

**Laplink® Software, Inc.**

# PCmover® Enterprise Policy Manager User Guide

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The Only Software that Moves Programs, Files, and  
Settings to a New PC!

## Laplink Software, Inc.

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# Overview

PCmover is composed of three essential components that interact to manage a successful migration. The Policy Manager is used by administrators to create the Master Policy File (MPF). The MPF is used to control the migrations, and the third component, the PCmover Client, is executed by the clients.

**PCmover Policy Manager:** The module used to configure and customize migrations through creating and editing policy files. In a policy file, you can specify what programs, files, and settings you want transferred, which PC and/or user is allowed to do the migration, and to which PC the data will be transferred. A license can also be pre-activated for an offline migration.

**PCmover Client:** The migration application that will transfer the programs, files, and settings from the user's source (old) PC to the target (new) PC, depending on the customized settings and configurations set up by you (the IT Administrator) in the policy file. PCmover Client can be installed and run from the user's source and target PCs, or directly from a corporate network or removable storage device.

For instructions on performing a migration using PCmover Client, see the PCmover Client user guide on Laplink's Web site: [www.laplink.com/enterprise/documentation](http://www.laplink.com/enterprise/documentation)

**Master Policy File (MPF):** Overriding file that applies to and controls all migrations. Usually, this file will have few migration restrictions, as any choices made in this file will apply globally. For example, if your corporation has a policy of no game applications on company PCs, the Master Policy File can be set to allow all applications to be transferred except for game applications. A Master Policy File is automatically created during installation of the Policy Manager. It is saved in the same root directory as the PCmover Client executable.

**Session Policy File (SPF):** Secondary file that can be set up to apply to a group of PCs (ex., Accounting) or to a specific pairing for a migration between two PCs. You have the option of creating and editing Session Policy Files after you have configured your Master Policy File. Any settings that are in a Session Policy file will override settings in the Master Policy file. If a setting in the Session Policy file is left at the default value, the corresponding setting in the Master Policy File will take precedence.

## Migration Strategies

There are multiple ways to run a user migration, from full user interaction to zero touch migrations. Many IT managers strive to reduce user interaction to avoid potential mistakes. PCmover Enterprise supports the most common IT strategies for deploying new desktop operating systems.

**Light touch:** Using policy files, you can place restrictions on PCmover migrations. The user's choices in the PCmover screens can also be limited, giving the user a 'light touch' migration.

**Zero touch:** If you make all the choices in the policy file, then the migration is automated, with no decisions needed by the user.

# Installation

## Pre-Installation Information:

**Network Domain PCs:** Corporate PCs on the network domain should be connected and logged into the domain at least once prior to the migration. If a domain user profile will be migrated, then the migration must be run with domain administrator privileges unless the user has logged into the new PC at least once.

**Users:** Be sure to log on as the same user on both the source (old) and destination (new) PC to ensure that the profile for that user is migrated correctly.

**Firewall(s):** During product activation, PCmover must have an active Internet connection that is not restricted by a firewall, whether it is a software firewall or a hardware firewall. Additionally, firewall(s) could potentially block communication over network ports between PCs. Confirm all firewalls are disabled prior to migration.

**Anti-virus and Anti-spyware Applications:** Antivirus software/services should be turned off/disabled. Antivirus software slows the migration significantly and may cause a full or partial failure of the migration.

**Application Compatibility:** Be sure that programs are compatible with the target operating system. If you determine that an application isn't compatible with the new operating system, PCmover supports black and white lists to select applications for migration.

## Minimum Requirements:

**Operating System Minimums:** Windows Server 2003 or later

**Clients:** Windows XP or later (non-server operating systems only)

**Disk Space Requirements:** Full install – 180 MB  
Client Directory – 90 MB

## Installing PCmover Enterprise:

1. Save **PCmover\_Enterprise.exe** to your PC from the download URL given to you by your Laplink Corporate Sales Representative.
2. Run **PCmover\_Enterprise.exe**. Before the PCmover Enterprise InstallShield Wizard opens, the **.Net 3.5 Framework Setup** might launch. The **.Net 3.5 Framework** is needed to run PCmover Policy Manager.
3. Once the **PCmover Enterprise InstallShield Wizard** opens, follow the on-screen prompts until you reach the **Custom Setup** screen.
4. On the **Custom Setup** screen, you have the option to change the installation location for PCmover Enterprise.

