Novell
ZENworks®
Personality Migration

6.5

INSTALLATION GUIDE

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Novell®

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Online Documentation: To access the online documentation for this and other Novell products, and to get updates, see www.novell.com/documentation.

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Contents

About This Guide

This *Novell ZENworks 6.5 Personality Migration Installation* guide consists of conceptual information to help you install and use Novell® ZENworks® Personality Migration.

The sections include:

Other Sources of Documentation

Miramar Systems has provided Release Notes for this release of Personality Migration. These notes include minimum installation requirements, minimum run requirements, installation instructions, and descriptions of new features. You can find these Release Notes (zenworks personality migration release notes.pdf) on the *ZENworks Personality Migration* CD in the / manuals folder.

You can also read an article on the ZENworks Cool Solutions Web site about Personality Migration. For more information, see Policy-Driven Personality Migration (http://www.novell.com/coolsolutions/zenworks/features/a_personality_mig_zw.html).

Documentation Updates

See the Novell Documentation Web site (http://www.novell.com/documentation) for the most current installation and administration information.

Documentation Conventions

In Novell documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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User Comments

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1 What Is Novell ZENworks Personality Migration?

Novell® ZENworks® Personality Migration is part of the Novell ZENworks product line, which also includes ZENworks Desktop Management, ZENworks Handheld Management, and ZENworks Server Management.

ZENworks products provide lifecycle directory-enabled management for all of your network components. For more information on the ZENworks product line, see the Novell ZENworks product Web site (http://www.novell.com/products/zenworks).

Novell has partnered with Miramar Systems to provide personality migration. Miramar Systems provides ZENworks Personality Migration, powered by Desktop DNA, to create the personality files. Novell provides ZENworks Desktop Management to distribute Application objects to collect, store, and apply personality settings to associated workstations.

The process of integrating Novell ZENworks Desktop Management and ZENworks Personality Migration consists of installing Desktop DNA, setting up a network directory structure to store Desktop DNA templates and personality files, creating the DNA template, and finally creating two Desktop Management Application objects. The first Application object collects the DNA personality from associated workstations and stores the files in a network location. The second Application object pushes and applies the DNA personality to associated workstations.

Desktop DNA lets you perform faster and more efficient PC migrations, upgrades, and backups. It uses the industry's only patented technology for customizing and automating the migration process of application and personal settings, applications, and data files. For more information about Miramar Systems and Desktop DNA, see the Miramar Web site (http://www.miramar.com).

ZENworks Personality Migration provides enterprise customers the fastest return on investment by saving time and resources every step of the migration process. Whether you are migrating to Windows* 2000 or XP, replacing or refreshing old machines, or building a desktop recovery process, ZENworks Personality Migration helps your organization increase IT staff productivity, reduce user downtime, and save money.

Personality Migration lets you migrate the following:

- **User Accounts:** User profiles for the logged-on user or for multiple users.

- **Desktop:** Shortcuts, system tray, wallpaper, display settings, and more.

- **Network Settings:** Dial-up settings, local network settings, TCP/IP and DNS settings, mapped network drives, folder and directory sharing, and more.

- **Printer Settings:** Printer settings are migrated if printer drivers are compatible with the destination system's operating system.

- **Applications:** ZENworks Personality Migration gives you the option to migrate any application on the source system.

◆ **Application Settings:** Preferences, templates, bookmarks, address books, macros, and other settings.

◆ **Files:** Any file can be migrated by selecting it from a check box tree, or by locating it with one or more search filters.

◆ **Folders:** You can migrate a folder and its contents or you can migrate entire folder structures.

ZENworks Personality Migration supports the following migration types:

◆ **Real-Time:** Real-Time migrations take place over a TCP/IP network and transfer a workstation's personality directly from the old workstation to a new workstation. This type of migration is useful if you are replacing an old workstation with a new workstation.This type of migration is not the focus of this guide. For more information on real-time migration, refer to the Help topics in the Desktop DNA program.

