



## Upgrading and Migrating to SharePoint 2013

# Agenda

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- Introductions
- What's New in 2013
- Migration Goals and Approach
- Case Studies
- Wrap-Up and Questions

# Peter Carson



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- <http://blog.petercarson.ca>
- [www.envisionit.com](http://www.envisionit.com)
- Twitter @carsonpeter
- VP Toronto SharePoint User Group
- Iron SharePoint Chairman





## SERVICES

Leaders in SharePoint Solutions



## PRODUCTS

Products to Enrich your SharePoint Experience



# Envision IT Services Overview

Focused on complex SharePoint solutions, Envision IT is the “go-to” partner for Microsoft SharePoint, building integrated public web sites, Intranets, Extranets, and web applications that leverage your existing systems anywhere over the Internet.



# Products



Envision IT  
**Extranet User Manager**  
for SharePoint



Envision IT  
**Digital Marketing Suite**  
for SharePoint



Envision IT  
**Video Player**  
for SharePoint



Envision IT  
**Image Rotator**  
for SharePoint



Envision IT  
**Photo Viewer**  
for SharePoint



Envision IT  
**Custom 404**  
for SharePoint

# Agenda

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# The new Office

Enterprise productivity and collaboration





# The new Office

Enterprise productivity and collaboration



# Office 365 at a glance

## Office

- Latest version of Office desktop apps licensed as a subscription
- Per user licensing across 5 PCs/Macs and 5 mobile devices
- Stream any Office application on a PC while traveling
- Deploy Office on desktops quickly and effortlessly

## Exchange Online

- Hosted business-class email and shared calendar
- 25 GB of storage space per user
- Robust anti-spam and anti-malware
- Set and manage mobile access and policies

## Office 365

## SharePoint Online

- Document sharing and management in the cloud
- Share documents with customers/partners with controlled access
- Sync online files to your devices for offline access with SkyDrive Pro
- Share team emails and documents with Site Mailboxes

## Lync Online

- Presence, IM, voice, and HD video conferencing
- Real-time note taking and document sharing
- Conduct Lync meetings with customers and partners
- Connect with Skype contacts using presence, IM, and voice

# Office 365 ProPlus

Deploy Office fast without giving up control



Word PowerPoint Excel  
Lync OneNote Outlook

Familiar & full Office applications  
locally installed, available offline



Side-by-side installs  
with older versions



5 installs per user  
on PCs or Macs



Personalized settings  
room between devices



Automated software  
distribution support

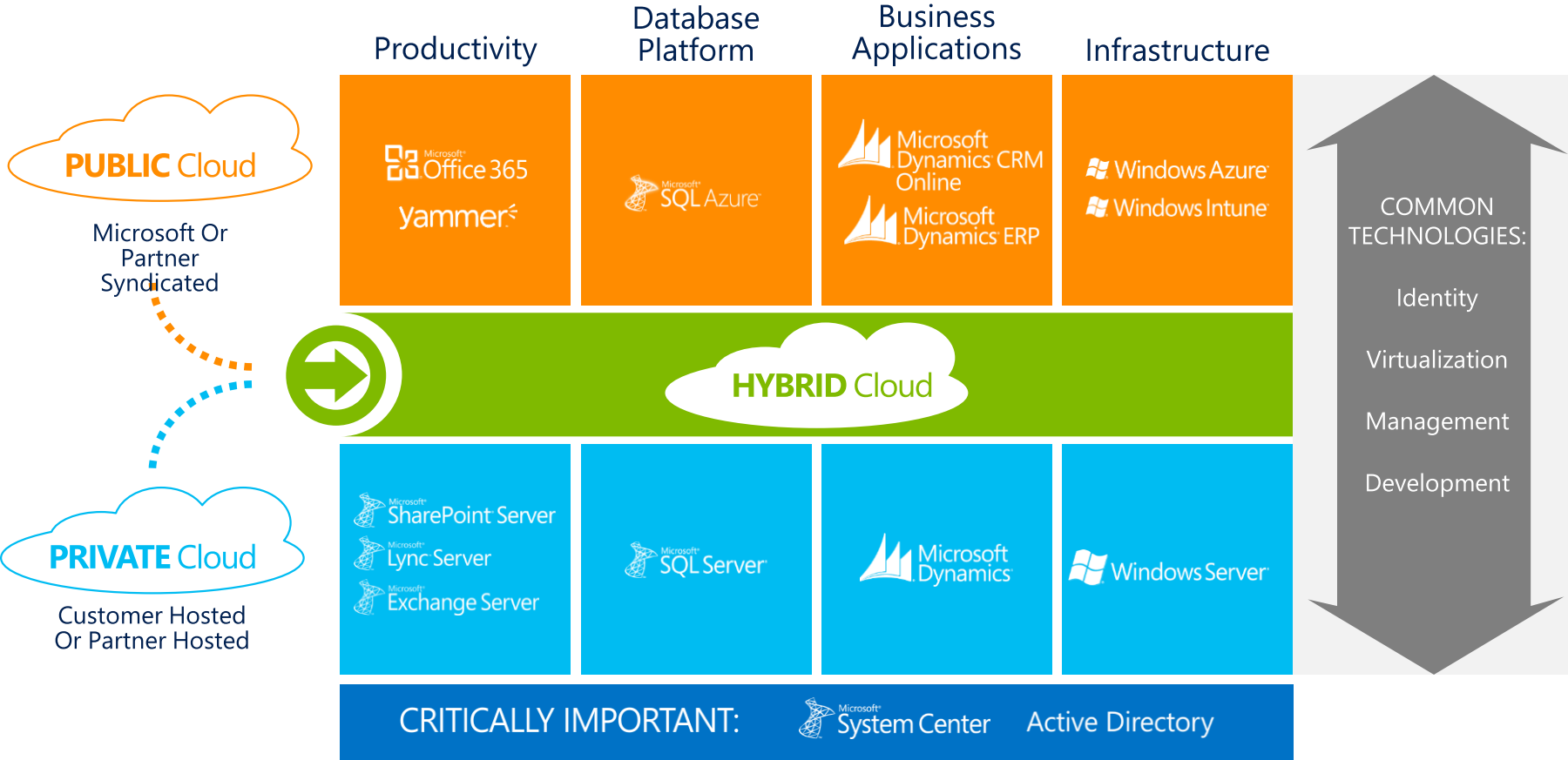


Manageable  
background updates

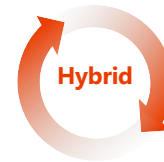
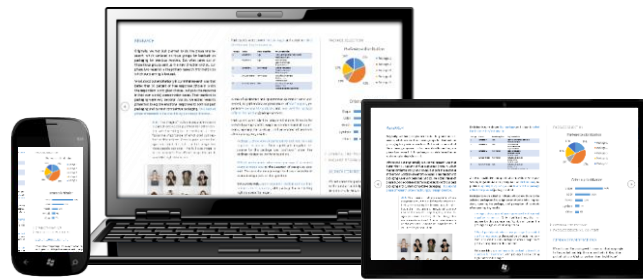


Group Policy and  
Telemetry support

# Help Our Customers Build A Cloud On Their Terms!



# Microsoft's productivity vision



Best experience across devices

Cloud on your terms

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Messaging

Voice  
& Video

Content  
Management

Enterprise  
Social

Reporting  
& Analytics

Integrated best-of-breed solutions

# Microsoft enterprise-grade cloud

Globally  
redundant  
data centers



\$3bn+ investment  
in cloud infrastructure

Massive network  
to minimize  
latency



Dark Fiber between  
hubs with multiple  
international  
edge points

Continually  
advancing  
compliance



ISO27001, EU Model  
Clauses, HIPAA,  
FISMA

Multi-level  
security



DC, physical, software

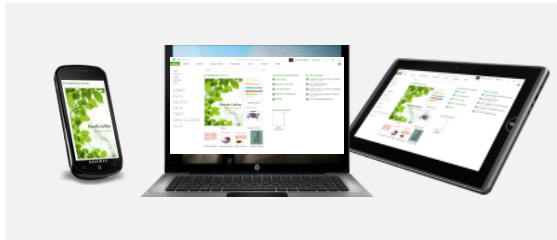
Automation saves  
costs and energy



Benchmark setting  
Power Usage  
Effectiveness (PUE)

# Trends impacting the way we work

## Devices



1.1 billion

smartphone subscribers  
worldwide, 4 years ahead  
of predictions

## People



For the first time in modern  
history, **workplace  
demographics now** span

**3 generations**

2.4 billion Internet users  
worldwide

## Cloud

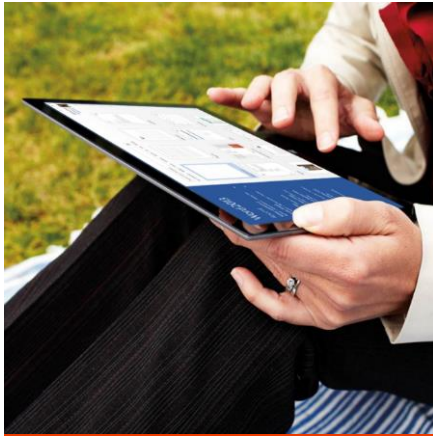


50%

of enterprise customers  
are "**on the road**" to cloud.

**13%** of worldwide Internet  
traffic is **mobile**

# Introducing the new Office/Demo



## Devices



Fast and fluid experience with touch, pen, mouse & keyboard

Immersive touch-optimized Windows 8 store apps

Support for Windows Phone, iOS & Android phones



## Social



Newsfeeds, microblogging & Yammer

Pervasive social capabilities across Office

Multiparty HD video & Skype federation



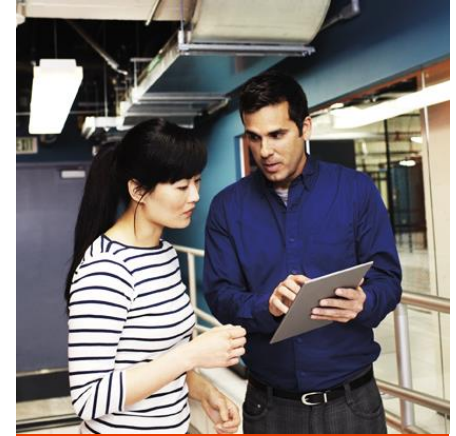
## Cloud



Office - on demand, roaming & up-to-date

New cloud app development model

Enterprise-grade reliability and standards



## Control



Spreadsheet governance and controls

DLP, data retention & unified eDiscovery

Consistent management experience across Office 365



# Hero Offerings

 Office 365

Office 365  
Home  
Premium

Office 365  
Small Business  
Premium

Office 365  
Midsize Business

Office 365  
Enterprise &  
Government



Consumer



1-10



11 - 250



Advanced IT needs

Target users

 Office

Office Home &  
Student  
2013 and RT

Office Home &  
Business 2013

Office Professional Plus  
2013

Office Professional Plus  
2013

## New flexible purchase options (1-249 Users – \$CDN)

### ENTERPRISE PLANS

	Plan E1 \$8.20/ user/mo.	Plan E3 \$23.20/ user/mo.	Plan E4 \$25.50/ user/mo.
Email, Calendar, Contacts, AV/AS, Personal Archive	✓	✓	✓
Collaboration Portal	✓	✓	✓
Virtual Meetings	✓	✓	✓
IM and Video Calls	✓	✓	✓
Office Web Apps	✓	✓	✓
Office Professional Plus (as a subscription)		✓	✓
Voicemail and Advanced Archiving Capabilities		✓	✓
Access/Visio/Excel Services		✓	✓
Voice*			✓

### KIOSK PLANS

	Plan K1 \$4.10/ user/mo.
Exchange Online Kiosk	✓
SharePoint Online Kiosk	✓
Office Web Apps	✓

*\*Voice currently requires an on-premises server*

Note: Prices provided is for information purposes and actual costs may vary. All pricing in CAD.

