

Upgrading from SPS 2003 to MOSS 2007 using the gradual approach

Category Upgrade

Warning – these directions make it seem very simple to upgrade from 2003 to 2007. While at the core it can be an easy process in reality there is a lot of planning and decision making you need to do before you ever sit down with this guide. In class it is taking me hours of lecture just to present all of the options and reasoning to the students. How much time have you spent planning to this point? Here is a quick list of some of the topics we cover.

- Which method are you going to use? Gradual, In place, or database migration?
- Do you have a communication plan in place? For who? Your content managers? Users?
- If gradual do you have a new URL planned and setup?
- Is your hardware strong enough? The hardware specs have gone way up from v2.
- What type of farm do you have now? Are you upgrading to the same farm type?
- Do you have any custom site definitions? Have you created mapping files for them?
- Do you have unhosted pages? Do you know what you are going to do with them?
- Are you using 3rd party web parts? Will they work with v3? What about custom web parts you wrote?

Anyway, you get my drift. This process is way tougher than just getting your portal upgraded. I am not trying to scare you I just would feel responsible if I didn't let you know some of the other challenges you will have. Ok. A couple of my quick points and then the directions begin.

This step by step guide will hopefully help you to go from a SharePoint Portal Server 2003 with Service Pack 2 to Microsoft Office SharePoint Server 2007. The environment that I am using to create these instructions is as follows.

- Windows Server 2003 Standard i386 running Active Directory and DNS
- SharePoint Portal Server 2003 with SP2
- SQL Server 2000 SP4

Check out <http://www.SharePointUpgrade.com> for the latest information on upgrading SharePoint. If you want to contribute ideas or content please notify help@sharepoint911.com.

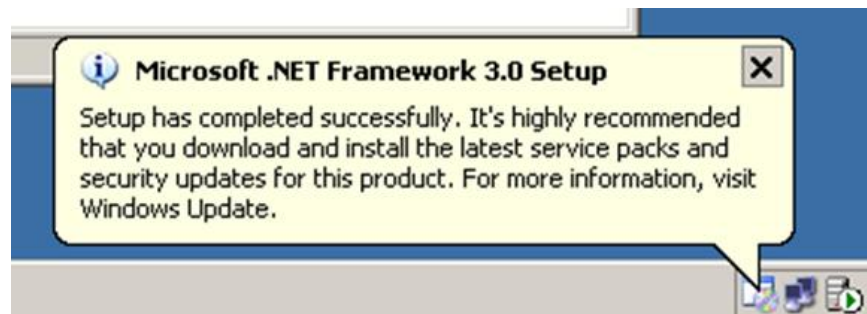
I am also using [SNAGIT 8](#) from TechSmith for screen captures

The concepts, environment, and my learning curve have all come thanks to [SharePoint Solutions](#). I am part of the team that has created and is delivering their [Upgrading From SharePoint 2003 to SharePoint 2007](#) course.