◆ **Deferred:** Deferred migrations save your personality file on your desktop, local or network drive, writable CD/DVD, or any external media. You can transfer your personality file to your destination workstation using a Desktop Management Application object. This type of migration is useful if you are not changing the workstation, but simply installing a new operating system or implementing a disaster-recovery process. The focus of this guide is to help you use ZENworks Personality Migration to create a template to collect users' DNA files, store them in a network location, and then collect and apply the DNA files using two Desktop Management Application objects.

2 **Preparing the Server for Personality Migration**

A functioning Novell® ZENworks® Desktop Management environment is a prerequisite for the ZENworks/Desktop DNA personality migration integration. This document is written with Desktop Management 6.5 as the basis; the concepts could be re-used with earlier versions. For installation instructions for Desktop Management, see the Novell ZENworks 6.5 Desktop Management Installation Guide.

In the following sections, you create a directory structure to store the Desktop DNA templates and DNA personality files. We recommend that you control Rights or Permissions to these directories by using groups.

The directories you create can be placed on a single server (the DNA server) or on multiple servers, depending on your LAN/WAN environment, the scale of the migration, and the ongoing requirements for life cycle management.

NOTE: You should not use the \sys: volume to house the \ddna directory.

The following sections contain additional information:

Creating the Desktop DNA Template Store

Desktop DNA templates can be thought of as policies defining the collection of settings and data from legacy workstations. Step-by-step instructions to create a template are provided in "Using the DNA Template Editor to Create the Template" on page 19.

You create DNA templates on the staging workstation and then store them in a network location that is accessible to users. You can store the templates on the DNA server or on another NetWare® or Windows server.

The following sections contain more information:

Creating the Template Store on a NetWare Server

1 Create a \ddna directory.

   This directory will hold the ZENworks Personality executable file, DNA templates, and workstation DNA personality files.

2 Copy the contents of the \ddnarun directory from the *ZENworks Personality Migration* CD into the \ddna directory on your server.

3 Create a \ddna\templates directory to be used as the storage location for Desktop DNA templates.

4 Provide users with Read and File Scan rights to this directory.

5 Provide OS and migration administrators with Write rights, in addition to Read and File Scan rights to this directory.

Creating the Template Store on a Windows Server

1 Create a \ddna directory.

This directory will hold the ZENworks Personality executable file, DNA templates, and workstation DNA personality files.

2 Copy the contents of the \ddnarun directory from the *ZENworks Personality Migration* CD into the \ddna directory on your server.

3 Create a \ddna\templates directory to be used as the storage location for Desktop DNA templates.

4 Share the \ddna directory as DDNA.

5 Provide users with basic Read permissions to this share.

6 Provide OS and migration administrators with Full Control permissions to this share.

Creating the Personality Migration Personality Store

A typical personality should be approximately 10-15 MB in size (assuming storage of Microsoft* Office settings, templates, and so forth). The size of the personality can grow to exceed 500 MB if user data is consolidated and relocated.

You should monitor the size and content of personalities and adjust templates as required.

Personalities can be stored anywhere, including the user home directory or Novell iFolder®. This guide discusses using a dedicated storage server for personality storage. Future integration solutions will include integration with NetWare and Windows user home directories and also Novell iFolder.

The following sections contain additional information:

Creating the Personality Store on a NetWare Server

1 On a NetWare server that users have access rights to, create a \ddna\data directory.

2 Provide users with Read, File Scan, and Write rights to this directory.

We recommend that you use group membership to control access to this directory.

A typical corporate personality store should start with a minimum of approximately 15 GB storage for personalities. As mentioned above, you should closely monitor the personality size.

Creating the Personality Store on a Windows Server

1 On a Windows server that users have access rights to, create a \ddna\data directory.

2 Share the \ddna\data directory as DDNADATA.

3 Provide users with Read and Write permissions to this share.

We recommend that you use group membership to control access to this share.