# Office 365 for Enterprise Suites & Standalones (\$CDN 1-249 Users)

Office 365 Suite Plans

Microsoft Exchange Online

Microsoft SharePoint Online

Microsoft Lync Online

Microsoft Office

Kiosk Plans

<p><b>Office 365 K1</b> \$4.10/mo</p>	<p><b>Exchange Online Kiosk</b> \$2.10/mo</p>	<p><b>SharePoint Online Kiosk</b> \$2.25/mo</p>	<p>Limited SharePoint Capabilities</p>	<p>Office Web Apps Create/Edit</p>
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IW Plans

<p><b>Office 365 E1</b> \$8.20/mo</p>	<p><b>Exchange Online Plan 1</b> \$4.10/mo</p> <p>Email, Calendar, Contacts, Discovery, AV/AS</p>	<p><b>SharePoint Online Plan 1</b> \$4.10/mo</p> <p>Advanced portal for collaboration, AV</p>	<p><b>Lync Online - Plan 1</b> \$2.10/mo</p> <p>Instant Messaging &amp; Presence PC-to-PC Audio/Video Conf</p>	<p>Office Web Apps View Only</p>
<p><b>Office 365 E3</b> \$23.20/mo</p>	<p><b>Exchange Online Plan 2</b> \$8.20/mo</p>	<p><b>SharePoint Online Plan 2</b> \$8.20/mo</p>	<p><b>Lync Online Plan 2</b> \$6.50/mo</p> <p>Instant Messaging &amp; Presence, AV, Virtual Meetings Lync Plan 3 - \$9.80/mo</p>	<p><b>Office Web Apps</b> (with SharePoint Online Plan 1/Plan 2) \$10.30/mo - \$14.40/mo</p>
<p><b>Office 365 E4</b> \$25.50/mo</p>	<p>Voicemail &amp; Archiving</p>	<p>Forms, data visualization, Access/Excel/Visio services</p>	<p><b>Lync to Voice Add-on</b> \$2.60/mo</p>	<p><b>Office Pro Plus</b> (includes Office Web Apps) \$15.20/mo</p>
<p><b>Offer Details:</b> Plan 2 offers include Plan 1 features Office Web Apps requires SharePoint Online or SharePoint Foundation 2010</p>	<p><b>Exchange Online Archiving</b> \$3.10/mo</p>	<p><b>SharePoint Online Extra Storage</b> \$0.21/1GB/mo</p>	<p>* We only provide on-premises rights to voice Note: Prices provided is for information purposes and actual costs may vary. All pricing in CAD.</p>	

Thanks for Your Time and Business!!



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# ECM FOR TEAMS



# Investor Relations Handbooks

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
  - Drop Off Library
- Mailbox
- Site Contents

EDIT LINKS

### Project Summary

Get updated exec bios due in **2 days**

[+ ADD TASK](#) [EDIT LIST](#)

Task	Start Date	End Date
Finalize IR Handbook for Q3	11/1	11/21
Get final P&L from departments	11/7	11/7
Get updated exec bios	11/11	11/11
Write section on HCl	11/15	11/15
Publish draft for board approval	11/18	11/18

### Get started with your site [REMOVE THIS](#)

- Share your site.
- Working on a deadline?
- Add lists, libraries, and other apps.
- What's your style?
- Your site. Your brand.
- Keep email in context.

### Newsfeed

Start a conversation

Feed content area

### Documents

[+ new document](#) or drag files here

- ✓ Name



# Documents > FY11 IR Handbook

Search this site

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
- Drop Off Library
- Mailbox
- Site Contents
- EDIT LINKS



## FY11 IR Handbook

Finance Dept. Sponsor  
Fiscal Year  
Release Date  
Document Stage

Garth Fort  
12/31/2011  
1/17/2012  
Ready for Archive

[View All Properties](#)  
[Edit Properties](#)

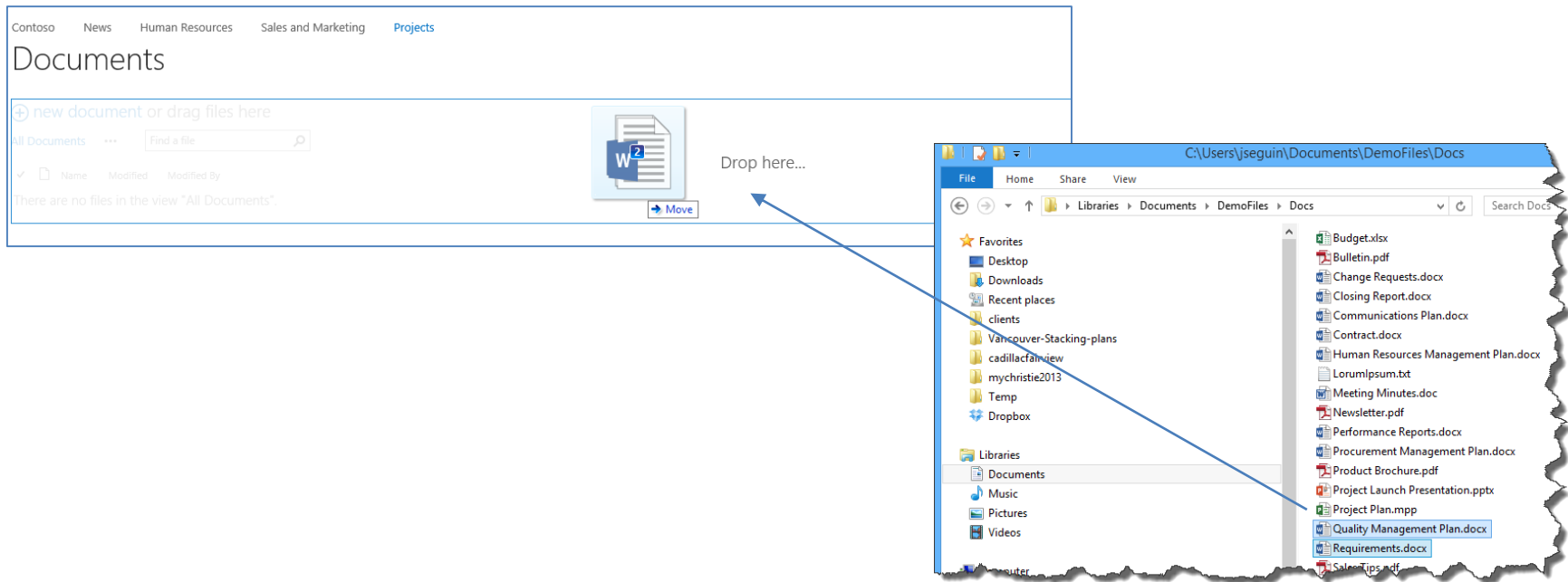
+ new document or drag files here

Find a file

✓	Name	Modified	Modified By	VTeam Department	Document Stage	Finance Dept. Sponsor	Release Date
✓	notebook	Wednesday at 9:23 PM	Garth Fort				
	Other Documents	Wednesday at 9:24 PM	Garth Fort				
	FY11 IR Handbook - BIOS	Monday at 10:12 AM	Peter Kelly	Copy Editing	Ready for Archive	Garth Fort	1/17/2012
	FY11 IR Handbook - Contoso Annual Statement	Monday at 10:12 AM	Peter Kelly	Copy Editing	Ready for Archive	Garth Fort	1/17/2012
	FY11 IR Handbook - Corporate Governance Guidelines	Monday at 10:12 AM	Peter Kelly	Copy Editing	Ready for Archive	Garth Fort	1/17/2012
	FY11 IR Handbook - Financial Position	Monday at 10:12 AM	Peter Kelly	Copy Editing	Ready for Archive	Garth Fort	1/17/2012
	FY11 IR Handbook - Growth Plans	Monday at 10:12 AM	Peter Kelly	Copy Editing	Ready for Archive	Garth Fort	1/17/2012

OneNote and folder support in document sets

# Drag and Drop Files





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# SITE MAILBOXES

# Site Mailboxes

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- Drag emails or documents from Outlook into the team mailbox
- Emails are stored in Exchange, but appear in SharePoint site like a library
- Requires Outlook 2013

FILE HOME SEND / RECEIVE FOLDER VIEW

New Email Items Clean Up - Delete Reply Reply All Forward More -

Move to: ? Team Email Reply & Delete To Manager Done Create New

Move Rules OneNote Unread/Read Categorize Follow Up

Search People Address Book Filter Email

AUTOMATIC REPLIES Automatic Replies are being sent for this account. Turn off

- Favorites
  - Inbox 5
  - Sent Items
  - Drafts
  - Deleted Items
- GarthF@spc12ecm.onmicrosoft.com
  - Inbox 5
  - Drafts
  - Sent Items
  - Deleted Items
  - Junk Email
  - Outbox
  - RSS Feeds
  - Search Folders
- Investor Relations Handbooks
  - Inbox 1
  - Deleted Items
  - Documents 14
  - Junk Email

Search Current Mailbox (Ctrl+E) Current Mailbox

All Unread By Date Newest

Yesterday

workflow@noreply  
Your task is completed - Hey, are these figures correct?. Thu 4:12 PM  
Your task is completed.

no-reply@sharepointonline.com  
More conversation on Sara Davis's post in Marketing Documents Thu 2:16 PM  
Bonnie Kearney > Marketing Documents

Allie Bellew  
Northwind Analysis documents Thu 2:15 PM  
Hi Garth, Here are a few Northwind analysis documents for you.

no-reply@sharepointonline.com  
More conversation on Sara Davis's post in Marketing Documents Thu 2:10 PM  
Allie Bellew > Marketing Documents

workflow@noreply  
New Task - Can you take a look at this? Thu 12:50 PM  
You have a new task from Garth Fort:

workflow@noreply  
Your task is completed - Need to revise description in introducti... Thu 12:30 PM  
Your task is completed.

workflow@noreply  
Your task is completed - Can you take a look at this?. Thu 12:29 PM  
Your task is completed.

workflow@noreply  
New Task - Can you take a look at this? Thu 12:24 PM  
You have a new task from Garth Fort:

Garth Fort

Reply Reply All Forward

Thu 11/8/2012 2:14 PM

Allie Bellew

Northwind Analysis documents

To: Garth Fort; Zrinka Makovac

Message Northwind Traders Project Analysis.xlsx (98 KB)

Hi Garth,

Here are a few Northwind analysis documents for you.

Thanks,  
Allie

See more about Allie Bellew.

Garth sees an email with an attachment relevant for the Investor Relations Handbook Project

And drags it directly into the document library for the project site

Investor Relations Handbooks - Documents - Investor Relations Handbooks - Outlook

FILE HOME SEND / RECEIVE FOLDER VIEW

Ignore Clean Up - Delete Reply Reply All Forward More - Meeting

New Email Items - Junk - Delete

Move to: ? To Manager Done Create New

Team Email Reply & Delete

Move Rules OneNote Unread/Read Categorize Follow Up

Search People Address Book Filter Email -

Search Investor Relations Handbooks - Documents (Ctrl+E) Current Folder

**AUTOMATIC REPLIES** Automatic Replies are being sent for this account. Turn off

**All Unread**

NAME	LAST CHANGED	CHANGED BY	SIZE ON SER...	CHECKED OUT TO	CATEGORIES
<b>Date: Today</b>					
Northwind Traders Project Analysis.xlsx	Fri 11/9/2012 2:1...	GarthF@spc12ecm.onmicros...			
<b>Date: Yesterday</b>					
Northwind Traders Legal Briefs.docx	Thu 11/8/2012 2...	Garth Fort	186 K		
Annual Report Kickoff-Allie Bellew-221158.msg	Thu 11/8/2012 2...	Garth Fort	51 K		
reminder.docx	Thu 11/8/2012 1...	Garth Fort	0		
<b>Date: Last Week</b>					
HCI Blurb.docx	Thu 11/1/2012 1...	Garth Fort	182 K		
Design Firm Recommendations.pptx	Thu 11/1/2012 1...	Garth Fort	1,782 K		
FIMA vs OASHA.pptx	Thu 11/1/2012 1...	Garth Fort	1,801 K		
Copy Editing Formate.pptx	Thu 11/1/2012 1...	Garth Fort	1,801 K		
Settlement Costs With Approval.xlsx	Thu 11/1/2012 1...	Garth Fort	34 K		
Suggestions for the Future.docx	Thu 11/1/2012 1...	Garth Fort	182 K		
2012 Contoso Financials.xlsx	Thu 11/1/2012 1...	Garth Fort	36 K		
Balance Sheet Summary.xlsx	Thu 11/1/2012 1...	Garth Fort	34 K		
Help Topics.docx	Thu 11/1/2012 1...	Garth Fort	182 K		
Intro Paragraphs from Execs.docx	Thu 11/1/2012 1...	Garth Fort	182 K		
Legal Guidelines.docx	Thu 11/1/2012 1...	Garth Fort	182 K		

Document gets uploaded to SharePoint

Mail Calendar People Tasks ...

