

November 2007

# DocAve™ 4.1 Migrator User Guide

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# 1 Revision History

This revision history summarizes the changes made in each published version of this document.

| <b>Document No.</b>       | <b>Publication Date</b> | <b>Description of Revisions</b>   |
|---------------------------|-------------------------|---|
| DocAve 4.1 Migrator Guide | January 9, 2007         | Creation of DocAve 4.0 Migrator Guide.  |
| DocAve 4.1 Migrator Guide | January 15, 2007        | Added images and image captions.  |
| DocAve 4.1 Migrator Guide | May 22, 2007            | Added Live Migrator   |
| DocAve 4.1 Migrator Guide | May 31, 2007            | Revised   |
| DocAve 4.1 Migrator Guide | July 11, 2007           | Updated Supported and Non-Supported Functionalities   |
| DocAve 4.1 Migrator Guide | November 1, 2007        | Added information about SetFieldSchemaOM.exe, Creating 2003 Item Level Backup, and Web Template XML file.<br>Updated Supported and Not Supported Functionalities. |

## 2 Overview of SP2003 to MOSS2007 Migrator

With the growth and acceptance of MOSS 2007 (WSS 3.0), many SPS 2003 (WSS 2.0) administrators are finding the need migrate over to the new SharePoint standard. This process poses a major problem for many users who want to retain metadata, version histories, and securities.

DocAve SPS 2003 to MOSS 2007 Migrator offers an answer to these common administrative pain points. There are two features available for DocAve SPS 2003 to MOSS 2007: **Backup Migration** and **Live Migration**. Both offer granular migration of content from entire sites, subsites, document libraries, lists, down to specific documents, list items, and even versions of documents from SPS 2003 to MOSS 2007.

With **Backup Migration**, the migration of data references a 2003 Item Level Backup. Conversely, with **Live Migration**, the migration of data does not refer to a backup file, but rather the action of just pointing and clicking the source to the destination. For those familiar with our other products, an analogy that might clarify the relationship between the two: **Backup Migration** is to an Item Level Backup and Restore, while **Live Migration** is to the Content Manager.

### Backup Migration Architecture Diagram

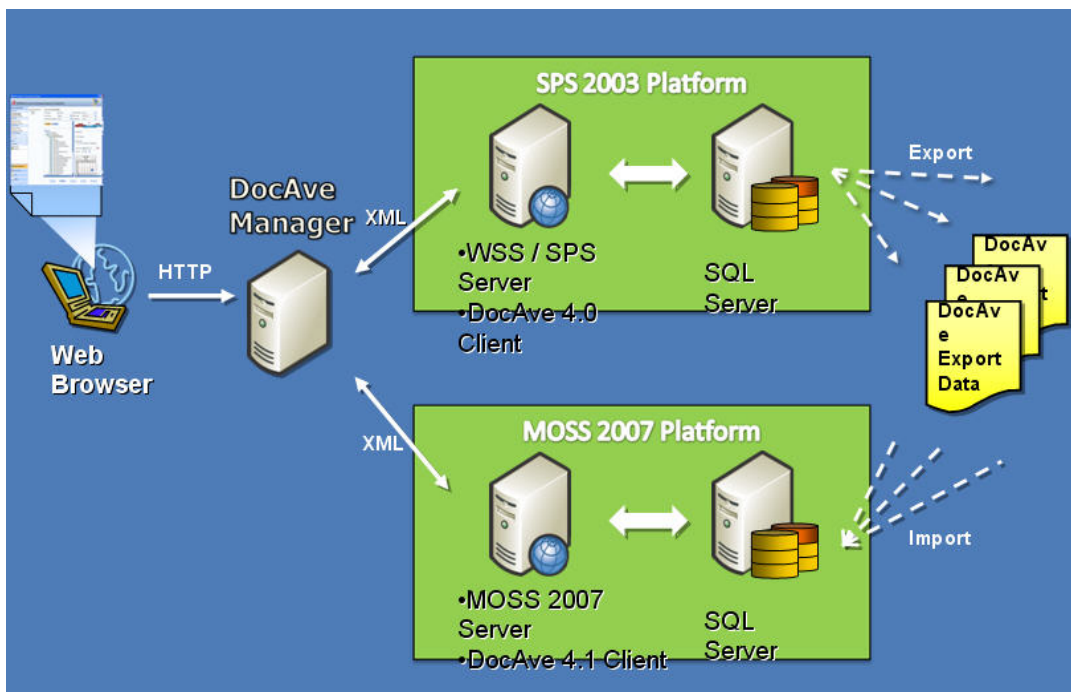
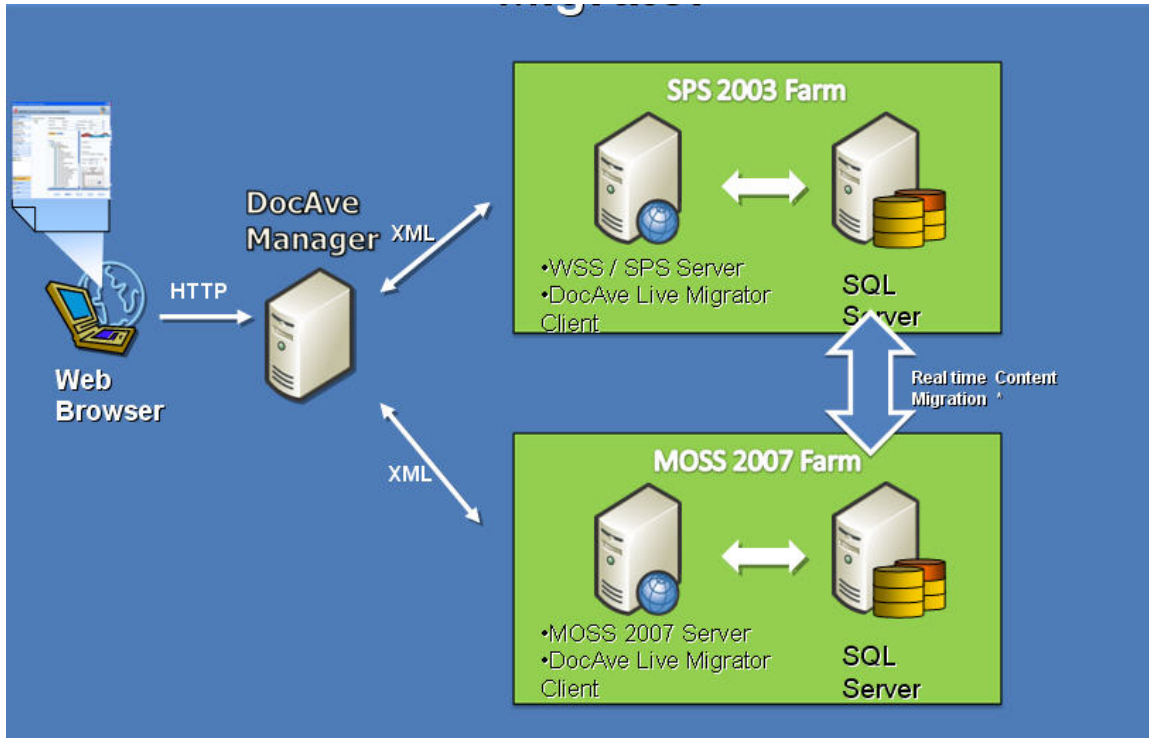


