Persona Backup & OS Migration

inSync 5.4

Druva Software

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About this document

This document provides information about the persona backup feature available with inSync and how you can use it for OS migration in your organization. This document describes the steps that must be followed to guarantee a smooth OS migration experience.

This document is intended for inSync administrators who want to use inSync to back up system and application settings on user laptops and use inSync for OS migration on user laptops.

Persona backup

About persona backup

The persona backup feature of inSync allows users to back up and restore various system and application settings from their laptops.

Users set up their laptops per their own preferences. They configure various system settings on their laptops, and the settings of various applications they use, to best suit their requirements. Losing these preferences forces them to work in an unfamiliar environment, hampering their productivity. Users waste time personalizing the new laptop same way as their old laptop. The persona backup feature allows users to back up their system and application preferences, and restore these preferences when required.

Use of persona backup

The following table lists the different scenarios where the persona backup feature can be used.

Use case	Description
Replacing a laptop	A user may need to replace his laptop because it is old, broken, or lost. Using persona backup, the user can restore the system and application settings from his old laptop to his replacement one.
Adding a new laptop	A user may decide to use one or more laptops in addition to his regular laptop. Using persona backup, the user can copy the system and application settings from the regular laptop to the additional laptops. This ensures that the user has the same familiar environment on all his laptops.
Upgrading the OS on a laptop	A user can restore the backed up system and application settings after the operating system on his laptop is upgraded. This ensures that the user's preferences are not lost because of the upgrade.

Availability

The persona backup feature is available with the following editions of inSync:

inSync On Premise Editions	inSync Cloud Editions
inSync Private Cloud	inSync Unlimited
inSync Enterprise	inSync Enterprise

Supported system settings backup

Supported operating systems

Using inSync you can back up system and application settings from laptops using one of the following operating systems:

- Windows XP and later
- Mac OS X 10.6 and later

Supported system settings on Windows

The following table lists the systems settings inSync backs up out of the box from Windows laptops.

Category	Settings
Operating System Settings	Region and Language Settings – Formats, Location, Keyboards and Languages (default input language and installed services)
	Personalization – Wallpaper, themes (Not backed up from Windows XP)
	Folder Options - General settings (Navigation pane settings), View settings (display file extensions, display hidden files, hide empty drives, and use sharing wizard)
	Encryption - Native EFS key
Browser Settings (Internet Explorer 7 and later)	General Settings – Home page, browser history, fonts, language, search providers
	Security Settings – Security levels for various zones
	Privacy Settings – Sites, level, InPrivate browser settings, and pop-up blocker
	Content Settings – Certificates and Publisher settings
Microsoft Outlook (2003 to 2010)	Email account settings - IMAP, POP, Exchange Server Details
	Encryption
	Default language
	Email signatures
	Junk email preferences

	Compose message format settings (only for same version of Outlook)
	Calendar work time settings
	Email send/receive settings
	Message arrival settings
	Address book
	Dictionary
MS Office (2003 to 2010)	Word, PowerPoint, and Excel templates
	Dictionary
Mapped/Shared Network Drives	Path to the mapped/shared drive
	Note: The credentials used to access the drive are not backed up. You must re-enter the credentials to access the drive.

Supported system settings on Mac

The following table lists the systems settings inSync backs up out of the box from Mac laptops.

Category	Settings
Network Settings	SSID and passwords for Wireless Network Connections
Browser Settings (Safari)	History
	Home page settings
	Default search engine
	Bookmarks
Apple Mail	Configured email ID and password
	Email signatures
	Font and color settings
	General settings

Address Book	Contacts
KeyChain	Passwords saved into Keychain

NOTE: For the most updated list of system and application settings backed up by inSync out of the box, see Supported system settings. If you want to back up additional system settings, contact support@druva.com. The Druva Support team will investigate the feasibility of your requirements and help you implement it.

Supported system settings restores

Supported restores

The following table lists the restores supported by inSync.

Settings	Supported restores
Windows OS (same bitness)	Windows XP Service Pack (SP) 3 to Windows 7 Windows XP SP3 to Windows 8 Windows 7 to Windows 7, Windows 8 Windows 8 to Windows 8
Windows OS (32-bit to 64-bit)	Windows XP SP3 (32 bit) to Windows 7 (64 bit)
Mac OS X	Mac 10.7 to Mac 10.7, 10.8, 10.9 Mac 10.8 to Mac 10.8, 10.9 Mac 10.9 to Mac 10.9 Note: Migration of Mac user accounts is not supported.
Internet Explorer	Internet Explorer (IE) 7 to IE 9, IE 10, IE 11 IE 9 to IE 9 IE 10 to IE 10 IE 11 to IE 11 Note: Migration of dial Up and virtual private network settings is not supported. For IE 7 to IE 10 migration, prefix and suffix options for Languages Preferences is not supported.
Microsoft Outlook	Outlook 2003 to Outlook 2010 Outlook 2010 to Outlook 2010 Note: For Outlook 2010, the default language is migrated, but not set as the default language. For Outlook 2007 to Outlook 2010 migration, stationary fonts and mail formats are not migrated. Stored passwords

	are not migrated.
Microsoft Office (same bit migration)	Microsoft (MS) Office 2003 to MS Office 2010 MS Office 2007 to Ms Office 2010

Unsupported restores

The following table lists the restores not supported by inSync.

