Enterprise Vault Whitepaper

Managing SharePoint Migrations with Enterprise Vault

This document provides information on how to use Enterprise Vault to migrate existing SharePoint configurations to a newer installation of SharePoint.

This document applies to the following version(s) of Enterprise Vault: 9.0.x and 10.0.x

If you have any feedback or questions about this document please email them to **IIG-TFE@symantec.com** stating the document title.

Confidence in a connected world.   ✔Symantec.

Document Control

Contributors

Who	Contribution
Amruta Purandare	Author
Evan Barrett	Reviewer
David Scott Shahnawaz Khan	Content

Table of Contents

Introduction

Enterprise Vault for SharePoint keeps users connected to vital organizational knowledge artifacts by automatically, using administrator-defined policies, moving older information off of SharePoint servers and into online vaults where it can be searched and accessed instantaneously.

Enterprise Vault is primarily used to optimize storage and prepare for eDiscovery however it can also be used to accelerate migrations to new versions of SharePoint.

How does Enterprise Vault Help?

The bottom line of any migration is to deliver the benefits of the new technology without introducing undue risk or ongoing costs (both storage and administrative) while delivering a seamless and transparent experience to the user.

Enterprise Vault can accelerate SharePoint migrations by reducing the overall storage footprint and providing a mechanism to safely delete content from SharePoint after copying it to the archive.

Symantec recommends the following points be considered before commencing with the actual migration process:

- Reduce the content in the SharePoint database by moving content to the archive and replacing it with shortcuts. Shortcuts are ~6 bytes in size and provide a seamless experience for the user

- Use the migration as a reason to examine content in SharePoint and eliminate stale/ unnecessary content by leveraging 'delete' rules based on modified date to eliminate stale content prior to migration

- Archive and then delete entire sites that are no longer needed. Enterprise Vault provides that ability to archive documents, most lists, Blogs, WIKIs and discussions allowing the admins to manually delete the unused sites prior to archiving while maintaining the important data for eDiscovery or other purposes.

- Accelerate backup of old SharePoint environment prior to migration. This reduces overall database size prior to backup through above archive techniques.

⚠️ **Disable scheduling on the respective targets before performing any migrations!**

Steps for Migrating from SharePoint 2007 to SharePoint 2010

There are two ways to migrate SharePoint 2007 to SharePoint 2010.