Figure 1: Backup Migration Architectural Overview Diagram

## Live Migration Architecture Diagram



**Figure 2: Live Migration Architectural Overview Diagram**

## 3 Installation of Backup and Live Migrators

Before you can use either Backup or Live Migration, you must make sure that they are selected on both SPS 2003 and MOSS 2007 Client Configuration Tools. More details regarding installation of the packages are found in the DocAve Installation Guide.

To ensure that both Backup and Live Migration are enabled on your DocAve Agent Hosts, please proceed as follows:

- Proceed and log onto your front-end web servers that contain the DocAve Clients.
- Then proceed to **Start > Programs > Avepoint DocAve 4.1 > Client Configuration Tool**.
- From this screen you will see all of the components available for DocAve 4.1, please select **SPS 2003 to MOSS 2007 Migrator** and **SPS 2003 to MOSS 2007 Live Migrator**.

DocAve Agent Configuration

DocAve Server Name: aveportal2007

DocAve Network Service Port: 11000 Test

DocAve Agent Host Name: aveportal2007

DocAve Agent Host Full Name: aveportal2007

Server Name In Farm: aveportal2007

DocAve Agent Port: 10103

Apache Tomcat Server Port: 8080 Test

DocAve Browser Port: 10105

Archiver Port: 10107

Agent Type:

Backup and Restore  DocAve Item/Site/Subsite Level for MOSS 2007

Content Management  DocAve Content Manager for MOSS 2007

Migrators  SPS 2003 to MOSS 2007 Migrator

SPS 2003 to MOSS 2007 Live Migrator

Public Folder to MOSS 2007 Migrator

SPDR  Platform Recovery Control Agent

Platform Recovery Member Agent

High Availability Sync Agent

High Availability SQL Agent

Archiver  DocAve Archiver for MOSS 2007

Confirm Cancel

**Figure 3: Enabling Backup and Live Migration**

## 4 Backup Migration

Backup migration requires a SPS 2003 Item Level Backup and then a restore using the Backup Migrator. Although this is a two step process that may require more time, the advantage is that the actual backup data is always available and can be stored locally, on the network, or on a SAN.

### 4.1 Prerequisites for DocAve 4.1 Backup Migration

There are two possible scenarios which may exist in a given environment for Backup Migration. The first scenario is that DocAve 4.0 is currently used for item-level backup on the 2003 Front End Web Server. The second is that DocAve 4.0 was never used or installed on any environment.

- Prior installation of DocAve 4.0
  - If DocAve 4.0 was installed on the SPS 2003 Server previously, a SharePoint administrator can use the existing item-level backup data from the DocAve 4.0 media server by setting the DocAve 4.1 media server data location directory to point to the same directory as the DocAve 4.0 media server. The default backup directory for the media server is c:\Program Files\AvePoint\DocAve4\VaultServer\DocAveMedia\data. If the DocAve 4.1 media server data storage location is the same location as the DocAve 4.0 media server, you do not need to copy any data.

The backup directory for the media server can be changed by going to:  
DocAve Control Panel > Data Management > Storage Manager > Physical Drive > then click on the Default Drive link under Backup Drive. (For further Storage Manager details please refer to the DocAve Control Panel User Guide)

- Launch the DocAve 4.1 GUI and proceed to Section 4.2.

- No prior installation of DocAve 4.0
  - If there is no prior installation of DocAve 4.0, install the DocAve 4.1 client on the SPS2003 front-end web server. Refer to the DocAve 4.1 installation guide.
  - Click on the DocAve for SharePoint 2003 section and proceed to execute a full item-level backup of the desired content. Refer to the DocAve 4.1 Backup user's guide.
  - Launch the DocAve 4.1 GUI and proceed to Section 4.2.

**Note:** When you install the DocAve 4.1 Client on the SPS 2003 or WSS 2.0 machine please select the 2003 option. When you install the DocAve 4.1 Client on the MOSS 2007 or WSS 3.0 machine please select the 2007 option.

## 4.2 Usage and Walkthrough for DocAve 4.1 Backup Migration

Running the Backup Migration process is similar to the out-of-place restore process except DocAve will translate SPS 2003 to MOSS 2007. The example given is based on the Migration process after a SPS 2003 Item Level Backup has taken place and correlates to both prerequisite examples given above. We also recommend running the SetFieldSchemaOM before doing an Item Level Backup for Backup Migration.

## 4.3 Running SetFieldSchemaOM for Migrations

Running the SetFieldSchemaOM before doing an Item Level Backup for Migration will enhance the process.

- 1.) Remote into the DocAve agent computer with the SharePoint 2003 environment installed.
- 2.) Navigate to this path C:\Program Files\AvePoint\DocAve4\VaultClient\bin. If the client was installed elsewhere, please navigate to the VaultClient\bin directory there.
- 3.) Look for the file SetFieldSchemaOM.exe and double-click on it. It should quickly flash DOS window.
- 4.) To make sure the SetFieldSchemaOM is on, go to C:\Program Files\AvePoint\DocAve4\VaultClient\data\SP2003 or if the client was installed elsewhere navigate to it accordingly. Double click on Env.cfg and make sure the toBackupSchema="2".
- 5.) Go back to the DocAve GUI and run the item level backup.

NOTE: The SetFieldSchemaOM should only be turned on during an Item Level Backup for Migration, please make sure the SetFieldSchemaOM is turned off when doing a regular backup and restore. To turn off the SetFieldSchemaOM change toBackupSchema="2" to toBackupSchema="0" in the Env.cfg file. If you're doing multiple backup migrations make sure in all instances the SetFieldSchemaOM either on or off.

