasks
- Upgraded to function in a WSS 3.0 environment, based on the original set of WSS 2.0 application templates offered on Microsoft TechNet.
- Upgraded utilizing process as described in solution guidance
- In most cases provides a basic and customized version of each template



Solution Components Upgraded Application Templates

- Include WSS 3.0 features. These application templates include WSS 3.0 upgraded functionality, such as:
 - Recycle bin
 - Folder item level security
 - E-mail to list
 - Site Actions button
 - Breadcrumbs
 - Mobile views
 - RSS feeds
 - Versioning in document libraries

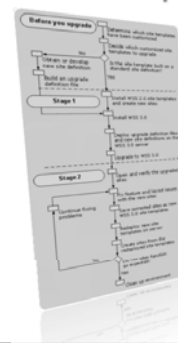


Solution Components Upgraded Application Templates

- Template functions:
 - Board of directors
 - Case work management
 - Change management
 - Classroom management
 - Competitive intelligence dashboard
 - Discussion database
 - Document library
 - Employee absence request
 - Employee activities
 - Employee timesheet and sch. management
 - Employee training
 - Event coordination
 - Expense reimbursement
 - Helpdesk dashboard
 - HR program and services
 - IT developer team
 - Breadcrumbs
 - Mobile views
 - RSS feeds
 - Versioning in document libraries
 - Legal document review workflow management
 - Loan initiation management
 - Marketing communications campaign site
 - Meeting management site
 - New product development
 - Performance review management
 - Professional services contractual setup management
 - Professional services site for engagement team resource
 - Project team site
 - Public official activity and issue management
 - Public relations work site
 - Publication editorial review
 - Recruiting resource center
 - Request for proposal management
 - Room and equipment reservation
 - Team Work
 - Travel request



Solution Workflow Custom Site and Template Upgrade Process



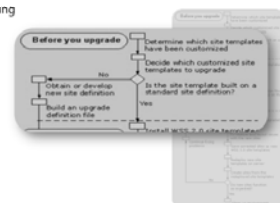
Solution Workflow Custom Site and Template Upgrade Process

- 3 Distinct phases in the upgrade process:
 1. Identify site Definition
 2. Stage 1- Pre-upgrade steps
 3. Stage 2- Post-upgrade steps



Solution Workflow Identify Site Definition

1. Identify customization
2. Determine which custom sites/templates to upgrade
3. Determine existence of corresponding Site Definition in WSS 3.0
 1. If Yes: Proceed
 2. If No:
 - a) Obtain/Develop new Site Definition
 - b) Build upgrade definition file



MICROSOFT
© 2006 Microsoft Corporation. All rights reserved. Microsoft, Windows, and/or other trademarks are the registered trademarks and/or trademarks of Microsoft Corporation in the United States and/or other countries.

The information herein is for informational purposes only and represents the current view of Microsoft Corporation as of the date of this presentation. Because Microsoft must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information provided after the date of this presentation. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED OR STATUTORY, AS TO THE INFORMATION IN THIS PRESENTATION.

Solution Workflow Stage 1

1. Install WSS 2.0 site templates and create new sites
2. Install WSS 3.0
3. Deploy upgrade definition files and new site definitions on the WSS 3.0 server
4. Upgrade to WSS 3.0

Microsoft
Office SharePoint
Server 2007

Solution Workflow Stage 2

1. Open and verify sites
2. Fix feature and layout issues in new sites
3. Save corrected sites as WSS 3.0 templates
4. Redeploy new site templates on the upgraded server
5. Create sites
6. Verify- function as expected?
 - a) If Yes- Clean up
 - b) If No- Repeat 2-6

Microsoft
Office SharePoint
Server 2007

Key Takeaways Upgrade Toolkit for WSS Sites and Templates

- Upgrading site and template customizations can be a challenging task
- Site and template upgrade process requires specific steps to take place before and after server upgrade
- Toolkit designed to facilitate custom site/templates upgrade process
 - Guidance
 - Solution Scripts
 - Upgraded Application Templates

Microsoft
Office SharePoint
Server 2007

Microsoft
Your potential. Our passion.™

Microsoft
Office SharePoint
Server 2007

© 2007 Microsoft Corporation. All rights reserved. Microsoft, Windows, Windows Vista and other product names are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. The information herein is for informational purposes only and represents the current view of Microsoft Corporation as of the date of this presentation. Microsoft makes no warranties, express, implied or statutory, as to the information in this presentation. Microsoft makes no warranties, express, implied or statutory, as to the information in this presentation.

MICROSOFT CONFIDENTIAL

© 2006 Microsoft Corporation. All rights reserved. Microsoft, Windows, Windows Vista and other product names are or may be registered trademarks and/or trademarks in the U.S. and/or other countries.

The information herein is for informational purposes only and represents the current view of Microsoft Corporation as of the date of this presentation. Because Microsoft must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information provided after the date of this presentation.

MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED OR STATUTORY, AS TO THE INFORMATION IN THIS PRESENTATION.