- **In-place migration**

  This is a straightforward way to migrate SharePoint 2007 to SharePoint 2010. The steps involved for this migration are explained in Figure 1.
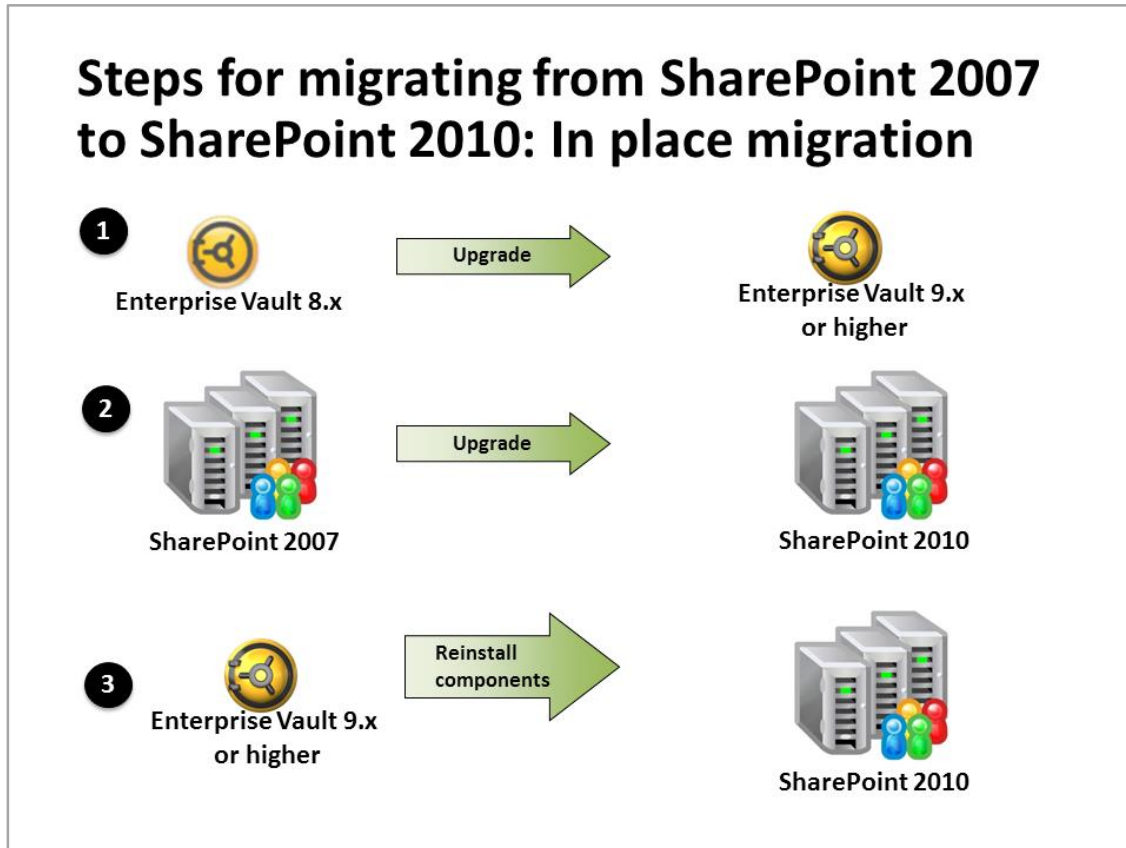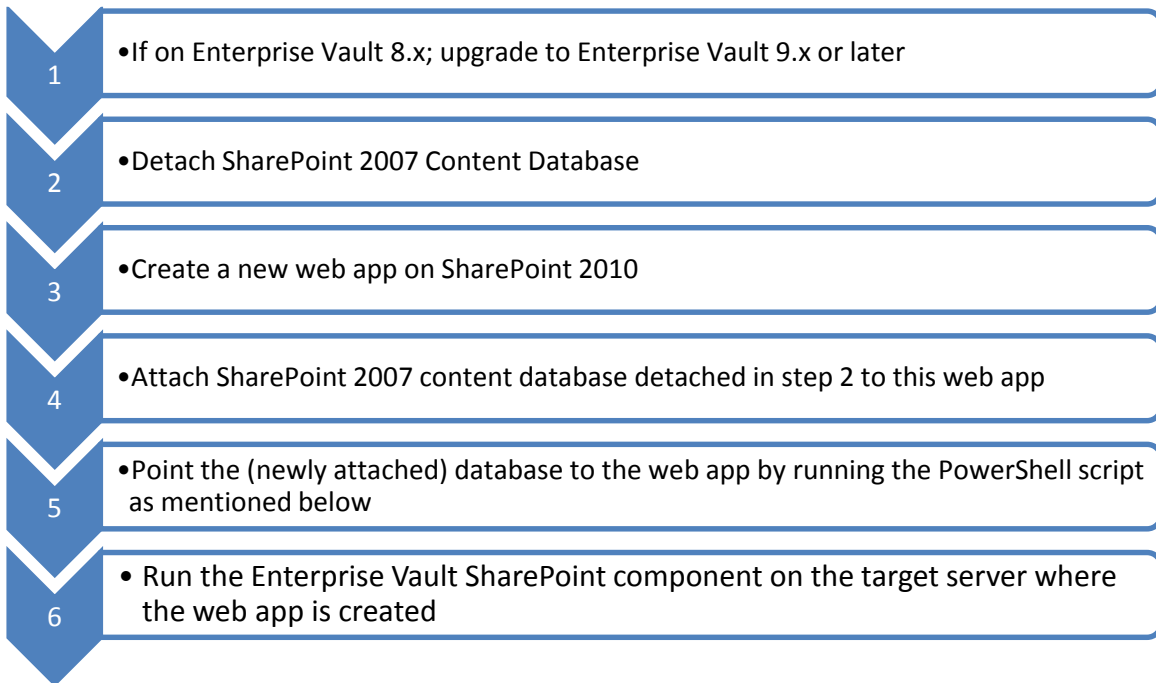