## 4.4 Creating an Item Level Backup Plan

### 4.4.1 Item Level Backup Builder

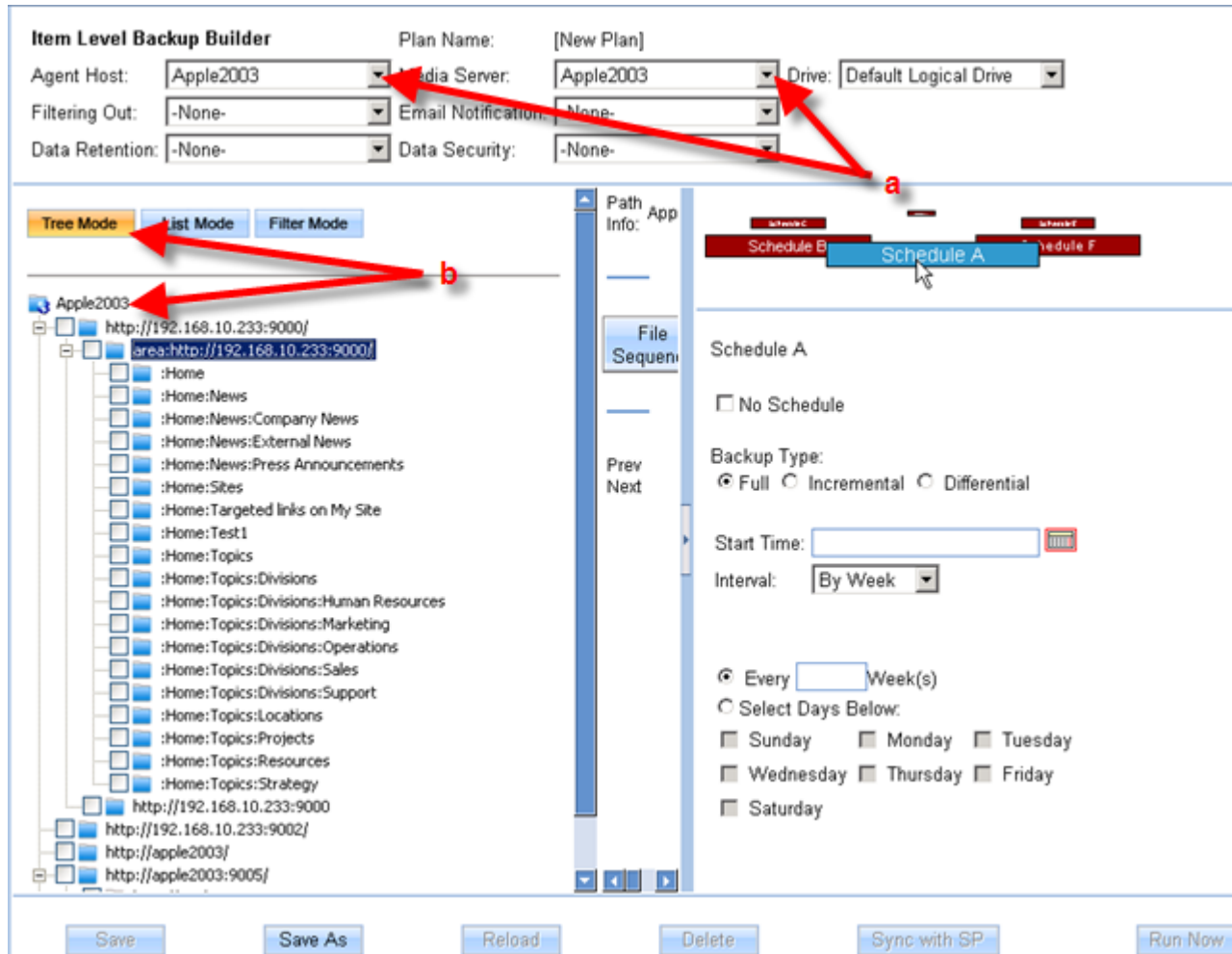


Figure 4: Item Level Backup Builder & Tree Mode Diagram

- 1.) Proceed to the backup builder under "item-level" to begin creating a plan for item-level backup.
- 2.) Select an Agent Host and Media Server (Figure 4, letter "a"). The Agent host name reflects the machine name of the server to extract data to be backed up from. The name of the Agent Host selected will be displayed in the backup builder directly underneath the common settings, ready for browsing. The Media Server reflects the name of the machine to dedicate the resources to for running the backup and for storage management (The Agent Host and Media Server are required to successfully create and run a backup plan).
- 3.) Tree Mode is the default view (Refer to the DocAve 4.1 installation guide for List and Filter modes). The name of the Agent Host you selected should be displayed in the area directly underneath, ready for browsing. Click on the name of that Agent Host. This will expand

the host to display the SharePoint instances installed underneath (Figure 4, letter "b"). ).

4.) Clicking on the name of the SharePoint instances will expand the tree further to display the top-level sites located within that specific SharePoint instance.

5.) Clicking on the name of a specific top-level site will expand the tree further to display a root directory or. (Dot), and also sub-sites located underneath that specific top-level site.

6.) Clicking on the. (Dot) expands the tree to display folders/lists and content located directly on the top-level site. Clicking on individual sub-site names expand the tree to display folders/lists and content located in those individual sub-sites.

7.) There is a check box corresponding to each level on the backup builder tree, the box is by default unchecked; checking the box indicates that all content on that level and underneath that level is to be extracted and backed up, or included in the backup plan.

8.) When checking a box to specify content to be backed up, the folder icon of the folder included in the plan includes a yellow triangle. The yellow triangle indicates that all new data created in those sites or folders/lists will be automatically picked up by the backup plan, this option is turned on by default.