ITEMS: 15 UNREAD: 14 THIS FOLDER IS UP TO DATE. CONNECTED AUTOMATIC REPLIES 100%



# Documents

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
  - Drop Off Library
  - Mailbox
- Site Contents
- EDIT LINKS

+ new document or drag files here

All Documents Find a file

Name	Modified	Modified By	VTeam Department	Document Stage	Finance Dept. Sponsor	Release Date
2012 Contoso Financials	Sunday at 9:38 AM	Peter Kelly	Finance	Draft	Alex Darrow	
2013 Contoso products	Yesterday at 2:21 PM	Garth Fort	Investor Relations	Draft		
Annual Report Kickoff-Allie Bellew-221158	Yesterday at 2:25 PM	Garth Fort	Investor Relations	Draft		
Balance Sheet Summary	Sunday at 9:38 AM	Peter Kelly	Finance	Draft	Denis Dehenne	
Consolidated Sales Team Master Plan	Yesterday at 2:21 PM	Garth Fort	Investor Relations	Draft		
Copy Editing Formats	Sunday at 9:38 AM	Peter Kelly	Copy Editing	In Audit	Katie Jordan	
Design Firm Recommendations	Monday at 11:59 AM	Peter Kelly	Copy Editing	Ready for Archive	Katie Jordan	
FIMA vs OASHA	Sunday at 9:39 AM	Peter Kelly	Copy Editing	Published	Katie Jordan	11/6/2012
Frame Games	Yesterday at 2:21 PM	Garth Fort	Investor Relations	Draft		
FY11 IR Handbook	Monday at 10:12 AM	Peter Kelly		Ready for Archive	Garth Fort	1/17/2012
HCI Blurb	Sunday at 9:38 AM	Peter Kelly	Design and Artwork	Draft	Garth Fort	
Help Topics	Sunday at 9:38 AM	Peter Kelly	Investor Relations	Draft	Garth Fort	
Intro Paragraphs from Execs	Sunday at 9:38 AM	Peter Kelly	Investor Relations	Draft	Garth Fort	
Legal Guidelines	Sunday at 9:38 AM	Peter Kelly	Design and Artwork	Draft	Denis Dehenne	
Northwind Traders Legal Briefs	Yesterday at 2:23 PM	Garth Fort	Copy Editing	Draft		
Northwind Traders Project Analysis	A few seconds ago	Garth Fort	Copy Editing	Draft		
Settlement Costs With Approval	Monday at 5:18 PM	Garth Fort	Copy Editing	Ready for Archive	Alex Darrow	11/29/2012

Here it is! ☺

FILE HOME SEND / RECEIVE FOLDER VIEW

New Email Items New Items Delete Ignore Clean Up Junk Delete Reply Reply All Forward More

Move to: ? Team Email Reply & Delete To Manager Done Create New

Move Rules OneNote Unread/Read Categorize Follow Up

Search People Address Book Filter Email Find

**AUTOMATIC REPLIES** Automatic Replies are being sent for this account. Turn off

- Favorites
  - Inbox 5
    - Sent Items
    - Drafts
    - Deleted Items
  - GarthF@spc12ecm.onmicrosoft...
    - Inbox 5
      - Drafts
      - Sent Items
      - Deleted Items
      - Junk Email
      - Outbox
      - RSS Feeds
      - Search Folders
    - Investor Relations Handbooks
      - Inbox 1
        - Deleted Items
        - Documents 14
        - Junk Email

Search Current Mailbox (Ctrl+E) Current Mailbox

All Unread By Date Newest

Yesterday

workflow@noreply  
Your task is completed - Hey, are these figures correct?. Thu 4:12 PM  
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New Task - Can you take a look at this? Thu 12:50 PM  
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Your task is completed.

workflow@noreply  
Your task is completed - Can you take a look at this?. Thu 12:29 PM  
Your task is completed.

workflow@noreply  
New Task - Can you take a look at this? Thu 12:24 PM  
You have a new task from Garth Fort:

Garth Fort

Reply Reply All Forward

Thu 11/8/2012 2:14 PM  
**Allie Bellew**  
Northwind Analysis documents

To: Garth Fort; Zrinka Makovac

Message Northwind Traders Project Analysis.xlsx (98 KB)

Hi Garth,

Here are a few Northwind analysis documents for you.

Thanks,  
Allie

See more about Allie Bellew.

Garth could also drag and drop the email into the Site Mailbox for everyone on the project to see

OR he could drag it into SP so that it can potentially be managed as a corporate record

Windows taskbar with icons for Internet Explorer, File Explorer, Mail, PowerPoint, Lync, and OneDrive. System tray shows network, volume, and date/time (2:12 AM 11/9/2012).



# Documents

+ new document or drag files here

All Documents Find a file

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
- Drop Off Library
- Mailbox
- Site Contents
- EDIT LINKS

Name	Modified	Modified By	VTeam Department	Document Stage	Finance Dept. Sponsor	Release Date
2012 Contoso Financials	Sunday at 9:38 AM	Peter Kelly	Finance	Draft	Alex Darrow	
2013 Contoso products	Yesterday at 2:21 PM	Garth Fort	Investor Relations	Draft		
Annual Report Kickoff-Allie Bellew-221158	Yesterday at 2:25 PM	Garth Fort	Investor Relations	Draft		
Balance Sheet Summary	Sunday at 9:38 AM	Peter Kelly	Finance	Draft	Denis Dehenne	
Consolidated Sales Team Master Plan	Yesterday at 2:21 PM	Garth Fort	Investor Relations	Draft		
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Legal Guidelines	Sunday at 9:38 AM	Peter Kelly	Design and Artwork	Draft	Denis Dehenne	
Northwind Traders Legal Briefs	Yesterday at 2:23 PM	Garth Fort	Copy Editing	Draft		
Settlement Costs With Approval	Monday at 5:19 PM	Garth Fort	Copy Editing	Ready for Archive	Alex Darrow	11/28/2012
SFC262 - Whats new with ECM in SharePoint 2013 v2	Wednesday at 1:57 PM	Garth Fort	Copy Editing	Draft		

Email can be managed in SP as a record

# Document Versioning

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- Now only keeps track of file deltas
- Result: far less storage requirements
- Example:
  - PowerPoint file that was 3MB, then 5MB, then 10MB takes up **10MB**, not 18MB



# Site Closure and Deletion

- Create a policy that you can apply to any site
- Can delete or close a site

Site Policies ▸ Edit Site Policy ⓘ

**Name and Description**  
The name and description are displayed when users classify sites under the appropriate policy.

Name:

Description:

**Site Closure and Deletion**  
You can configure how sites under this policy are closed and eventually deleted automatically.

When a site is closed, it is trimmed from places that aggregate open sites to site members such as Outlook, OWA, and Project Server. Members can still access and modify site content until it is automatically or manually deleted.

Do not close or delete site automatically.  
 Delete sites automatically.  
 Close and delete sites automatically.

**Deletion Event:**  
 ▾ +  months ▾

Send an email notification to site owners this far in advance of deletion:  
 months ▾

Send follow-up notifications every:  
 days ▾

Owners can postpone imminent deletion for:  
 months ▾

**Site Collection Closure**  
When a site collection is closed, you can choose for it to become read only. Visitors will receive a notification that the site collection is closed and in read only mode.

The site collection will be read only when it is closed.

# Site Closure and Deletion

## Policies are applied to sites:

### Site Settings ▸ Site Closure and Deletion ⓘ

#### Site Closure

When a site is closed, it is trimmed from places that aggregate open sites to site members such as Outlook, OWA, and Project Server.

Close this site now

#### Site Deletion

Deleting a site deletes the site, its shared mailbox and all documents, emails and tasks associated with the site.

This site will be deleted on: Never

#### Site Policy

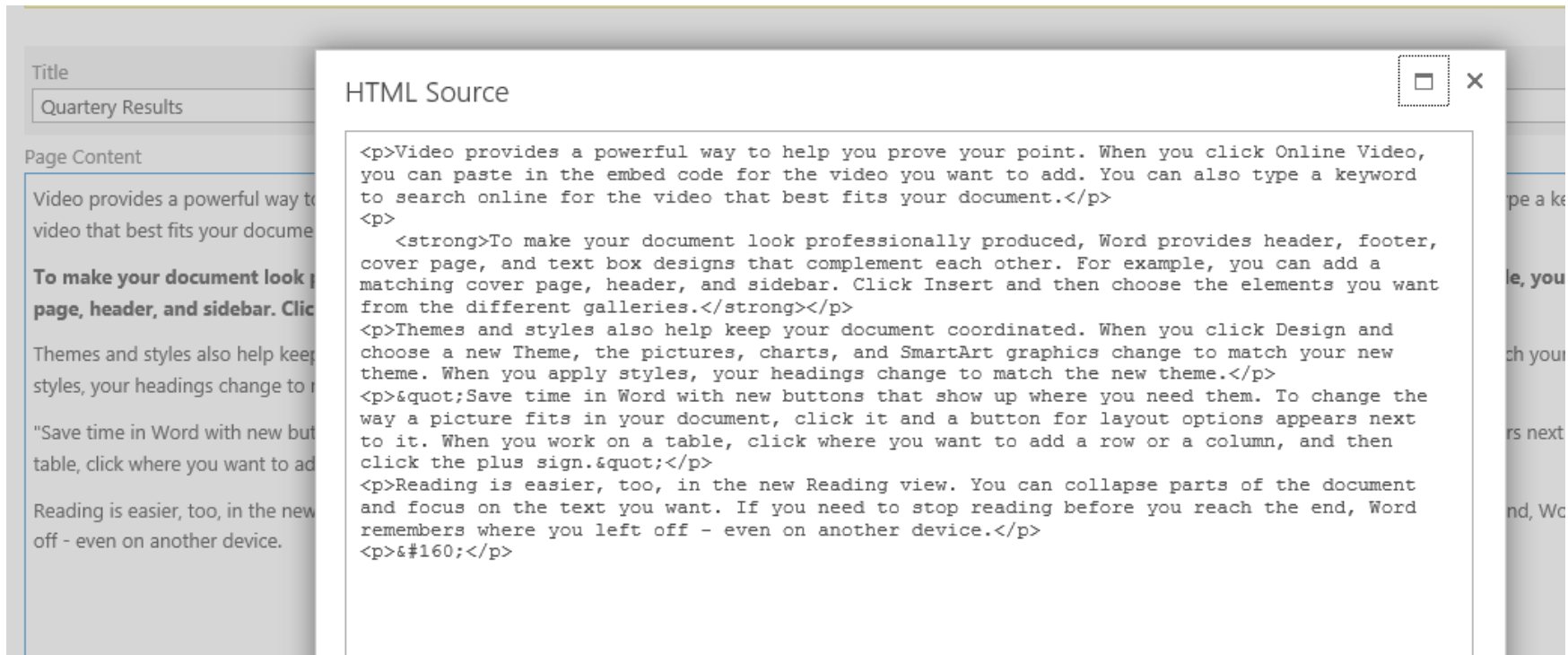
Select the appropriate policy for this site. Site policies are configured by your administrator and define the rules for closing and deleting the site.

