

SharePoint 2003 to SharePoint Server 2007 RTM Demo - resetting customized sites and configuring search after an Upgrade to 2007 RTM.doc

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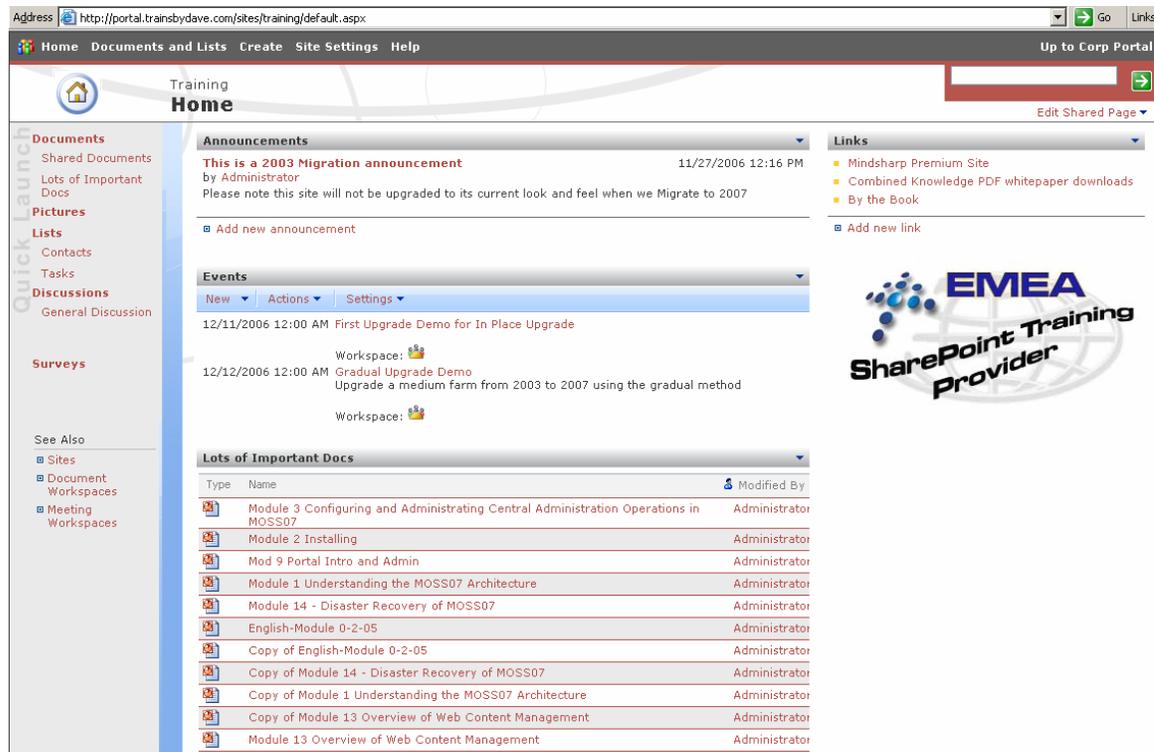
This is the final Whitepaper in my upgrade series. It will deal with the effects of Customized Sites that became Un-ghosted in the SharePoint 2003 Site collection and also how to correctly configure the Search service so that the new Index file is propagated correctly to the Two Web Servers

Our current environment of the Upgraded servers is as follows:

Server Type	Role	Software
Root Domain Controller	DC , Mail Server	Windows 2003 SP1 Exchange 2003 SP2
SQL Server	Database server	SQL 2000 SP4
SharePoint Server	Index / Job	Windows 2003 SP1 SharePoint Portal Server 2003 SP2 SharePoint Server 2007 Enterprise
SharePoint Server	Web Front End 1	Windows 2003 SP1 SharePoint Portal Server 2003 SP2 SharePoint Server 2007 Enterprise
SharePoint Server	Web Front End 2	Windows 2003 SP1 SharePoint Portal Server 2003 SP2 SharePoint Server 2007 Enterprise

The first change we are going to look at is the affect or rather non effect that the Upgrade had on a customized 2003 Site that had been customized using FrontPage 2003 in a process commonly referred to as Un-Ghosting. This is when changes are made to the Site and the site is then saved which in turn saves the template file in SQL instead of using the Site Definition file that is stored on the file system.

