



7 Steps to Windows 7 Migration Best Practices

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Agenda

Why Symantec and Codework?

Why Migrate?

Migration Challenges and Considerations

7 Steps to Migration

Automating the Process



Why Use Symantec for Migration?



Ease of Use

Other solutions have too much scripting, services and moving parts

Scalability

Easy to implement scalable solution for servers and desktops

Speed

Creates images in 40% the time and deploys them in 33% the time (from other vendors' solutions)

Automation

Allows Zero Touch migrations, completely automate the migration process

Cost

Other solutions require additional hardware for PXE, Multicast server, plus services



Why will companies migrate?

Performance

Application support
(Virtual XP)

Hardware support

Connectivity Features
(DirectAccess – BranchCache)

End-user Productivity
(Interface - Search)



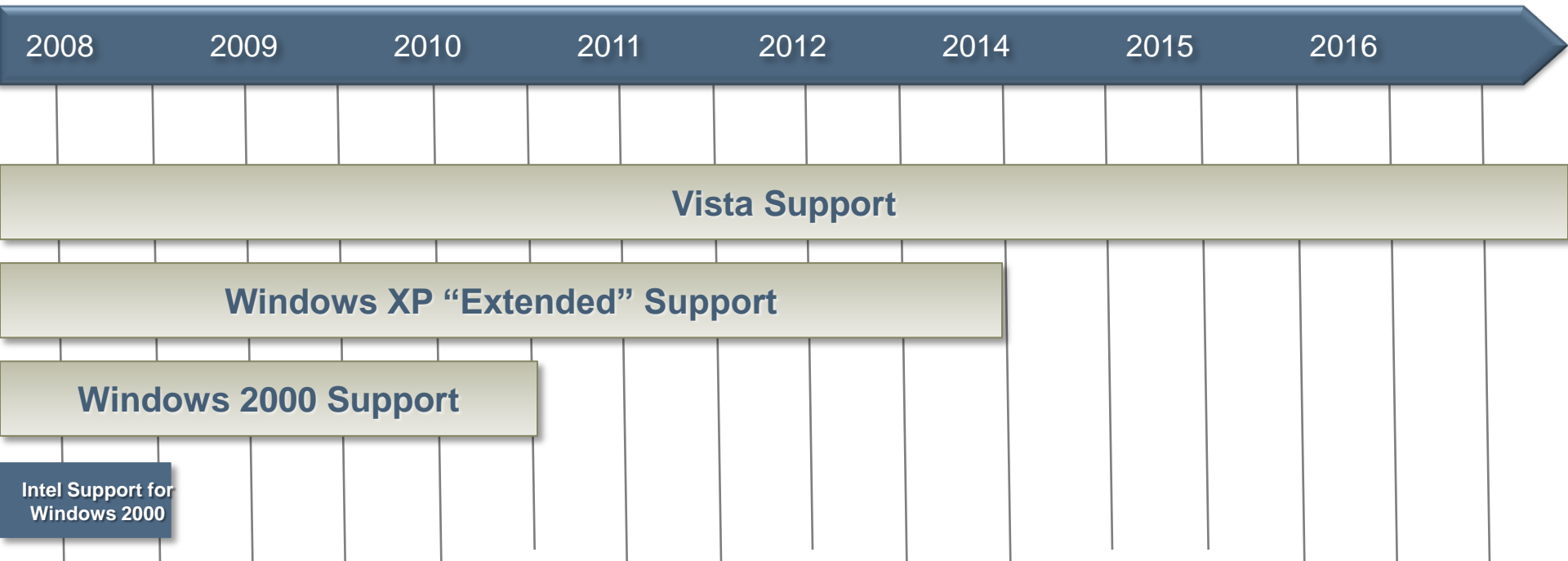
Everyone will move
(99% Windows on Corporate PCs)

Security
(Applocker- BitLocker)