Settings	Unsupported restores
Windows OS	Windows 64-bit to Windows 32-bit Later version of Windows to earlier version of Windows
Mac	Later version of Mac to earlier version of Mac
Cross-platform OS	Windows to Mac Mac to Windows

Using inSync for OS migration

Overview

Changing the operating system on a user's laptop is a time consuming process. Before upgrading a laptop, you must back up the data on it. After the upgrade, you have to restore the data and also configure the laptop to bring the system and the application configurations to a state they were before the upgrade. Upgrading the operating system for all employees in an organization can be quite exhaustive for the administrators.

Using inSync, you can simplify the process of OS migration for your organization. Using inSync you can quickly back up data as well as system and application settings from each employee laptop. After upgrading the operating system, you can easily restore the backup data and the system and application settings.

The following table lists the advantages of using inSync for OS migration.

Advantages for the organization	Advantages for the administrators
Quick and easy migration process minimizes loss in employee productivity.	Easy to implement migration process.
	Transparent migration process that is easy to manage.
Organization can choose the system and application preferences and the folders on user laptops that need to be backed up.	Integration with Active Directory can minimize user's involvement in the migration process.

Supported OS migration implementations

The following table lists the two processes you can follow for OS migration using inSync.

Process	Description
Replace device	In the replace device process, you will either replace the user's laptop with a new one or upgrade the operating system on the user's laptop. In either case, the user

|	
	has only one laptop during the migration process.
Add new device	In the add new device process, you will give a new laptop to the user. The user maintains both laptops for a certain period to verify the migration. After the user is satisfied, you take the old laptop away.

The OS migration process

Overview

The following table lists the steps for OS migration using inSync.

Step	Step	Description
Step 1	Enable persona backup for users	Identify the profiles of the users whose laptops you want to upgrade. Modify the identified profiles to include **System, App Settings** for backup.
Step 2	Install inSync on user laptops	Install and activate inSync on the laptops that have to be upgraded. You can ask the users to install and activate inSync themselves, or use the integrated mass deployment process.
Step 3	Monitor backup progress	Use the User Rollout report to monitor the progress of the installation, activation, and backups from the laptops. Make sure at least one backup has been taken from each laptop.
Step 4	Install inSync on replacement user laptops	Install and activate inSync on the new laptops assigned to the users. You can ask the users to install and activate inSync themselves, or use the integrated mass deployment process.

Step 1 of 4: Enable persona backup for users

To enable persona backup for users, you must include **System, App Settings** for backup. You can enable the option either while creating new profiles for the users or by modifying the existing profiles.
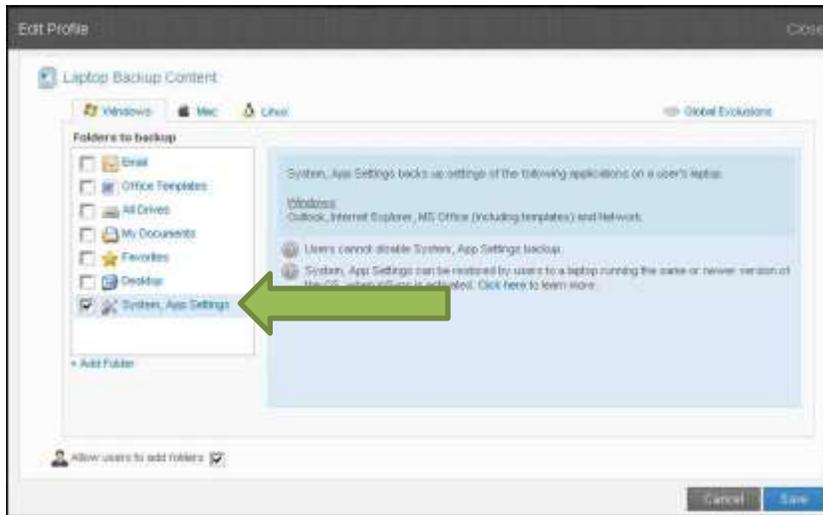
For step by step instructions on selecting System, App Settings for backup, see Enabling Persona Backup.

Step 2 of 4: Install inSync on user laptops

This step is required for only those users of your organization who are not using inSync. You can create inSync account for such users and ask them to install and activate inSync. Alternatively, you can follow the integrated mass deployment (IMD) process to install and activate inSync on the user laptops.

IMD is an end-to-end process of automated deployment of inSync in your organization. It includes automating the installation of inSync client on all Windows and Mac laptops as well as automating the process of creation of inSync users for your organization and activating the inSync client installed on user devices. IMD is possible only if your organization uses Active Directory (AD) to manage user access and authentication.

