Persona Backup and OS Migration

Overview

This document contains information about persona backup and includes instructions for using OS migration in your organization. This document is for administrators who want to use inSync to back up system and application settings on user devices and use inSync for OS migration on user devices.

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.

Usage Scenarios

When you enable System, App Settings, you can:

<table>
<thead>
<tr>
<th>Use case</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replace a lost device</td>
<td>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.</td>
</tr>
<tr>
<td>Quickly configure new devices</td>
<td>If your organization requires all devices to adhere to a specific configuration, use the Persona Backup feature to create a backup of the system settings from an existing system. Administrators can use this backup data to quickly configure new devices and have them ready for use.</td>
</tr>
<tr>
<td>Migrate to a later version of an operating system</td>
<td>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.</td>
</tr>
<tr>
<td>Recover from a</td>
<td>You can quickly recover your system settings in the event of a failure. If a system stops</td>
</tr>
</tbody>
</table>
System Settings for Backup

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

- Windows 7 or later
- macOS X 10.12 or later

**Important:** 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.

Windows system settings

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Settings</th>
</tr>
</thead>
</table>
| Operating System Settings    | • Region and Language Settings: Formats, Location, Keyboards and Languages (default input language and installed services)  
                                  • Personalization: Wallpaper, themes (not backed up from Windows XP) Note: To backup custom wallpaper like personal photos or other downloaded images, the user must configure the folder that contains the original photos for backup using inSync Client.  
                                  • Folder Options: General settings (navigation pane settings), View settings (display file extensions, display hidden files, hide empty drives, and use sharing wizard)  
                                  • Encryption: Native EFS key |
| Browser Settings (Internet Explorer 8 or later) | • 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 |
| Browser Settings (Mozilla Firefox, version 44) | • Bookmarks  
                                  • Home page  
                                  • Default search engine |
- Download location
- Font
- Language
- All settings including general, security, privacy, and proxy

Browser Settings (Google Chrome, versions 60)

- Bookmarks
- Home page
- Default search engine
- Download location
- Font
- Language
- All settings including general, security, privacy, and proxy

Microsoft Outlook (2003 to 2016)

- 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

MS Office (2003 to 2016)

- Microsoft Word, Microsoft PowerPoint, and Microsoft Excel templates
- Dictionary

Mapped/Shared Network Drives

Note: inSync does not back up the credentials to access the drive. You must re-enter the credentials to access the drive.
- Network printers (Only on Windows 7 and Windows 8, Windows 8.1, Windows 10)

**Printer settings**

*Note:* inSync does not backup the credentials to access the network printer or the drivers for the network printer. You must reenter the credentials to access the printer and ensure that the destination device contains the requisite drivers.

### Mac system settings

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Network Settings</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• SSID</td>
</tr>
<tr>
<td></td>
<td><em>Note:</em> inSync does not backup passwords for wireless network connections.</td>
</tr>
<tr>
<td><strong>Browser settings (Safari)</strong></td>
<td>• History</td>
</tr>
<tr>
<td></td>
<td>• Home page settings</td>
</tr>
<tr>
<td></td>
<td>• Default search engine</td>
</tr>
<tr>
<td></td>
<td>• Bookmarks</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Apple mail</strong></td>
<td>• Email ID and password</td>
</tr>
<tr>
<td></td>
<td>• Email signatures</td>
</tr>
<tr>
<td></td>
<td>• Font and color settings</td>
</tr>
<tr>
<td></td>
<td>• General settings</td>
</tr>
<tr>
<td><strong>Address book</strong></td>
<td>• Contacts</td>
</tr>
<tr>
<td><strong>Keychain</strong></td>
<td>• Passwords saved in Keychain</td>
</tr>
</tbody>
</table>
Mac system settings 10.12 and later

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Home page settings</td>
</tr>
<tr>
<td>Browser Settings (Safari)</td>
<td>• Default search engine</td>
</tr>
<tr>
<td></td>
<td>• Bookmarks</td>
</tr>
<tr>
<td>Internet Accounts</td>
<td>• LinkedIn/Gmail/Facebook/Yahoo/Twitter</td>
</tr>
<tr>
<td>Address books</td>
<td>• Contacts</td>
</tr>
<tr>
<td>Keychain</td>
<td>• Passwords saved in Keychain</td>
</tr>
</tbody>
</table>

**Important:** If you want to back up additional system settings, submit your request to Support. The Druva Implementation team will investigate the feasibility of your requirements and help you implement it.