Higher support costs
for older versions

Lack of support
for older version

Support for older versions



Windows XP

- Mainstream Support has ended
- Extended support until 2014

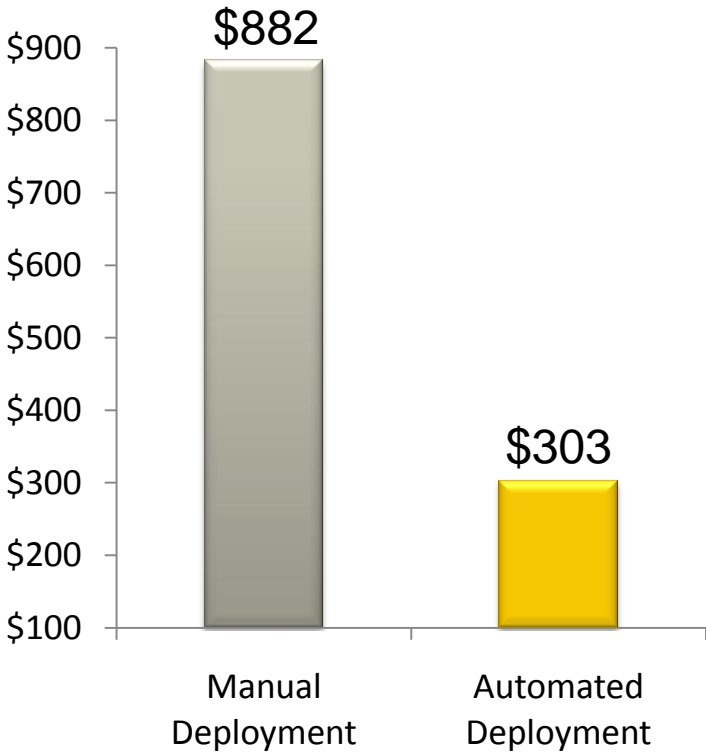
Windows 2000

- Intel no longer supports drivers
- Extended support no longer offered after Jul 2010
- No patches, service packs or security fixes available after Jul 2010

Reduce Migration and Management Costs

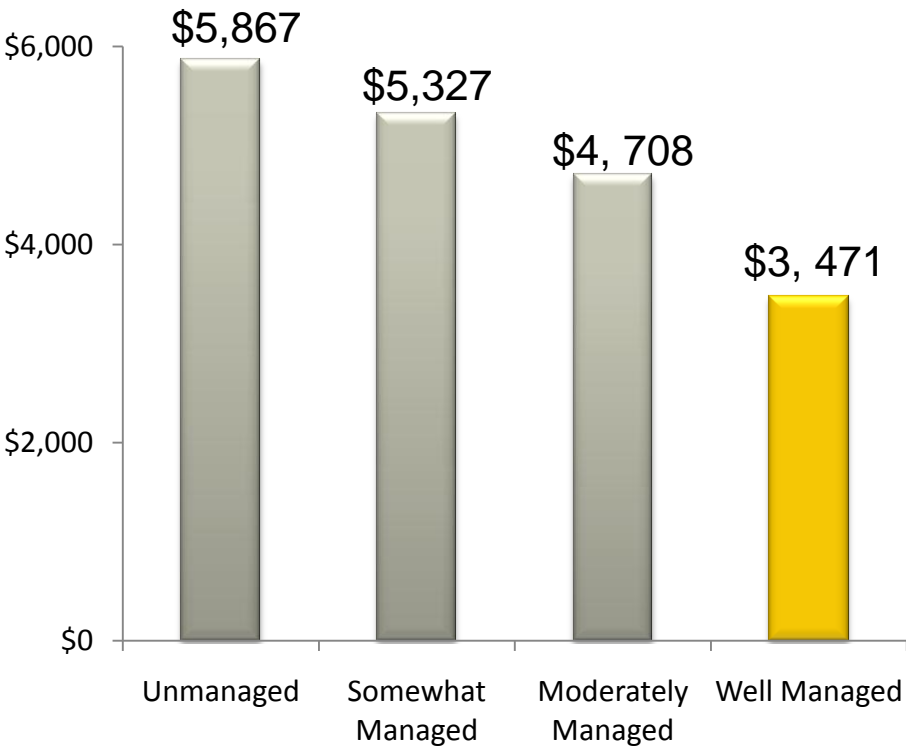


Automated Deployment Costs Less



Well Managed Computer Cost Less

TCO of a Desktop PC with Various Levels of Management



End-User Concerns

- Where are my favorites?
- Where is my printer?
- I can't see my network drives...
- How come I can't...?
- What about my MP3s?

Business Concerns

- Do we have to migrate now or can we wait?
- How much hardware will we have to replace?
- How much overtime will we need to pay?
- How do we keep our end users productive?

IT Concerns

- Do I really have to touch every computer?
- How do we handle the computers in a branch office?
- How many weekends will this cost me?

IT Management Suite v7

Client Management

- Discovery & Inventory
- Imaging & Deployment
- Intelligent Software & Patch Management
- Remote Assistance
- Real Time System Manager

Server Management

- Discovery & Inventory
 - Provisioning
- Software Distribution & Patch Management
- Monitoring & Alerting