## 4.4.2 Schedules

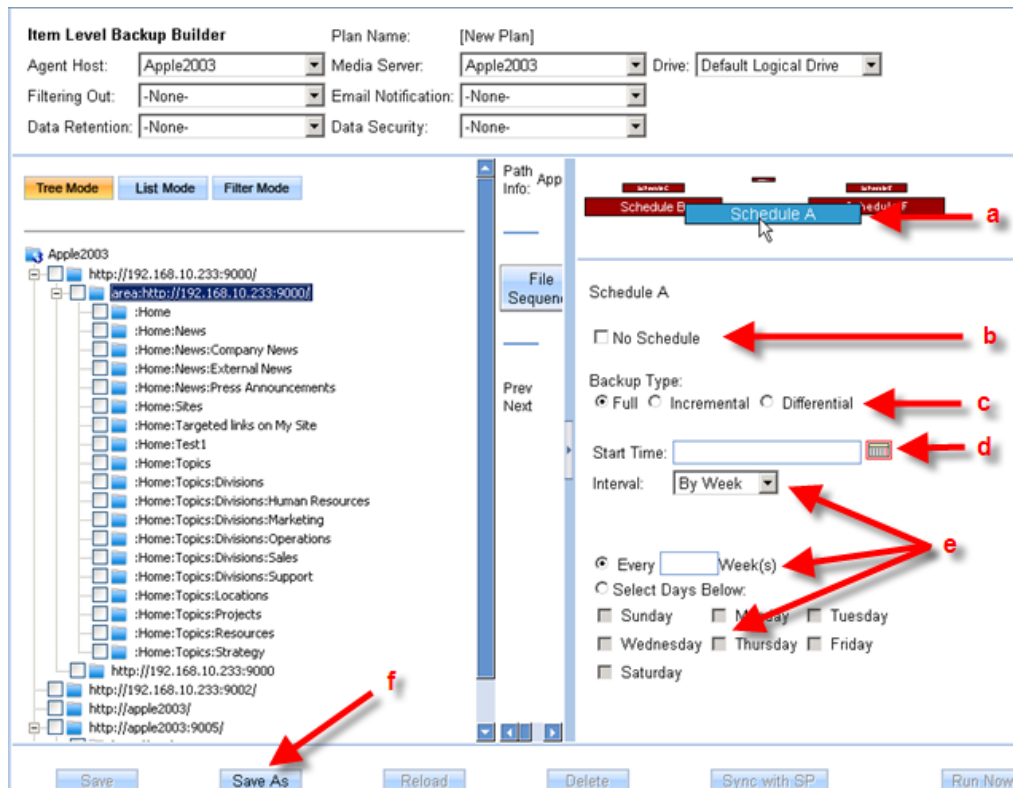


Figure 5: Schedule Diagram

(a) After selecting the content to be backed up, specify the frequency of the backup job plan. Note that you have multiple schedules, accessed by cycling through the schedule carousel.

(b) Un-check the “no schedule” box in order to activate a new schedule. An active schedule is shown in a different color, inactive schedules are in red.

(c) After activating a schedule, select the backup type you wish to use.

Full – a complete backup of the selected source location.

Incremental – data that has been added since the last incremental or full backup is backed up. Incremental data saves time and storage space by backing up only the differences between incremental backups, instead of backing up the entire source location over and over.

Differential – data that has been added since the last full backup is backed up. A differential backup always compares the latest data against a FULL backup at an earlier point in time; data previously backed up by a differential backup is not relevant.

NOTE: It is not recommended to run differential backups too frequently as this could potentially fill up server space quickly. Frequent consecutive differential backups have a tendency to backup the same data over and over again. For best results in high frequency backups, please use incremental backups.

(d) Next set a start time for your backup. Click on the calendar by the Start Time field. A calendar will pop up. Use the calendar to specify when the backup will begin.

(e) Specify the interval at which the backup will occur. Choices are: Only Once, By Hour, By Day, By Week, By Month or By Year.

(f) After successfully scheduling the time and frequency the backup plan is to be conducted. Proceed to save the plan by clicking on “Save As” as shown in figure 2.3.3. Then provide a name for the new plan created. After the plan has successfully been saved, it will be displayed in the narrow column area on the left.

## 4.5 Running Backup Migration

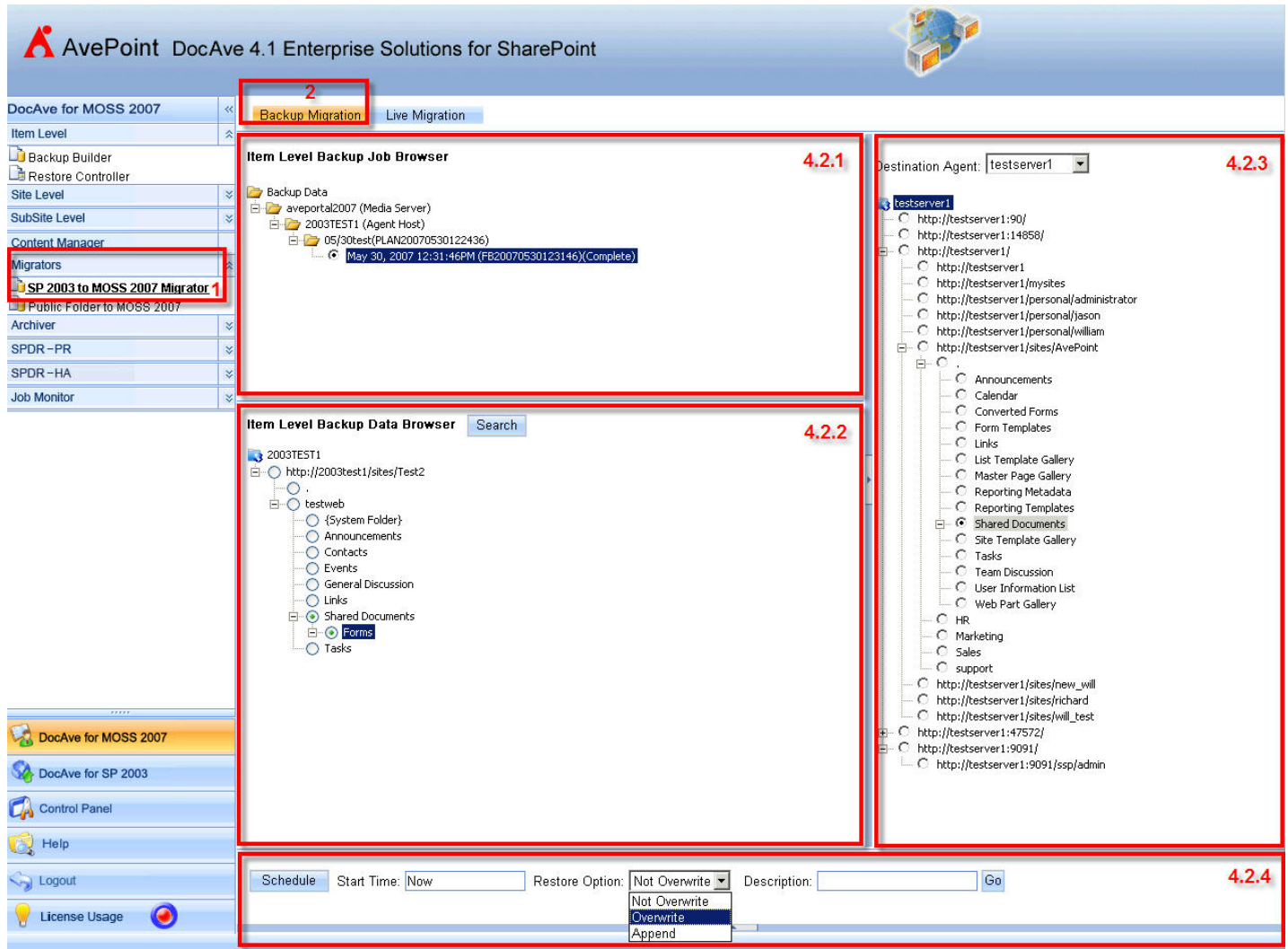


Figure 6: Backup Migration – Complete Screen Shot

- 1.) Select the **SPS 2003 to MOSS 2007 Migrator** link.
- 2.) Select the **Backup Migration** tab.