You can see below that the picture is showing a site that still looks like a 2003 site even though the site has been upgraded with the 2007 Farm.



The reason this site was not upgraded is because the Logo and the changes to the navigation on the left hand quick launch bar were just copied and pasted onto the site page using FrontPage 2003 and then just saved.

So how do you fix this?

Well you have several options. First you can choose to just leave the site looking as it does. Second we can reset the site to use the new 2007 templates available to us from the File System Site Definitions. To do this follow these steps

1. On the site Click Site Settings
2. Under the Look and Fell Section click reset to site definition

Site Settings

Site Information				
Site URL:	http://portal.trainsbydave.com/sites/training/			
Mobile Site URL:	http://portal.trainsbydave.com/sites/training/m/			
Version:	12.0.0.4518			

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none"> People and groups Site collection administrators Advanced permissions 	<ul style="list-style-type: none"> Title, description, and icon Tree view Site theme Top link bar Quick Launch Save site as template Reset to site definition 	<ul style="list-style-type: none"> Master pages Site content types Site columns Site templates List templates Web Parts Workflows 	<ul style="list-style-type: none"> Regional settings Site libraries and lists Site usage report User alerts RSS Search visibility Sites and workspaces Site features Delete this site 	<ul style="list-style-type: none"> Search settings Search scopes Search keywords Recycle bin Site collection features Site hierarchy Portal site connection Site collection audit settings Audit log reports Site collection policies

- You now get the choice to point to a new template URL or alternatively select the option to reset the site to the site definition file.
- Select 'Reset all pages in this site to site definition version'
- Click Reset

Reset Page to Site Definition Version

Reset to Site Definition

If you want to remove all customizations from a page (such as changes to Web Part zones or text added to the page) you can use this feature to reset to the version of the page included with the site definition.

You can reset a single page within your site to use the version of the page included in the site definition, or you can reset all pages.

Caution: When you reset to the site definition version, you will lose all customizations made to the current version of the page. No backup copy of the page will be made before the page is updated, and no new version is created.

Reset specific page to site definition version
 Local URL for the page

 Example: http://server/site/default.aspx
 Reset all pages in this site to site definition version

- To change the site template choose site settings
- Click site theme
- Select default theme

Site Theme

Use this page to change the fonts and color scheme for your site. Applying a theme does not affect your site's layout, and will not change any pages that have been individually themed.

Select a Theme

The screenshot shows the 'Select a Theme' page. On the left is a list of themes including Belltown, Breeze, Cardinal, Citrus, Classic, Default Theme (highlighted), Granite, Jet, Lacquer, Lichen, Obsidian, Petal, Plastic, Reflector, Simple, Verdant, Vintage, and Wheat. Below the list is a 'Preview' section. On the right, there is a 'Preview' section showing a sample of the selected theme's appearance.

9. Click apply
10. Go back to the home page
11. You now have a 2007 Site look and feel but you have lost the 2003 features that were not part of the standard site templates.

The screenshot shows a SharePoint 2007 site interface. The address bar displays the URL: <http://portal.trainbydave.com/sites/training/default.aspx>. The page title is "Training". The navigation bar includes "Home", "Documents and Lists", "Create", "Site Settings", and "Help". The main content area is divided into several sections:

- Announcements:** A message titled "This is a 2003 Migration announcement" dated 11/27/2006 12:16 PM, posted by Administrator. The message states: "Please note this site will not be upgraded to its current look and feel when we Migrate to 2007". Below the message is a link to "Add new announcement".
- Events:** A section with a "New" dropdown, "Actions" dropdown, and "Settings" dropdown. It contains two events:
 - 12/11/2006 12:00 AM: First Upgrade Demo for In Place Upgrade. Workspace:
 - 12/12/2006 12:00 AM: Gradual Upgrade Demo. Upgrade a medium Farm from 2003 to 2007 using the gradual method. Workspace:
- Links:** A section with a dropdown menu containing:
 - Mindsharp Premium Site
 - Combined Knowledge PDF whitepaper downloads
 - By the Book
 - Add new link
- Recycle Bin:** A link in the left sidebar.
- Documents and Lists:** A section titled "Lots of Important Docs" containing a table of documents.

