**GOJO Industries Inc.**

2nd Quarter 2012

**GOJO Collaboration**

**Infrastructure Upgrades and SharePoint Migration**

**Scott Wade**

Infrastructure Upgrades and SharePoint Migration

# Introduction

GOJO is seeking to upgrade core components of its technology offerings to the business and its employees in areas ranging from desktop operating system upgrades (Windows 7), new versions of business productivity application suites (Microsoft Office 2010) and new versions of the associated enterprise collaboration servers (SharePoint Server 2010, Exchange 2010), to new database server versions (Microsoft SQL 2012, Oracle 11g), new server operating systems (Windows Server 2008 R2) and a world-class enterprise ERP system (SAP).

Driven by the enhanced capabilities and new functionality available in these upgrades, both individually and concertedly, GOJO can grow along with these technologies to derive even greater business value by enhancing productivity and transforming the way the organization connects its workers, business processes, and enterprise-wide content worldwide.

This report will explain and detail the central collaboration-related components of this effort, explaining the reasons for an adopted migration plan selected from the different ones available, key considerations that were involved, necessary requirements and critical preqequisite planning that must be completed, and the proven practices and tools that will be used in the migration to help make the move with minimal business disruption through an approach the enables a cost-effective, risk-managed and efficient migration to SharePoint 2010 and Microsoft Office 2010 running on Windows 7.

Preparation

It is essential to the project’s success that a shared clear and concise understanding of what SharePoint 2010’s purpose is and why it is being implemented. This mission and the reasons for undertaking this effort to “upgrade” the technological offerings to the business, must be well understood and easily communicated.

To aid in that effort, all involved parties need to solidify on a shared understanding of what exactly SharePoint is, what it is designed to do and enable for the business; realize what the various feature set implementations and configurations are focused on, their intended purpose and which best aligns with the organization’s mission.

The BlueChip Consulting Group has been contracted to assist with this project. Their stated understanding of the project and their involvement with deliverables is as follows:

“GOJO…has identified the need to upgrade its core collaboration technology offering to the business by migrating its core internal…(MOSS) 2007 web applications to a new (MSS) 2010 environment. By migrating…GOJO will leverage new functionality…GOJO has requested assistance with the planning and execution…”

Deliverables: Migrated Sites, Content Migration.

# Design and Planning

# “The single most important task of a SharePoint system is to find information.”

**Organizational Areas**

**Top-Level Taxonomy**

Navigation Taxonomy

Security Taxonomy

Organizational Taxonomy

Informal Organizational Taxonomy

Rank

Product Catalog

Process Taxonomy

Document Taxonomy

**Site Navigation and Structure**

**Metadata**

What it is and how it is part of the solution

Findability/Putability

Policies so they can act on metedata values

Process can use metdata to track state/status of a process, etc.

Document Organization

Relationship with Taxonomy

How much metadata

Tools for developing metadata

Content Types

**Search and Architecture**

Requirements for effective “search”

Solid foundation of:

Info Arch, Adequate Metadata, Governance, Usage Patterns, Continuous Improvement/Feedback

**Tools for workshop/brainstorming**

MOSS 2007 to SharePoint 2010 Migration

## Phase I: Analysis for Migration, Architecture and Design

* Conduct inventory detailed analysis of existing source content, metadata, security.
* Identify content types, content parameters (type, owner, size, last modified, name, location, audience, importance, etc.), and any content and/or types that will not be migrated.
* Define migration strategy and appropriate tools selection, plan migration action items/activities
* Identify sub-parts of sites that need manual migration, and content areas that can be migrated automatically.
* Define target taxonomies, target sizing, and any re-engineering site enhancements, metadata enrichment.
* See Migration Report

## Phase II: Migration Items

* Define validation scenarios and test strategy
* Map content from source (MOSS 2007 infrastructure) to destination (SP 2010 infrastructure).
* Map metadata and taxonomy from source to destination organization and metadata.
* Map roles, users from source security and permissions strategy to destination strategy
* Identify the gaps and develop strategies for addressing them.
* Stage proof-of-concept, prototype migration, test export and import mappings, etc.
* Keep track of any issue/resolution in test migrations
* SP2010 Diagnostic/Toolkit, MBSA, SPDiag, Attack Surface Reduction Tool, etc.

## Phase III: Implementation

* Develop/Review migration procedures, scripts, tools and utilities used in test outcomes.
* Perform actual migration both manual tasks and automated, in functional units, planned schedule for outages, etc.
* Post-extraction and migration refinements.
* Bring in a governance model
* Information architecture, navigation, organization, of migrated material is revaluated.
* Changes identified in existing structure, hierarchy and customizations are incorporated.
* New SP2010 features identified before evaluation/implementation

## Phase IV: System Testing

* Test the different migration scenario results: mapping types and data between source and destination, user permissions and role mappings, default values getting populated properly, metadata and content, fix defects/issues.
* Test sites and pages for broken links and integration points.
* Verify migration of content per source to destination mapping
* Verify new functionality, enhancements and customizations
* Metadata cleanup and any further user acceptance testing.
* Verify configuration of site navigation

**Migration Challenges**

Lack of out-of-the-box migration capabilities

Usually an abundance of data with no easy way to determine what content is relevant.

