



# The Five C's of Upgrading SharePoint WHITE PAPER

## Introduction

Upgrading SharePoint, whether from an older version or another system, is a long and detailed process. It can also be costly if the upgrade isn't correctly completed the first time. Careful planning and understanding of the current and future environments is important to ensure a successful upgrade. Our SharePoint experts compiled five areas that IT personnel should always review before upgrading to SharePoint.

The 5 C's of upgrading SharePoint are...

1. **Cleanup** – delete or archive old sites and content
2. **Customization** – review and update custom features and solutions including 3<sup>rd</sup> party solutions
3. **Compatibility** – review the compatibility of features, web parts, and site templates
4. **Communication** – develop a comprehensive communication plan and communicate all steps of the process
5. **Compile** – Create SharePoint requirements based on information gathered from the previous C's.

## 1 Cleanup

Cleanup occurs before the upgrade begins. Many areas of your current environment need to be reviewed and deleted or archived. This includes sites, and content within the sites. A good rule to develop is to delete or archive sites and content that no one has used after a pre-determined time. The time can be months or years depending on the archiving policies of your company.

During the cleanup process, make sure to communicate with the content owners before deleting the content. This ensures only unimportant information is deleted. What one person feels needs to be deleted doesn't mean that the content owner agrees. The information may be old, but it may be important to someone.

Microsoft recommends removing nonessential document versions, unused templates, features, and web parts from the environment before the upgrade begins.

## 2 Customization

Review existing custom features and solutions within your current environment. Several of these features may need updating to work with

the new version of SharePoint. Once we update the features, testing needs to occur to ensure they will work in your new environment.

Identify any 3<sup>rd</sup> party solutions that may be deployed in the current environment. Like the custom features, the solutions may need to be upgraded or changed to accommodate the requirements of the new environment.

### 3 Compatibility

Before moving into the new SharePoint environment, review the functionality that is critical to your organization. It is important to conduct this review to ensure that functionality is compatible with this new environment. If the functionality is not compatible, your organization needs to develop a plan to keep the same process using the new functionality.

This is especially important when upgrading to the newest version of SharePoint. Not all web parts, site templates, and features are available.

### 4 Communication

Communication between everyone is important. IT staff must communicate to all users about the plan to upgrade the system before performing any work. This allows users time to prepare for the upgrade and to ask questions to alleviate any future confusion.

A best practice for upgrade planning is to create a comprehensive communication plan. The communication plan provides avenues for open dialogue between the organization and IT consultants. An important part of the communication plan is to document everything.

During the upgrade itself, it's important to document everything. This is especially

important for the farm configuration. Custom site or list templates, broken inheritance, custom solutions, and search customizations (scopes and queries) all need to be documented during the upgrade.

This eliminates any confusion for future upgrades and provides IT staff a clear understanding of the work performed.

### 5 Compile

All information gathered from the cleanup, customization reviews, compatibility reviews and communication plan becomes the list of requirements for the new SharePoint environment.

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