## Running PCmover Client:

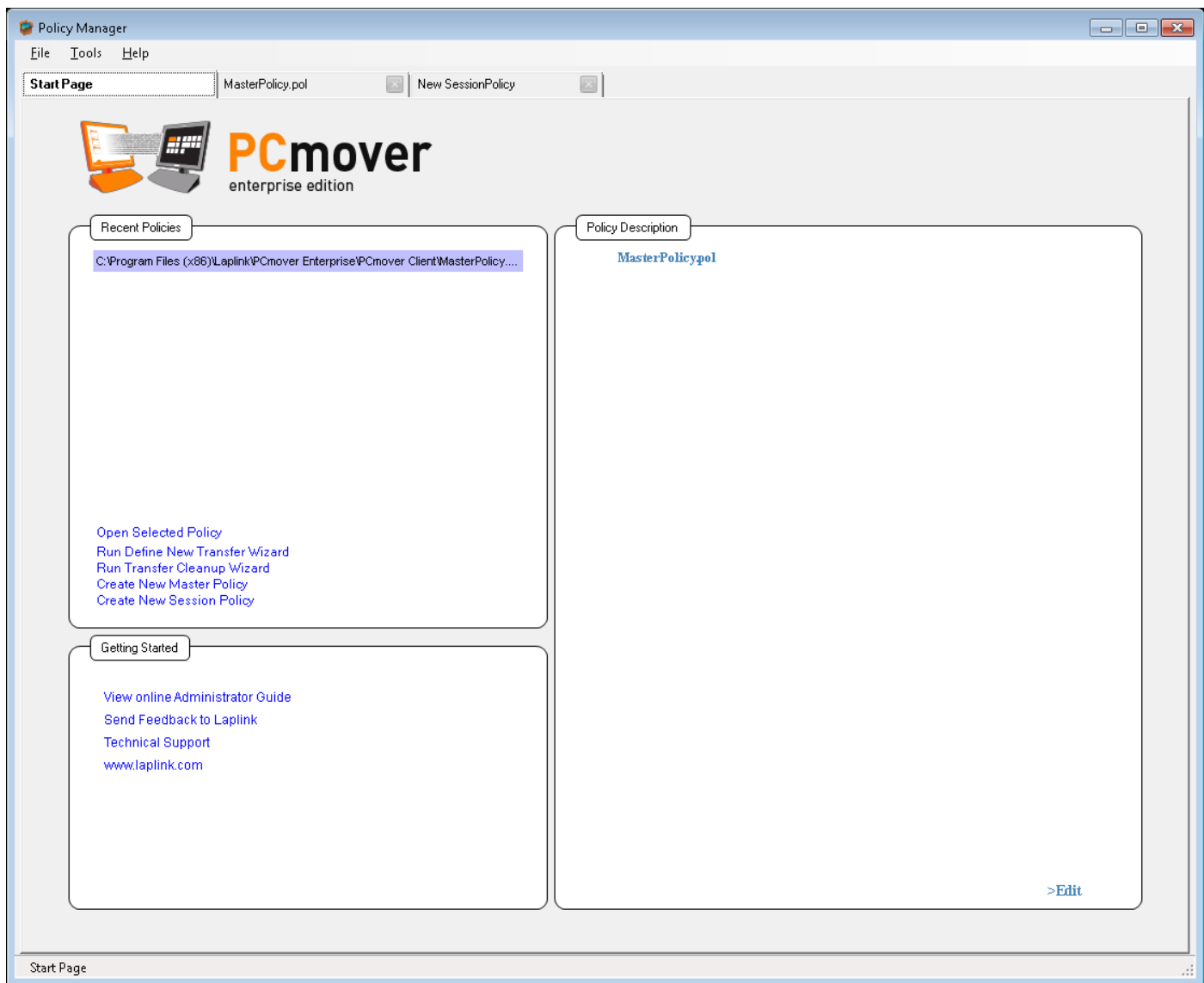
For instructions on performing a migration using the PCmover Client, see the PCmover Client user guide on Laplink's Web site: [www.laplink.com/enterprise/documentation](http://www.laplink.com/enterprise/documentation)

# Policy Manager

## User Interface:

Through the Start Page, you can view your recent Policies and their descriptions. You can also access this user guide, contact technical support, and send feedback to Laplink.

