

Persona Backup and OS Migration for inSync Private Cloud 5.9.6

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1. About this Document

This document contains information about persona backup and includes instructions for using OS migration in your organization. This document is 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.

Note: The inSync On-Premise 5.9.6 documentation is applicable for the On-Premise v5.9.7 patch, v5.9.8 patch, and v5.9.9 patch release as well.

2. About Persona Backup

The Persona Backup (also System, App Settings) feature ensures backup of system and application settings across user devices. With Persona Backup, administrators can restore what they need anytime, anywhere. Users no longer need to remember or reconfigure their system preferences. They can simply restore system and application settings to as many new devices as required in just a few clicks.

2.1 Usage Scenarios

When you enable System, App Settings, you can:

Use case	Description
Replace a lost device	The user can restore the system and application settings from the lost device to the replacement device. This ensures that the user has the same familiar environment on the replacement device.
Quickly configure	If your organization requires all laptops to adhere to a specific configuration, use the Persona Backup feature to create a

new laptops	backup of the system settings from an existing system. inSync administrators can use this backup data to quickly configure new laptops and have them ready for use.
Migrate to a later version of an operating system	You can now quickly migrate systems across your organization to a later version of your preferred operating system. Once you complete the upgrade, you only need to restore previously stored system settings.
Recover from a system failure	You can quickly recover your system settings in the event of a failure. If a system stops responding, the inSync user can use the previously backed up system settings to restore the previous state of the system.

2.2 Availability

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

- inSync Private Cloud Elite
- inSync Private Cloud Enterprise

3. System settings for backup

You can perform system settings backup from the following operating systems:

- Windows 7 or later
- macOS X 10.11 or later

inSync does not backup system settings on any of the Windows Server operating systems, Windows 2000, or any of the starter editions for Windows XP, Windows Vista, or Windows 7.

3.1 Windows system settings

The following table lists the system settings that inSync backs across Windows devices when you enable Persona Backup.

Category	Settings
Operating System Settings	<ul style="list-style-type: none"> ■ Region and Language Settings: Formats, Location, Keyboards and Languages (default input language and installed services) ■ Personalization: Wallpaper, themes (not backed up from Windows XP) Note: You must configure all custom wallpapers for backup. ■ 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
Internet Explorer (version 8 or later)	<ul style="list-style-type: none"> ■ General Settings: Home page, browser history, fonts, language, search providers ■ Security Settings: Security levels for various zones ■ Privacy Settings: Sites, InPrivate Browsing settings, and Pop-up blocker ■ Content Settings: Certificates and Publisher settings
Microsoft Edge (version 41) Note: Support for this browser is available with On-Premise 5.9.8 and	<ul style="list-style-type: none"> ■ Bookmarks ■ Themes ■ Favorites ■ Home page ■ All settings including general, security, privacy, proxy



later.	
<p>Mozilla Firefox</p> <ul style="list-style-type: none"> • Version 55 • Version 57* <p>*On-Premises 5.9.8 and later.</p>	<ul style="list-style-type: none"> ■ Bookmarks ■ Home page ■ Default search engine ■ Download location ■ Font ■ Language ■ All settings including general, security, privacy, proxy
<p>Google Chrome</p> <ul style="list-style-type: none"> • Version 60 • Version 65* <p>*On-Premises 5.9.8 and later.</p>	<ul style="list-style-type: none"> ■ Bookmarks ■ Home page ■ Default search engine ■ Download location ■ Font ■ Language ■ All settings including general, security, privacy, proxy
<p>Microsoft Outlook (2003 to 2016)</p>	<ul style="list-style-type: none"> ■ Email account settings: IMAP, POP, Exchange server details ■ Encryption ■ Default language ■ Email signatures ■ Junk email preferences ■ Compose message format settings (only for the same version of Microsoft Outlook) ■ Calendar work time settings ■ Email send and receive settings ■ Message arrival settings ■ Address book ■ Dictionary ■ Profiles
<p>Microsoft OneNote (2010, 2013, and</p>	<ul style="list-style-type: none"> ■ General settings: Font, Display, Proofing ■ Audio and video