3 Preparing Workstations for Personality Migration

The following sections contain additional information:

- ◆ "Personality Migration Management Workstation" on page 15
- ◆ "User Workstations" on page 15

Personality Migration Management Workstation

The ZENworks Personality Migration management console is a Windows workstation typically used by the OS deployment and migration administrators. In addition to installing Personality Migration on this workstation, you should also install ConsoleOne® to allow management and creation of Desktop Management Application objects. For installation instructions for ConsoleOne, see the *Novell ZENworks 6.5 Desktop Management Installation Guide*.

In the previous version of ZENworks Personality Migration, in order to create a Personality Migration template that contained the application settings for all of the applications used in your organization, you were required to set up a staging workstation that had each corporate and line-of-business application locally installed. You then used this workstation to create a Desktop DNA template that defined the personality and application settings that will be subsequently collected from individual workstations in your organization.

In ZENworks Personality Migration 6.5, the Desktop DNA Template Editor is now included. This means that you no longer need to set up a workstation that has each corporate and line-of-business application locally installed. You can now use the Template Editor to define personality settings for most, if not all, of the applications used in your environment.

User Workstations

In order to collect and apply workstation personalities using ZENworks Personality Migration, user workstations need to be able to access the \ddna directory you created in "Preparing the Server for Personality Migration" on page 11.

User workstations must also have Microsoft XML parser 3 installed. Windows XP Professional workstations and workstations running Microsoft Internet Explorer 6 should already have XML parser 3 installed. If user workstations do not have XML parser 3 installed, you can download it at the Microsoft Download Center (http://www.microsoft.com/downloads/details.aspx?familyID=4a73fcf1-98eb-4709-829b-f4de94f5b5fe&displaylang=en).

You can install the XML parser by creating a Desktop Management Application object to install the XML parser system.
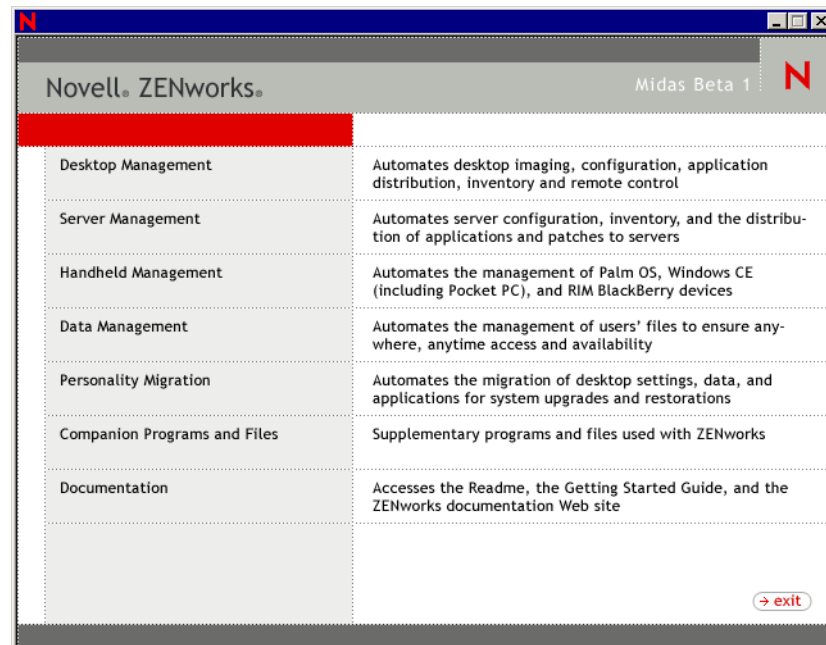
4 Installing ZENworks Personality Migration

You can run Novell® ZENworks® Personality Migration from a Windows server or from a Windows workstation. You use either the server or the workstation to open the Desktop DNA Template Editor to create the personality templates that will collect users' workstation personalities.

If you want to run the Desktop DNA Template Editor from a Windows server that is accessible to users, follow the directions in this section. If you want to install Personality Migration on a Windows server, you should install it in the \ddna directory that you previously created so that the program files, templates, and personality files are in one location. However, if you do not want to run the Template Editor from the server, the steps you performed in Step 2 under "Creating the Template Store on a Windows Server" on page 12 copied the necessary files to the server.