Delete Project Site After 12 months ▼

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# WEB CONTENT MANAGEMENT

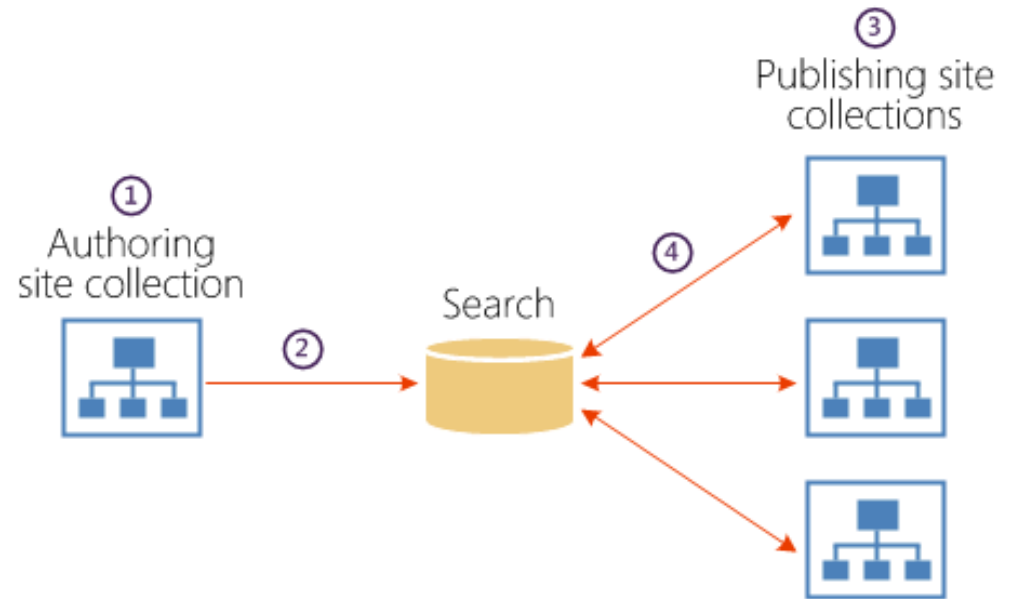
# Easier Page Authoring With Cut and Paste



The screenshot displays a web editor interface. On the left, a sidebar contains a 'Title' field with the text 'Quarterly Results' and a 'Page Content' section. The main content area shows a preview of the page with the following text: 'Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document.' Below this is a bolded heading: 'To make your document look professional, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries.' This is followed by several paragraphs of text, including: 'Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme.', '"Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign.', and 'Reading is easier, too, in the new Reading view. You can collapse parts of the document and focus on the text you want. If you need to stop reading before you reach the end, Word remembers where you left off - even on another device.' The HTML source code for this content is shown in a window titled 'HTML Source' on the right, with a close button (X) in the top right corner. The code is as follows:

```
<p>Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document.</p>  
<p>  
<strong>To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries.</strong></p>  
<p>Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme.</p>  
<p>"Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign."</p>  
<p>Reading is easier, too, in the new Reading view. You can collapse parts of the document and focus on the text you want. If you need to stop reading before you reach the end, Word remembers where you left off - even on another device.</p>  
<p>&#160;</p>
```

# Cross Site Publishing



Source: Technet

# Catalogs

---

- A place to store published lists or libraries
- Can be used to display these items on a site via Content By Search web parts, Search results or other web parts
- When items are opened, they are displayed on a page using a **Page Template**


# Category Pages

---

- Layouts used for displaying structured content
- Can display from a list or catalog
- Category Pages can be tied to managed navigation
  - Can associate a specific category page with a specific term inside a term set
  - Category pages can be used to filter.

# Image Renditions

## Image Renditions ⓘ

ID	Name	Width	Height	Edit	Delete
<a href="#">Add new item</a>					
1	<a href="#">Display Template Picture 3 Lines</a>	100px	100px		
2	<a href="#">Display Template Picture On Top</a>	304px	100px		
3	<a href="#">Display Template Large Picture</a>	468px	220px		
4	<a href="#">Display Template Video</a>	120px	68px		

## Edit Image Rendition

ID	1
Name *	<input type="text" value="Display Template Picture 3 Lines"/>
Width	<input type="text" value="100"/>
Height	<input type="text" value="100"/>
<hr/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	



Address: /news/PublishingImages/1\_i  
Alt Text:



Horizontal Size: 600 px



Horizontal Space: 5 px



Vertical Size: 300 px



Vertical Space: 5 px

Lock Aspect Ratio

Styles

Arrange

Size

Spacing

Change Picture

Pick Rendition

- Full Size Image
- Display Template Picture 3 Lines (100 x 100)
- Display Template Picture On Top (304 x 100)
- Display Template Large Picture (468 x 220)
- Display Template Video (120 x 68)
- News Rendition (300 x 200)
- Contoso Large Rendition (600 x 300)
- Edit Renditions



# Other WCM Improvements

---

- Managed Metadata Navigation
- SEO Page Properties
- New Branding Model
- Improved Mobile Support

---

# CONTENT SEARCH

# Content Search Web Part

---

- Query across multi site collections and web sites
- Much easier to style with display templates
- Enables Cross Site Publishing

### Site Collection A



### Site Collection B



### Site Collection C



Search Crawl

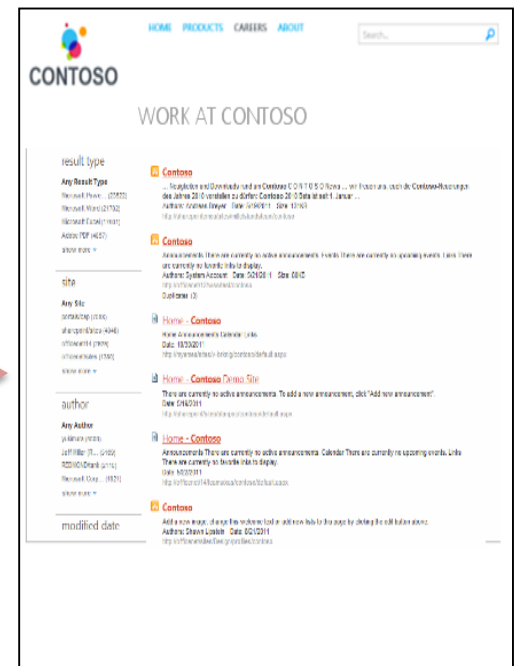


Search



Content Search Web Part

### Site Collection D



List of articles/documents  
Recommendations  
Popular items

---

# SEARCH



# Search

hci 🔍

Browser tabs: https://spc12ecm.sharepoint.com/sites/con, Search, spc12ecm.sha..., Machines, Machines, Machines, Client, SharePoint

Address bar: Home - Tailspin Toys, Tailspin Toys, SPC12, ben's launch page, http--infopedia-Pages-M..., aboutblank, Microsoft SharePoint Tea..., Newsfeed, Welcome to Microsoft On...

Search: Find: sharepoint Previous Next Options

Office 365 Outlook Calendar People Newsfeed SkyDrive Sites Admin Garth Fort

Search results for "hci":

- Everything People Conversations Videos
- Theory-Driven Design in HCI**

now, it's my personal opinion that we're at the tools stage of the next generation of **HCI** ... We have some examples of generative theory in **HCI**, but I hope to see much more in the ...

spc12ecm.sharepoint.com/.../Theory-Driven Design in **HCI**.p...
- 2009 Legal Briefs**

This is a working reference document for use by the Legal project team ... Please add or reply to comments where you have changes, queries, or action items ... Remember, we can all work in ...

spc12ecm.sharepoint.com/sites/.../Shared Documents/**HCI** Blurb.docx
- HCI In Brazil:**

Unifor Main Topics Of Research In **HCI** Usability Engineering **HCI** Evaluation **HCI** in Distance Education **HCI** for ...

spc12ecm.sharepoint.com/.../**HCI** In Brazil The research an...
- MSRA Human-Computer Interaction**

**HCI** is an interdisciplinary field it refers to the user experience in a broad sense ... **HCI** refers to the means of communication between human and machine from keyboard input ...

ecm.sharepoint.com/.../Human-Computer-Interaction,-A-Portal-to...
- Being Human: Human-Computer Interaction in the Year 2020 ...**

3. **HCI**: Looking Forward – what can the **HCI** community do to help? 4 ... By 2020, we will still be ... we should – raising important privacy concerns in 2020 and providing a key focus of **HCI** ...

spc12ecm.sharepoint.com/.../Being Human Human-Computer Interaction ...
- Investor Relations Handbooks**

SPC262 - Whats new with ECM in SharePoint 2013 v2 ... **HCI** Blurb ...

spc12ecm.sharepoint.com/sites/contoso/Departments/Finance/IRH
- A New Way to Interact with the Cloud**

Much researcher attention is being applied to the "cloud." the Web-based

Visual refiners: Modified date (One Year Ago, Today), All

Slide preview: Theory-Driven Design in HCI, Dichotic Listening Task (Cherry, 1953), Figure 3.1: A typical shadowing task. Different messages are presented to the left and right ears, and the subject attempts to "shadow" one ear. (From Lindsay & Shiffrin, 1977.)

Contextual actions: EDIT FOLLOW SEND VIEW LIBRARY

Changed by Garth Fort on 10/19/2012 2:25 PM

Contextual actions based on the type of document or result





hci 

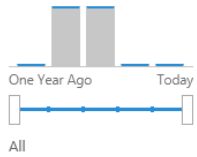
Everything People Conversations Videos

Duration

0 - 5 minutes

5 - 20 minutes

Created



HCI-Demo

5:45

...



HCI in Consumer Elect...

0:42 | 3 views

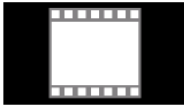
...



Remote Play Using Illu...

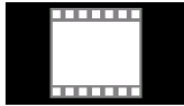
1:53 | 59 views

...



Contoso HCI Initiatives

...



HCI in Digital Cameras

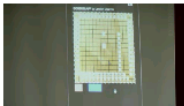
...



TouchDevelop at Cont...

3:32

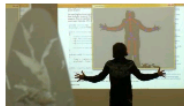
...



Contoso Research Proj...

3:32 | 9 views

...



Just Press Play - frame...

4:11

...



Humantenna-Using th...

2:09

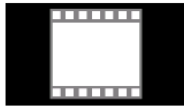
...



IllumiShare Physical an...

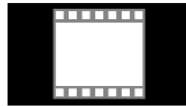
3:35 | 4 views

...



Contoso HCI Initiatives

...



HCI in Digital Cameras

...

12 results

Alert Me Preferences

# Contoso KNOWLEDGE CENTER

## Contoso Knowledge Center

Search...

### VideoDetails

#### Products

- Audio
- Cameras
- Computers
- Home appliances
- Phones
- TV and video

#### Research

- Business technology
- Computer sciences
- Industries

#### HR

- Benefits
- Career development
- Company financials
- Legal
- New employees
- Personal purchasing

#### IT

- Help desk
- Install software
- Submit an SR
- Technical support

### Remote Play Using IllumiShare and Skype



Watch videos inline

This video shows how IllumiShare provides a delightful remote play experience when coupled with a Skype video connection.

### Recommended Videos

1:53 0:16 5:34 43:46 0:14

Remote Play Usi... Appliance Ware... Become a Time ... Blotto on Faceb... Camera Accesso...

Car Audio Produ... 0:05

# Agenda

---

- Introductions
- What's New in 2013
- Migration Goals and Approach
- Case Studies
- Wrap-Up and Questions

# Migration Goals

---

- These include Platform Upgrade plus any combination of the following:
  - Rebranding
  - New Information Architecture
  - Leverage New SharePoint 2013 Capabilities
  - New Governance, Legal and Compliance Initiatives
  - and more ... driven by business needs
- Alignment of IT SharePoint Initiative with Business Goals

# Challenges & Considerations...

---

- Should we upgrade...
- Can we upgrade...
- How should we upgrade...
- What is the ROI for doing this?
- What is the opportunity cost if we don't?