Asset Management

- Asset Management
- License Compliance
 - CMDB
 - Barcode
 - Connector

ServiceDesk

- Incident
- Problem
- Change
- Release
- Knowledge management

Add-On Solutions

Workflow Solution

Workspace Streaming

IT Analytics

Symantec Integration Components

Symantec
Endpoint
Protection

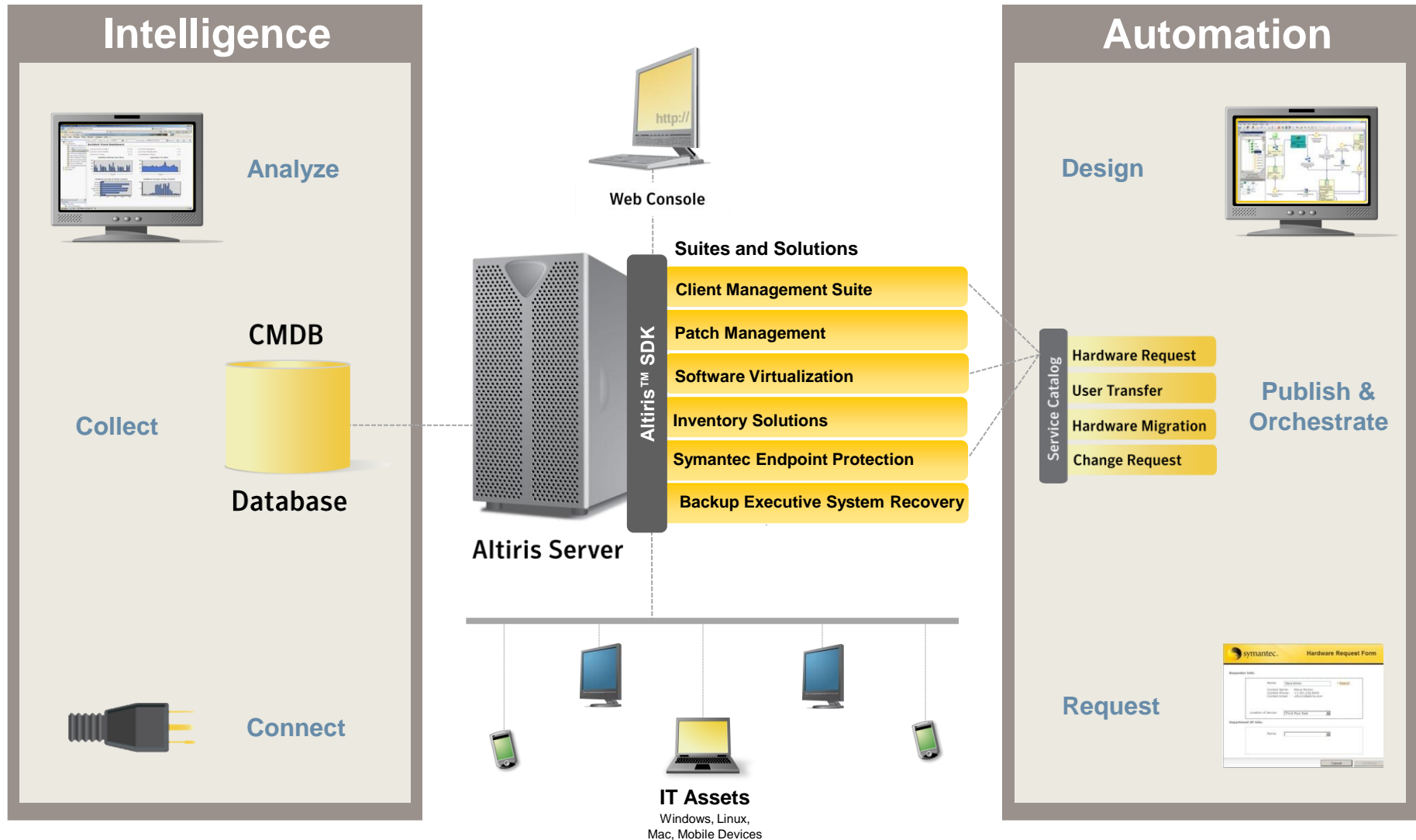
Symantec
Endpoint
Encryption

Data Loss
Prevention

Backup Exec
System
Recovery

Backup Exec
Infrastructure
Manager

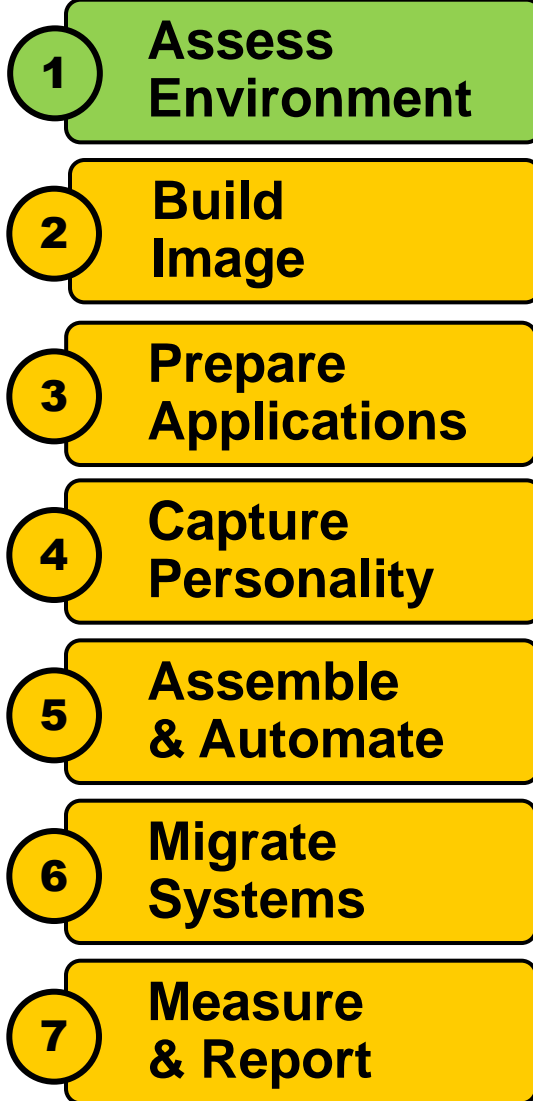