## 4.5.1 Item Level Backup Job Browser

Under the Item Level Backup Job Browser, the media server that contains the location of the source SPS 2003 Item Level Backup is present. Drill down to the backup job (listed by date) and select the appropriate one via radio button. That will reveal the Item Level Backup Data Browser link in the section below.

### Item Level Backup Job Browser



Figure 7: Backup Migration – Item Level Backup Job Browser

## 4.5.2 Item Level Backup Data Browser

At this point, the actual backed up data can be selected to migrate. By clicking on the arrow button on the page divider, allows you to bring up a detailed view (also known as the Path Info.) of the files that are under that document library.

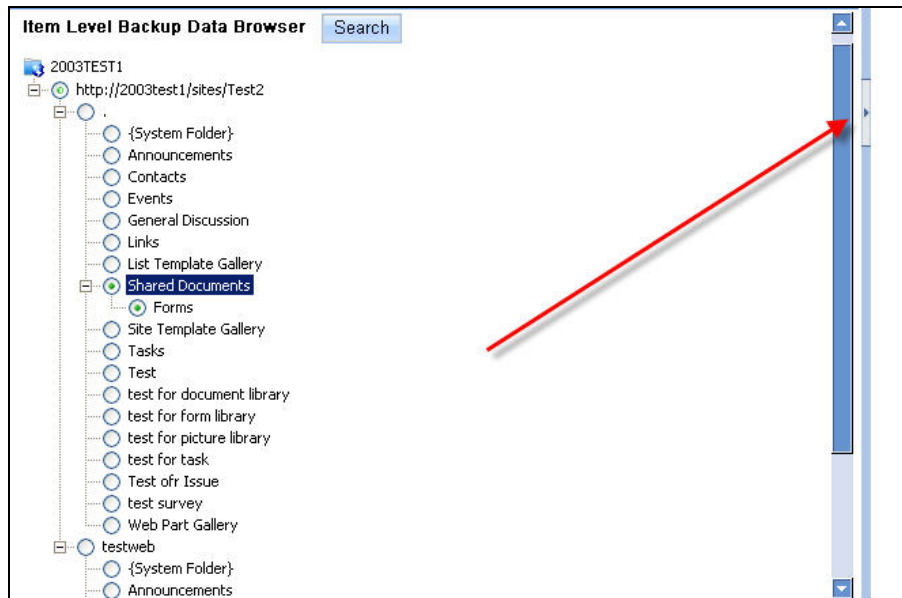
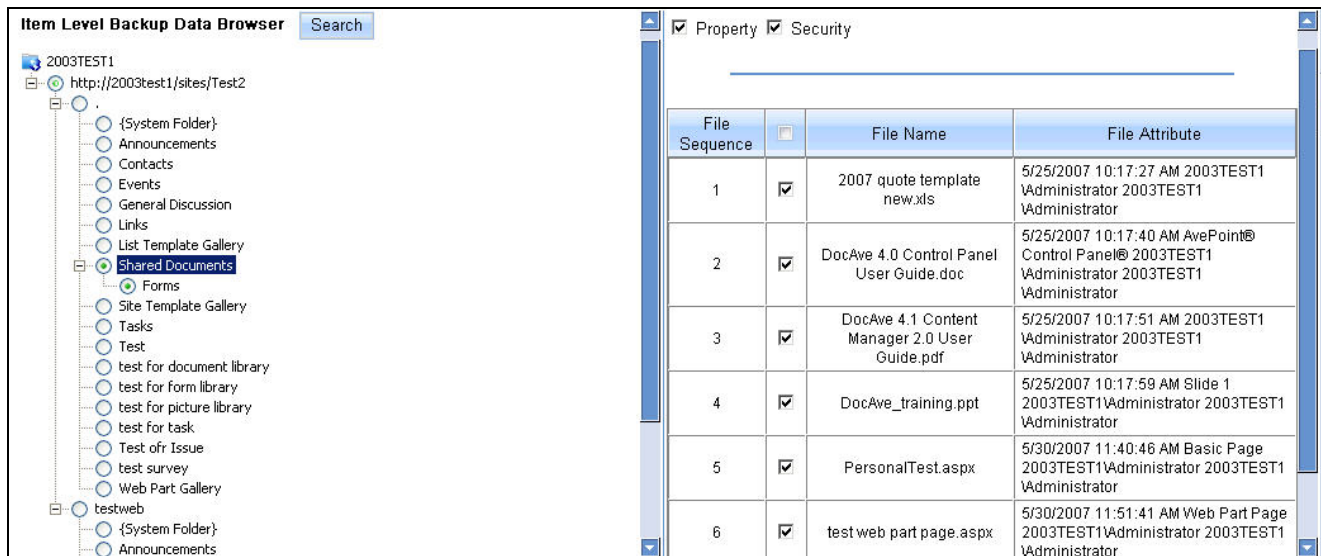


Figure 8: Backup Migration - Item Level Backup Data Browser Page Divider



**Figure 9: Backup Migration - Item Level Backup Data Browser Page Divider Path Info**

Select the Document Library to see all the files underneath. Select the files to be migrated by checking the box next to the item. As an option, the end user can also select **Property** and **Security** to ensure that the permitted metadata, version histories, and securities are migrated over as well.

**Property:** Selecting this box will copy all the metadata; for example information about site creation and modification.

**Security:** Selecting this box will copy all the security permissions; for example the users that can access a particular site.

### 4.5.3 Destination Agent and Location (Backup Migration)

Select the destination by clicking on the drop down box by Destination Agent. From the drop down box the end user will see the list of possible Destination Agents (MOSS 2007 agents). Once an agent is selected, the data tree browser will populate.

Via radio button select the location for the data to be migrated to.



Figure 10: Backup Migration – Destination Path on MOSS 2007

## 4.5.4 Final Options for Backup Migration

Lastly, at the bottom there are some final options that complete the Migration process configuration.

- a.) Schedule – allows the user to set up a start time and date
- b.) Restore Option – allows the user to select either Not Overwrite, Overwrite, or Append
- c.) Description and GO – allows the user to enter a description to the Migration job (helps distinguish jobs from amongst others) and then finally execute the Migration job

The screenshot shows the final configuration options for a backup migration. It is divided into three main sections, each highlighted with a red box and labeled with a letter:

- a.** The 'Schedule' section includes a 'Schedule' button and a 'Start Time' dropdown menu currently set to 'Now'.
- b.** The 'Restore Option' section features a dropdown menu with three options: 'Not Overwrite', 'Overwrite', and 'Append'. The 'Overwrite' option is currently selected.
- c.** The 'Description and GO' section contains a text input field for 'Description' and a 'Go' button to execute the migration.