The IMD workflow is as follows:

1. You register the AD from which you want to import user details. If your organization uses inSync Cloud, you must install an AD Connector before you can register your AD.

2. Configure IMD settings to disable the option to activate only the first device during deployment. This is essential if you are planning to use IMD for installing inSync on the replacement laptops.

3. You identify the profiles that will be assigned to the users and enable login using AD for those profiles.

4. You create an AD mapping. This defines the filter parameters to extract the right user details from the AD and map them to the profile, storage, and quota that will be assigned to the users.

5. You generate a mass deployment token that is required for automated installation of inSync.

6. You use automated installation tools to install inSync on user laptops. During the installation, you use a script that contains the location of the installer, the mass deployment token, and the IP address and port number for the inSync Master. The following is a sample script that was used to install inSync on Windows laptops:

```
msiexec /qn /i \\sharelocation\inSync.msi TOKENV2='33-
bb0af8c55da3f9dd32e6ce6ad23e97b5d9951ae6fcf37ee062754ceabc76cf69'
SERVERLIST="192.168.53.123:6061"
```

7. You ask the users to log on to their laptops using their AD credentials.

When the users log in, their inSync user accounts are created, inSync client is activated on their laptops, and first backups are initiated.

For detailed instructions on each step of the IMD process, see [Integrated Mass Deployment of inSync](#).

Step 3 of 4: Monitor backup progress

Ensure that first backups from user laptops are successful and that system and application settings have been backed up. You can use the user rollout report to monitor the progress.

If you notice laptops for which the first backup failed, or system settings have not been backed up, resolve the issues. For troubleshooting assistance, contact support@druva.com.

Step 4 of 4: Install inSync on replacement user laptops

When installing inSync on the replacement user laptops, you can either replace the users existing laptops or add the replacement laptop as a new device. The latter allows users to use both laptops till the time you withdraw the old ones.

You can either install inSync on the replacement user laptops using the mass installation process or ask the users to install inSync themselves on the replacement laptops.

NOTE: If your users are already using multiple laptops, it is recommended that you ask them to install and activate inSync on the replacement laptops themselves. The mass installation process works best if the user has only one laptop or if you are just adding a new laptop without restoring backup data or system settings.

Mass installation process

As an inSync administrator, you can mass install inSync on all user laptops. However, parts of the installation and activation will fail or succeed depending on the number of laptops the user already has and the OS on them. The following table lists the different scenarios for the mass installation process.

Existing laptops	Replacement Laptop	Add Laptop	Replace Laptop	Restore backup data	Restore system settings
Only one	Same OS platform as the existing laptop	Yes	Yes	Yes	Yes
Only one	Different OS platform than the existing laptop	Yes	No	No	No
Multiple laptops	Any OS	Yes	No	No	No

The mass installation process for inSync on replacement laptops is similar to the one described earlier for IMD, except for the script to which additional parameters must be added to cater to the replacement scenarios. The following table lists the new parameters in the mass installation script for adding or replacing a laptop.

Parameter	Value	Description
REPLACE_DEVICE	Yes/No	If the value of the parameter is set to **Yes**, the laptop will replace the existing laptop. If the value of the parameter is set to **No**, the laptop will be added as a new device.
RESTORE_SYSTEM_SETTINGS	Yes/No	If the value of the parameter is set to **Yes**, the system settings from the existing laptop will be restored on the new laptop. This works only if the user has one laptop and the new laptop has the same OS as the existing one. If the value of the parameter is set to **No**, the system settings from the existing laptop will not be restored on the new laptop.
RESTORE_DATA	Yes/No	If the value of the parameter is set to **Yes**, the data backed up from the existing laptop will be restored on the new laptop. This works only if the user has one laptop and the new laptop has the same OS as the existing one. If the value of the parameter is set to **No**, the data backed up

from the existing laptop will not be restored on the new laptop.

The following is a sample script that was used to replace an existing Windows XP laptop with a Windows 8 laptop. Both system settings and backup data were restored from the Windows XP laptop to the Windows 8 laptop.

```
msiexec /qn /i \\sharelocation\inSync.msi TOKENV2='33-
bb0af8c55da3f9dd32e6ce6ad23e97b5d9951ae6fcf37ee062754ceabc76cf69'
SERVERLIST="192.168.53.123:6061" REPLACE_DEVICE="Yes"
RESTORE_SYSTEM_SETTINGS="Yes" RESTORE_DATA="Yes"
```

Note: If possible, inSync will restore MAPI PST files to the original location. However, if inSync is not able to access the original location, it will restore the PST on the desktop. The restored PST file is renamed as **restore.pst**.

Manual installation process

In situations where users have more than one laptop, it is best to let them install inSync manually on the replacement laptop. During the installation process, the users are asked to choose if they want to replace an existing laptop or add a new device to their inSync account.

If users choose to add a new device, they are provides options to restore data and system and application settings from one of the existing laptops.

If users choose to replace an existing laptop, they are asked to choose the device they want to replace and select if they want to restore data and system and application settings from the replaced laptop.