Symantec Management Platform



7 Steps to Windows 7 Migration

- 1 Assess Environment** 
- 2 Build Image** 
- 3 Prepare Applications** 
- 4 Capture Personality** 
- 5 Assemble & Automate** 
- 6 Migrate Systems** 
- 7 Measure & Report** 

7 Steps to Windows 7

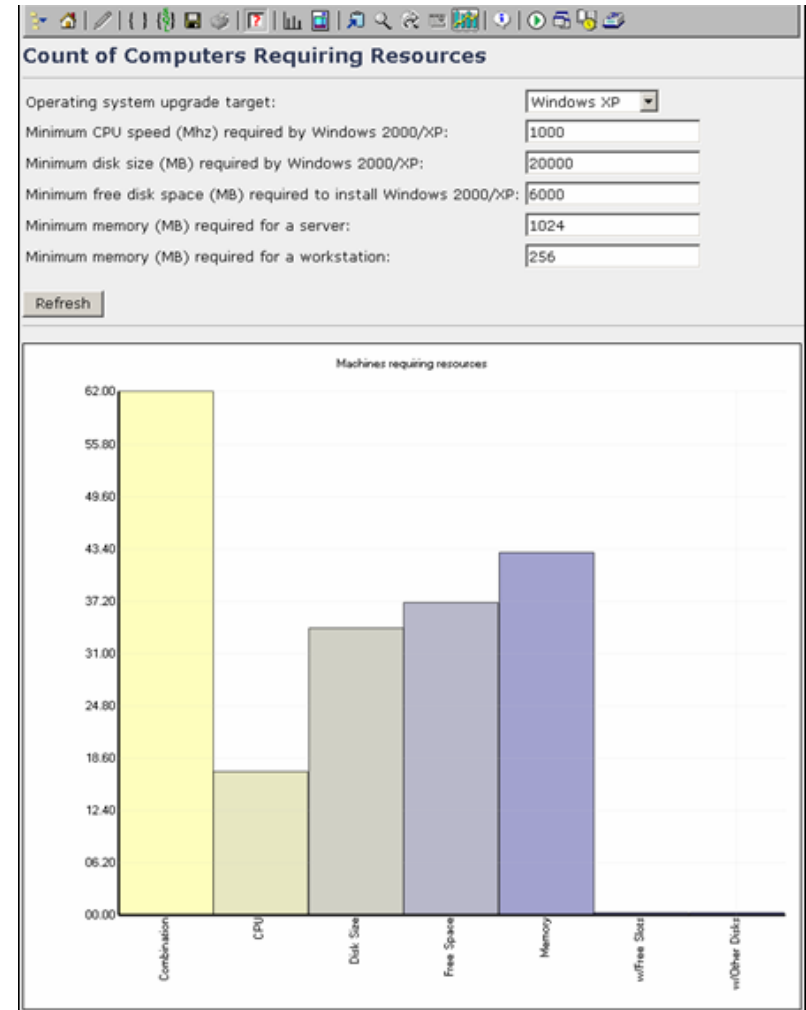


ASSESS ENVIRONMENT & PLAN DEPLOYMENT

- Discover devices and capture inventory
- Determine hardware readiness
- Prioritize applications to test and migrate
- Evaluate costs, SLAs, and identify risks