# Upgrade and Migration Strategies

Upgrade to next  
version – sequential  
(recommended)



Leapfrog to the latest  
version



Upgrade/migrate to  
the cloud



# Upgrade to the Next Version

The only built-in method supported and provided by the product

Things to look out for:

- Storage requirements
- Customizations & Missing files
- Changes in supportability limits
- Orphaned sites
- Patch level (not up to date)
- Platform changes (Search, OWA, etc.)
- Authentication type (Classic, Claims, etc...)



# Leapfrog to the Latest Version

Requires 3<sup>rd</sup> party tools or multiple upgrades

Things to look out for:

- Storage requirements
- Customizations & missing files
- Changes in supportability limits
- Orphaned sites
- Functionality in use
  - Running workflows
  - Depricated features**
- Load on resources (hardware and people)





# Upgrade/Migrate to the Cloud

- Benefits
  - High Availability/Disaster Recovery is the provider's responsibility
  - Maintaining current software and patch levels (evergreen, etc.)

Requires 3<sup>rd</sup> party tools or manual migration

Things to look out for

- Difference in capabilities
- Not all workloads available in the cloud
- Certain workloads are challenging in hybrid mode
- Connectivity to other systems and their locations
- Existing solution-specific customizations/managed code
- Licensing costs for 3rd party migration tools, support, etc.
- Future plans with regards to customizations, integration, etc.
- Amount of data to be migrated and throughput targets during process



# Hosting Options

---

- On Premise
- Hosting Centre
- Office 365
  - Some constraints on functionality and customizability
  - Not suitable for public web sites
- Windows Azure
  - FIS on Azure VM option just went to General Availability with full SLA
  - Price reductions to match Amazon pricing

# Migration Approaches

---

- Upgrade Approaches
  - In-place Upgrade no longer supported
  - Database Attach Upgrade
    - Attach and upgrade multiple database at a time to improve performance and reduce downtime
    - Not supported for Office 365
  - 3<sup>rd</sup> Party Migration Tools
    - Allows you to reorganize content and structure as part of the migration
    - Supports Office 365

# Database Attach Upgrade

- Separated into two distinct process
- DB Attach
  - Schema update
  - Monolithic operation
  - Microsoft has focused on performance to minimize downtime (saves ~2/3 upgrade time)
- Visual Upgrade
  - Managed by site owners
  - Can be deferred to later
  - Evaluation mode allows site owners to test out the new UI
  - Upgrades are queued and throttled so they don't overload the farm

# Deferred Site Collection Upgrade

- Eliminate big bang upgrades
  - Upgrade database now, upgrade site collections later
  - Keep existing customizations, updated ones can wait
- Move forward at a manageable pace
  - Initially let users stay with 2010 experience:
    - Stay with the familiar
    - Keep using existing customizations
  - Gradually move users over to 2013 experience:
    - As training occurs (e.g. incrementally for each team)
    - As users decide to adopt new experience/features
    - As new version compatible customizations are available
- Provide self-service site collection upgrade capability
  - Site collection admins can easily do the upgrade
  - Admins can still do upgrades or prevent users from doing them

# Organizational Aspects - Environment & Skills

Who owns the environment?

Who manages the environment?

Who has access to the environment's servers?



How skilled is your organization on the new version of SharePoint?

Operations team

Development team

Support organization

# Organizational Aspects - Customizations

- ❑ Are customizations a result of an effort by a 3<sup>rd</sup> party implementer?
  - ❑ Are the customizations supported in the current version or will they need to be modified?
  - ❑ Is the IT Provider providing an upgraded version?
  - ✓ Contact vendor as soon as possible to better understand upgrade path and planning.
- ❑ Were the customizations created & deployed by internal IT Resources?
  - ❑ Is the team that created the customizations available to assist in the upgrade effort?
  - ❑ Are the specifications, documentation artifacts, etc. available?
  - ✓ Include relevant internal development teams in upgrade plans & discussions ASAP
- ❑ Is the source code/configurations available for modification if needed?
- ❑ Are the customizations being used by other deployments?
  - ❑ Are the other deployments being upgraded as well?
  - ❑ Will you branch the code/customizations?
- ❑ What will the overall business impact be on upgrading the customizations?
  - ✓ Test, Test, and Test some more...

# Organizational Aspects – Project Management

- Project Management Skills & Experience
- Support within the Organization
  - ❑ Executive Sponsor
  - ❑ Internal IT
  - ❑ Business Units
    - ✓ Ensure adequate level of support
- External or Internal
  - ❑ Is the Project Management service provided by an internal or external resource?
  - ❑ Where do ultimate interests lie?
- Project Management approach (ITIL, Agile, Ad-Hoc 😊, etc.)



# Business Case

- Understanding the Business Case
  - Current scenario, desired end-state, ultimate “success factors”
  - ❑ Timeline & Schedule?
  - ❑ Overall functionality and integration with Lync & Exchange? (User Productivity)
  - ❑ External drivers, deadlines, etc.
  - ❑ Outsource contracts, retirement of hardware, other relate projects, budget, etc.
- Complimentary Technologies in Use/Planned
  - ❑ Exchange? Which version?
  - ❑ Lync? Voice, IM/Chat? Which version?
  - ❑ Office Suite and version?
  - ❑ Operating System (Vendor & Version)
  - ❑ Supported Browsers and requirements

# How to Discovery & Analyze Risks

- Technical (environmental)
  - Tools-based approach – for assessing key metrics
    - ✓ Size of environment (# of site collections, content databases, etc.)
    - ✓ Number of Farm solutions
  - Goal: Quickly establish risk areas and potential areas of concern
    - Example: Multi TB Content databases, unsupported customizations, etc.
- Organizational
  - Consultative approach with a structured, well-defined execution
    - ✓ External factors, interdependencies, capabilities, opportunities
  - Goal: Thoroughly uncover tacit areas of concern and identify risks to execution of overall project
    - Example: Unrealistic budgetary or timeline constraints, insufficient resources or skills, etc.

# DB Attach Migration Best Practices

1. Document your source SharePoint environment
2. Ensure the source environment is fully functioning before upgrading
3. Perform a trial upgrade on a test farm first to find potential issues
4. Plan for capacity
5. Back up your environment
6. Optimize your environment before upgrade
7. Create a communication plan
8. Set the original databases to read-only
9. Do not add any servers to your server farm after you begin the upgrade process
10. After upgrade, review the Upgrade Status page and upgrade logs to determine whether there are issues that must be addressed. Then review the upgraded sites
11. Train the users

# SHAREPOINT 2013 PREVIEW UPGRADE PROCESS

This model describes the required steps to upgrade from SharePoint Foundation 2010 or SharePoint Server 2010 to SharePoint Foundation 2013 Preview or SharePoint Server 2013 Preview. The database-attach method is the only supported method for upgrading from SharePoint 2010 Products to SharePoint 2013 Products Preview. Information about the Business Data Connectivity service application applies to both SharePoint Server 2013 Preview and SharePoint Foundation 2013 Preview. Information about all other service applications and about My Sites applies only to SharePoint Server 2013 Preview.

## A PREPARE

Before starting to upgrade, you must understand what is in your SharePoint 2010 Products farm and set up a new farm based on SharePoint 2013 Products Preview.

### 1 GATHER INFORMATION AND CLEAN UP 2010 FARM

Gather information from the 2010 farm to help determine the 2013 farm topology. Gather settings and customizations, plus a performance baseline and information about the environment. Clean up your farm to elimination potential upgrade errors. Try out upgrade in a test farm. See the model poster "SharePoint 2013 Products – Testing Upgrade" for information about how to perform the test upgrade.

#### In original farm

##### Gather settings:

- Alternate access mappings
- Authentication providers and authentication modes that are being used
- Quota templates
- Managed paths
- Self-service site management settings
- Incoming and outgoing e-mail settings
- Customizations (solution packages, etc.)
- Certificates

##### Gather environment information:

- Number of sites
- Number of databases
- Number of users

##### Clean up:

- Check for and repair all database consistency errors.
- Turn off Web Analytics service application
- Remove PowerPoint Broadcast Sites

### 2 PREPARE 2013 FARM

For a database-attach upgrade, you upgrade the data and sites on a separate farm from your original farm. In this step, you set up and configure this new farm. The new farm is used to upgrade the data and sites, and becomes the farm that users will connect to going forward.

**Important** Review the system requirements and administrative accounts needed for SharePoint 2013 Products Preview.

#### In new farm

##### Install the software

Install the following on your farm servers:

**Database servers:** SQL Server 2008 R2 or SQL Server 2012

**Web and Application servers:** Install all prerequisites and then install SharePoint 2013 Products Preview.

Install necessary language packs, and then run the SharePoint Products Configuration Wizard to create the new farm.

##### Configure service applications

**Do not** use the Farm Configuration Wizard to install the following service applications:

- Business Data Connectivity service application
- Managed Metadata service application
- PerformancePoint Services service application
- Search service application
- Secure Store service application
- User Profile service application

You will configure these service applications when you upgrade their databases.

##### Configure farm settings

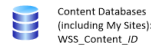
Configure email settings, farm-level security and permission settings, blocked file types, usage and health data collection settings, and diagnostic logging settings.

## B UPGRADE DATABASES

After you have prepared the new environment, you can copy and upgrade databases.

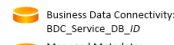
The following database types can be upgraded to SharePoint 2013 Products Preview:

#### Content databases



Content Databases (including My Sites): WSS\_Content\_ID

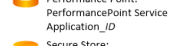
#### Service application databases



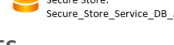
Business Data Connectivity: BDC\_Service\_DB\_ID



Managed Metadata: Managed Metadata Service\_ID



Performance Point: PerformancePoint Service Application\_ID



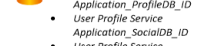
Secure Store: Secure\_Store\_Service\_DB\_ID



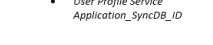
Search: Search\_Service\_Application\_DB\_ID



User Profile: User\_Profile\_Service\_Application\_ProfileDB\_ID



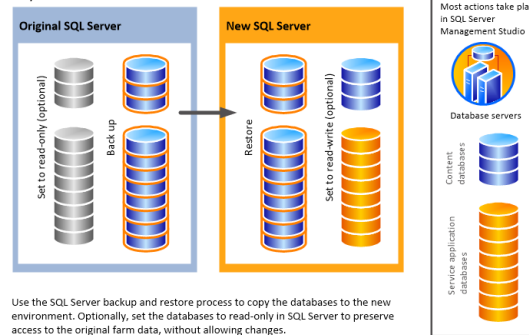
User Profile: User\_Profile\_Service\_Application\_SocialDB\_ID



User Profile: User\_Profile\_Service\_Application\_SyncDB\_ID

### 1 COPY DATABASES

To perform a database-attach upgrade, you copy your databases from your original farm to your new farm.



Use the SQL Server backup and restore process to copy the databases to the new environment. Optionally, set the databases to read-only in SQL Server to preserve access to the original farm data, without allowing changes.

### 2 UPGRADE SERVICE APPLICATION DATABASES

Use Windows PowerShell cmdlets to create new service applications and upgrade the service application databases. You must also create proxies for the upgraded service applications and add the new service application proxies to the default proxy group.

### 3 CREATE WEB APPLICATIONS AND APPLY CUSTOMIZATIONS

Now that the service application databases are upgraded, you can finish configuring the 2013 environment.

#### Create and configure web applications

Create a web application for each web application in your 2010 farm. Do not create site collections. Those will be created automatically when you upgrade the content databases.

#### Reapply customizations

Install necessary customizations for your environment: solution packages, custom site definitions, style sheets, Web Parts, Web services, features, solutions, assemblies, Web config changes, form templates, and so on.