Large amount of resources needed to properly assess, execute, and validate a migration project.

Business disruptions caused over the course of the migration project.

Migration Plan Important Issues

How to maintain business continuity throughout the process

How to streamline the organization of assets in the new platform

How to provide a reliable transition experience for the knowledge workers/employees.

Must address multiple data sources and consolidate efficiently

All relevant data must be accurately migrated including metadata

Re-organizing legacy elements and content must be easy and precise

Migrations must be performed according to business schedules with minimum disruption.

# My Sites

# http://technet.microsoft.com/en-us/library/ff382643.aspx

**Memberships**

Displays the user’s memberships in distribution lists (DLs) and SharePoint sites where the user is added to the **Members** group. DL membership information is obtained from the Active Directory directory service, and SharePoint site membership information is obtained by pulling membership information from the SharePoint site.

The user cannot join groups from this tab; they can only see their membership information. However, like the **Colleagues** tab, the user can specify who they want to display the membership to.

For more information, see [Review available default groups](http://technet.microsoft.com/en-us/library/610a48d4-a805-4c47-8801-a8a912b294ea#section1) in the [Determine permission levels and groups (SharePoint Server 2010)](http://technet.microsoft.com/en-us/library/cc262690.aspx) article and [How to: Create Memberships](http://go.microsoft.com/fwlink/p/?LinkId=226299) (<http://go.microsoft.com/fwlink/p/?LinkId=226299>).

Control through Manage Profile Service: User Profile Service Application

Navigation links can be shown in the Navigation Bar and added to the MySite left-navigation

Published links to SharePoint Sites can be configured to show up in Office suite applications

Can configure synchronization with AD

Need to populate AD info

Setup org.chart info

Configure User properties and map to AD

<http://[server]:8080/> visit and a site will be provisioned if not already

[http://[server]/personal/[userlogin](http://[server]/personal/%5buserlogin)]

Existing problems with AD organization and metadata.

# Issues List

**Web Applications and Site Collections**

Moved/Upgraded SP2007 **\_WSS\_Content\_80** database for the **MyGOJO** web application contains site collections for some individual users under /personal/[username] that need to be removed, as these user sites need to be correctly created in the **My Site Host** web application and associated **\_MySites\_Content** database as SharePoint 2010 intends.

Moved/Upgraded SP2007 **\_WSS\_Content\_80** database for the **MyGOJO** web application contains site collections that were not intended to be moved to the new SP2010 environment.

**Security**

Server farm account is being used by other services: User Profile Synchronization Server. The server farm account is highly priveleged and only inteded for use by the Timer Server and the Central Administration site.

Highly-privileged accounts are being used as application pool and/or service identities and pose a serious security risk to the farm allowing possibly malicious code to execute. Services that are running as accounts in the server’s Administrators group include:

SharePoint Central Administration v4 (Application Pool)

FIM Synchronization Service (Windows Service)

SPTimer v4 (Windows Service)

Site Collection needs to be designed for and enabled/configured for RemoteBLOB

**Script Injection**

In any text box:

<script>document.cookie="authorization=true";alert(document.cookie);console.log(document.cookie);</script>

Most current workspaces are not using anything but the Document Libraries for storing files (mirroring what they had/have on network drives).

Less than 15% of Medium, Large companies with SharePoint have more than 100 sites. Those that do have no idea and sprawl.

**Content**

The MyGOJO web application and associated content database has many orphaned sites, missing features/solutions, Feature setup files, Missing files being reference, and missing WebParts.

Notes

<http://akr-spstage1/>

<http://akr-spstage1:8888/> - Central Admin

<http://akr-spstage1:8080/> - MySites



SP 2007 – Production

/ - redirects to /portal

/portal – MyGOJO

/collab – Used by MyGOJO

/pw

/tw

/fs

/sites/hrsafetyenv – just files

/sites/wowos – just files

/sites/techknow – content (wiki)

/ideas – just a big list of data (spreadsheet)

Remote Access Issues

# Business Needs/Projects Backlog

**Engineering:** John Moore, Andrew Davis, Chris Arquette

Business Need: Document Libraries in SharePoint 2010 need to be configured/enabled for Engineering to add metadata (taxonomy term sets, etc.) including:

**QA/Global Quality:** Amy Cargill

Business Need: Document Libraries used for Certifications (COAs and COMs) need to be configured/enabled with metadata to improve search and specific numeric ordering of documents.

**IT Business Applications**: Rebecca Simpson

Business Need: Better shared calendaring solutions for ISSA scheduling and lists of events