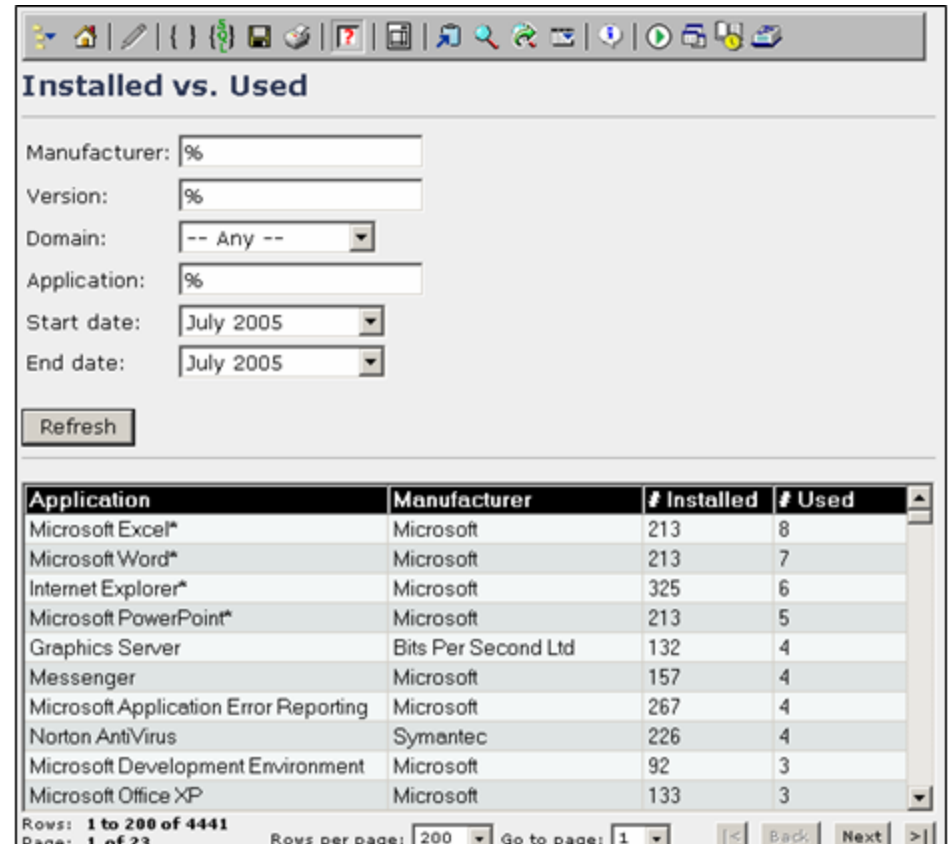
Hardware Readiness Assessment

- Review HW compliance (RAM, disk space, etc.)
- Can non-compliant components be cost-effectively upgraded (add RAM, add a hard drive, etc.)?
- How many PCs will be replaced? Where are they located?
- Required network infrastructure changes (routers, upgraded bandwidth, etc.)?



Software Readiness Assessment

- What OS is currently installed?
- What software packages are the end users running?
- What kind of data resides on the user's systems?
- Which data is critical to the business?



Installed vs. Used

Manufacturer: %
Version: %
Domain: -- Any --
Application: %
Start date: July 2005
End date: July 2005

Refresh

Application	Manufacturer	# Installed	# Used
Microsoft Excel*	Microsoft	213	8
Microsoft Word*	Microsoft	213	7
Internet Explorer*	Microsoft	325	6
Microsoft PowerPoint*	Microsoft	213	5
Graphics Server	Bits Per Second Ltd	132	4
Messenger	Microsoft	157	4
Microsoft Application Error Reporting	Microsoft	267	4
Norton AntiVirus	Symantec	226	4
Microsoft Development Environment	Microsoft	92	3
Microsoft Office XP	Microsoft	133	3

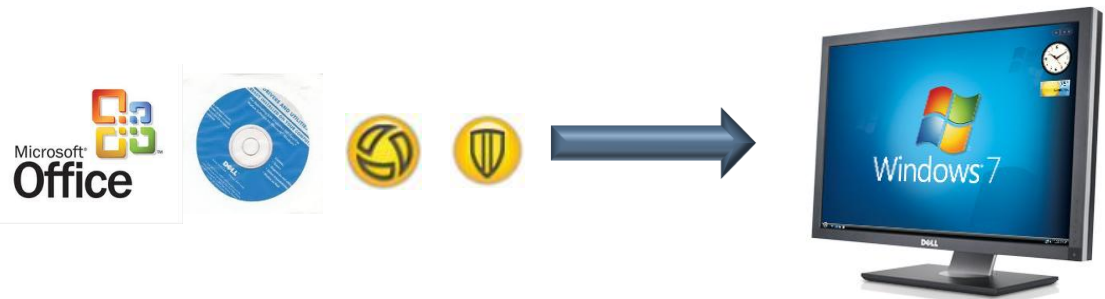
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7 Steps to Windows 7

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BUILD STANDARD WINDOWS 7 IMAGES

- Create standard hardware-independent images
- Provide additional devices drivers
- Include applications required for ALL computers in base image
- Include only base applications, such as Endpoint Protection client



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PREPARE AND VERIFY APPLICATIONS TO ENSURE POST MIGRATION SUCCESS

- Identify support status for Windows 7
- Test application combinations
- Identify any compatibility challenges, repackaging or virtualization needs, and custom install requirements
- Identify any applications that can be harvested



7 Steps to Windows 7

CAPTURE USER SETTINGS AND PERSONALITY

- Identify global settings to migrate
- Determine applications settings to migrate, including custom applications
- Include data to be moved or require end users to transfer
- Communicating to end users for things that won't get migrated... mp3s, etc.