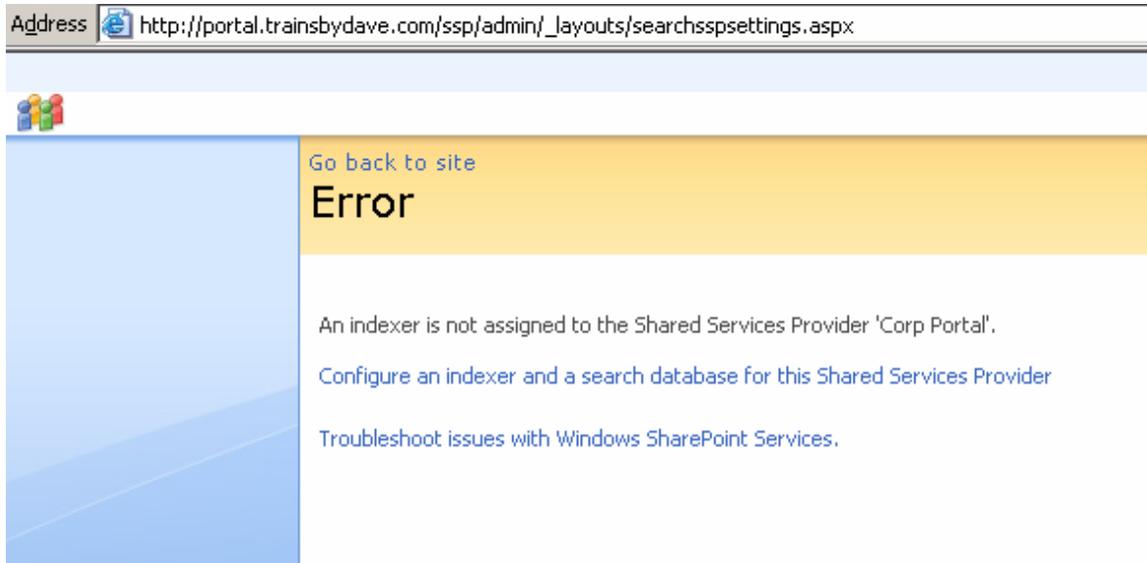
Type	Name	Modified By
	Module 3 Configuring and Administering Central Administration Operations in MOSS07	Administrator
	Module 2 Installing	Administrator
	Mod 9 Portal Intro and Admin	Administrator
	Module 1 Understanding the MOSS07 Architecture	Administrator
	Module 14 - Disaster Recovery of MOSS07	Administrator
	English-Module 0-2-05	Administrator
	Copy of English-Module 0-2-05	Administrator
	Copy of Module 14 - Disaster Recovery of MOSS07	Administrator
	Copy of Module 1 Understanding the MOSS07 Architecture	Administrator
	Copy of Module 13 Overview of Web Content Management	Administrator
	Module 13 Overview of Web Content Management	Administrator
	Module 11 Configuring and Administering Document Management	Administrator
	Module 12 Configuring and Administering Records Management	Administrator

This is an important understanding when preparing for your Upgrade and Migration planning. You will need to decide which sites you wish to keep as they are and which you want to be changed to the 2007 template.

Notice that you do not get the new 2007 features such as breadcrumb trail and recycle bin until you have reset to the new site definition files

Configuring Search

Let's now look at configuring the search service after the upgrade has completed. The first thing you will notice when you go to configure search is that you may get an error such as the one below. This is to be expected and there are several things that we need to configure before we can start re crawling our content.



Search is configured via the Shared Service Provider but before we can configure it there we first need to configure search in the farm. There are several steps to doing this.

1. Make sure that the search service is started on the machines that will be used for either Indexing or Answering Queries. In my Medium Farm I am going to use the following scenario
 - a. Application Server (Index/Job) will be the Indexing server
 - b. Web1 and Web 2 will be the servers for answering users Search Queries
2. To start the service go Central Administration 3.0
3. Click on Operations
4. Click on services on server
5. If the Office SharePoint Server Search is not started Click Start.

