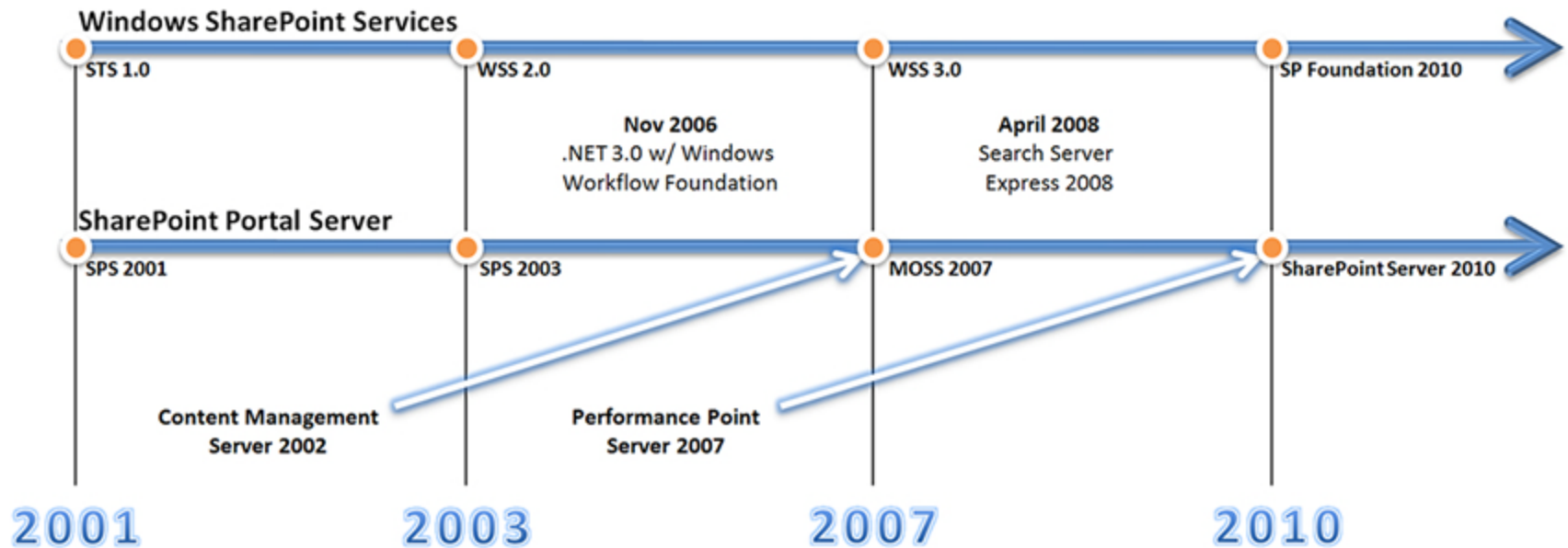


# SharePoint 2010 Technologies Visual Upgrade Guide

**P** **ORTALOGIKS™**

*SharePoint Solutions for Content, Collaboration and Communications*

## Understanding the SharePoint Road Map



## SharePoint 2007

The screenshot displays a SharePoint 2007 Team Site interface. At the top left, it says "Team Site" and "Team Site" with a logo. A navigation bar includes "Home" and "Site Actions". The left sidebar contains links for "View All Site Content", "Documents" (with "Shared Documents"), "Lists" (with "Calendar" and "Tasks"), "Discussions" (with "Team Discussion"), "Sites", "People and Groups", and "Recycle Bin". The main content area features three sections: "Announcements" (no active announcements, with "Add new announcement" link), "Calendar" (no upcoming events, with "Add new event" link), and "Links" (no favorite links, with "Add new link" link). A "Microsoft Windows SharePoint Services" logo is visible on the right side of the main content area.

## SharePoint 2010 Pre-Visual Upgrade

Team Site

Team Site

Search this site...

Home

Site Actions

View All Site Content

**Documents**

- Shared Documents

**Lists**

- Calendar
- Tasks

**Discussions**

- Team Discussion

**Sites**

**People and Groups**

Recycle Bin

**Announcements**

There are currently no active announcements. To add a new announcement, click "Add new announcement".

+ Add new announcement

**Calendar**

There are currently no upcoming events. To add a new event, click "Add new event".