You can also install Personality Migration on the Personality Migration management workstation from which you will create personality templates.

To install Personality Migration:

1 Insert the *ZENworks Personality Migration* CD into the CD drive.

2 Click Personality Migration.

3 Click ZENworks Personality Migration.

4 Click Install ZENworks Personality Migration, review the information on the Welcome page, then click Next.

5 Review the license agreement, click I Accept the Terms of the License Agreement, then click next.

or

If you do not agree with the terms of the license agreement, do not install the software.

6 Fill in the fields in the Customer Information page, then click Next.

7 Click the type on installation you want: Typical, Compact, or Custom, then click Next.

8 On the Ready to Install the Program page, click Install.

9 On the Select Options page, click the options you want: View Readme, Run ZENworks Personality Migration, or Add Shortcut to Desktop.

10 Click Next, then click Finish.

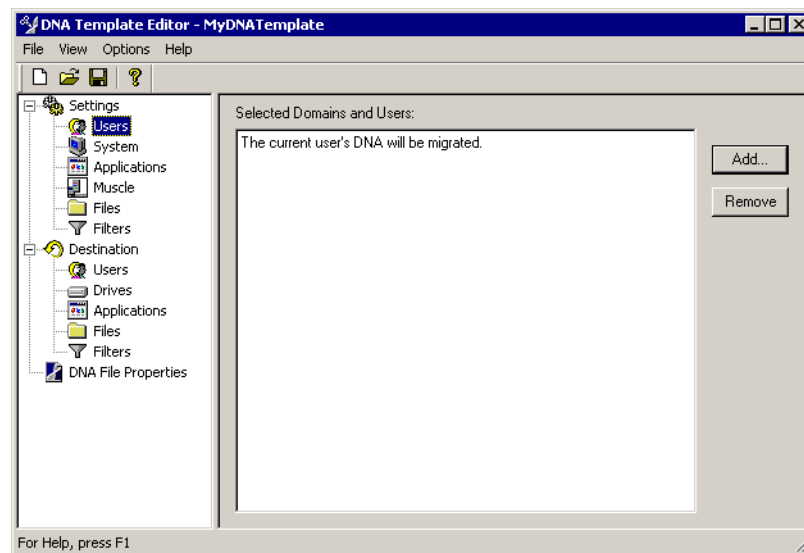# 5 Using the DNA Template Editor to Create the Template

Each customer can have specific requirements for his or her personality migration. It is outside the scope of this guide to define the various implications and parameters for each migration.

The main factors that will drive the complexity and, ultimately, the size and scope of the personality migration, are whether the legacy environment is well managed, whether the customer has an existing Standard Operating Environment (SOE), how many laptops and remote users are part of the migration project, and how much data is stored locally on workstations as opposed to network storage.

Desktop DNA templates can be thought of as policies defining the collection of settings and data from the legacy workstation.

To create the Desktop DNA template in the Template Editor:

1 Click Start > Programs > Novell ZENworks Personality Migration > Migration Management Toolkit > DNA Template Editor.

2 Select your template settings.

For detailed information about the Template Editor, see the online Help in the DNA Template Editor. The Help topics contain detailed information about the following settings:

Users: Lets you add or remove user profiles from your template. Unless you are a system administrator and logged into a system supporting multiple profiles, only the current user's settings are migrated. Current User is designated as the user who is logged into the computer at the time of the migration.

If the user is not an administrator who is logged in during the migration, then you should not add any users to the template. You should simply use the default, which is the current user logged into the system at the time of the migration. If you are only going to migrate the Current User, do not add any users to the template.

To add a user, click Users in the left pane of the Template Editor window, then click the Add button on the right side. You can use the Domains, Local, Special, and Unlisted tabs in the Add Users dialog box to select the user that you want to add.

System: Lets you edit all the system settings listed in the right pane of the Template Editor window.

To select System settings, click System in the left pane of the Template Editor window, click the Add button on the right side, then select the desired settings.

You can expand the folders by clicking the plus sign (+) next to each item.