**Figure 11: Backup Migration - Final Options**

## 4.6 Supported and Not Supported for DocAve 4.1 Backup Migration

| Supported  | Not Supported  |
|--|--|
| Files/Items/Documents                                      | Customized Layouts & Site Definitions                      |
| Document Versions  | Area portal listing  |
| List Items & Attachments to List Items                     | Area restore keeps the area hierarchy                      |
| Original Creation Metadata (timestamp, user info)          | My link  |
| Last Modified Metadata (timestamp, user info)              | Migrate SP2003 list to a different list template in SP2007 |
| Folders, Subfolders  |  |
| Lists, List Properties                                     |  |
| Form & Document Libraries                                  |  |
| Issues   |  |
| Site & Subsite Securities                                  |  |
| Surveys  |  |
| Roles (admin, contributor, reader...)                      |  |
| Linked Lists w and w/o Attachments                         |  |
| Library & List Securities                                  |  |
| User Created Document Library / List Views                 |  |
| Discussion Boards  |  |
| Alerts   |  |
| Webparts & Area  |  |
| Migrate SP2003 site to a different site template in SP2007 |  |

**Supported** functionalities of Migrator will be included in the ProDemo and Purchased Enterprise versions.

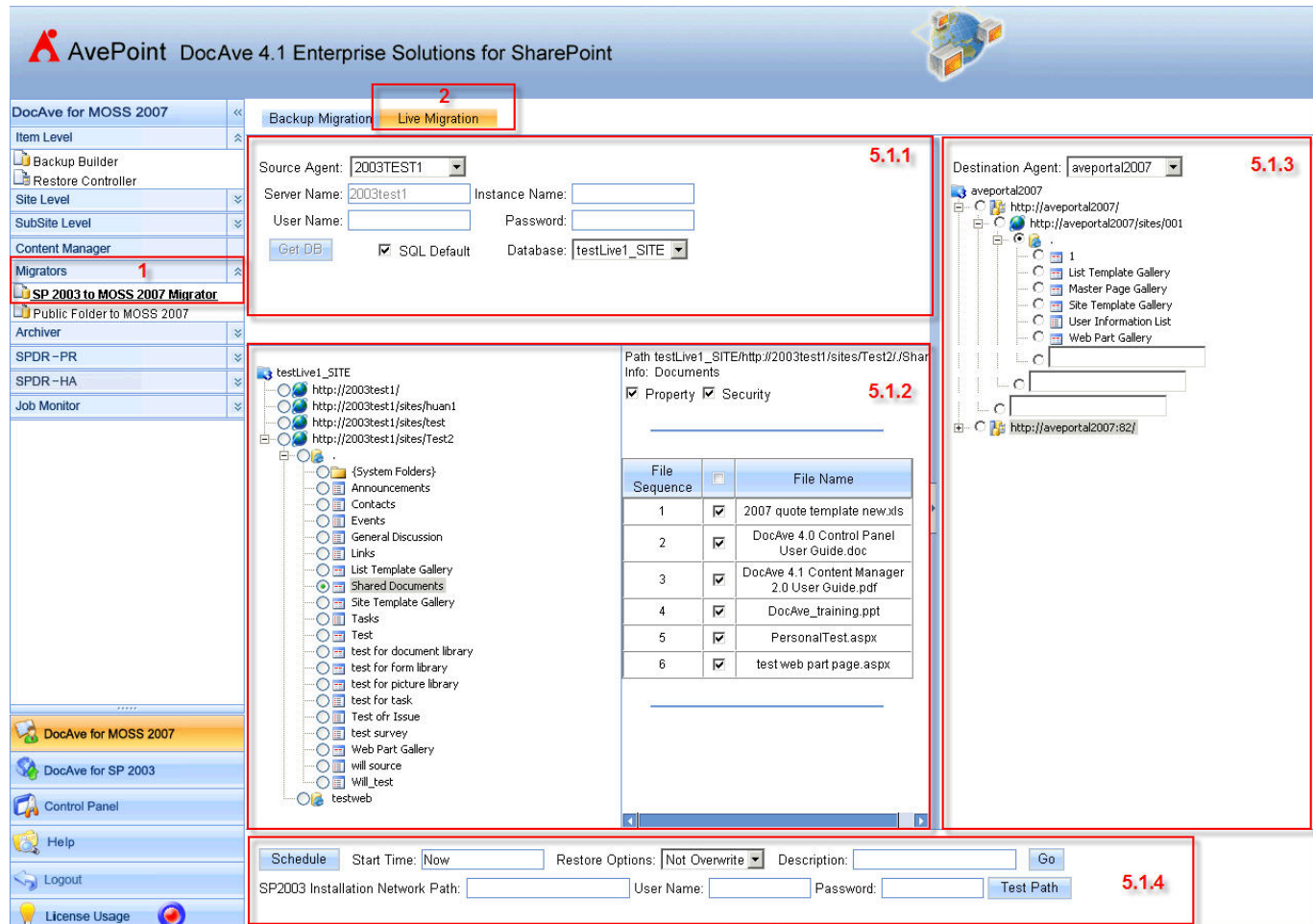
**Not Supported** functionalities may or may not be under further development. Please contact our Sales office to inquire about customized development work for your copy of DocAve SharePoint Migrator.

## 5 Live Migration

Considered a real-time content migration, Live Migration allows for the seamless transfer of data from SPS 2003 to MOSS 2007. Although, this offers a quicker, one step process for migrating, it is not as secure as Backup Migration do to the fact that it is On-the-Fly and relies heavily on constant network connectivity.

### 5.1 Usage and Walkthrough for DocAve 4.1 Live Migration

Running the Live Migration process is similar to the Content Manager process except DocAve will translate SPS 2003 to MOSS 2007. Thus, no Media Server is needed in this feature.



**Figure 12: Live Migration – Complete Screen Shot**

- 1.) Select the **SP 2003 to MOSS 2007 Migrator** link.
- 2.) Select the **Live Migration** tab.