#### Verify

Use the `Test-SPContentDatabase` cmdlet in Windows PowerShell to verify that the new environment has all of the components you need before you upgrade any databases.

### 4 UPGRADE CONTENT DATABASES

Now that the databases are available in the new farm, you can attach and upgrade them. Although this upgrades the data, it does not upgrade the user interface for the sites contained in the databases. Use the `Mount-SPContentDatabase` cmdlet in Windows PowerShell to upgrade the databases.

## C UPGRADE SITES

Now that the databases have been upgraded, site collection administrators can upgrade their sites. The following steps are performed from the Site Settings page in the site collection.

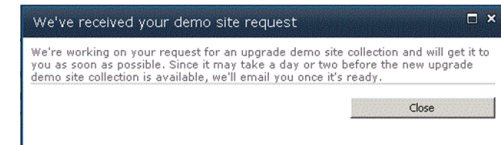
### 1 RUN SITE COLLECTION HEALTH CHECKS

Before upgrading, site collection administrators can use the site collection health checker to identify and address potential issues in their site collections. Health checks are also run automatically before upgrade.



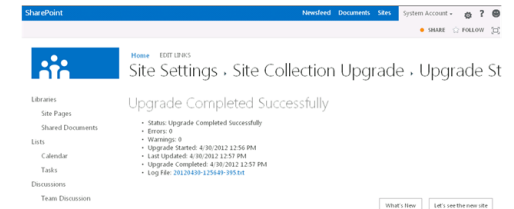
### 2 CREATE AN UPGRADE EVALUATION SITE COLLECTION

Site collection administrators can also request an upgrade evaluation site collection – a separate copy of the site collection upgraded to the new user interface. This site is used to preview the new user interface so that the administrator can address issues before upgrading the site collection.



### 3 UPGRADE A SITE COLLECTION

After verifying that the site is ready, site collection administrators can upgrade their site collection to the new user interface.



**Important** For My Sites, when you are ready to upgrade them, upgrade the My Site host site collection before allowing users access to their My Sites. When users browse to their My Sites after the My Site host is upgraded, their site collections are upgraded automatically.

# Infrastructure Requirements

---

- Windows Server 2012 or Windows Server 2008 R2 SP1
  - 12 Gb 4 cores recommended for WFE and App servers
  - Minimum of one WFE and one App server
- SQL Server 2012 or SQL Server 2008 R2 SP1
  - 16 Gb 8 cores recommended for medium deployment
- 24 Gb RAM for single server or dev environment

# Migration Gotchas

---

- Third Party Web Parts and Components
- Customizations
  - Master Page Design
  - Features
  - Binaries (BIN folder, GAC)
  - Web.config file entries
  - Event Handlers
  - Timer Jobs
- Authentication changes (Claims vs. Classic)
- Search configuration
- Workflows

# Identify and Update Customizations

---

- Create a list of all customizations in the environment
  - Solutions
  - Features
  - Web Parts
  - Event Handlers
  - Master Pages
  - CSS files
  - ...
- Identify the source of the customizations (third-party or in-house)
- Find or create updated or upgraded versions of customizations as needed
- Make sure you check **all** SharePoint servers in the Farm

# Capacity Planning Decisions

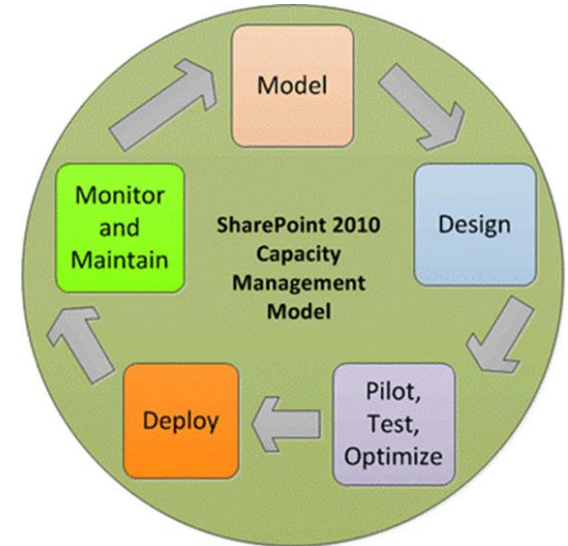
---

- Understand the concepts behind effective capacity management.
- Define performance and capacity targets for your environment.
- Select the appropriate data architecture.
- Choose hardware to support the number of users and the features you intend to deploy.
- Test, validate, and adjust your environment to achieve your performance and capacity targets.
- Monitor and adjust your environment to match demand.



# Capacity Management

- Capacity Management Model
  - Model
  - Design
  - Pilot, Test, Optimize
  - Deploy
  - Monitor and Maintain



# Third-Party Tools

- Documentation Toolkit for SharePoint
  - [www.spdockit.com](http://www.spdockit.com)
  - Generates a detailed report of your farm
- Metalogix Content Matrix
  - [www.metalogix.com](http://www.metalogix.com)
  - Upgrade, migrate and organize SharePoint content
  - Upgrade to SharePoint 2010 or 2013, directly from 2003 or 2007
- Sharegate
  - [en.share-gate.com](http://en.share-gate.com)
  - Migrate and reorganize
  - Currently just for lists and libraries
- AutoSPInstall
  - [autospinstaller.codeplex.com](http://autospinstaller.codeplex.com)
  - PowerShell scripted SharePoint Server installer

# Agenda

---

- Introductions
- What's New in 2013
- Migration Goals and Approach
- Case Studies
- Wrap-Up and Questions

olê  
majorly indie™

# ole

---

- One of the world's largest independent music publishers
- Founded in 2004
- Offices in Toronto, Nashville, New York and Los Angeles
- Team of 45

# ole

---

- Intranet upgrade from SharePoint 2007 to 2013
- Project started Jan 2013
- Joint effort of Envision IT, Catharsis Managed IT, and ole

# ole Technical Details

---

- Double-hop content database attach method
  - Going from 2007 to 2010, and then to 2013
  - Requires building both 2010 and 2013 farms
  - 2010 VMs can be discarded after process
- 2 server 2007 farm
- Building a 2 server 2010 farm, and 3 server 2013 farm
  - Sharing SQL 2012 between 2010 and 2013 -> 4 new VMs
- 2 web applications, including My Sites
- 2 content databases, 125 Gb
- 1 site collection (not including My Sites)
- New HyperV and SAN infrastructure arriving next week
- Farm build and upgrade testing starts from there





# L3 Wescam

- Advanced Electro-Optic / Infrared (EO/IR), laser imaging and targeting systems
- Unparalleled image stability and long-range detection capability
- Supply Defense/Military, Homeland Security and Airborne law enforcement agencies worldwide
- Thousands of systems fielded worldwide, found on over 100 different types of platforms, including fixed-wing, rotary-wing, UAV and aerostat airborne platforms, numerous surface vehicles and marine-based platforms.

# L3 Wescam

---

- Intranet upgrade from SharePoint 2007 to 2010
- Main project ran from Feb to Aug 2012
  - New branding
  - New information architecture
  - Migration of majority of SharePoint content
- Smaller migration project ran from Sep 2012 to Jan 2013

 [Multimedia Library](#) [Contract Awards](#) [Applications](#)

### Find It Fast

This will show your pages that you visit often



< **April 2013** >

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

[events >](#)



June 29, 2012  
[Employee Health and Fitness](#)

June 26, 2012  
[Latest news from L3 Wescam](#)

June 25, 2012  
[High Resolution in Helicopters](#)

### Recent Success

[more >](#)

June 27, 2012  
[Success in Innovation](#)

June 26, 2012  
[Success Story1](#)

June 20, 2012  
[L3 Wescam Success Story2 with a long title](#)

June 19, 2012  
[Here we grow again!](#)

### eWescam Blog

[more >](#)

Our people....our success  
[October 09, 2012](#)

Suspendisse ut risus ligula. Fusce in malesuada augue. Aliquam lacus felis, faucibus quis dignissi...

Welcome to eWescam!  
[June 22, 2012](#)

Welcome to our new intranet site eWescam. Lorem ipsum dolor sit amet, consectetur adipiscing elit....

### Internal Links

[Active Projects](#)[Lunch and Learns](#)

### External Links

[Wescam Internet](#)[SharePoint 2010 Training Courses](#)[Weather](#)

# L3 Wescam Technical Details

---

- New information architecture required third-party migration tool
- Metalogix Content Matrix was used
- 150 sites
- Dozens of business owners
- Cataloging and organizing content for migration involved the business
- Envision IT built the 2010 farm and did some of the initial migration work
- New branding and site architecture implemented
- Trained the L-3 staff on doing the inventories and migrating with the Metalogix tool

**CHRISTIE®**

# Christie Digital

---

- Intranet upgrade from SharePoint 2007 to 2010
- Project ran from April to June 2012
- Joint effort of Envision IT and Christie Global Information Systems

# Christie Technical Details

- Content database attach method
- 6 web applications, including My Sites
- 26 content databases
- 46 site collections (not including My Sites)
- Custom search
- Some site collections were merged or deleted as part of the upgrade
- 5 test runs, dry run, and live run
- Source farm set to read-only while migration was done over the weekend

Step	Time (hh:mm)
SQL Restore	3:04
DB Attach	8:33
<b>Total</b>	<b>11:37</b>

# Christie Lessons Learned

---

- Testing turned up many missing solutions and features
- Some of these may not have been needed any more
- Should spend more time and effort identifying and cleaning these up in the source system before migrating
- Custom search became an issue, and was replaced by standard SharePoint Search
- Business could have been more involved in the process, particularly with testing
- Training and communication before and after is critical



# Christie Medical Business Case

---

- Christie Digital is a World Leader in Visual Solutions for World-Class Organizations
- Christie Medical's web site is a subsite of Christie Digital, at [www.christiedigital.com/en-us/medical](http://www.christiedigital.com/en-us/medical)
- Currently hosted on SharePoint 2007 at a third-party facility



### Medical Imaging

**VeinViewer Access** Starts with VeinViewer®. VeinViewer uses near-infrared light to produce a digital image of a patient's veins and project it directly on the surface of the skin.

1 2 3

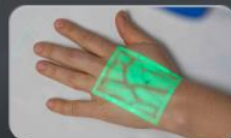
[Latest News](#) Christie Medical introduces innovative image capture. [Read more](#)

[News Room](#)



### Christie Medical Holdings, Inc.

Christie Medical Holdings, Inc. is a division of Christie Digital Systems focused on the exploration of light technologies in the medical arena. Our market-leading product, **VeinViewer®**, is a mobile vascular imaging system that allows healthcare providers to clearly see accessible vasculature in real time directly on the surface of the skin.



### Better patient care, improved efficiencies

Your first priority is to provide the best care for your patients. VeinViewer® is *clinically proven* to reduce the number of attempts to start an IV by 50%, reduce the time to start an IV by 50%, and double patient satisfaction scores.\*



### Less pain, better care, improved patient outcomes.

No one likes to have blood drawn or an IV inserted. But when it's necessary for your healthcare, you want it done as quickly and painlessly as possible. VeinViewer® is helping clinicians provide a more comfortable experience for you, the patient.

#### BUSINESS UNITS

- 3D/Visualization
- Business
- Digital Cinema Solutions
- Digital Signage
- Managed Services
- Medical Imaging
- Simulation Solutions
- Video Walls

#### CHRISTIE INFO

- Complete Product Listing
- Customer Stories
- Innovation
- Our Advantage
- Technology
- Videos
- Whitepapers

#### HELP & SUPPORT

- Clearance Center
- Contact Us
- Contact Webmaster
- Product Support
- Technical Support
- Website Map

#### CHRISTIE NEWS

- Awards & Industry Firsts
- Careers
- Media
- News Room
- Press Releases
- Tradeshows & Events
- What's New

#### CORPORATE INFO

- About Christie
- Environmental Leadership
- Evolution of Christie
- Executive Profiles
- Legal
- Office Locations
- Privacy Policy

Email to a friend

Print this page



# Christie Medical

---

- Public web site rebuild from SharePoint 2007 to 2013
- Project started February 2013
- Main development is nearing completion and content authoring is starting
- Net new site build with new branding and creative
- Completely independent site with its own URL and identity
- Built from the ground up to leverage SharePoint 2013



## See Vascular Imaging in a Whole New Light

*VeinViewer's breakthrough light technology has greatly improved vascular access.*



**Request Information**  
*or schedule a demonstration*

**VeinViewer Benefits**  
*Pre, During and Post*

### Christie Medical Holdings Launches VeinViewer® Flex

Christie Medical Holdings, Inc. today announced the market launch of the company's newest product, VeinViewer® Flex.