<p>2016)</p> <p>Note: Support for Microsoft OneNote is available with On-Premise 5.9.8 and later.</p>	<ul style="list-style-type: none"> ■ Language ■ Customize ribbons ■ Trust center
<p>MS Office (2003 to 2016)</p>	<ul style="list-style-type: none"> ■ Microsoft Word, Microsoft PowerPoint, and Microsoft Excel templates ■ Microsoft Word, Microsoft PowerPoint, and Microsoft Excel settings ■ Dictionary
<p>Mapped/Shared Network Drives</p>	<ul style="list-style-type: none"> ■ Path to mapped or shared drives <p>inSync does not back up the credentials to access the drive. You must re-enter the credentials to access the drive.</p>
<p>Printer Settings</p>	<ul style="list-style-type: none"> ■ Network printers (Only on Windows 7 and Windows 8, Windows 8.1) <p>inSync does not backup the credentials to access the network printer or the drivers for the network printer. You must re-enter the credentials to access the printer and ensure that the destination laptop contains the requisite drivers.</p>

3.2 Mac system settings

The following table lists the system settings that inSync backs across Mac devices when you enable Persona Backup.

Category	Settings
Network Settings	<ul style="list-style-type: none"> ■ SSID <p>Note: inSync does not backup passwords for wireless network connections.</p>
Browser Settings (Safari)	<ul style="list-style-type: none"> ■ History ■ Home page settings ■ Default search engine ■ Bookmarks
Apple Mail	<ul style="list-style-type: none"> ■ Email ID and password ■ Email signatures ■ Font and color settings ■ General settings
Address Book	<ul style="list-style-type: none"> ■ Contacts
Keychain	<ul style="list-style-type: none"> ■ Passwords saved in Keychain

If you want to back up additional system settings, contact [Druva Support](#). The Druva Implementation team will investigate the feasibility of your requirements and help you implement it.

3.3 Mac system settings 10.11 and after

The following table lists the system settings that inSync backs across Mac devices when you enable Persona Backup.

Category	Settings
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Browser Settings (Safari)	<ul style="list-style-type: none"> • History • Home page settings • Default search engine • Bookmarks
Apple Mail	<ul style="list-style-type: none"> • Email ID and password • Email signatures • Font and color settings • Rules • General settings • Email sound settings under general mail settings
Internet Accounts	<ul style="list-style-type: none"> • LinkedIn/Gmail/Facebook/Yahoo/Twitter
Address Book	<ul style="list-style-type: none"> • Contacts
Keychain	<ul style="list-style-type: none"> • Passwords saved in Keychain

4. System settings for restores

4.1 Supported restores

The following table lists the restores that your inSync setup supports.

Settings	Supported Restores
Windows OS	<ul style="list-style-type: none"> ■ Windows 7 (32-bit) to Windows 7 (32-bit/64-bit), Windows 8 (32-bit/64-bit), Windows 8.1 (32-bit/64-bit), Windows 10 (32-bit/64-bit) ■ Windows 7 (64-bit) to Windows 7 (64-bit), Windows 8 (64-bit), Windows 8.1 (64-bit), Windows 10 (64-bit) ■ Windows 8 (32-bit) to Windows 8 (32-bit/64-bit), Windows 8.1 (32-bit/64-bit), Windows 10 (32-bit/64-bit) ■ Windows 8 (64-bit) to Windows 8 (64-bit), Windows 8.1 (64-bit), Windows 10 (64-bit) ■ Windows 8.1 (32-bit) to Windows 8.1 (32-bit/64-bit),

