Using a Search-First Migration Strategy to SharePoint 2013

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SharePoint 2013 includes many major improvements over previous versions, and upgrading to it can provide significant business value. There are end user-oriented improvements that lead to increased productivity and adoption, architectural and platform enhancements that improve operations and governance, and significant new workload capabilities across BI, Web content management, publishing and more. Better search has consistently been a top request of SharePoint 2010 users and has been a major focus for Microsoft.

With the release of SharePoint 2013, there is a brand new search core combining the best qualities and functionality of both SharePoint search and FAST search. Powerful indexing, linguistics, entity extraction and query capabilities are now evident throughout the platform. There is a brand new face in the form of a compelling new search experience for end users. In addition, the cost of licensing, deploying, operating and scaling a top-tier search engine is dramatically reduced.

Challenges with the Standard Upgrade Process

The standard upgrade process to SharePoint 2013 uses a database-attach method from SharePoint 2010. There are many improvements over the 2007-to-2010 upgrade process, including the ability to run site collections in 2010 mode on 2013 farms. However, the standard process has several drawbacks and slowdowns, especially for organizations with large-scale SharePoint deployments:

◆ It requires a complete additional set of hardware during the migration.
◆ Selective and 'smart' migrations (where some applications and content are upgraded, some are moved to the cloud, and others are retired or restructured) typically require going through a full 2013 upgrade first.
◆ Some services do not have "2010 mode" functionality, which means there are dependencies that complicate upgrades.
◆ "Double-hop" upgrades from 2007 to 2013 require going through 2010 and are particularly painful.

Many organizations are struggling with these drawbacks or overwhelmed by the thought of migrating the substantial content they house in SharePoint 2010 or SharePoint 2007 farms in a single step. For large deployments, the sheer volume of content, the complexity in dealing with customizations, and the need to do everything at once create significant challenges and delay time-to-value in the upgrade.

Benefits of a Search-First Migration Strategy

Search-first migration provides a solution to a lot of the pain in a typical migration. In addition, it provides a way to get started and quickly take advantage of the search improvements outlined above. In BA Insight's experience involving hundreds of implementations of SharePoint with search, we find the search-first migration strategy provides many benefits:

◆ Substantially better search, experienced across the whole organization.
◆ Much quicker deployment, hence faster time-to-benefit.
◆ Reduced risk by allowing a phased approach without degradation of service.
◆ Increased flexibility since different farms can upgrade or migrate at their own pace.

Once the new SharePoint 2013 search farm is in place and providing great search, it has the additional benefit of making the rest of the migration and upgrade much easier. One of the nice aspects of search is that it provides the user with a unified view, independent of where the content happens to be. This means that content can be moved without the user experience changing.

Content migration can be done independently for different site collections, allowing each group to move at its own pace, and the migration can be tested ahead of time, minimizing the risk. The search-first approach removes project dependencies and simplifies each part of the project.

Better Search FAST, with a Search-First Migration Accelerator

Search-first migration provides much quicker time-to-value than a standard upgrade. Rather than needing a complete additional set of hardware all at once, a small farm on new hardware is needed up front, and then content farms can upgrade using one spare set of hardware, reducing or phasing capital costs. Selective and "smart" migrations are possible because the user experience through search can stay stable while selected content is moved. Services without "2010 mode" functionality aren't an issue because there is a 2013 services farm, as well as a 2010 farm. For "double-hop" upgrades from 2007 to 2013, the search farm can leapfrog to SharePoint 2013 and then each content farm can go through the double-hop at its own pace.

Microsoft recommends that many customers take this potentially phased approach by choosing a search-first migration accelerator. A search-first migration accelerator is a combination of guidance and tools provided by Microsoft and BA Insight that enables organizations to establish a more granular approach by allowing them to upgrade their SharePoint Server 2010 and/or FAST 2010 search component(s) prior to the underlying content. This approach provides a familiar search user experience and enables IT Professionals to approach upgrades in established phases while allowing the organization to benefit from the improvements in SharePoint Search 2013.

If moving to SharePoint 2013 is well planned and takes advantage of out-of-the-box software to reduce customization, then it can be implemented relatively quickly. Although the sheer volume and complexity of content in many modern SharePoint environments can make a migration seem overwhelming, the reality is that BA Insight has helped many organizations implement search-first swiftly and smoothly, without any interruptions to business processes.

Adopting a search-first migration strategy is a proven, successful pattern. This strategy does not require any changes to the existing infrastructure and provides a mechanism for content to remain in the current repository, while the technology and search engine for the enterprise takes a leap forward. It reduces risk by allowing a phased approach without degradation of service. It increases flexibility since different farms can upgrade or migrate at their own pace. And, most importantly, it provides rapid time-to-value. Search-first migration often provides a visible "early win" that also increases overall adoption. ◼