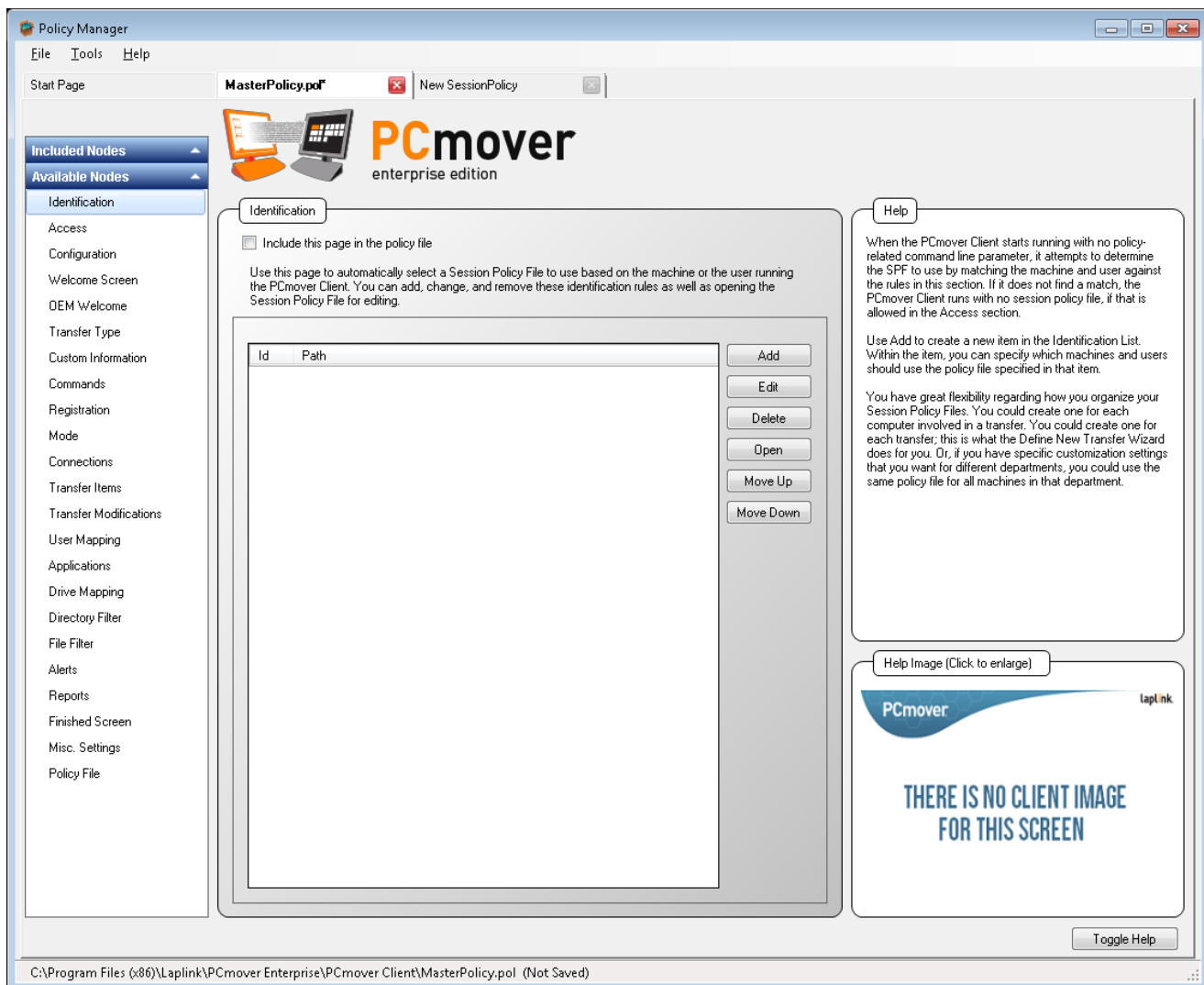
Through the Policy Manager, you can edit the Master Policy File. Only one Master Policy File can be used at one time, and the Master Policy File must be named 'MasterPolicy.pol'. The first time you make changes to the Master Policy File, choose to "Save As" and make sure the file is saved to the PCmover Client root folder. The Policy Manager can create two types of Policy Files: Master Policy Files and Session Policy Files. The tabs on the left hand side of the window are slightly different, depending on whether you are working within a Master Policy or Session Policy. The title bar on the Policy Manager window will indicate whether you are working within a Master Policy or Session Policy File.



# Configuring a Master Policy

**Overview:** At the top of each tab (node) discussed below is an option to “include this page in the policy file”. If it remains unchecked, any migration settings that are modified in that page will NOT be included as part of the migration and the settings will NOT be saved in the policy file. If the box is checked, the page will be included in the migration and any changes made will be saved in the policy file. Tabs included in the policy file are in the ‘Included Nodes’ list in the upper left corner. Tabs NOT included are in the ‘Available Nodes’ list in the lower left corner. Each tab also contains an option to be interactive or not interactive. Interactive screens will be presented to the user. Screens that are not interactive will not be displayed to the user, and must be fully configured within a policy file. The default is set to be interactive. For both the Master Policy File and Session Policy Files, edits can be made by making choices and selections in these tabs. Many of the tabs directly correspond to a screen that the user may see in the PCmover Client. For those tabs that directly correspond to a screen in PCmover Client, the image in the lower right will show an example of that screen.

**Order of Tabs (Nodes):** The tabs are listed in this guide in the order they are displayed in the Available Nodes list. If “include this page in the policy file” is selected for a tab, it will be moved to the bottom of the Included Nodes list. The order of tabs in Included Nodes can be changed by dragging and dropping tabs as desired. Any of these changes will result in a different order of tabs than is listed in this guide.



**Showing changes made in the Master Policy File:** All tabs/nodes that have been changed from the default (MasterPolicy.dflt) can be shown in blue text in the list on the left side of the window. This setting is off by default. To enable it, go to the **Tools** menu, click **Options**, and select **'Display Blue Nodes...'**

## **'Identification' Tab:**

When the PCmover Client starts running with no policy-related command line parameter, it attempts to determine if there is an SPF to use by matching the machine and user against the rules in this section. If it does not find a match, the PCmover Client runs with no session policy file, if that is allowed in the Access section.

Use **Add** to create a new item in the Identification List. Within the item, you can specify which machines and users should use the policy file specified in that item. The "Add" option in this tab allows the administrator to determine which PCs or users are allowed access to the policy file when processing a migration. If the user or machine name is not added to the identification list, then the migration will not be allowed.