	<p>Windows 10 (32-bit/64-bit)</p> <ul style="list-style-type: none"> ■ Windows 8.1 (64-bit) to Windows 8.1 (64-bit), Windows 10 (64-bit) ■ Windows 10 (32-bit) to Windows 10 (32-bit/64-bit) ■ Windows 10 (64-bit) to Windows 10 (64-bit)
Mac OS X	<ul style="list-style-type: none"> ■ macOS X 10.11 to macOS X 10.11, macOS X 10.12, and macOS X 10.13 ■ macOS X 10.12 to macOS X 10.12 and macOS X 10.13 ■ macOS X 10.13 to macOS X 10.13 ■ macOS X 10.13 to macOS X 10.14 <p>inSync does not support the migration of Mac user accounts.</p>
Internet Explorer	<ul style="list-style-type: none"> ■ Internet Explorer (IE) 8 to IE 9, IE 10, IE 11 ■ IE 9 to IE 9 ■ IE 10 to IE 10 ■ IE 11 to IE 11 <p>inSync does not support the migration of dial Up and virtual private network settings. This is applicable to all versions of IE.</p>
Network Printer Settings	<ul style="list-style-type: none"> ■ Windows 7 to Windows 7 ■ Windows 8 to Windows 8 ■ Windows 8.1 to Windows 8.1 ■ Windows 10 to Windows 10 <p>inSync does not support migration of local printer settings. For network printers, inSync does not backup the credentials to access the printer. You must re-enter the credentials.</p>
Microsoft Outlook (Outlook)	<ul style="list-style-type: none"> ■ Outlook 2003 to Outlook 2010 ■ Outlook 2010 to Outlook 2010 ■ Outlook 2013 to Outlook 2013



	<ul style="list-style-type: none"> ■ Outlook 2016 to outlook 2016 <p>Note:</p> <p>inSync migrates the default language for Outlook 2010. However, inSync does not set it as the default language.</p> <p>inSync does not support the migration of stationary fonts and mail formats from Outlook 2007 to Outlook 2010.</p> <p>inSync does not support the migration of stored passwords.</p> <p>inSync does not support the migration of settings of an earlier version of Outlook to Outlook 2013.</p>
<p>Microsoft Office (same bit migration)</p>	<ul style="list-style-type: none"> ■ Microsoft Office 2003 to Microsoft Office 2010 ■ Microsoft Office 2007 to Microsoft Office 2010

4.2 Unsupported restores

The following table lists the restores that your inSync setup does not support.

Settings	Unsupported Restores
Windows 64-bit	Windows 32-bit
Later version of Windows	Earlier version of Windows
Windows (any version)	Mac (any version)
Later version of Mac	Earlier version of Mac

5. OS migration using Persona Backup

Using inSync, you can simplify the process of OS migration for your organization. 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.

5.1 Advantages for the organization

The Persona Backup feature drastically minimizes revenue and productivity loss in the event of a system failure. Organizations no longer need to employ standby hardware for system recovery. Organizations can choose their system preferences in addition to the default preferences that the inSync setup backs up. This means that you can define the most critical system settings for your organization.

5.2 Advantages for the administrators

Persona Backup is platform dependent. inSync recognizes platform-specific system preferences and creates a backup of these preferences. Restoring system and application settings is an easy procedure. You can restore system settings at the time of inSync client activation. System upgrade does not have to translate to lost preferences. Users can upgrade their operating systems, and then import system preferences to the newly created environment. Device loss now has lesser impact on productivity. The Persona Backup feature gets a new device ready within minutes.

5.3 Advantages for the users

Adding a new device is easy. You can create a ready environment in just a few minutes. Users no longer need to remember system preferences. They can restore their favorite preferences to new devices with minimal time and effort.

5.4 Supported OS migration implementations

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

Process	Description
Replace device	You will either replace a user laptop with a new laptop or upgrade the operating system. In either case, the user has only one laptop during the migration process.
Add new device	You will give a new laptop to the user.

6. The OS migration process

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

Step 1	Action
Step 1	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 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	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 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.

6.1 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 instructions on selecting System, App Settings for backup, see [Enable Persona Backup](#).

6.2 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.

After you create an inSync account for such users, do one of the following:

- Let users [install and activate the inSync Client on their laptops](#).
- You install the inSync Clients on user laptops by using the [integrated mass deployment](#) (IMD) process.

Integrated mass deployment (IMD) is an end-to-end process that involves the automated deployment of inSync client in your organization. It includes the automation of inSync client installation on all user laptops, inSync user creation, and inSync client activation on user devices. You can leverage IMD if your organization uses Active Directory to manage user access and authentication, and users in your organization use Windows or Mac devices.

The following table lists the steps for the integrated mass deployment.