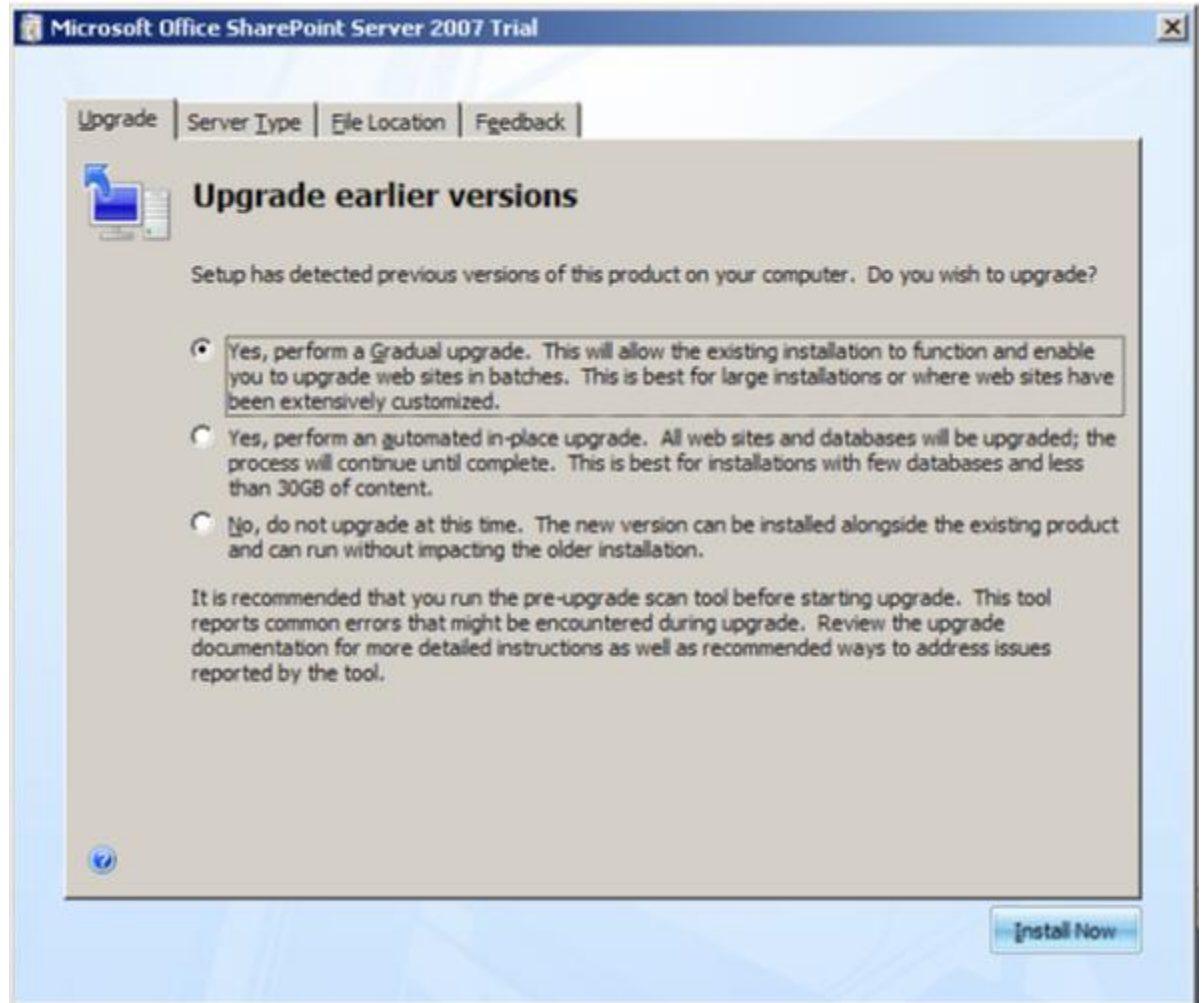
For Microsoft instructions on upgrading from 2003 to 2007 check out [Upgrading to Microsoft Office SharePoint Server 2007](#).

1. Download [Microsoft .NET Framework Version 2.0 Redistributable Package \(x86\)](#)
2. Install .NET 2.0 by running dotnetfx.exe that you just downloaded.

1. At the welcome screen click Next
2. At the EULA screen click I accept and Install
3. The install will now run for several minutes and will give you a message when it finishes
3. Download the [Microsoft .NET Framework Version 3.0 Redistributable Package \(x86\)](#)
4. Install .NET 3.0 Framework
 1. Double click dotnetfx3.exe
 2. Read the license agreement and click I have read and Accept
 3. Click install
 4. You will notice that the installer minimize to the tray. You need to wait until it finishes and you get message as such.