If you choose to set up a general rule on the Master Policy's Identification tab to apply a Session Policy File to all PCs, we recommend that you set up this general rule last. PCmover Enterprise will check the list from top to bottom for a Session Policy File that it is allowed to use for a specific migration. If the general rule is set up first, it will be at the top of the list and the application will always use that rule for migrations (even if there is a more specific rule further down the list that you designated to have used for a certain migration). You may also choose to use the Session Policy File Name ("PolicyFile") or Session Policy ID ("PolicyID") methods of specifying a Session Policy File to avoid unintentionally using the general rule for a migration; this is also discussed in the Session policy section.

## **'Access' Tab:**

This section gives you some control over how the PCmover Client can be accessed. It is primarily useful to make sure that only the migrations that have been configured by Policy Manager take place. To make sure that users do not bypass use of a Session Policy File, choose "Require a Policy File when running PCmover" on this tab.

## **'Configuration' Tab:**

In the Policy File, you can specify what directory the PCmover Client will use for certain data. None of these need to be set in the policy file; they all default to sub-directories below the PCmover Client directory. This policy gives the flexibility to provide a different set of rules or application profiles for different migrations, and to control where the proprietary log files are stored.

Since the PCmover Client will need to access the data in these directories, you should not use local drives or mapped drive letters that will not be correct when the client is running. The easiest way to avoid this problem is to use relative paths, which are resolved relative to the PCmover Client directory. Failure to specify directory paths will result in the new/target client storing them locally on migrated machine.

Ensure your users have write access to any directory you configure.

## **'Welcome screen' Tab:**

If allowed, this screen welcomes the user to the migration. You can choose to have PCmover automatically check for updates.



Custom text can be specified using the text boxes.

See the 'Transfer Type' tab for other settings on this 'Welcome' screen.

### **'OEM Welcome' Tab:**

This screen is an optional second Welcome screen, displayed immediately after the main Welcome screen, and can be used to display a message to the user.

### **'Transfer Type' Tab:**

PCmover gives the option for different types of transfers.

Three different transfer types are supported: PC to PC Transfer, Windows (In-Place) Upgrade Assistant, and Image & Drive Assistant. Enable a Default Selection to have the PCmover Client select the specified transfer type by default.

A PC to PC Transfer is either file based or synchronous through a connection (network, crossover Ethernet or Laplink USB cable). Image & Drive Assistant is a migration from a mounted image of the source machine, and the Windows (In-Place) Upgrade Assistant is not recommended for enterprise deployments, because typically the machine's hard drive is reformatted for the new OS install.

#### **Default selections for drop-down menus:**

Interactive: Yes

Hide Disabled: No

### **'Custom Information' Tab:**

The PCmover Client can display introductory pages with your own information, or include additional information in a summary report. Just add each item on this page. You can specify this information:

- Whether it is Interactive, defining a page that is displayed, or is only for adding specific data to the summary report.
- The Title to be displayed when it is Interactive.
- The Explanation to be displayed when it is Interactive.
- The Report Header to be used in the Summary Report. If you want the user-obtained information recorded in the migration report, enter an identifying title for this information. You may also enter information here that you want directly written to the migration report, but never displayed on a screen to the user. Make sure to choose No from the Interactive drop-down menu for this to occur.
- Text that can be edited by the user, if it is Interactive, or included in the summary report.
- A Prompt for the text to be displayed when it is Interactive.

#### **Default selection for drop-down menu:**

Reset: No

Be careful, if you append summary reports together, that you provide the same custom information for each migration.

You could use this to request the technician name or the trouble report ID, or to log a specific ID in the summary report, or to display specific instructions, or for any other purpose.

### **'Commands' Tab:**

With this policy page, you can specify a particular action for the PCmover Client to perform without requiring the user to select it. The choices are:

- Send - This is run on the source computer to migrate to the target computer.
- Receive - This is run on the target computer to receive a migration from the source.
- Undo - This is run on the target computer to undo a previous migration.
- PC Analysis - This can be run on the target computer as the first step of a file-based migration, or it can be run on any computer if you want to create a PC Analysis file to view in PCmover Control Center.
- Disallow - This action means that PCmover should not do anything. It can be used instead of the Authorization section to prevent actions on computers that are not configured for this policy file.

### **'Registration' Tab:**

By pre-setting the information on this page, PCmover will automatically activate itself without prompting the user for information. You will normally enter your multiple license serial number on this page. Be aware that anyone using this policy file will be able to migrate using your serial number, and so be careful about the distribution of this file.

If the target computer will not have Internet access, you can pre-register the migration here. If you do that, Policy Manager will validate the serial number and use one of the licenses on it, storing a Validation Code in the policy file. It is important to understand that the license will be used up even if you do not perform the migration, and so you should be cautious before using this feature.

### **'Mode' Tab:**

On this tab, choose whether the PCmover client will run in Basic/Standard mode or Full Customization mode. If you select Full Customization, the PCmover client will display the 'Customize the Transfer' screen, from which the user can access advanced screens to set custom settings and selectively migrate applications, user accounts, drives, file types, and folders. On the tabs corresponding to these screens, you must also select to "Include this page in the policy file" and set 'Interactive' to 'Yes' for the user to access these screens. Otherwise, the corresponding buttons on the 'Customize the Transfer' screen will be disabled.