Address http://wfe1:34229/_admin/Server.aspx?ServerId=b8fdec1%2Dc080%2D48d2%2D639d%2D378284f21678 Go Link

Central Administration Welcome System Account | My Site | My Links | Site Actions

Central Administration **Operations** Application Management Site Actions

Central Administration > Operations > Services on Server
Services on Server: APPLICATION

Server Farm Configuration Not Complete
 See [administrator task list](#) for more information

View All Site Content
Central Administration
 Operations
 Application Management
Shared Services Administration
 Corp Portal
 Recycle Bin

Complete all steps below

Server: **APPLICATION**

Select server role to display services you will need to start in the table below.

Single Server or Web Server for small server farms All services run on this server
 Web Server for medium server farms Web application and Search Query services run on this server
 Search Indexing Search Indexing service runs on this server
 Excel Calculation Excel Calculation service runs on this server
 Custom Services you choose run on this server

Start services in the table below:

Service	Comment	Status	Action
Document Conversions Launcher Service		Stopped	Start
Document Conversions Load Balancer Service		Stopped	Start
Excel Calculation Services	Required on Farm, not running	Stopped	Start
Office SharePoint Server Search	Service running on server: WFE1	Stopped	Start
Windows SharePoint Services Search	Required on Farm, not running	Stopped	Start
Windows SharePoint Services Web Application		Started	Stop

When finished, return to the [Central Administration](#) home page

You will now be taken to a configuration screen for setting up the Indexing server, Make sure you only select the choice for 'Use the Server for indexing content'

Central Administration > Operations > Services on Server > Office SharePoint Server Search Service Settings
Configure Office SharePoint Server Search Service Settings on server APPLICATION

Server Farm Configuration Not Complete
 See [administrator task list](#) for more information

View All Site Content
Central Administration
 Operations
 Application Management
Shared Services Administration
 Corp Portal
 Recycle Bin

Use this page to configure Office SharePoint Server Search Service Settings.

Warning: this page is not encrypted for secure communication. User names, passwords, and any other information will be sent in clear text. For more information, contact your administrator.

Query and Indexing
 Use this option to specify if you want to use this server for search queries or indexing or both.

Use this server for indexing content
 Use this server for serving search queries

Contact E-mail Address
 Specify an e-mail address that external site administrators can contact if problems arise when their site is being crawled. This setting applies to all servers in the Farm.

E-mail Address:

 Example: someone@example.com

Farm Search Service Account
 The search service will run using this account. Setting or changing this account affects all index and query servers in the server Farm.

The farm search service account must not be a built-in account for security reasons and for it to access the database and content index. Examples of built-in accounts are Local Service and Network Service.

User name:

 Password:

Index Server Default File Location
 The search index will be located at this path by default on this server. For index servers, you can specify a different path when you create a Shared Services Provider. To change this index file location for an existing Shared Services Provider, use the command stsadm.exe -o editssp.

Default index file location:

Indexer Performance
 Indexing information can place a large load on the local SQL Server database and might slow down the responsiveness of the local SharePoint sites. However, reducing the maximum allowed indexing activity will slow down the speed at which items are indexed, and therefore might cause search results to be outdated. Use information about the local server load to select the appropriate indexer performance level.

Reduced
 Partly reduced
 Maximum

Complete the rest of the page with the correct username and password for your chosen Farm Search account. The search service will now start. Ensure it is started for the Web Servers as well.

Now lets get the web servers ready to take the new Index file from the Indexing server. This process is known as propagation and it is when the Index server copies the new index file from the Indexing server to the web servers configured for answering users search queries.

1. Go to central administration 3.0
2. Go to Application Management
3. Click on Search Service
4. Under the Query and Index servers section click 'Office SharePoint Search Query' underneath WFE1

Central Administration > Application Management > Search Service

Manage Search Service

Server Farm Configuration Not Complete
See [administrator task list](#) for more information

View All Site Content

Central Administration

- Operations
- Application Management

Shared Services Administration

- Corp Portal

Recycle Bin

Farm-Level Search Settings

Proxy server used: None

Contact email address: administrator@trainsbydave.com

Crawler impact rules: 0 defined

- Farm-level search settings
- Crawler impact rules

Query and Index Servers

Server name: APPLICATION

Search service: [Office SharePoint Server Search Indexing](#)

Remaining disk space: <div dir="ltr">C: </div<div dir="ltr">3GB</div

SSPs hosted: Corp Portal

Server name: WFE1

Search service: [Office SharePoint Server Search Query](#)

Remaining disk space: C: 3GB

- All servers in this farm

You will now get a page where you need to configure the username, password for the search service account, plus the location for the Index File and a username that will share and access the folder where the index file is to be located. This folder needs to be shared so that the Index Server can propagate the file correctly to the Web Servers. This is why you may have seen an error previously that the Search settings were waiting for propagation. This is because this share was not in place correctly.