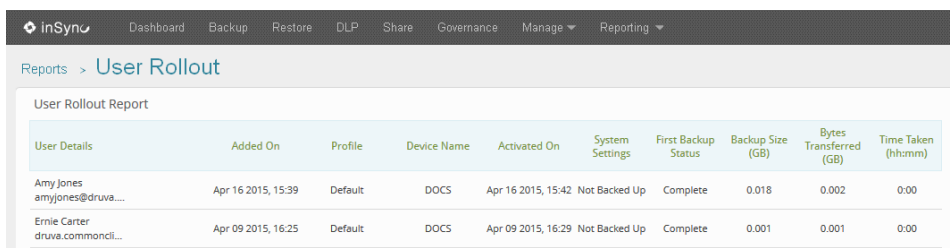
Step	Action
Step 1	Register Active Directory (AD) with the inSync Server from which you want to import user details.
Step 2	Configure integrated mass deployment settings. If you are planning to use IMD for installing inSync on the replacement laptops, ensure that you disable the option to activate only the first device during deployment. If the Activate first device only during deployment check box is selected, click to clear the check box.
Step 3	Create or identify the profiles to which inSync must assign the users who you are importing from your AD. Ensure that you configure the login mechanism as Active Directory.
Step 4	Create an Active Directory mapping. The AD mapping allows you to create inSync users by importing their details from your Active Directory (AD). In an AD mapping, you define filter parameters to extract user details from your AD. You also define the profile, storage, and quota that inSync must assign to users who match the filter parameters.
Step 5	Generate a mass deployment token.
	Install inSync Client on user laptops using automated installation tools, such as System Center Configuration Manager (SCCM), LANDesk, or Casper. Use a script that contains the location of the installer, the mass deployment token, and the IP address and port number for the



	<p>inSync Server.</p> <p>For example</p> <pre>msiexec /qn /i \\sharelocation\inSync.msi TOKENV2='33-bboaf8c55da3f9dd32e6ce6ad23e97b5d9951ae6fcf37ee062754cea bc76cf69' SERVERLIST="192.168.53.123:443"</pre> <p>For more information, see Install inSync Client for integrated mass deployment.</p>
<p>Step 6</p>	<p>Users log on to their laptops using their AD credentials.</p> <ul style="list-style-type: none"> ■ The inSync Client fetches the user's AD information from the AD Server, such as the user's logon name, email, group information. ■ The inSync Client sends the user's AD information along with the mass deployment token to the inSync Server. ■ The inSync Server validates the information received and sends the activation response to the inSync Client. <ul style="list-style-type: none"> ● If the validation was successful, the inSync Server creates the user account and activates the inSync client for the user. ● If the validation was not successful, the activation fails. <p>For detailed instructions on each step of the IMD process, see Integrated Mass Deployment of inSync client.</p>

6.3 Step 3 of 4: Monitor backup progress

Ensure that first backups from user laptops are successful and the inSync Client is backing up the system and application settings from the user laptops. You can refer to 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.

If you notice laptops for which the first backup failed, or system settings have not been backed up, resolve the issues. For troubleshooting assistance, [Druva Support](#).

6.4 Step 4 of 4: Install inSync on replacement user laptops

When installing the inSync Client 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 until the time you withdraw the old laptops.

After you create an inSync account for such users, do one of the following:

- Let users [replace a laptop linked to their inSync account](#).
- You replace the inSync Clients on user laptops by using the [integrated mass deployment](#) (IMD) process.

If your users are already using multiple laptops, Druva recommends that you ask users to [replace a laptop linked to their inSync account](#). 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.



6.5 Mass installation process

As an inSync administrator, you can mass install inSync Clients on all user laptops. However, the installation and activation process might fail or succeed depending on the number of laptops the user already has and the OS of the laptops. 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	✓	✓	✓	✓
Only one	Different OS platform than the existing laptop	✓	✗	✗	✗
Multiple laptops	Any OS	✓	✗	✗	✗

6.6 Replace a device

The enhanced Integrated Mass Deployment (IMD) device/client activation process checks whether the device is an existing device (the same device name was already activated for the same user in inSync at an earlier point in time). If the same device

name already exists, inSync replaces the old device with the new device automatically for the user.