Tabs corresponding to the advanced screens are: 'Transfer Items', 'Transfer Modifications', 'User Mapping', 'Applications', 'Drive Mapping', 'Directory Filter', and 'File Filter'.

### **Default selections for drop-down menus:**

Interactive: No

Default: Basic

## 'Connections' Tab:

PCmover allows multiple methods of connecting the old computer to the new computer. On this screen you can predefine which methods are presented to the user doing the migration. Selecting only one option will cause the screen to be bypassed entirely.

Some migration scenarios will require you to run a transfer even when you don't have a way to directly connect the two PCs. In these scenarios, PCmover allows you to run a migration and save it as a file to a specified location. That file can then be uploaded to the new PC when ready or convenient.

The steps below show how to modify a policy file so it can automatically save the PCmover migration to a predetermined folder location on your network:

1. Next to the "Enable File Storage Device Transfer", select the "Configure" button.
2. In the "Transfer File" field, enter the relative or absolute location for the directory in which you wish to save the PCmover Transfer file (i.e. - \\network\PCmoverFolder\%USERNAME%.pcv)
  - a. Environment variables are supported in file naming convention - %USERNAME% or %COMPUTERNAME% - but make sure to add .pcv as this is the PCmover File Type.
  - b. 'Always allow user to modify transfer file' and 'Modify only if transfer file does not exist' – These options allow you to designate whether the user can choose to use a different transfer file than is specified by the Policy File.
  - c. 'Use a PC Analysis file' and 'PC Analysis' – These options are available if you wish to provide PCmover with a PC Analysis file of the new PC. This can help create a smaller file size so no duplicate files or applications are saved from the old PC.
  - d. 'Span Size' and 'Span Notify' – These options allow you to define how big PCmover should save incremental files and whether you should be notified. This option is good for burning CD/DVD to make the transfer.
  - e. 'Password' - Password can be set that the user is required to enter in PCmover Client to unload the transfer file.
3. Go to **File** and select **Save** to update your policy file.

**Note: File Storage Device is available as a migration option if it was specifically included in your company's PCmover Enterprise purchase.**

### Default selection for drop-down menu:

Hide Disabled: No

## 'Transfer Items' Tab:

The PCmover Client will normally migrate all files, settings, and applications that do not already exist on the new computer. However, the user is allowed to restrict the items that are migrated through a screen in PCmover Client. If you desire to pre-set these restrictions for the user, you may do so on this tab. If you want the user to only migrate files, for example, select "**Files only**" here.

If you choose to migrate "Files and Settings only" or "Files only", the user will be restricted from migrating applications and/or settings, regardless of choices you make in other tabs in the Policy Manager.

This tab corresponds to the 'Custom Settings' screen in the client. For other settings accessed by the 'Additional Settings' button on this screen, see the 'Transfer Modifications' tab.

### **Default selection for drop-down menu:**

Interactive: Yes

### **'Transfer Modifications' Tab:**

In some cases there may be a need to configure some of the more advanced modification options for a migration such as "Not moving the Outlook Express Identity and Address Book", which are listed under 'Additional Settings' on the 'Custom Settings' screen in the PCmover Client. If you do not include this page in the Policy File the default action will be taken for each option.

### **Default selections for drop-down menus:**

Interactive: Yes

Reset (Items): No

Reset (Rules): No

### **'User Mapping' Tab:**

During a migration, PCmover Client matches user accounts on each computer, and it creates any users as necessary on the target computer to correspond to migrated users from the source computer.

Through a screen in PCmover Client, the user can view and modify these mappings. Using the options on this tab, you have control over the mappings and over a user's ability to change them.

Options for Mapping Users:

- Map a particular user from the source computer to a particular user on the target computer.
- Prevent a particular user from being migrated at all.
- Prevent the PCmover Client user from modifying the pre-configured mappings.
- Prevent PCmover Client from creating any new users on the target computer.
- Set PCmover Client to transfer only the current user.
- Set PCmover Client to defer creation of a user's profile until the first time the user logs in. This option is designed to help prevent transfer errors due to domain privilege restrictions.

Sometimes a PC will have multiple users that will need to be transferred to the new PC. The Policy Manager will allow you to customize the User Mapping step of the PCmover Client, giving you greater flexibility in defining how your user accounts get transferred.