### Christie Medical Holdings Selects Henry Schein

Christie Medical Holdings Inc. today announced the company has selected [Henry Schein](#), Inc. as exclusive U.S. distributor of...

### See How the VeinViewer Works



### Why Choose VeinViewer

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer eu justo ipsum, vitae vehicula diam. Nulla et tortor sed ante mia.

[Click here to download our latest white paper](#)

[Schedule a Demo](#)

# Site Framework

---

- Built using the Twitter Bootstrap CSS framework
  - [twitter.github.com/bootstrap/](https://twitter.github.com/bootstrap/)
  - Provides a responsive design framework for supporting PC, Mac, tablet, and mobile
  - We enhanced to provide better touch navigation support
- Incorporated into the SharePoint 2013 Design Master
  - HTML based master page that can be edited with any tool
  - SharePoint converts to a master page when uploaded or saved
  - Can still be packaged into a traditional WSP solution for deployment

# Site Navigation

---

- Uses the new 2013 term store navigation
- Allows for more than two levels of nav (3 implemented)
- Friendly URLs are implemented as part of this
- Rendered using an ASP.NET repeater control and the Twitter Bootstrap CSS
- Touch to open/close on touch devices
- Collapses for mobile devices

# Site Features

---

- Extensive use of the Content Search Web Part
  - New 2013 feature replaces the Content Query Web Part
  - Leverages 2013 search
- Display Templates are HTML that define how the results are displayed
  - Can be simple HTML presentation for text and images
  - Showcase web part on the home page uses Nivo Slider <http://dev7studios.com/nivo-slider/>
  - Image Gallery uses fancybox <http://fancybox.net/>
  - Distributor map uses Bing Maps
  - Videos use Vimeo

# Christie Digital

---

- Intranet upgrade from SharePoint 2010 to 2013
- Project started March 2013
- Envision IT is leading the project with Christie Global Information Systems



# Christie Process

---

- Focusing first on building a proper 2010 test environment and cleaning the source farm up
- Remove unnecessary or missing solutions and features
- 2013 infrastructure requirements are more significant – Christie is provisioning new VM environments to support this
- Not doing a Visual Upgrade as part of the migration. Business will do their own upgrades at time of their choosing with IT support
- Leveraging the new SharePoint 2013 search
- Business is already more involved in the process, and will be responsible to participate in testing
- Training and communication planning is happening



Leaders in SharePoint Solutions

# Envision IT Technical Details

---

- Content database attach method
- Two source 2010 farms
  - Two server public web site farm
    - [www.envisionit.com](http://www.envisionit.com)
    - [blog.petercarson.ca](http://blog.petercarson.ca)
  - Two server Intranet/Extranet farm
- Merging into one 2013 farm
  - Three server farm
  - Same SQL 2012 server used for all three farms

# Envision IT Sites

## SharePoint 2013 Farm

https://secure.vm13-demo.envisionit.com

http://www.vm13-demo.envisionit.com

http://blogpeter.vm13-demo.envisionit.com

The screenshot shows the home page of the Envision IT Secure SharePoint 2013 Farm. The page features a navigation bar with links for Home, Operations, Development Products, Sales, Marketing, and Clients. The main content area includes a welcome message, a weather widget for London (15°C, Partly Cloudy), and a grid of staff photos. There are also sections for 'Upcoming Events' and 'SharePoint Team Blog'. The footer contains the text '2013 Envision IT' and a 'Privacy Policy' link.

The banner features the Envision IT logo at the top. Below it, there are two columns: 'SERVICES' with the subtext 'Leaders in SharePoint Solutions' and 'PRODUCTS' with the subtext 'Products to Enrich your SharePoint Experience'. The bottom of the banner contains a row of colorful icons representing various services and products.

The screenshot shows a blog post by Peter Carson, an MVP, titled 'Creating a Dialogue around Microsoft SharePoint'. The post is dated August 13, 2012, and is part of a series on upgrading a 2010 Publishing Site to SharePoint 2013. The content discusses the challenges of upgrading, including the need to archive and re-upload content, and the importance of documenting the process. The post includes a photo of Peter Carson and a 'Microsoft MVP' badge.

# Envision IT Technical Details

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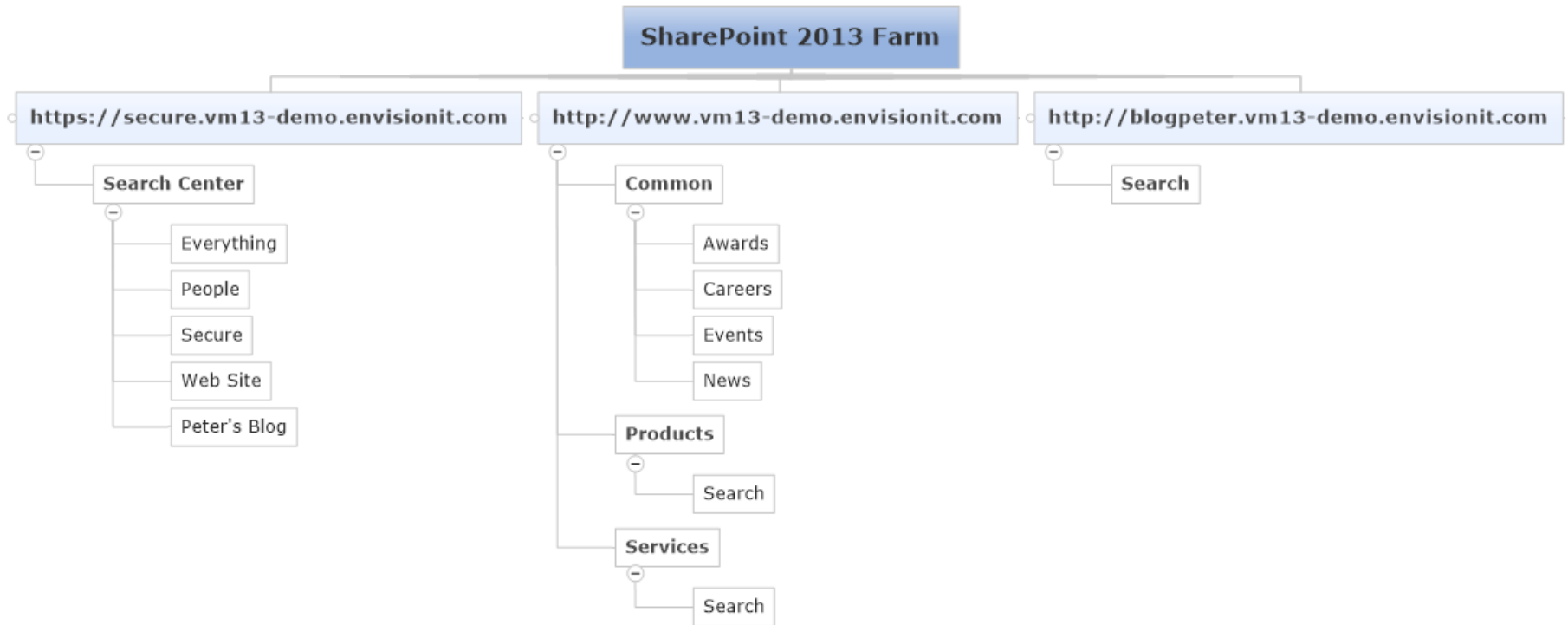
- 4 web applications, including My Sites
- 6 content databases, 90 Gb
- 7 site collections (not including My Sites)
- Numerous connected systems (Time Tracking, TFS, CRM)
- Source farm set to read-only while migration was done over the weekend
  - Started Friday at 5 PM
  - Migration was done by 10 PM
  - Cleanup and search crawls were done by Sunday night

# Envision IT Lessons Learned

---

- Search was not fully implemented and tested in dev
- Disk space planning on the servers was an issue – search crawl and IIS logs
- My Sites went well as a result of testing and planning
- Company update and training session Monday morning was a good idea
- Some branding work still to be completed
- Integration of the three sites using search
  - Leverage the 2013 catalog feature for news and events on the public site
  - Cross-site publishing to the Intranet of news, events, and blog posts

# Search Implementation



# Secure Search

The screenshot shows a SharePoint search interface. At the top, the navigation bar includes 'SharePoint', 'Newsfeed', 'SkyDrive', 'Sites', and a user profile 'Peter Carson'. Below this is the 'envision IT' logo and a menu with 'Home', 'Operations', 'Development', 'Marketing', 'Products', and 'Sales'. The search results are filtered by 'Result type' (Email, Excel, PDF, PowerPoint, Web page, Word) and 'Author' (System Administrator, Mark Jones, Peter Carson, Nicholas Romyn, Augustine Ng). A 'Modified date' bar is also present. The search query is 'sharepoint demo' in English. The top result is 'SharePoint Demo Script' (secure.envisionit.com/marketing/.../SharePoint Demo Script.docx). A preview window is open for this document, showing a table of contents with items like 'Envision IT Site Walkthrough', 'Create a Site', 'Create doc', 'Version history', 'Add a user', 'Review workflow', 'Search', 'People search', 'My sites', 'Forms', 'Excel Services', and 'Publishing'. The preview also shows 'PAGE 1 OF 1' and 'Changed by Peter Carson on 7/20/2007 2:50 AM'. Other search results include 'This is a test document', 'Home Page', 'Seminar Outline', and '2007-07-20 Golfinar on SharePoint and Business Productivity'.



# www Search



Products to Enrich your SharePoint Experience

- Home
- Products
- Services
- Case Studies
- Purchase
- Events

Products > Results

Result type

extranet

PDF

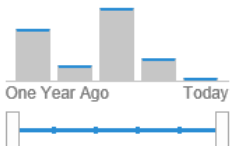
SharePoint Site

Web page

Relevance

Zip

Modified date



All

## Products

Public Web Sites Intranets Extranets Board of Directors Portal SharePoint ... October 23: Extranets in SharePoint 2013 October 30: Search in SharePoint 2013 ...  
[www.vm13-demo.envisionit.com/products](http://www.vm13-demo.envisionit.com/products)

<https://www.vm13-demo.envisionit.com/products>

## Services

Public Web Sites Intranets Extranets Board of Directors Portal SharePoint ... by Solution Type Intranets Extranets Public Web Sites Business Process Automation ...  
[www.vm13-demo.envisionit.com/Services](http://www.vm13-demo.envisionit.com/Services)

## Login

by Solution Type Intranets Extranets Public Web Sites Business Process Automation ... Public Web Sites Intranets Extranets Board of Directors Portal SharePoint ...  
[www.vm13-demo.envisionit.com/Login](http://www.vm13-demo.envisionit.com/Login)

## Impact 2012

by Solution Type Intranets Extranets Public Web Sites Business Process Automation ... Public Web Sites Intranets Extranets Board of Directors Portal SharePoint ...  
[www.vm13-demo.envisionit.com/impact2012](http://www.vm13-demo.envisionit.com/impact2012)

Products Web Page

30 views

SharePoint

Home Products Services Case Studies Purchase Events News About Us

ExtranetUserManager

Extranet User Manager

Version 2.5.4898.2

Release October 10, 2012

Video Player

Version 1.0.4840.8

Release September 14, 2012

Upcoming Events

seminar series

Find out what you can expect from SharePoint 2013 in one of our upcoming webinars:

- October 23: Extranets in SharePoint 2013
- October 30: Search in SharePoint 2013
- November 06: Digital Marketing Suite and SharePoint 2013

New Releases

Extranet User Manager

Version 2.5.4898.2

Release October 10, 2012

Video Player

Version 1.0.4840.8

Release September 14, 2012

Latest News

SharePoint 2013 is here!

envision IT is your first resource for

- News: Read the RTM announcement and 50+ the pre-release version of SharePoint 2013.
- Events: Join us at our upcoming events and tell about you how to unlock powerful new functionality in SharePoint 2013 to move your organization forward.
- Blog: Our President, Peter Carson is a Microsoft MVP. Read his blog for the latest on our research.