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	<p>If the value of the parameter is set to Yes, the laptop will replace the existing laptop.</p> <p>If the value of the parameter is set to No, the laptop will be added as a new device.</p>
RESTORE_SYSTEM_SETTINGS	Yes/No	<p>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.</p> <p>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.</p>
RESTORE_DATA	Yes/No	<p>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</p>

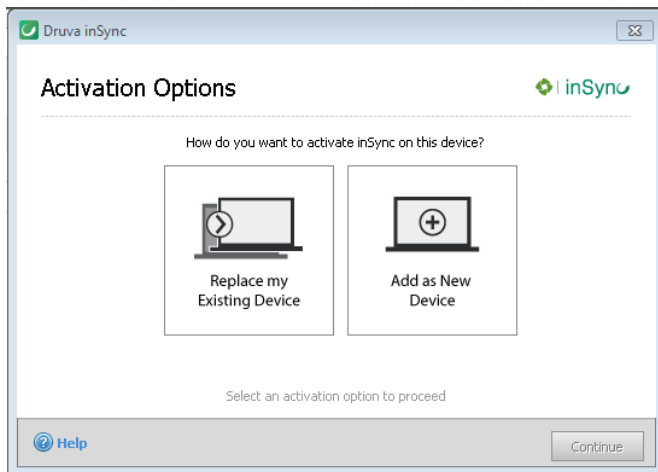


		<p>the user has one laptop and the new laptop has the same OS as the existing one.</p> <p>If the value of the parameter is set to No, the data backed up from the existing laptop will not be restored on the new laptop.</p>
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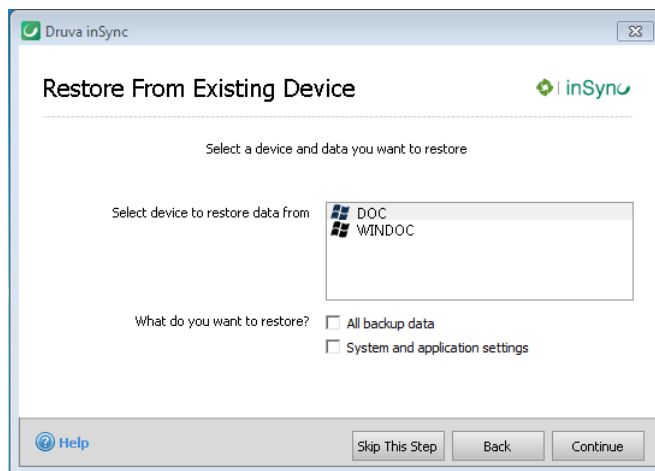
If possible, inSync will restore MAPI PST files to the original location. However, if inSync is not able to access the original location, it will restore the PST on the desktop. The restored PST file is renamed as **restore.pst**.

6.7 Manual installation process

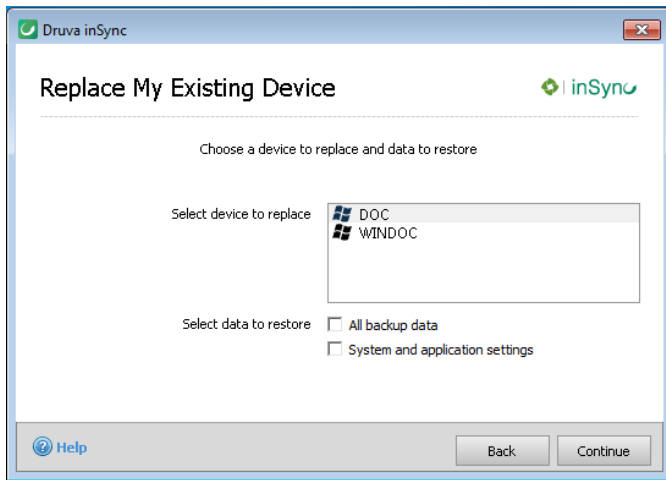
In situations where users have more than one laptop, it is best to let them [replace a laptop linked to their inSync account](#). During the installation process, the users have the option to replace an existing laptop or add a new device to their inSync account.



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



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



If the same device name already exists (the same device name was already activated for your username in inSync at an earlier point in time), inSync replaces the old device with the new device automatically. In such case, the following window appears.

If the same device name already exists (the same device name was already activated for your username in inSync at an earlier point in time), inSync replaces the old device with the new device automatically. In such case, the following window appears.