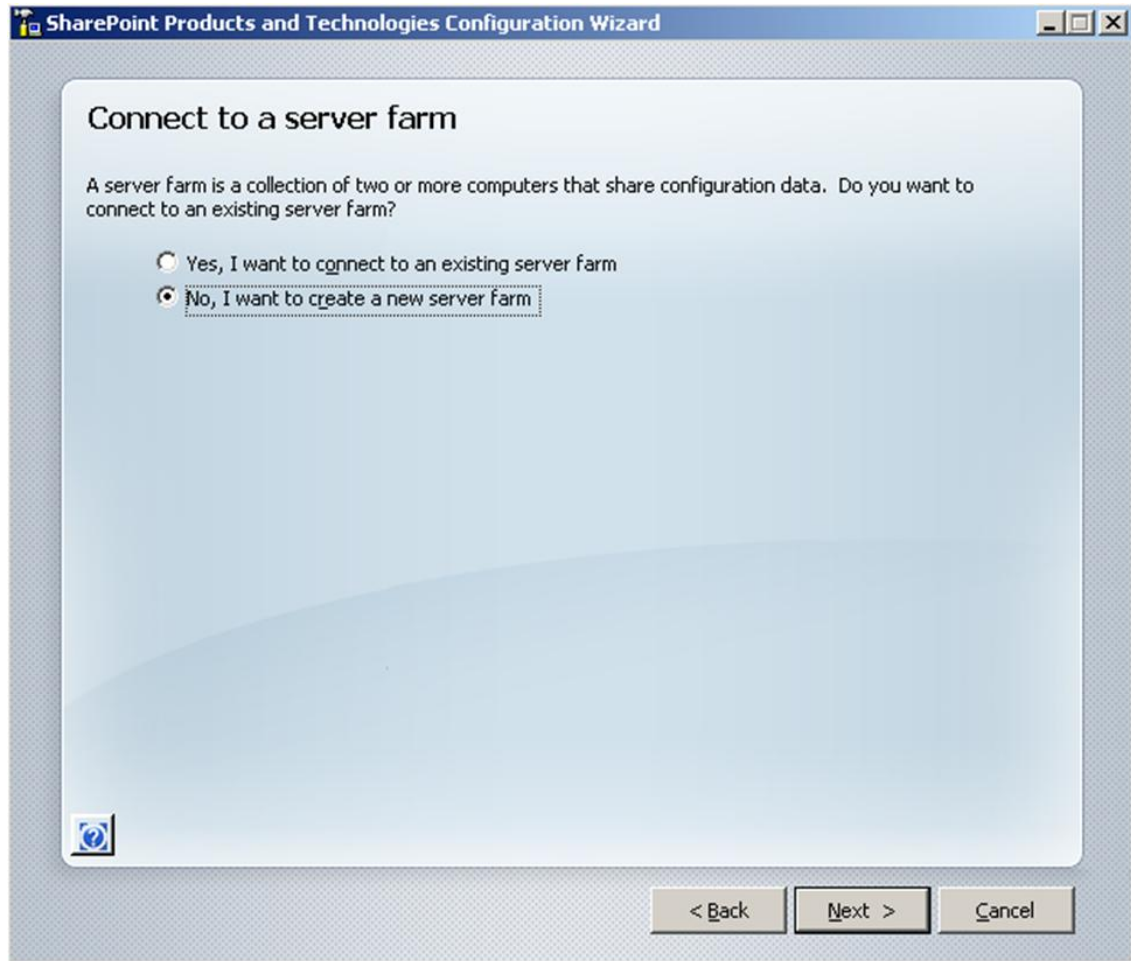


5. Once you click the message it will send some anonymous information back to the mother ship. Give it a second to finish
6. Now you need to download [Microsoft Office SharePoint Server 2007\(trial version\)](#). The trial version can be converted to a full installation anytime within the 180 day limit by just putting in a full license code.
7. Now you are ready to install MOSS
 1. Double click the setup.exe file you just downloaded
 2. Enter your product key or the trial key and click continue
 3. At License Terms screen check I accept and click Continue
 4. SLOW DOWN! At this screen it is very easy to make a mistake that will cause you a lot of grief so be careful.
 5. First thing to do is to choose your upgrade approach. In my testing (a couple hundred upgrades to this point) I have found that gradual is the best approach to use. It provides maximum flexibility since it will let you run v2 and v3 sites from the same machine side by side. For these instructions we will assume you want to do a gradual upgrade. For more information on the options available check out [Joel Oleson's post](#).
 6. To do a gradual upgrade choose Yes, perform a Gradual Upgrade and click install now.