The steps below show you how to customize the User Mapping selection list:

1. Review the filter options available:
  - a. Allow Users Creation: Yes or No
  - b. Transfer only Current User: Yes or No
  - c. Transfer User Profiles Only: Yes or No. If set to yes, PCmover will exclude all applications and data from transferring.
  - d. Reset: Yes or No. If set to "Yes", this attribute clears the list of <User> tags that may have been set by previously processed policy files.
  - e. Current (User) to Current (User): Yes or No
  - f. Only Users with Profiles: Yes or No

- g. Only Regular Users: Yes or No
  - h. Logon Days: 0 to 999. Will transfer users based on last login date.
  - i. Defer User: Never, On Error, Created, or All. PCmover supports deferring the creation of each user's new files and settings until the first time the user logs in.
    1. Never: PCmover never defers user data.
    2. On Error: PCmover will defer user data for any user that it creates but which it gets an error when trying to create the profile, generally due to some domain privilege restrictions.
    3. Created: PCmover will defer user data for all created users.
    4. All: PCmover will defer user data for all transferred users.
2. Once you've set your default User Map filter options, you can customize specific User Map scenarios by clicking the "Add" button.
  3. Choose the Source User and corresponding Target User and select whether the specified user should migrate or can be modified.
  4. Go to **File** and select **Save** to update your policy file.

#### **Default selections for drop-down menus:**

Interactive: Yes

Allow Users Creation: Yes

Transfer only Current User: No

Transfer User Profiles Only: No

Reset: No

Current to Current: Yes

Only Users with Profiles: No

Only Regular Users: No

Defer User: On Error

#### **'Applications' Tab:**

The PCmover Client will normally migrate all applications that are not already installed on the target computer, or that are prohibited by an application profile. This policy page lets you specify applications that should be pre-set to migrate or not. You can also specify that no applications should migrate other than specified ones.

Applications that you may not want to migrate could include:

- Forbidden applications, such as certain games.
- Old versions of programs that have a newer version already installed on the target computer.
- Obsolete applications that are no longer being used.

Many times desktop administrators will want to filter an application(s) from transferring to the target PC. As an example, you may not want to transfer any applications that are pre-installed on the base image of the new PC. This enables you to transfer the non-standard applications only.

The steps below show you how to create an application filter list:

1. Select **Add**.
2. Choose from one of three filter options – Application ID, Application Name, or Publisher (i.e. Microsoft).
  - a. The application name can include the "\*" wildcard character.

- b. Application ID is specific to application versions.
- 3. Set the Transfer drop-down option to **No** to automatically deselect it from the application list.
- 4. Set "Allow Users to Modify" to **No** so the end user cannot transfer it by mistake
- 5. Go to **File** and select **Save** to update your policy file.

**Transfer 32-bit to 64-bit:** If this drop-down is set to "Yes", this attribute allows unknown 32-bit apps to transfer to a 64-bit platform by default.

**Show Safety:** If set to "Yes", PCmover will display colors on the 'Application Selections' screen that indicate which applications will transfer successfully:

- Green: Application is compatible for transfer. Application check box is 'checked' and application will be transferred.
- Red: Application is not compatible for transfer. Application check box is 'unchecked' and application will not be transferred.
- Yellow: If transferring from 32-bit operating system (OS) to 32-bit OS, or 64-bit OS to 64-bit OS, application is most likely compatible. Application check box is 'checked' and application will be transferred.
- Yellow: If transferring from 32-bit OS to 64-bit OS, application may not be compatible. Application check box is 'unchecked' and application will not be transferred.

**Default selections for drop-down menus:**

Interactive: Yes  
 Transfer All by Default: Yes  
 Show Unregistered Applications: No  
 Display Show Unregistered Applications Checkbox: Yes  
 Reset: No  
 Modify Selected: Yes  
 Transfer 32bit to 64bit: No  
 Show Safety: Yes

**'Drive Mapping' Tab:**

During a migration, PCmover Client matches hard drives on the source and target computers. If a source drive letter does not exist on the target computer, it creates a sub-directory off of drive C for the migrated data. Through a screen in PCmover Client, the user can view and modify these mappings. Using the options on this tab, you have control over the mappings and over a user's ability to change them.

Options for Mapping Drives:

- Map a particular drive from the source computer to a particular drive or sub-directory on the target computer.
- Prevent a particular drive from being transferred at all.
- Prevent the PCmover Client user from modifying the pre-configured mappings.

**Default selections for drop-down menus:**

Interactive: Yes  
 Reset: No

## 'Directory Filter' Tab:

The PCmover Client will normally transfer all files from all directories (other than temporary directories) to the corresponding location on the target computer. PCmover never overwrites files that already exist on the new computer. The Directory Filter screen allows the user to choose certain directories that should not migrate. On this screen, you can specify the full absolute directory path of those directories that should not migrate.

Directories that you may not want to migrate could include:

- Backup storage locations
- Data directories for applications you are not transferring

The steps below provide you with a step-by-step guide to filter directory paths from transferring to the new PC:

1. Select **Add** and enter the location or path that you do not want transferred to the target PC.
2. Choose whether you want the PCmover user to modify this filter and whether or not it should transfer to the new PC.

Go to **File** and select **Save** to update your policy file.

### Default selections for drop-down menus:

Interactive: Yes

Reset: No

## 'File Filter' Tab:

The PCmover Client will normally transfer all files that do not already exist to the target computer. The File Filter screen allows the user to choose files, as specified by a wildcard pattern, which should not migrate. This policy page lets you specify masks of files that should not migrate.