1 Assess Environment

2 Build Image

3 Prepare Applications

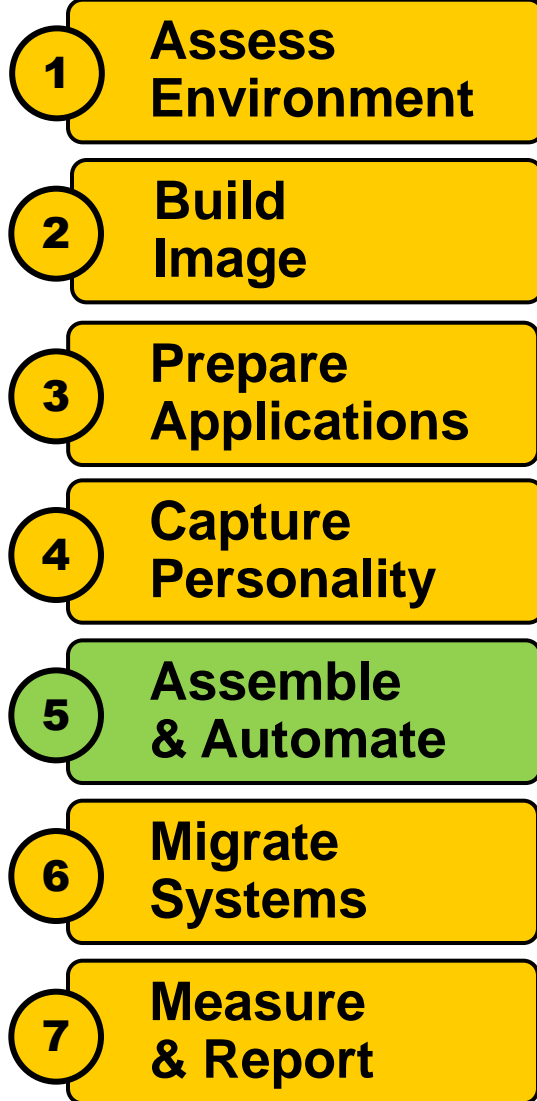
4 Capture Personality

5 Assemble & Automate

6 Migrate Systems

7 Measure & Report

7 Steps to Windows 7

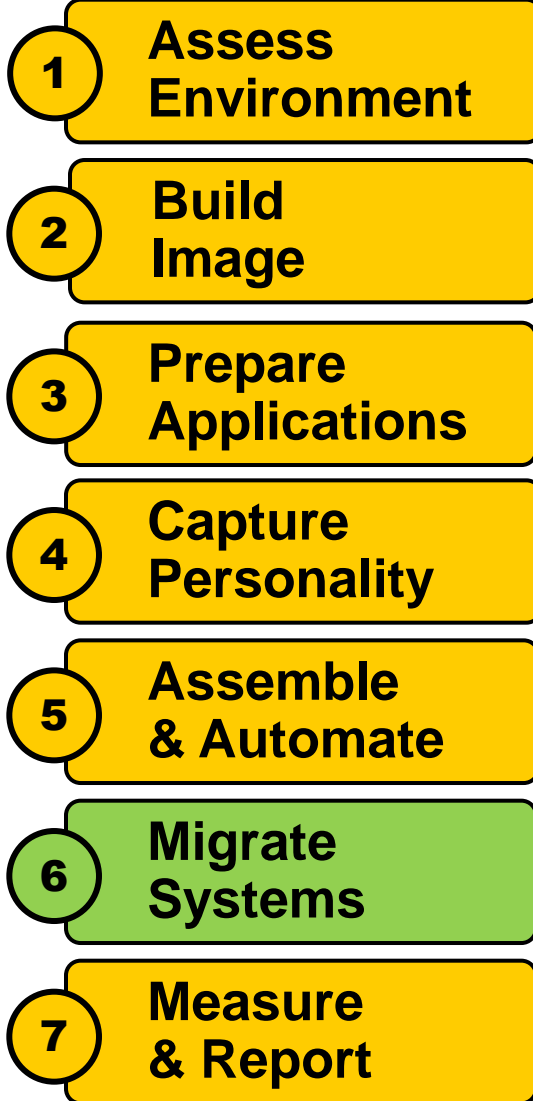


ASSEMBLE & AUTOMATE THE MIGRATION PROCESS

Create single process flow that includes the following steps:

- Capture personality settings
- Deploy the image
- Install prepared applications
- Restore personality settings

7 Steps to Windows 7



MIGRATE SYSTEMS

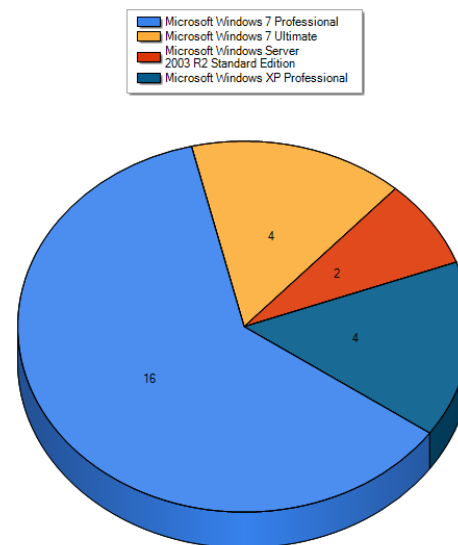
- Test with a simple pilot to ensure success
- Provide timing and proper communication
- Migrate based on the best approach for your organization.
- Different approaches
 - Mass
 - Batch
 - Gradual