Address http://wfe1:34229/_admin/SearchServiceInstanceSettings.aspx?ServerId=381e64e1-7ad8-49b3-b478-ce293fb3d2b6&Source=%2F%5Fadmin%2Fmanagesearchservice%2F Go Lin

View All Site Content

Central Administration

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[Recycle Bin](#)

or both.

Use this server for serving search queries

Contact E-mail Address
Specify an e-mail address that external site administrators can contact if problems arise when their site is being crawled. This setting applies to all servers in the farm.

E-mail Address:

Example: someone@example.com

Farm Search Service Account
The search service will run using this account. Setting or changing this account affects all index and query servers in the server farm.

User name

Password

The farm search service account must not be a built-in account for security reasons and for it to access the database and content index. Examples of built-in accounts are Local Service and Network Service.

Query Server Index File Location
This is the path where search indexes propagated to this server are stored.

Query server index file location:

Example: C:\searchindexes

Configure share automatically
Credentials of a local administrator of WFE1:
User name

Password

I will configure the share with STSAdm

Do nothing. The share is already configured

OK Cancel

5. Click OK
6. Do the same for WFE 2 (Web2)
7. To make sure it is happy we need to go the Search settings in the Shared Service Provider
8. In Central Administration click the name of you shared Service provider in the left hand quick launch bar.

Address <http://portal.trainsbydave.com/ssp/admin/default.aspx> Go Lin

Shared Services Administration: Corp Portal Welcome System Account | My Site | My Links |

Shared Services Administration: Corp Portal This Site: Shared Services Adr Site Actions

Home

Home

View All Site Content

Back to Central Administration

Shared Services Administration

- Corp Portal

[Recycle Bin](#)

User Profiles and My Sites

- User profiles and properties
- Profile services policies
- My Site settings
- Trusted My Site host locations
- Published links to Office client applications
- Personalization site links
- Personalization services permissions

Search

- [Search settings](#)
- Search usage reports

Office SharePoint Usage Reporting

- Usage reporting

Audiences

- Audiences

Excel Services Settings

- Edit Excel Services settings
- Trusted file locations
- Trusted data connection libraries
- Trusted data providers
- User-defined function assemblies

Business Data Catalog

- Import application definition
- View applications
- View entities
- Business Data Catalog permissions
- Edit profile page template

9. Click Search Settings

10. You should now see a screen the same as below. This will take a few minutes so wait a while and then click refresh. The Index status will change to Idle.

Shared Services Administration: Corp Portal

Home

View All Site Content

Back to Central Administration

Shared Services Administration

Corp Portal

Recycle Bin

Shared Services Administration: Corp Portal > Search Settings

Configure Search Settings

Crawl Settings

Indexing status:	Computing ranking
Items in index:	0
Errors in log:	0
Content sources:	1 defined (Local Office SharePoint Server sites)
Crawl rules:	0 defined
Default content access account:	trainsbydave\administrator
Managed properties:	127 defined
Search alerts status:	Active
Propagation status:	Propagating to new query server (WFE1)

- Content sources and crawl schedules
- Crawl rules
- File types
- Crawl logs
- Default content access account
- Metadata property mappings
- Server name mappings
- Search-based alerts
- Search result removal
- Reset all crawled content

Shared Services Administration: Corp Portal > Search Settings

Configure Search Settings

Crawl Settings

Indexing status:	Idle
Items in index:	0
Errors in log:	0
Content sources:	1 defined (Local Office SharePoint Server sites)
Crawl rules:	0 defined
Default content access account:	trainsbydave\administrator
Managed properties:	127 defined
Search alerts status:	Active
Propagation status:	Idle

- Content sources and crawl schedules
- Crawl rules
- File types
- Crawl logs
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- Search result removal
- Reset all crawled content

11. You are now ready to re-crawl your content. You will have noticed that you items in the index were zero.
12. Click on the 1 defined content source
13. On the drop down arrow next to the content source click full crawl. This could obviously take a while depending on the size of your database.