7. Now prepare to wait a few minutes while the bits are actually installed.
8. Finally you get the completion screen. **Make sure the box is unchecked to Run the config wizard** and click close.
9. Odds are you will get a screen that says you must Reboot to complete setup. If you do click Yes.
10. If you rebooted log back in when it finishes.
8. If the configuration wizard is open close it now. You will come back to it after a few more steps.
9. Using the command prompt navigate to C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN and run Prescan.exe /c preupgradescanconfig.xml /all
 1. You can review the output here to find unghosted pages and what definitions your sites are using.
10. Close the command prompt
11. Now we can run SharePoint Products and Technologies Configuration Wizard by going to Start> Microsoft Office Server > and clicking the link.
12. On the Welcome screen click Next
13. On the pop up about warning click Yes

14. On the language pack screen click OK. If you have any language packs to install now would be the time to do it. For more information check out <http://technet2.microsoft.com/Office/en-us/library/26c07867-0150-463d-b21a-a6d42aecf05a1033.mspx> .
15. On the connect to a server farm screen you need to choose **No, I want to create a new server farm** and click Next



16. Now you need to specify the name of the SQL server and the account password that SharePoint will use. In our example we are SQL is installed on the local server so we will enter the server name and the password.

SharePoint Products and Technologies Configuration Wizard

Specify Configuration Database Settings

All servers in a server farm must share a configuration database. Type the database server and database name. If the database does not exist, it will be created. To reuse an existing database, the database must be empty. For additional information regarding database server security configuration and network access please see [help](#).

Database server:

Database name:

Specify Database Access Account

Select an existing Windows account that this machine will always use to connect to the configuration database. If your configuration database is hosted on another server, you must specify a domain account.

Type the username in the form DOMAIN\User_Name and password for the account.

Username:

Password:

< Back Next > Cancel

17. Now you can take the defaults here and click Next. If you wanted to specify the port that Central Administration will use you may do so now. You also have the option to choose Kerberos authentication instead of NTLM. If you are familiar with how to make Kerberos work it is the preferred method. If you have no idea what that is then NTLM will work fine and you don't lose anything.
18. At the Completing screen make sure things look good and click Next.
19. Now sit back and relax. This will take several minutes to process the 11 steps necessary. Once it finishes you will get a Configuration Successful screen where you can click Finish.
20. You will not be automatically taken to SharePoint Central Administration. Here we need to get your farm back to fully functional. The first step is to click on the Operation tab
21. Now click on Services on server under Topology and Services
22. If you look in the server role section will see several options. You need to choose Single Server in our example.
 1. Now for the options at the bottom we need to get all of them Started. To the right of each one that you need to start you will set Start
 2. Click start for Document Conversions Load Balancer Service

3. Click start for Document Conversions Launcher Service
 1. For the load balancer select your server name and click ok
 4. Click start for Excel Calculation Services
 5. Click start for Windows SharePoint Services Search
 1. Fill out your service accounts in the form domain\username and the enter password
 2. Accept the other defaults and click Start
 6. If everything looks like below you are ready to continue
23. Now click on the Home tab

You are now ready to go on performing a gradual upgrade. I will save this process and explanation for another day. I am sure if you have gotten to this point you are as tired as I am. This was not a hard process just long and tedious. ☺

If you want to continue on then here is a brief outline of your next steps

- Go back to the operations tab and click on site content upgrade status
- Find your portal and click Begin upgrade
- Once you fill out that screen you will be able to start upgrading sites
- When you go to upgrade your sites remember you always have to upgrade the root site first
 - Sometimes after you upgrade the root site you need an iisreset before you can upgrade another site

One more thing before I let you go. Did you read the warning above? You should go back and read that. There is still a lot to do, you just finished the easy part. ☺

Have fun!

Shane – [SharePoint Help](#)