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MEASURE AND REPORT ON MIGRATION SUCCESS

- Identify the total number of migrated systems
- Report problems encountered during migration
- Provide overall migration status
- License verification



Windows 7 Self-Serve Migration



Window 7 Upgrade Request Form

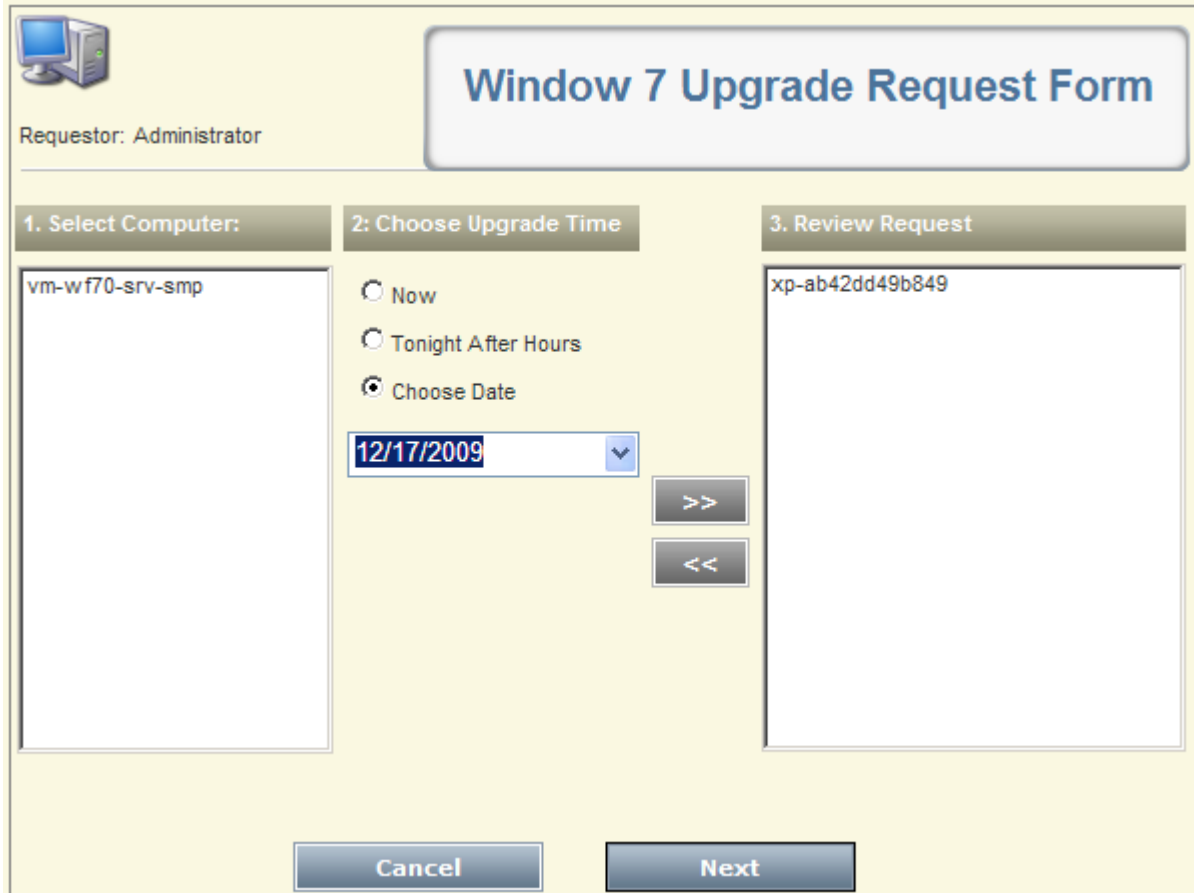
Welcome to the Windows 7 Upgrade Request From. You will be able to request an upgrade for and compatible computer that you are listed as the owner.

Upgrade Process:

- 1) Fill out Upgrade Request Form for your selected computers (including target upgrade date)
- 2) The process will automatically take a backup snapshot of your machine. To do the backup, your computer must be attached to the network.
- 3) The process will take a snapshot of your personal settings. Your computer must also be connected to the network to take this snapshot.
- 4) On the target upgrade date, the process will upgrade you computer to Windows 7. Your computer must be attached to the network for this to take place.0 Should there be an error, the process will automatically restore your backup, send you a notification email and alert IT.

To proceed with this request click the "Next" button.