## 5.1.1 Getting the Content Database from SP2003 Agent

### 5.1.1.1 Manually

The screenshot shows a configuration form with the following fields and controls:

- Source Agent:  (dropdown menu)
- Server Name:
- Instance Name:
- User Name:
- Password:
- 
- SQL Default
- Database:  (dropdown menu)

**Figure 13: Live Migration – Getting Content DB from 2003 Agent (Manually)**

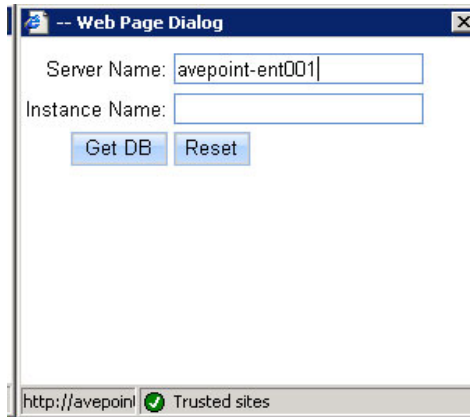
- Select the **Source Agent** from the drop down list.
- Enter the **Server Name**, **Instance Name (at times this may be blank)**, **User Name** and **Password**. It is required that the user has the permission of accessing the SharePoint Database.
- Click the **Get DB** button and the databases will be listed in the **Database** drop down list,.
- Lastly, select a database from the drop down list.

### 5.1.1.2 SQL Default

The screenshot shows a configuration form with the following fields and controls:

- Source Agent:  (dropdown menu)
- Server Name:
- Instance Name:
- User Name:
- Password:
- 
- SQL Default
- Database:  (dropdown menu)

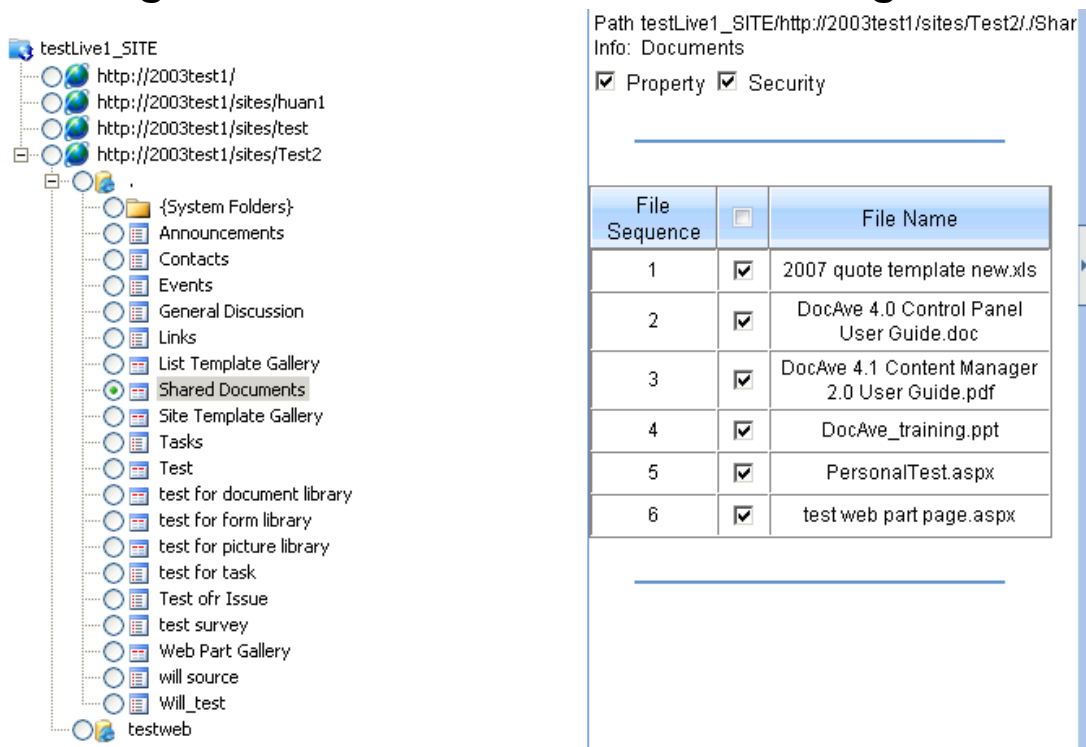
**Figure 14: Live Migration – Getting Content DB from 2003 Agent (SQL Default) 1**



**Figure 15: Live Migration – Getting Content DB from 2003 Agent (SQL Default) 2**

- With **SQL Default** option selected, the Instance Name, User Name and Password need not be entered and DocAve will get the database for the SharePoint 2003 server on which DocAve Agent for SP2003 to MOSS2007 Live Migrator has been successfully installed. Simply type in the **Server Name** and press **Get DB**.

## 5.1.2 Browsing for the SharePoint Data to be migrated



Path testLive1\_SITE/http://2003test1/sites/Test2/./SharePoint Info: Documents

Property  Security

| File Sequence | <input type="checkbox"/>            | File Name                                     |
|---------------|-------------------------------------|---|
| 1             | <input checked="" type="checkbox"/> | 2007 quote template new.xls                   |
| 2             | <input checked="" type="checkbox"/> | DocAve 4.0 Control Panel User Guide.doc       |
| 3             | <input checked="" type="checkbox"/> | DocAve 4.1 Content Manager 2.0 User Guide.pdf |
| 4             | <input checked="" type="checkbox"/> | DocAve_training.ppt                           |
| 5             | <input checked="" type="checkbox"/> | PersonalTest.aspx                             |
| 6             | <input checked="" type="checkbox"/> | test web part page.aspx                       |

**Figure 16: Live Migration - SharePoint Data Browser**

The above figure shows an example of picking up the data from SharePoint 2003 Server, first click the Agent name to expand the tree, and then load the tree level by level to find out the data which you want to migrate to MOSS 2007. The left side of the tree could be loaded down to the folder level, and the related files will be shown on the right window. Converse to the Backup Migration, the contents listed here are all from the live database instead of the backup data located on Media Server.

### 5.1.3 Destination Agent and Location (Live Migration)

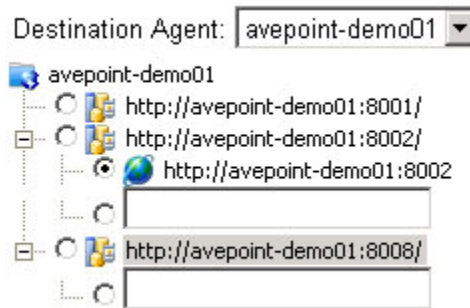


Figure 17: Live Migration – Destination Path on MOSS 2007 (Select Destination)

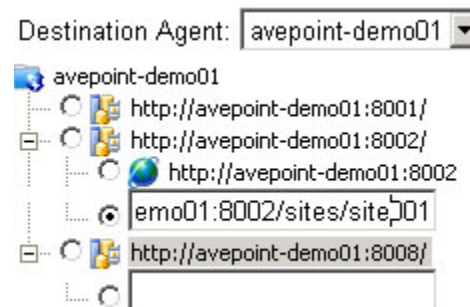


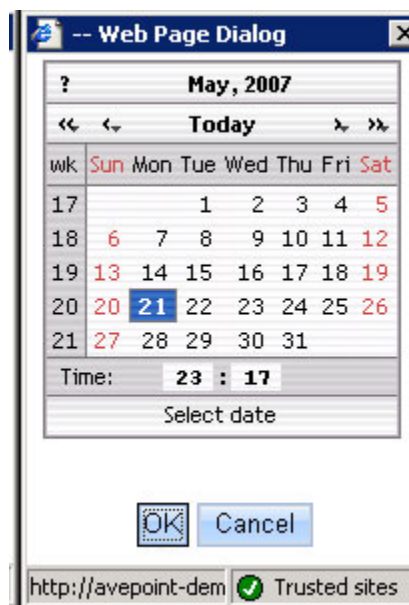
Figure 18: Live Migration – Destination Path on MOSS 2007 (Manual Input)

There are 2 ways to specify the destination path, one is to select the destination from the loaded tree and the other is to manually input a new path as the destination (if it does not exist currently, DocAve will create the site/subsite/lists).