Files that you may not want to migrate could include:

- Temporary files (e.g. \*.tmp)
- Backup files (e.g. \*.bak)
- Obsolete data files (e.g. OldProg.mdb)

### Default selections for drop-down menus:

Interactive: Yes

Reset: No

## 'Alerts' Tab:

This allows you to request email notification of the completion of a migration. Alerts can be sent to multiple recipients by adding them to the list.

Sometimes when a desktop support team is running several PCmover migrations simultaneously, it is helpful to receive an alert notification for when a migration has finished. This helps save time because the user is no longer required to continually check in on a migration or monitor its progress, as they can simply wait for the email notification.

The steps below provide an overview on how to set up automatic alert notifications for events related to the PCmover wizard process:

1. Fill out the fields titled Name, Email and Message.
  - a. Environment Variables can be used in the “Message” field to help identify which migration applies to which email alert.
2. Select ‘Add’.
  - a. Set Interactive – ‘Yes’ to show the step, ‘No’ to hide
  - b. Select Type to ‘Done’
  - c. Choose the Name, Email and Message as with the header fields
3. Go to **File** and select **Save** to update your policy file.

#### **Default selection for drop-down menu:**

Reset: No

### **‘Reports’ Tab:**

PCmover can generate several types of reports at the end of a migration. These reports are saved in a Comma-Separated-Values (CSV) format that can easily be imported into a spreadsheet or database.

Each report is available in a shorter, exceptions only, version. This would include, in some cases, only the items that encountered an error. It is less complete but may contain those specific items that are of the greatest interest.

Each report can be appended to an existing file or can create a new file. Typically, the single line Summary report is appended to a file of summary reports, but the detail reports are stored in their own files.

If the text “{Machine}” appears in the file name, that is replaced with the network name of the computer that generated the report. This way, you can have multiple computers store reports in the same location and easily keep track of them.

Many times an audit trail is required in organizations that need to record and track the information transferred between PCs. The PCmover Policy Manager gives you the ability to create several types of reports whenever a migration occurs and save them automatically to a predetermined location on the network.

Below are the steps to configure a policy file that will automatically save four types of reports (Summary Report and Detailed Reports for Applications, Disk Items and Registry Items).

1. Open the PCmover Enterprise Policy Manager and navigate to the policy file you wish to modify (default policy file is MasterPolicy.pol).
2. Select the “Reports” tab.
3. Set Interactive to **Yes** or **No** depending on if you want this step displayed in the PCmover Wizard.
4. Identify the Reports Directory – choose a relative or absolute path for where you want each report saved.
5. **CSV** is the file format that will be used for the report.
6. Select **Add Summary** and define the file name (i.e. – “Summary for %USERNAME% on %COMPUTERNAME%.csv”
7. Select **Add Detail**, then define the report type and file name (i.e. - Applications for %USERNAME% on %COMPUTERNAME%.csv)



- a. Repeat steps 1 thru 7 for building other report types.
  - b. Use Environment Variables to help identify which file applies to each specific migration.
8. Go to **File** and select **Save** to update your policy file.

**Default selection for drop-down menu:**

Interactive: No

**'Finished Screen' Tab:**

- Restart: This controls the restart option after finishing a migration on the target computer.
- Allow user to Modify: This controls whether the user can change the value.

**Default selection for drop-down menu:**

Interactive: Yes

**'Misc. Settings' Tab:**

- Display UI: This specifies whether the user interface should be displayed. If it is not, all settings must be specified in a policy file.
- Display Warning Page: This specifies whether the warning screen that requires the user to check a box is displayed.
- Display Info Pages: This specifies whether intermediate information pages of the Wizard should be displayed.
- Display Ready Pages: This specifies whether "Ready to Start" is displayed requiring the user to click "Next" on the progress screens.
- Allow Stop: This controls whether the progress screens allow the user to click the "Stop" button.
- Only allow Administrator users to run PCmover: If set to "Yes", PCmover will refuse to run if the logged on user does not have administrative rights.
- Rename MAPI: If set to "No", PCmover will not automatically rename Outlook data files and profiles that are migrated.

Sometimes desktop support personnel who frequently use PCmover will want to automate the PCmover Client as much as possible, keeping the number of clicks and interactions to a minimum. Policy Manager gives you the ability to hide these non-essential screens during the PCmover migration process.

The steps below show you how to hide different parts of the PCmover client wizard interface:

1. Deselect the User Interface elements you wish to hide
  - a. Display UI – Specifies whether the user interface should be displayed at all. If it is not, all settings must be specified in the policy file.
  - b. Display Warning Page – Specified whether the warning screen that requires the user to check a box is displayed.
  - c. Display Info Pages – Specified whether intermediate information pages of the PCmover Wizard are displayed.

- d. Display Ready Pages – Specifies whether “Ready to Start” is displayed requiring the user to click “Next” on the progress screens.
2. Go to **File** and select **Save** to update your policy file.

## **‘Policy File’ Tab:**

Allows a policy file to cause another policy file to be processed, like an "include" file.