Windows 7 Self-Serve Migration



Window 7 Upgrade Request Form

Requestor: Administrator

1. Select Computer:

vm-wf70-srv-smp

2. Choose Upgrade Time

☐ Now
☐ Tonight After Hours
☒ Choose Date

12/17/2009


>>
<<

3. Review Request

xp-ab42dd49b849

Cancel Next

Windows 7 Self-Serve Migration



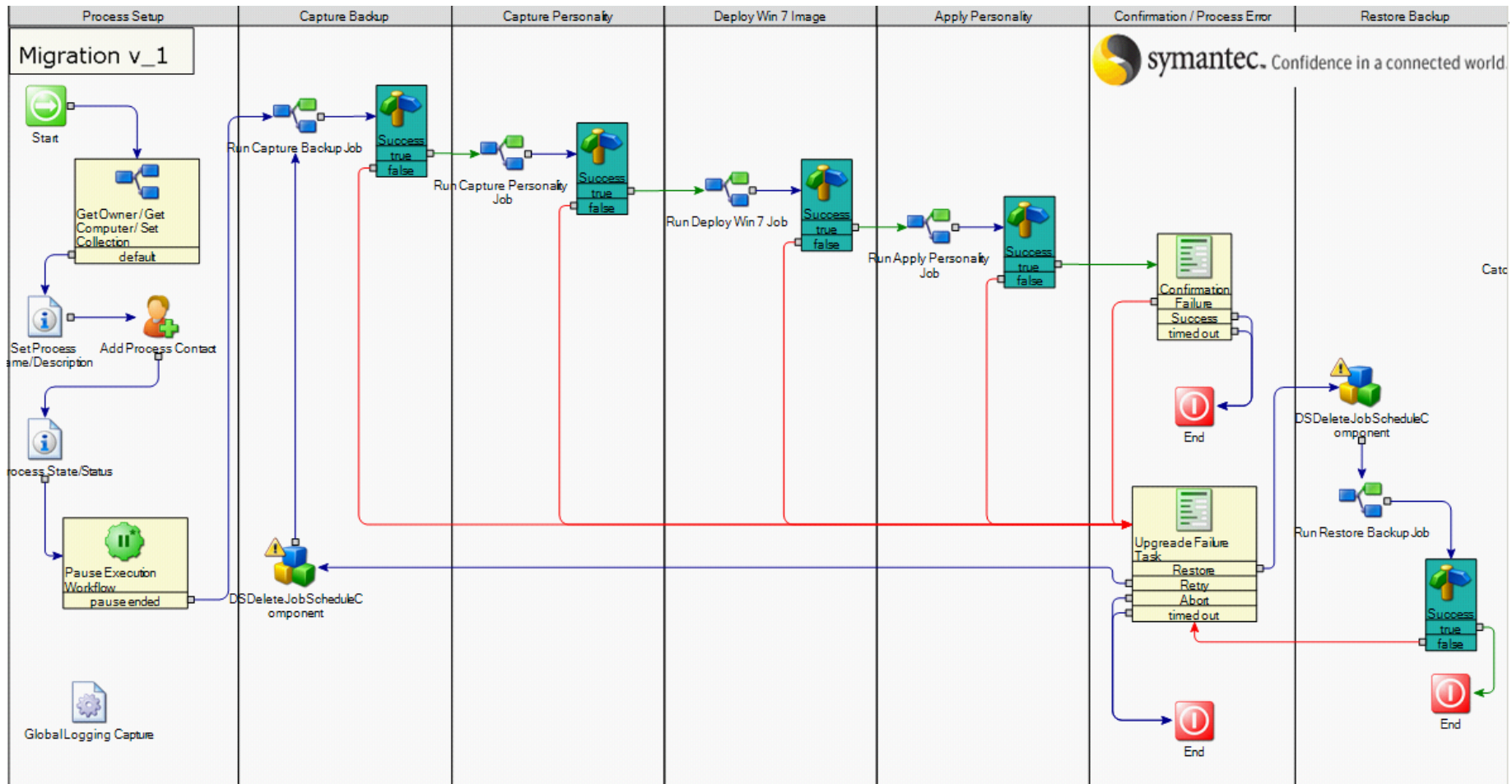
Requestor: Administrator

Window 7 Upgrade Request Form

Computer	CreateDate
xp-ab42dd49b849	12/16/2009 3:35:41.827 PM

☒ confirm the upgrade requests above

Windows 7 Self-Serve Migration



<http://www.screencast.com/t/ZWI2Yzlh>

The video is about 15 mins and shows the full upgrade process:

1. End user self service request form from Service Catalog in Process Manager
2. Workflow Process
 - Capture Backup of Target Computer
 - Capture Personality
 - Load Win 7 image
 - Apply Personality
 - End User Confirmation Task
 - IT Admin Remediation Task
 - Restore backup image



Business Objective:

“Transport Fred from Toronto to Ottawa. You have four days to accomplish this, and a budget of \$20k”

Tools Available to you:



**Assemble your own
(Other Vendors)**

OR



**Ready-To-Go/Integrated
(Symantec)**

Useful Resource and Contacts



<http://www.symantec.com/altiris>

<http://www.symantec.com/community>

<http://www.symantec.com/windows7>

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