Figure 1 - Steps for an in place migration of SharePoint 2007 – SharePoint 2010

- **Database attach migration**

  This is a more complex procedure as it requires SQL and SharePoint application changes, in addition to the Enterprise Vault Upgrade process. The steps involved for this migration are explained in Table 1.

Steps to migrate SharePoint 2007 to SharePoint 2010: database attach migration

1	•If on Enterprise Vault 8.x; upgrade to Enterprise Vault 9.x or later
2	•Detach SharePoint 2007 Content Database
3	•Create a new web app on SharePoint 2010
4	•Attach SharePoint 2007 content database detached in step 2 to this web app
5	•Point the (newly attached) database to the web app by running the PowerShell script as mentioned below
6	• Run the Enterprise Vault SharePoint component on the target server where the web app is created

Table 1 – Steps to migrate SharePoint 2007 – SharePoint 2010: Database Attach Method

PowerShell script:

```
Mount-SPContentDatabase    "<ContentDb>"    -DatabaseServer
"<DbServer>" -WebApplication http://SiteName
```

Where:
- `<ContentDb>` is the content database to be attached
- `<DbServer>` is the name of the database server
- **http://SiteName** is the name of the Web application to which the content database is being attached

This migrates your sites to the new server.

Steps for Migrating from SharePoint 2010 to SharePoint 2013

- Database attach migration

The only way to migrate SharePoint 2010 to SharePoint 2013 is using the database attach method. In place migration is no longer supported.
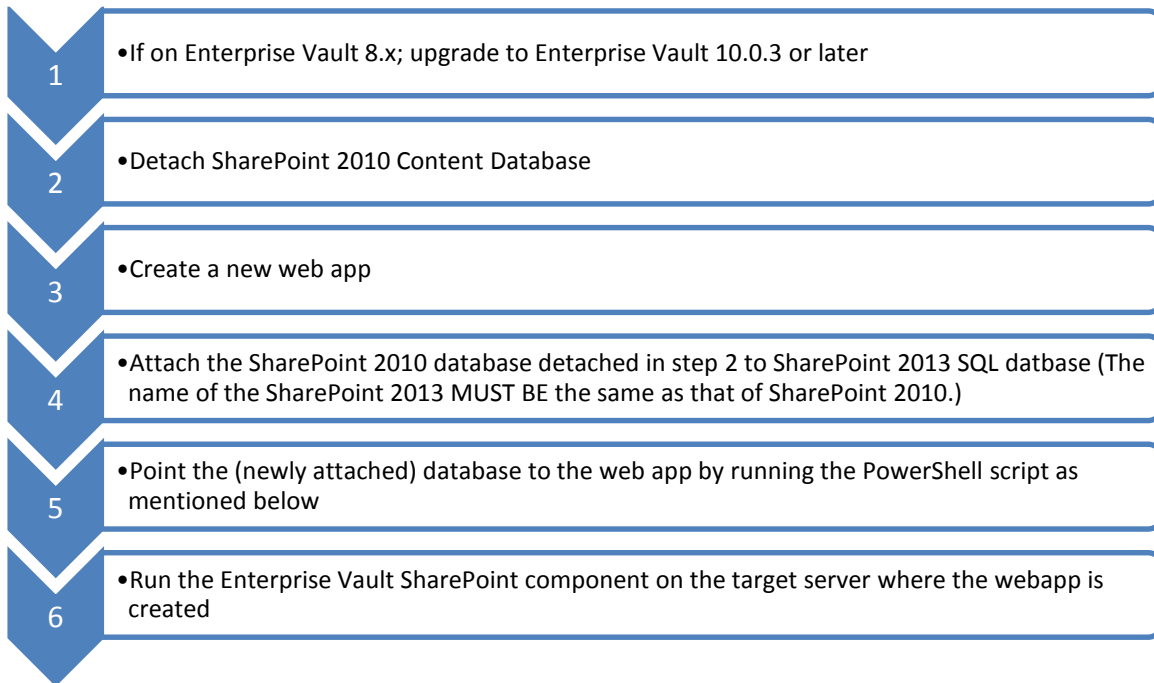
NOTE: Before starting this migration, note that the name of the SharePoint 2013 SQL database MUST BE the same as that of the SharePoint 2010 database.