### **Default selection for drop-down menu:**

Required: No

## **Saving a Master Policy File:**

Implementing changes to a PCmover Enterprise Policy is fairly simple. Once you’ve been able to set your policy modifications, you can implement changes instantly by saving the policy file to the PCmover Enterprise Client Directory.

1. Navigate to the File Menu and select ‘Save As...’
2. In the ‘Save As...’ dialogue box, navigate to the PCmover Enterprise Client directory.
3. Locate the previous MasterPolicy.pol file, select the file, and click ‘Save’.
4. This will overwrite the policies from the previous version, so be careful when saving an updated policy file.

## **Configuring a Session Policy**

**Overview:** Session Policies are nearly identical to Master Policy files and use many of the same tabs as Master Policies with some exceptions. Session Policies do not include the Identification or Access tabs. Session Policies include the Authorization tab, which is not present in Master Policy files.

When doing a large number of migrations, it may be useful to create a Session Policy File with restrictions and choices broad enough that it can apply to a group of PCs. Then, when setting up a migration for a PC from within the group, the general Session Policy File can be applied for this specific migration.

To create and edit a Session Policy File, choose **New Session Policy File** in the File menu.

These Session Policy Files will, by default, save to the Documents folder on the local (IT Administrator’s) PC. We recommend that you create a new folder within the PCmover Client root folder and save the Session Policy Files there. Each Session Policy File will open in a new window within Policy Manager.

At the top of the Authorization tab is an option to “include this page in the policy file”. If it remains unchecked, anyone can use the Session Policy file. If the box is checked, only the selected users and computers will be able to use the Session Policy.

Information is also available in the Help section for the Authorization tab.

## 'Authorization' Tab:

Lists what users or computers are allowed to use the Session Policy file.

## 'Auto Run' Tab:

Allows a process such as a batch file or registry file to be set to run before and/or after a migration.

## Specify Session Policy File

To specify the Session Policy File for a specific migration use one of the following three methods.

- **Auto-Identification:** In the **Identification** tab in the Master Policy File, specify machine names and/or user names for both the source (old) and target (new) PCs, in relation to a specific Session Policy File. Using this method, only PCs and/or users identified in this section can run PCmover Client using that specific Session Policy File. When the user runs PCmover Client, the application will automatically identify the correct Session Policy File to use.
- **Specific Session Policy File Name ("PolicyFile"):** To specify what Session Policy File to use by its file name, run PCmover using a command line parameter as in the example listed below. (Note the spaces after "PCmover.exe" and "PolicyFile"):

```
[File path to PCmover.exe]\PCmover.exe /PolicyFile \\[File path to Policy File]\[Policy File name]
```

- **Session Policy ID ("PolicyID"):** To specify what Session Policy File to use by its Policy ID, run PCmover using a command line parameter as in the example listed below. (Note the space after "PCmover.exe"):

```
[File path to PCmover.exe]\PCmover.exe /PolicyID [ID Name]
```

## Initiating a Migration

The PCmover Enterprise Client was developed to be a portable install, enabling the application to run directly from an external drive, USB flash drive, or network share. Because of this, the application itself (PCmover.exe) can be triggered to run from a command line. With a fully configured policy file and PCmover executing from a command line, the process can be fully automated without the need for any end user interaction.

When running PCmover from a command line, there is also an opportunity to introduce additional parameters to the policy file during run time. Listed below are those command line parameters.

### PCmover Command Line Parameters

- `/policyfile filename:` This parameter specifies the full path of the Session Policy File to be used by PCmover, if the Master Policy File permits this parameter. If this is present, it is used instead of any identification process in the Master Policy File.
- `/policyid ID:` This parameter specifies an ID that is used to specify the Session Policy File according to the <Identification> section of the Master Policy File.

- `/env VAR=VAL`: This parameter sets new environment variables in the environment that is used to parse the policy files. Thus, this command line parameter can be used to feed data into a policy file that uses environment variables.

### **User-Driven Execution**

In instances where users are intermittently connected or remote over slow links, an interactive process may be appropriate, allowing these end users to initiate the process when they are well connected or have received their new laptop. Simple methods like sending the users a program link in email are supported.

### **Configuration Management Tools**

Many organizations use configuration management tools to upgrade their operating systems. They typically do this by remotely rebooting each machine, taking a backup, rebooting to install a base OS, which may have some base applications included and then install any missing applications the user requires. PCmover is just another task in the process that needs to be inserted at the correct point in the task sequence.

Within the OS upgrade scenario, there are two supported migration methods: using an image or using a file-based migration. If the image of the source machine can be mounted as a drive on the new OS target, then the PCmover task can be executed after the OS upgrade. When using the file-based method, then PCmover will be executed on the machine prior to reimaging. After the new OS is installed, PCmover is executed to migrate the data.

Administrators familiar with Microsoft's System Center Configuration Manager, (SCCM) and the User State Migration Tool (USMT) will easily see where PCmover can replace the tasks of scan state and load state.

## **Feedback and Assistance**

For PCmover Enterprise product support or inquires about other Laplink products, contact your Laplink Corporate Sales Representative, or send an e-mail to:

**CorpSales@laplink.com**