Shared Services Administration: Corp Portal > Search Settings > Content Sources

Manage Content Sources

Use this page to add, edit, or delete content sources, and to manage crawls.

Type	Name	Status	Next Full Crawl	Next Incremental Crawl
	Local Office SharePoint Server sites	Crawling Full	None	None

14. When complete you should have your index populated again and should now be able to search for content.

Shared Services Administration: Corp Portal Welcome System Account ▾

 Shared Services Administration: Corp Portal

[Home](#)

Shared Services Administration: Corp Portal > Search Settings

Configure Search Settings

Crawl Settings

Indexing status:	Idle
Items in index:	1700
Errors in log:	1
Content sources:	1 defined (Local Office SharePoint Server sites)
Crawl rules:	0 defined
Default content access account:	trainsbydave\administrator
Managed properties:	127 defined
Search alerts status:	Active
Propagation status:	Idle

- [Content sources and crawl schedules](#)
- [Crawl rules](#)
- [File types](#)
- [Crawl logs](#)
- [Default content access account](#)
- [Metadata property mappings](#)
- [Server name mappings](#)
- [Search-based alerts](#)
- [Search result removal](#)
- [Reset all crawled content](#)

You will notice that many of your search settings have been lost such as Server Mappings and Scopes. These will all need to be redefined. Some elements have been carried over though like Alternate Access mappings, as you can see in my screen shots where I had an

extranet configured these carried over via the Upgrade. Although there is still work to be done for anonymous access (but that's another whitepaper)

The screenshot shows the 'View Scopes' page in the Shared Services Administration interface. The breadcrumb trail is 'Shared Services Administration: Corp Portal > Search Settings > Scopes'. The page title is 'View Scopes'. Below the title, there is a description: 'Use this page to view and manage search scopes. The order in which the search scopes appear in this list is the order in which they will appear in the search scope list next to the Search box.' There are two buttons: 'New Scope' and 'Refresh'. A '1 - 2' indicator is visible. A table lists search scopes:

Title	Update Status	Items
Shared (2)		
People	Ready	not available
All Sites	Ready	not available
http://portal.trainsbydave.com/ (0)		
http://portal.trainsbydave.com/personal/steve (0)		
http://portal.trainsbydave.com/ssp/admin (0)		

Scopes not carried over

The screenshot shows the 'Server Name Mappings' page in the Shared Services Administration interface. The breadcrumb trail is 'Shared Services Administration: Corp Portal > Search Settings > Server Name Mappings'. The page title is 'Server Name Mappings'. Below the title, there is a description: 'Use this page to create server name mappings to override how SharePoint Portal Server displays search results or how users access content after you crawl some documents'. There is a 'New Mapping' button. Below the button, it says 'There are no items to show in this view.'

Server name mapping not carried over

Central Administration

Welcome System Account | My Site | My Links

Central Administration

Home Operations Application Management Site Actions

Central Administration > Operations > Alternate Access Mappings

Alternate Access Mappings

Edit Public URLs | Add Internal URLs | Map to External Resource

Alternate Access Mapping Collection: Show All

Internal URL	Zone	Public URL for Zone
http://wfe1:34229	Default	http://wfe1:34229
http://portal.trainsbydave.com	Default	http://portal.trainsbydave.com
http://extranet.trainsbydave.com	Internet	http://extranet.trainsbydave.com

Server Farm Configuration Not Complete

See administrator task list for more information

View All Site Content

Central Administration

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Shared Services Administration

- Corp Portal

Recycle Bin

Alternate Access mappings carried over

Well that's all for now, I hope you have found this series of whitepapers on Upgrade and Migration useful. There is still a lot more to consider from a planning and understanding point of view but I will leave that for the 3 day upgrade course.

Any comments are greatly appreciated for this white paper and I hope you found it useful.

Steve Smith



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