System Settings for Restore

**Supported restores**

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

<table>
<thead>
<tr>
<th>Settings</th>
<th>Supported Restore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows OS</td>
<td>• 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)</td>
</tr>
<tr>
<td></td>
<td>• Windows 7 (64-bit) to Windows 7 (64-bit), Windows 8 (64-bit), Windows 8.1 (64-bit), Windows 10 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows 8 (32-bit) to Windows 8 (32-bit/64-bit), Windows 8.1 (32-bit/64-bit), Windows 10 (32-bit/64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows 8 (64-bit) to Windows 8 (64-bit), Windows 8.1 (64-bit), Windows 10 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows 8.1 (32-bit) to Windows 8.1 (32-bit/64-bit), Windows 10 (32-bit/64-bit)</td>
</tr>
</tbody>
</table>
- 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)

- macOS X 10.11 to macOS X 10.12
- macOS X 10.12 to macOS X 10.13
- macOS X 10.13 to macOS X 10.14
- macOS X 10.14 to macOS X 10.15

**Note:** inSync does not support the migration of Mac user accounts.

- 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

**Note:** inSync does not support the migration of dial Up and virtual private network settings. This is applicable to all versions of IE.

- Windows 7 to Windows 7
- Windows 8 to Windows 8
- Windows 8.1 to Windows 8.1
- Windows 10 to Windows 10

**Note:** 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.

- Outlook 2003 to Outlook 2010
- Outlook 2010 to Outlook 2010
- Outlook 2013 to Outlook 2013
• Outlook 2016 to Outlook 2016

Note:

• inSync migrates the default language for Outlook 2010. However, inSync does not set it as the default language.
• inSync does not support the migration of stationary fonts and mail formats from Outlook 2007 to Outlook 2010.
• inSync does not support the migration of stored passwords.
• inSync does not support the migration of settings of an earlier version of Outlook to Outlook 2013.

Microsoft Office (same bit migration)

• Microsoft Office 2003 to Microsoft Office 2016
• Microsoft Office 2007 to Microsoft Office 2016
• Microsoft Office 2010 to Microsoft Office 2016

Unsupported restores

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

<table>
<thead>
<tr>
<th>Settings</th>
<th>Unsupported Restore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 64 bit</td>
<td>Windows 32 bit</td>
</tr>
<tr>
<td>Later versions of Windows</td>
<td>An earlier version of Windows</td>
</tr>
<tr>
<td>Windows (any version)</td>
<td>macOS (any version)</td>
</tr>
<tr>
<td>A later version of macOS</td>
<td>An earlier version of macOS</td>
</tr>
</tbody>
</table>

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 device. After upgrading the operating system, you can easily restore the backup data and the system and application settings.

Important: If you want to exclude specific system and app settings from the restore during OS migration, contact Support.
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.

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 a lesser impact on productivity. The Persona Backup feature gets a new device ready within minutes.

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.

Supported OS migration implementations

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

<table>
<thead>
<tr>
<th>Process</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replace device</td>
<td>You will either replace a user device with a new device or upgrade the operating system. In either case, the user has only one device during the migration process.</td>
</tr>
<tr>
<td>Add new device</td>
<td>You will give a new device to the user.</td>
</tr>
</tbody>
</table>

OS Migration Process

Step 1: Identify user profiles

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.
Step 2: Install inSync on user devices

Note: This step is required for only those users of your organization who are not using inSync.

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

- Let users install and activate the inSync Client on their devices.
- You install the inSync Client on user devices 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 devices, 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.