Results from this site

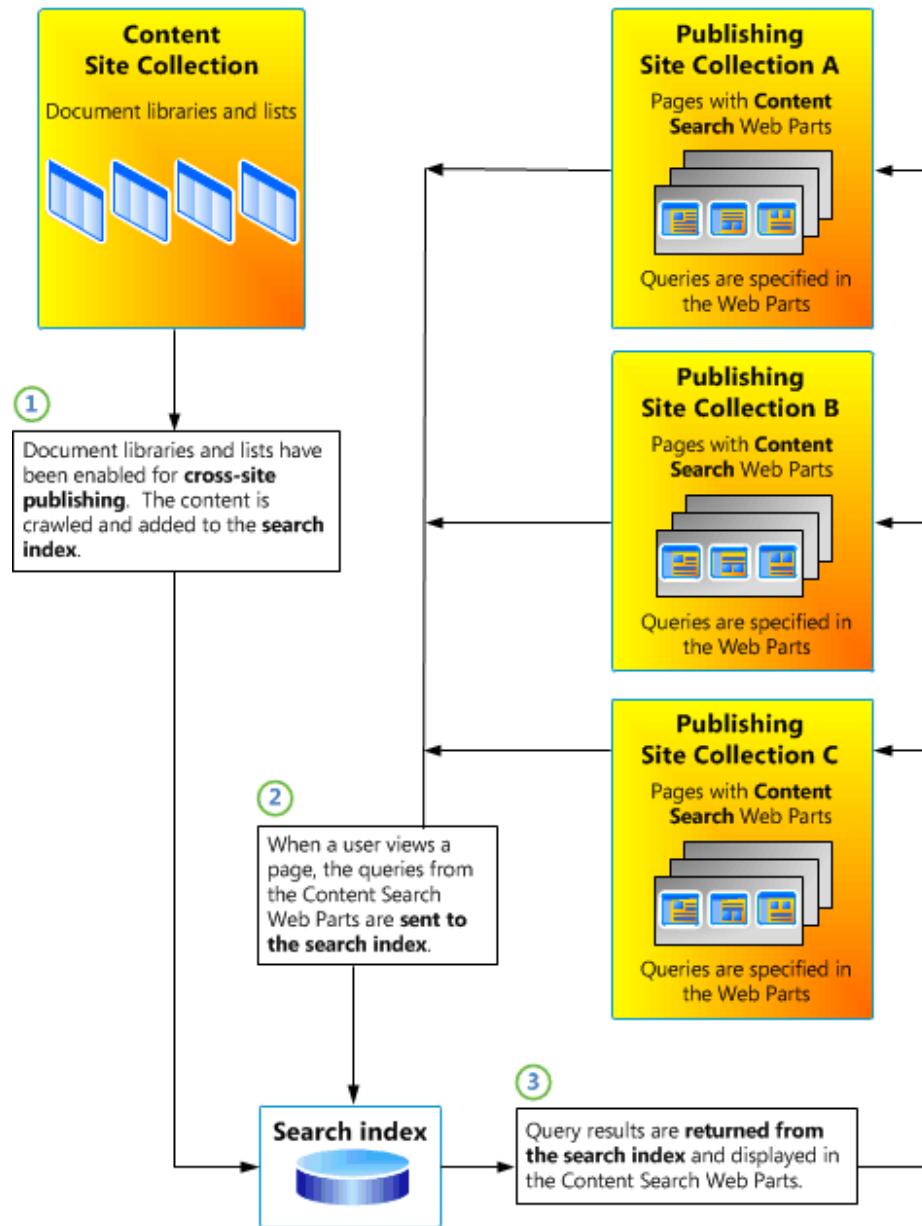
- Products
- Cloudshare Trial
- Case Studies

OPEN FOLLOW SEND

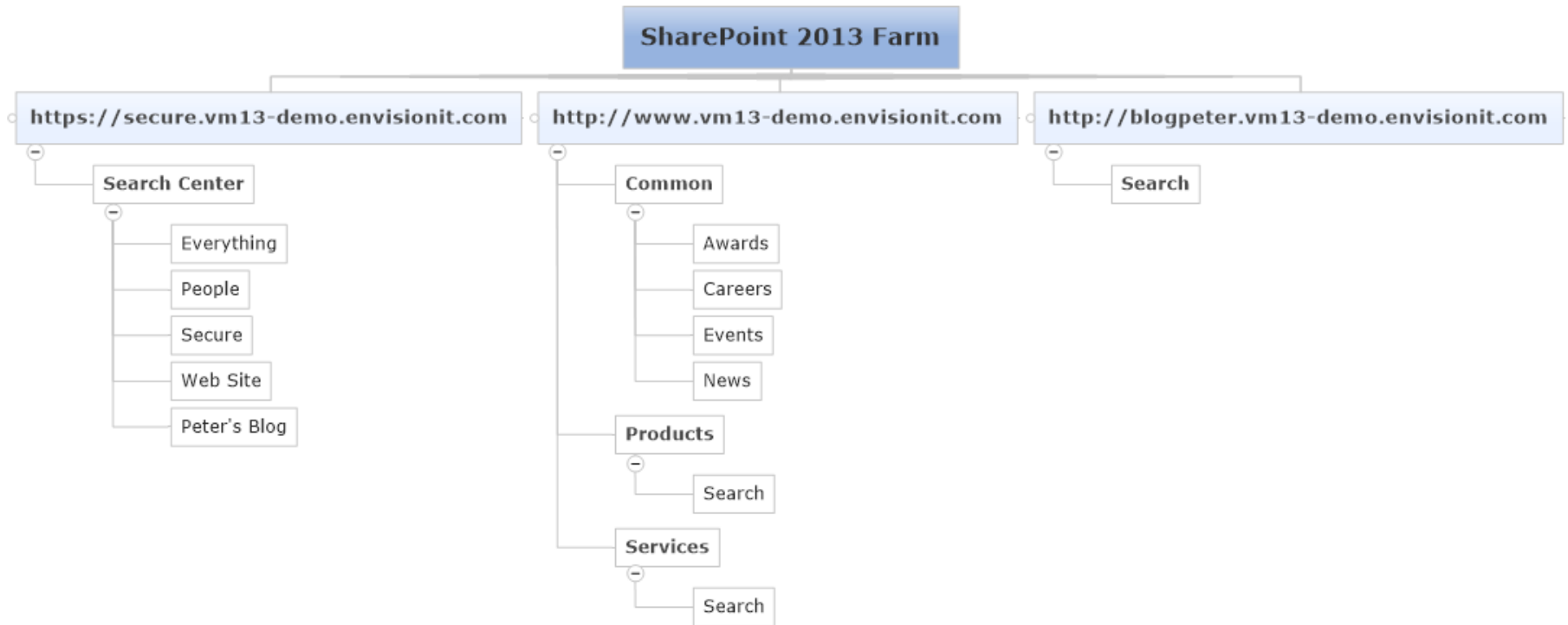
# Cross-Site Publishing

---

- Reuse content between Intranet and public web site
- Can be surfaced through the Content Search Web Part
- Catalogs can surface lists into publishing sites
- Topic pages can customize landing pages and provide SEO-friendly URLs



# Search Implementation



# www Events Products



Products to Enrich your SharePoint Experience

Peter Carson | Careers | Contact Us

- Home
- Products
- Services
- Case Studies
- Purchase
- Events
- News
- About Us

Products > Events



## Upcoming Events

There's lots happening this Fall, and Envision IT is excited to be hosting and attending a number of SharePoint events in the coming weeks. Our developers and consultants are busy ramping up on SharePoint 2013, and we would love to meet with you and share some of the solutions we have been working on.

### Webinar 2012-10-30 What's New in Search in SharePoint 2013

Tuesday, October 30, 2012



During this webinar Envision IT will compare and contrast Search in SharePoint 2013 with both SharePoint 2010 and FAST Search for SharePoint.

### Webinar 2012-11-06 Digital Marketing Suite and SharePoint 2013

Tuesday, November 6, 2012



During this webinar Envision IT will explore some of the new features of SharePoint 2013, and how we are leveraging those in our new 2013 versions of our products.

### SharePoint Conference 2012

Monday, November 12, 2012



Envision IT is excited to announce that once again we will be exhibiting at the Microsoft SharePoint Conference in Las Vegas, Nevada from November 12th to 15th, 2012

# www Events Services



Leaders in SharePoint Solutions

Peter Carson | Careers | Contact Us



- Home
- Services
- Products
- Case Studies
- Events
- News
- About Us

Services > Events



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# Secure Events

Newsfeed SkyDrive Sites Jeff Clement

BROWSE PAGE PUBLISH

SHARE FOLLOW EDIT

Edit New Check Out Edit Properties Page URLs Page History Page Permissions Delete Page E-mail a Link Alert Me Popularity Trends Preview Page Layout Make Homepage Incoming Links Draft Check Library Settings Library Permissions View All Pages Tags & Notes

envision IT

Home Operations Development Products Sales Marketing Clients

Home > Secure

## Welcome to Envision IT SECURE

Tuesday, April 16 2013

LONDON  
**15°**  
Partly Cloudy  
High: 13° Low: 8°  
Wind: SW 27.36km/h

Full forecast

### Quick links

- CRM
- SPLATT
- Team Foundation Server
- Vacation Calendar

### My recent documents

- Secure 2013 Upgrade Project Plan 4/8/2013 9:03 PM
- Secure-2013-Mockup 4/15/2013 3:48 PM
- Secure 2013 Mockup 4/16/2013 2:38 PM

### Peter's blog

- SharePoint Summit 2011
- Envision Wins 2010 Microsoft IMPACT Award
- SharePoint Saturday
- Tech Days 2010

### Upcoming Events

- Webinar series: Webinar 2013-04-16 Extranets in SharePoint 2013 April 16, 2013
- Webinar series: Webinar 2013-04-16 Rich Media Support in SharePoint 2013 April 16, 2013
- Seminar series: Seminar 2013-04-25 Upgrading to SharePoint 2013 April 25, 2013
- SharePoint Saturday Boston April 27, 2013

### SharePoint Team Blog

The SharePoint Team Blog has moved

Don't miss the Virtual Launch Event for the New Office 365 for Business

Following in SharePoint 2013

- Localization and Internationalization improvements in SharePoint 2013
- Enabling modern SharePoint experiences on Windows 8 for students and teachers

### Staff

# Agenda

---

- Introductions
- What's New in 2013
- Migration Goals and Approach
- Case Studies
- Wrap-Up and Questions



# Links

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- [www.envisionit.com](http://www.envisionit.com)
- [blog.petercarson.ca](http://blog.petercarson.ca)

## TechNet

- [Upgrade site collections to SharePoint 2013](#)
- [What's new with SharePoint 2013 site development](#)
- [What's new in web content management for SharePoint 2013 publishing sites](#)
- [Hardware and software requirements for SharePoint 2013](#)

# Call to Action

---

- SharePoint 2013 Discovery Session
  - Learning about the available features
  - Establish business buy-in
- Pre-Upgrade Assessment
  - SPDockKit review of your current farm
  - High level content inventory
  - Office 365 or on-premise options
  - Suggested on-premise infrastructure
  - Branding and customizations implications
  - High-level budget and project plan

---

**Thank You**