Failing this, the Enterprise Vault Search Web Part will not be able to perform a "Restore file to the original location" operation as the file does not exist in the new location due to name change. The

shortcuts will continue to function and you will be able to search and open items from the Enterprise Vault Search Web Part.

The steps involved for this migration are explained in Table 2.

Steps for migrating SharePoint 2010 to SharePoint 2013

1 • If on Enterprise Vault 8.x; upgrade to Enterprise Vault 10.0.3 or later

2 • Detach SharePoint 2010 Content Database

3 • Create a new web app

4 • Attach the SharePoint 2010 database detached in step 2 to SharePoint 2013 SQL datbase (The name of the SharePoint 2013 MUST BE the same as that of SharePoint 2010.)

5 • Point the (newly attached) database to the web app by running the PowerShell script as mentioned below

6 • Run the Enterprise Vault SharePoint component on the target server where the webapp is created

⚠ ONLY database attach method is supported!

Table 2 – Steps for migrating SharePoint 2010 - SharePoint 2013: Database Attach Method

PowerShell script:

```
Mount-SPContentDatabase    "<ContentDb>"    -DatabaseServer
"<DbServer>" -WebApplication http://SiteName
```

Where:
- <ContentDb> is the content database to be attached
- <DbServer> is the name of the database server
- **http://SiteName** is the name of the Web application to which the content database is being attached

Handling a Different Web Application Name (Different URL) in the new environment

Often when upgrading to a new SharePoint environment the Web Application name may change resulting in a new URL. If content has been archived prior to migrating to a new SharePoint environment we recommend keeping the same name if possible however if you need to change the web application name (or have already done the migration), follow these steps to ensure your shortcuts continue to work properly:

1. Remove the target within the Enterprise Vault Admin console that points to the old web application name. **NOTE:** Deleting a target does not delete the archive.

2. Once the old target is removed, add the new Web Application as a target in the Vault Admin Console.
   NOTE: While re-adding the target ensure you are using same vault store used before.

3. Run the archive task on the new target. When the target is re-added Enterprise Vault will re-associate the original archive with the new target URL so that you will be able to access content via shortcuts that were created under the old URL.

These steps will preserve all functionality with one minor exception. When using the Enterprise Vault for SharePoint Search Web Part you will not be able to use the "RESTORE" option to restore the item to its original location as the original location will point to the original URL (a location which no longer exists). This is a minor issue as simply clicking on a shortcut will allow you to access the archived content. Also the Enterprise Vault for SharePoint Search Web Part will allow you to search for old content and open it – only the restore option does not work.

About Symantec:

Symantec is a global leader in providing security, storage, and systems management solutions to help consumers and organizations secure and manage their information-driven world. Our software and services protect against more risks at more points, more completely and efficiently, enabling confidence wherever information is used or stored.

Headquartered in Mountain View, Calif., Symantec has operations in 40 countries. More information is available at **www.symantec.com**.