1. Install or upgrade inSync Connector.
2. Register Active Directory (AD) with the inSync Server from which you want to import user details.
3. Configure integrated mass deployment settings.
   If you are planning to use IMD for installing inSync on the replacement devices, ensure that you disable the option to activate only the first device during deployment. If the Activate first device only during the deployment check box is selected, click to clear the check box.
4. 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.
5. Create an AD/LDAP mapping. The inSync AD/LDAP mapping wizard allows you to create users in inSync by importing their details from your Active Directory (AD) or LDAP. In an AD/LDAP mapping, you define filter parameters to extract user details from your AD/LDAP. You also define the profile, storage, and quota that inSync must assign to users who match the filter parameters.
6. Generate a mass deployment token.
   - Install inSync Client on user devices 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 inSync Server.
   - For example
     msiexec /qn /i \sharelocation\inSync.msi TOKENV2='33-bb0af8c55da3f9d325e6ce6ad23e97b5d99rg576cf37ee062754cea bc76cf69'
     SERVERLIST="cloud.druva.com:443"
     For more information, see Install inSync Client for integrated mass deployment.
7. Post user logon to their devices:
   - inSync Client fetches the user's AD information from the AD Server, such as the user's logon name, email, group information.
   - inSync Client sends the user's AD information along with the mass deployment token to the inSync Server.
   - inSync Server validates the information received and sends the activation response to the inSync Client.
   - 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.
For detailed instructions on each step of the IMD process, see Integrated Mass Deployment of inSync Client.

Step 3: Monitor backup progress

Ensure that first backups from user devices are successful and the inSync Client is backing up the system and application settings from the user devices. You can refer to the User Rollout report to monitor the progress.

If you notice devices for which the first backup failed, or system settings have not been backed up, resolve the issues. For troubleshooting assistance, submit your request to Support.

Step 4: Install inSync on replacement user devices

When installing the inSync Client on the replacement user devices, you can either replace the user's existing devices or add the replacement device as a new device. The latter allows users to use both devices until the time you withdraw the old devices.

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

• Let users replace a device linked to their inSync account.
• You replace the inSync Clients on user devices by using the integrated mass deployment (IMD) process.

Important: If the users are already using multiple devices, Druva recommends that you ask users to replace a device linked to their inSync account. The mass installation process works best if the user has only one device or if you are just adding a new device without restoring backup data or system settings.

Mass Installation Process

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

<table>
<thead>
<tr>
<th>Existing</th>
<th>Replacement device</th>
<th>Add device</th>
<th>Replace device</th>
<th>Restore backup data</th>
<th>Restore system settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only one</td>
<td>Same OS platform as the existing device</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Only one</td>
<td>Different OS platform than the existing device</td>
<td>✔️</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
</tbody>
</table>
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 devices 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 device.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPLACE_DEVICE</td>
<td>Yes/No</td>
<td>If the value of the parameter is set to <strong>Yes</strong>, the device will replace the existing device.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the value of the parameter is set to <strong>No</strong>, the device will be added as a new device.</td>
</tr>
<tr>
<td>RESTORE_SYSTEM_SETTINGS</td>
<td>Yes/No</td>
<td>If the value of the parameter is set to <strong>Yes</strong>, the system settings from the existing device will be restored on the new device. This works only if the user has one device and the new device has the same OS as the existing one.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the value of the parameter is set to <strong>No</strong>, the system settings from the existing device will not be restored on the new device.</td>
</tr>
<tr>
<td>RESTORE_DATA</td>
<td>Yes/No</td>
<td>If the value of the parameter is set to <strong>Yes</strong>, the data backed up from the existing device will be restored on the new device. This works only if the user has one device and the new device has the same OS as the existing one.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the value of the parameter is set to <strong>No</strong>, the data backed up from the existing device will not be restored on the new device.</td>
</tr>
</tbody>
</table>
Important:

- 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.
- If custom folders configured using global variables, as described in Configure custom folders for backup, are being restored, inSync automatically detects the user path and restores the data. For example, if you have configured the directory %USERPROFILE% on the user device, inSync automatically identifies the user home for the logged-on user on the new device and restores the data.

Manual installation process

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

If users choose to add a new device, they have the option to restore backup data and system and application settings from one of the existing devices.
If users choose to replace an existing device, 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 device.
If the same device name already exists, inSync displays a Device with the same name is already configured message and prompts the users to replace their device. In such a case, the following window appears.
Configure "DDSPLDOCTEAM" for Backup

Device with the same name is already configured.

This device will replace the currently configured device. All prior backups of the replaced device will be available under the new device.

[Cancel]  [Replace]