Applications: Lets you edit application selections, such as applications, their settings, and their associated documents.

To select Application settings, click Applications in the left pane of the Template Editor window, click the Add button on the right side, then select the desired settings.

You can expand the folders by clicking the plus sign (+) next to each item.

Muscle: Lets you migrate applications for which there are no scripts available. These are called Muscle Migrations.

To select Muscle settings, click Muscle in the left pane of the Template Editor window, then click the Add button on the right side. Enter the filename for the application's executable. If you browse to locate the application's executable, remove the path information so that you can migrate this executable wherever it is located on the computers being migrated. Select the check boxes to specify that you want to migrate the application, its settings, and its associated documents on local drives, then click Add.

Files: Lets you edit file and folder migration selections.

To select Files settings, click Files in the left pane of the Template Editor window, click the Add button on the right side, then select the desired settings.

You can expand the folders by clicking the plus sign (+) next to each item.

Filters: Lets you edit the filters you created to implement a search for files, folders, or drives.

To select Filters settings, click Filters in the left pane of the Template Editor window, click the Add button on the right side, then select the desired settings.

3 To create the Desktop DNA template, click File > Save.

4 Use the default template name, mydnatemplate.dtf, or give the template a descriptive name and save the file on the server in the \ddna\templates directory that you created in "Creating the Desktop DNA Template Store" on page 11.

5 Click Save.

For the purposes of this guide, after you save the template, you are ready to create the Desktop Management Application objects to collect and apply the personality information. See "Creating the Application Object to Collect the Personality" on page 21 and "Creating the Application Object to Apply the Personality" on page 23 for more information.

6 Click File > Exit.

6 Creating the Application Object to Collect the Personality

The Application object you create in the following steps collects the DNA personality from associated workstations and stores the DNA personality files on the network. You can use the DNA personality files to restore users' personality settings after upgrading to a new OS or replacing hardware, or you can store the DNA personality files in a network location as part of your disaster-recovery process.

To create the Application object:

1 In ConsoleOne, right-click the container that you want to create the Application object in, click New, then click Object.

2 Click Application, then click OK.

3 In the New Application Object dialog box, select the Simple Application (No .AOT/.AXT/ .MSI File) option, then click Next.

4 In the Object Name field, type a name for the Application object, for example CollectDNA, then click Next.

5 In the Path to File field, browse to or type the path to the location on the network from which the application's executable file (desktopdna.exe) will be run. Include the executable file in the path.

You need to enter a UNC path (with server name or IP address).

6 Click Next, then define the system requirements that a workstation must meet before the application will be run. To do so:

6a Click Add, then select the type of requirement you want to define.

6b Fill in the information for the requirement, then click OK to add the requirement to the list.

7 Click Next, then associate the Application object with the users or workstations on which you want the application to run. To do so:

7a Click Add > browse for and select User or Workstation objects.

You can also select Group objects, Workstation Group objects, and container objects (Organizational Unit, Organization, or Country). If you select a container object, you are given the choice of associating all the container's User and/or Workstation objects with the application.

7b After you add the user or workstation to the list, click the Force Run check box.

Clicking the Force Run check box runs Desktop DNA as soon as Novell® Application Launcher™ or Workstation Helper starts and the CollectDNA Application object is run and the personality is taken.

8 Click Next, review the Application object settings, then click the Display Details After Creation check box, then click Finish.

9 Click the Run Options tab, then click Application.

10 In the Parameters field, type the following:

```
%DDNA_ACTION% %DDNA_DATA%\%DDNA_USER%\%DDNA_WS% /T
%DDNA_SOURCE%\Templates\%DDNA_TEMPLATE% /X %DDNA_SILENT%
```

For example, using the sample directories explained above:

```
/D \\server1\vol\ddna\data\%DDNA_User%\%DDNA_WS% /T
\\server1\vol\ddna\templates\mydnatemplate.dtf /X %DDNA_SILENT%
```

The following table contains information about each switch used in this parameter.