+ Add new event

**Links**

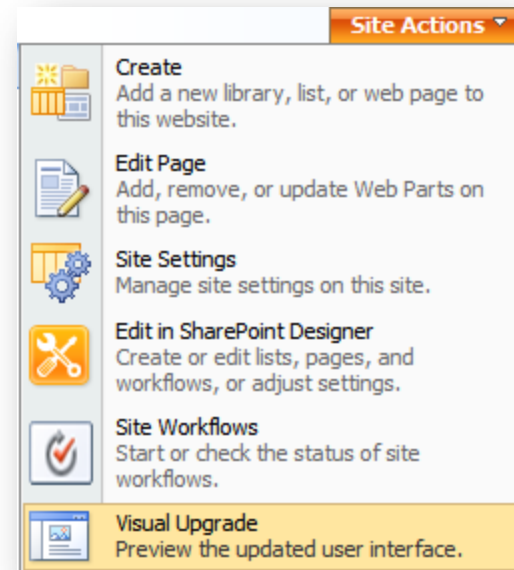
There are currently no favorite links to display. To add a new link, click "Add new link".

+ Add new link

Microsoft Windows SharePoint Services

# Activate Visual Upgrade

Upon first login to an upgraded environment, access the **Site Actions** menu and select Visual Upgrade from the list of options.



## Preview the Visual Upgrade

The screenshot shows the 'Site Settings · Title, Description, and Icon' page in SharePoint. The 'Visual Upgrade' section is highlighted with a red border. It contains a text area with instructions and three radio button options for the user interface.

**Visual Upgrade**

Choose the user interface of your SharePoint sites. If you choose to update, your sites will use the new interface, which includes the ribbon. Choose Preview the updated user interface to evaluate new features. You will be able to commit the update or to return to the user interface of the earlier version of SharePoint. If you notice that some pages from the earlier version of SharePoint display incorrectly after Visual Upgrade, you can [reset the pages](#) or all pages on this site.

- Use the previous user interface
- Preview the updated user interface
- Update the user interface

OK Cancel



## Preview the Updated User Interface

A screenshot of a SharePoint Team Site interface. The top navigation bar includes 'Site Actions', 'Browse', and 'Page'. Below this is a 'Team Site' header with a search bar and a 'Home' button. A yellow banner contains a 'Visual Upgrade' message. The main content area is divided into three sections: 'Announcements', 'Calendar', and 'Links', each with an 'Add new' button. A left sidebar lists navigation options like 'Documents', 'Lists', 'Discussions', 'Sites', 'Recycle Bin', and 'All Site Content'. A 'Microsoft Windows SharePoint Services' logo is visible on the right side.

Site Actions ▾ Browse Page

Team Site

Home

**Visual Upgrade:** This site has been set to preview the latest SharePoint features and interface. Changing the content while in preview mode may adversely affect its appearance. [View or modify this site's Visual Upgrade settings.](#)

**Documents**  
Shared Documents

**Lists**  
Calendar  
Tasks

**Discussions**  
Team Discussion

**Sites**  
People and Groups

Recycle Bin  
 All Site Content

**Announcements**

There are currently no active announcements. To add a new announcement, click "Add new announcement".

[+ Add new announcement](#)

**Calendar**

There are currently no upcoming events. To add a new event, click "Add new event".

[+ Add new event](#)

**Links**

There are currently no favorite links to display. To add a new link, click "Add new link".

[+ Add new link](#)



# Upgrade Decision Checks

1. Did I use a custom master page that might not work in SharePoint 2010?
2. Are there substantial CSS customizations made to the site?
3. Did I use a custom theme that might have a successor that needs selection in Site Settings?
4. Are there pages that are detached from their master page or web layout that might need to be updated manually?
5. **Does my company's SharePoint design team have availability this week to reconcile these items, or should I wait to visually upgrade?**



## Update the User Interface

Team Site

Team Site

Home Site Actions

Team Site > Site Settings > Title, Description, and Icon

### Site Settings · Title, Description, and Icon

**Title and Description**  
Type a title and description for your Web site. The title is displayed on each page in the site. The description is displayed on the home page.

Title:

Description:

**Logo URL and Description**  
Associate a logo with this site by entering the URL to an image file (recommended size: 60 x 60 pixels). Add an optional description for the image. Note: If the file location has a local relative address, for example, /\_layouts/images/logo.gif, you must copy the graphics file to that location on each front-end Web server.