## 5.1.4 Final Options for Live Migration

**Figure 19: Live Migration – Final Options**

a.) Schedule Migration: Click the **Schedule** button and pick a start time to run the Migration. This is an optional requirement.



**Figure 20: Live Migration - Scheduler**

b.) There are 2 restore options: **Overwrite** and **Not Overwrite**. By default **Not Overwrite** is selected and DocAve will skip the document migration when there's a document with same name that exists on destination server.

c.) Allows the user to enter a description to the Migration job (helps distinguish jobs from amongst others) and then finally execute the Migration job.

d.) The SP2003 Installation **Network Path** is optional, if the source contents include SharePoint lists with customized columns, it is necessary to enter the path as follows **\\Server\c\$\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE**. DocAve needs the path to find the SharePoint 2003 templates for the customized lists.

## 5.2 Supported and Not Supported for DocAve 4.1 Live Migration

| Supported  | Not Supported  |
|--|--|
| Files/Items/Documents                                      | Customized Layouts & Site Definitions                      |
| Document Versions  | Area portal listing  |
| Attachments to List Items                                  | Area restore keeps the area hierarchy                      |
| Original Creation Metadata (timestamp, user info)          | My link  |
| Last Modified Metadata (timestamp, user info)              | Migrate SP2003 list to a different list template in SP2007 |
| Folders, Subfolders  |  |
| Lists, List Property                                       |  |
| Form & Document Libraries                                  |  |
| Issues   |  |
| Site & Subsite Security, Security Groups                   |  |
| Surveys  |  |
| Roles (admin, contributor, reader..)                       |  |
| Linked Lists w and w/o Attachments                         |  |
| Library & List Security                                    |  |
| User Created Document Library / List Views                 |  |
| Discussion Boards  |  |
| Alerts   |  |
| Webparts & Area  |  |
| Migrate SP2003 site to a different site template in SP2007 |  |
| Calendar/Events  |  |
| Personal Site  |  |

**Supported** functionalities of Migrator will be included in the ProDemo and Purchased Enterprise versions.

**Not Supported** functionalities may or may not be under further development. Please contact our Sales office to inquire about customized development work for your copy of DocAve SharePoint Migrator.

## 6 Advanced Tips for Migration

### 6.1 Managing Web Templates for Migrator

By default, DocAve Migrator keeps the same Web Template intact during migration. In some cases, those results are not desired. In order to change this you can modify the configuration file named "Web Template.xml" in the default directory here:

"C:\Program Files\AvePoint\DocAve4\VaultClient\data\Migrator"

## 6.1.1 About the Web Template XML file

Open up the XML file in any XML editor and you should see a page similar to the one in Figure 21.

```

- <TemplateMaps>
  <TemplateMap source="STS#0" destination="STS#0" />
  <TemplateMap source="STS#1" destination="STS#1" />
  <TemplateMap source="STS#2" destination="STS#2" />
  <TemplateMap source="MPS#0" destination="MPS#0" />
  <TemplateMap source="MPS#1" destination="MPS#1" />
  <TemplateMap source="MPS#2" destination="MPS#2" />
  <TemplateMap source="MPS#3" destination="MPS#3" />
  <TemplateMap source="MPS#4" destination="MPS#4" />
  <TemplateMap source="BAS#0" destination="BAS#0" />
  <TemplateMap source="SPS#0" destination="SPS#0" />
  <TemplateMap source="SPSPERS#0" destination="SPSPERS#0" />
  <TemplateMap source="SPSMSITE#0" destination="SPSMSITE#0" />
  <TemplateMap source="SPSTOC#0" destination="SPSTOC#0" />
  <TemplateMap source="SPSTOPIC#0" destination="SPSTOPIC#0" />
  <TemplateMap source="SPSNEWS#0" destination="SPSNEWS#0" />
  <TemplateMap source="SPSNHOME#0" destination="SPSNHOME#0" />
  <TemplateMap source="SPSSITES#0" destination="SPSSITES#0" />
  <TemplateMap source="SPSBWEB#0" destination="SPSBWEB#0" />
  <TemplateMap source="SPSCOMMU#0" destination="SPSCOMMU#0" />
</TemplateMaps>

```

Figure 21: Web Template XML Top

On the top of this page you will see the Migrator Web Template settings. The Default SharePoint 2003 templates are entered into this configuration file and sent to the appropriate MOSS 2007 templates.

Below the source and destinations is a legend of the templates shown in Figure 22:

```
Team Site, STS#0
Blank Site, STS#1
Document Workspace, STS#2
Basic Meeting Workspace, MPS#0
Blank Meeting Workspace, MPS#1
Decision Meeting Workspace, MPS#2
Social Meeting Workspace, MPS#3
Multipage Meeting Workspace, MPS#4
Business Activity Services Team Site, BAS#0
SharePoint Portal Server Site, SPS#0
SharePoint Portal Server Personal Space, SPSPERS#0
SharePoint Portal Server My Site, SPSMSITE#0
Contents area Template, SPSTOC#0
Topic area template, SPSTOPIC#0
News area template, SPSNEWS#0
News Home area template, SPSNHOME#0
Site Directory area template, SPSSITES#0
SharePoint Portal Server BucketWeb Template, SPSBWEB#0
Community area template, SPSCOMMU#0
-->
```

**Figure 22: Web Template XML Legend**

## 6.1.2 Editing the Web Template XML file

The Web Template XML file consists of several nodes representing the 2003 source template leading to the 2007 destination template. The nodes are notated as follows:

```
<TemplateMap Source = "A" Destination "B"/>
```

If a new template needs to be added to this list, it can be done through Notepad or any XML editor as long as the Node convention is kept.

Changing the source and destination templates is also possible. For example, if you wanted to move a SharePoint 2003 site with a blank template to a MOSS 2007 site with a Team site template, you can change the second line to:

```
<TemplateMap source="STS#1" destination="STS#0"/>
```