Switch	Description	Parameters
/T	Use a template to specify migration settings.	Template file to use for this migration. Use a UNC path to specify the location.
/M	Starts the migration.	
/X	Exits Desktop DNA ZENworks Edition when migration is completed unless an error occurred.	

The following table contains information about each CollectDNA macro in this parameter.

Macro	Value	Description
DDNA_ACTION	/D	Dumps or takes the personality of the workstation
DDNA_DATA	UNC path to ddnadata share or directory	Specifies the directory where the personality file will be copied to or retrieved from
DDNA_SILENT	/Q or Empty	/Q: Silently performs the action Empty: Provides a progress dialog box as the action is performed
DDNA_SOURCE	UNC path to ddnarun share or directory	Directory where the Desktop DNA executable is located
DDNA_TEMPLATE	Template file	Filename of the template file to use
DDNA_USER	%CN%	User name of the current user
DDNA_WS	%DNA_MACHINE_NAME%	Workstation machine name

11 Click OK to save the Application object information.

7 Creating the Application Object to Apply the Personality

To create an Application object to apply the personality to users' workstations, you copy the information from an existing Application object.

1 In ConsoleOne®, right-click the container that you want to create the Application object in, click New, then click Object.

2 Click Application, then click OK.

3 Click An Application By Using an Existing Application Object.

4 Click Next, then browse to and select the Application object you want to duplicate (in this example, the CollectDNA object).

5 Click Next.

6 In the Object Name field, type a descriptive name for the new object (ApplyDNA, for example), then click Next.

7 If necessary, define the system requirements that a workstation must meet before the application is distributed to it, then click Next.

8 Associate the Application object with the users or workstations that you want to distribute the application to, click the Force Run check box, then click Next.

9 Review the settings for the Application object, select the Display Details After Creation check box, then click Finish.

10 Click the Run Options tab, then click Application.

11 In the Parameters field, type the following:

```
%DDNA_ACTION% %DDNA_DATA%\%DDNA_USER%\%DDNA_WS% /T
%DDNA_SOURCE%\Templates\%DDNA_TEMPLATE% /X %DDNA_SILENT%
```

For example, using the sample directories explained above:

```
/A \\server1\vol\ddna\data\%DNA_User%\%DDNA_WS% /T
\\server1\vol\ddna\templates\mydnatemplate.dtf /X %DDNA_SILENT%
```

The parameter is the same as the parameter for the CollectDNA Application object except the /D (create the DNA file) switch has been replaced with the /A (apply the DNA file) switch.

The following table contains information about each switch used in this parameter:

Switch	Description	Parameters
/T	Uses a template to specify migration settings.	Template file to use for this migration.

Switch	Description	Parameters
/M	Starts the migration.	
/X	Exits Desktop DNA ZENworks Edition when migration is completed unless an error occurred.	

The following table contains information about each ApplyDNA macro in this parameter.

Macro	Value	Description
DDNA_ACTION	/A	Applies a personality to a workstation
DDNA_DATA	UNC path to the ddnadata share or directory	Specifies the directory where the personality file will be copied to or retrieved from
DDNA_SILENT	/Q or Empty	/Q: Silently performs the action Empty: Provides a progress dialog box as the action is performed
DDNA_SOURCE	UNC path to the ddnarun share or directory	Directory where the Desktop DNA executable is located
DDNA_TEMPLATE	Template file	Filename of the template file to use
DDNA_USER	%CN%	User name of the current user
DDNA_WS	%DNA_MACHINE_NAME%	Workstation machine name

12 Click OK to save the Application object information.

8 **Upgrading Personality Migration**

Novell® ZENworks® Personality Migration is powered by Miramar Desktop DNA. Desktop DNA now includes the Template Editor, which eases the process of creating desktop templates used for migrations. For a more detailed list of enhancements, see the Release Notes (zenworks personality migration release notes.pdf) in the /manuals folder on the *Personality Migration* CD.

If you are upgrading Personality Migration, follow the installation instructions in "Installing ZENworks Personality Migration" on page 17. A prompt will notify you that the previous version will be uninstalled before proceeding with the new installation.