URL:

[Click here to test](#)

Enter a description (used as alternative text for the picture):

**Visual Upgrade**  
Choose the user interface of your SharePoint sites. If you choose to update, your sites will use the new interface, which includes the ribbon. Choose Preview the updated user interface to evaluate new features. You will be able to commit the update or to return to the user interface of the earlier version of SharePoint. If you notice that some pages from the earlier version of SharePoint display incorrectly after Visual Upgrade, you can [reset the pages](#) or all pages on this site.

Use the previous user interface

Preview the updated user interface

Update the user interface

OK Cancel



# SharePoint 2010 Visual Upgrade

A screenshot of a SharePoint 2010 Team Site home page. The page features a dark blue header with 'Site Actions', 'Browse', and 'Page' tabs, and a 'Portalogiks Support' link. Below the header is a 'Team Site' icon and title. A search bar is located on the right side of the page. The main content area is divided into three columns: 'Documents' (Shared Documents), 'Lists' (Calendar, Tasks), and 'Discussions' (Team Discussion). The 'Announcements' section contains a message about no active announcements and an 'Add new announcement' button. The 'Calendar' section contains a message about no upcoming events and an 'Add new event' button. The 'Links' section contains a message about no favorite links and an 'Add new link' button. A 'Recycle Bin' and 'All Site Content' link are located at the bottom left. The Microsoft Windows SharePoint Services logo is visible on the right side of the page.



## Update All Sites

Directly available at:

[http\(s\)://<<YOUR PORTAL>>/ layouts/suppux.aspx](http(s)://<<YOUR PORTAL>>/layouts/suppux.aspx)

The screenshot shows the SharePoint 'Site Settings' page for a 'Team Site'. The 'Site Actions' section is expanded, showing the 'Visual Upgrade' option. A blue arrow points from the 'Visual Upgrade' link to a dialog box. The dialog box has a title bar 'Portalogiks Support' and contains two buttons: 'Hide Visual Upgrade' and 'Update All Sites'. Below the 'Update All Sites' button is the text: 'Use the latest SharePoint user interface on all sites in this site collection.' At the bottom right of the dialog is a 'Cancel' button.

## Anticipated Visual Upgrade Sample

SharePoint Portal Server

Enterprise Portal

My Site Site Settings Help

Home Intranet Public Affairs Team Sites Project Reports CRM CMS Operations Help Center

Enterprise Portal  
CIO Executive Dashboard

All sources

Topics

- Divisions
- Resources
- Strategy
- Projects
- Locations

Actions

- Add Listing
- Create Sub Area
- Upload Document
- Change Settings
- Manage Users
- Manage Content
- Manage Portal Site
- Edit Page

Welcome to the CIO Executive Dashboard. Here you can review real-time performance indicators by market as well as top global business risks.

Contact: PMO

**Sales Market Performance Indicators**

Market	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	Total
North America	✓	✓	✓	✗	✓	✓	✓	✗	✓	✓	2
South America	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	1
Europe	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	3
Asia	✓	✓	✗	✓	✓	✗	✓	✗	✓	✓	3
Australia	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	1
Africa	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	1

**Top Business Risks**

Risk Name	Risk Type	Risk Date	Markets Effected	Forecast Charts
South Capitol Labor Strike	Labor	April 16, 2006	Brazil	14
EPA Compliance Deadline	Operations	May 10, 2006	North America	14
Shipping Delays	Supply Chain	Nov 11, 2006	Japan	14
Renewal of Trade Sanctions	Market	June 22, 2007	UAE, Kuwait	14
Data Center Construction Delays	IT	August 17, 2006	Europe	14
Attrition	Resource	December 1, 2005	France, Germany	14

Example of a highly customized site (CSS+Masterpage) that will possibly need design support to use the SharePoint 2010 visual upgrade

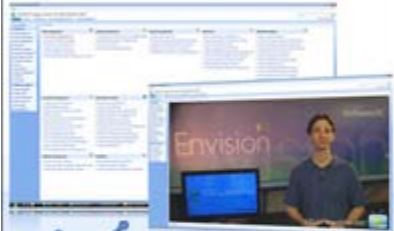



# Looking for SharePoint 2010 Training?

The SharePoint 2007 Virtual Training Center will soon become VTC 2010! Check the Software FX website for official release dates!

<http://www.softwarefx.com/sharepoint/VTC/>

*Cost-Effective  
Centralized Training  
for your SharePoint Users*



 **VTC**



**VTC** *Virtual Training Center  
for SharePoint 2007*

*Put SharePoint Training Where it  
Really Belongs: On Your Server.*

