



Evaluator's Guide



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1.1 Introduction

MigratePro is a powerful application from Software Pursuits, Inc. that makes it easy to perform complex file share migrations to new hardware. MigratePro is capable of copying shares and all related share permissions between machines. It will also copy local users and local groups to the new machine(s) making it easy to move share structures to a new machine(s) that have NTFS file security based on local security objects. MigratePro makes a time consuming and error prone task simple, quick, and error free.

This Evaluator's Guide is designed to guide you through the initial setup of MigratePro. By reviewing this guide you will become more familiar with MigratePro and how to use the product to perform successful share migrations.

1.2 System Requirements

MigratePro's basic operating system and hardware requirements are:

- **Supported Operating Systems:** Windows Server 2008 R2; Windows Server 2008; Windows Server 2003; Windows Server 2003 R2; Windows Vista; Windows XP; Windows 7
- **Processor:** 400Mhz Pentium Processor or equivalent (Minimum); 1Ghz Pentium Processor or equivalent (Recommended)
- **RAM (total for system):** 256MB (Minimum); 1GB (Recommended)
- **Hard Disk:** 30MB for application files; 20MB+ for database
- **Display:** 800x600, 256 colors (Minimum); 1024x768 high color, 32-bit (Recommended)

MigratePro can perform file share migrations from older operating systems such as Windows NT 4.0 and Windows 2000. However, the software must be installed on a machine running a supported operating system.

MigratePro requires a database that is used to store configuration information. The following formats are supported:

- Microsoft Access (default)
- MSDE 2000 / SQL Express 2005 / SQL Express 2008
- SQL Server 2000 / SQL Server 2005 / SQL Server 2008

MigratePro requires a number of Microsoft components to be installed on the system. The MigratePro installer will inspect your system for these components and offer to upgrade or install them as needed.

- Microsoft .NET Framework 3.5 with Service Pack 1
- Microsoft MDAC 2.8 Refresh with Service Pack 1
- Microsoft Visual C++ Runtime 9.0 with Service Pack 1
- Microsoft Windows Installer 3.1
- Microsoft XML Parser 6.0
- Microsoft Jet 4.0 with Service Pack 8

1.3 Contact Information

If you need further information about MigratePro or need clarification on anything within this guide please contact our team and they will be happy to assist you with your evaluation.

Software Pursuits, Inc.

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Technical support is available between 8:00AM and 5:00PM PST Monday through Friday.

1.4 Installation

MigratePro should be installed on the new server that will be receiving the data from the migration job. MigratePro can be removed from the system once the migration is complete. When migrating to a new server, the new machine does not have shares defined. The configuration of the migration jobs is made easier having the software on the new machine. You can use a local browse panel in the software to select the source directory instead of having to manually type administrative share paths.

To install the MigratePro application you would run MigrateProSetup.exe on the machine and follow the installer prompts. The installer can be downloaded from <http://www.softwarepursuits.com/migratepro/download.asp>.

Please note that the standard MigratePro trial license includes 3 server licenses and 3 workstation licenses. These licenses are valid for 30 days from the date of installation or for 5GB of total data transfer, whichever comes first. Please contact sales if you need a trial license that covers more machines.

1.5 Uses for MigratePro

MigratePro is a powerful application that can be used for a number of different purposes. A few of these common uses are outlined below.

Server, NAS & SAN Migration

MigratePro can be used to perform a data migration from an old server to a new machine, network attached storage device (NAS) or an iSCSI based storage area network (SAN). When performed manually, such a migration can be time consuming and error prone. MigratePro makes the migration process painless. MigratePro can copy local users, local groups, folder shares, share permissions, and NTFS compression settings to ensure a smooth move to the new hardware.

Server Consolidation

MigratePro can consolidate multiple file servers down to a single newer and larger server, NAS, or SAN. This results in significant cost savings. Once the consolidation has occurred, fewer machines need to be maintained in your network environment. This allows you to reduce your power consumption, heat in the server room, and administrative overhead. Merging shares together manually is tedious and you can easily retain the wrong version of a file accidentally. MigratePro eliminates these difficulties.

Merge File Shares

If you have multiple shares that contain the same basic files but have differences, you can use a Migrate Merge rule to consolidate multiple source directories to one destination path. This simplifies your file share structure and makes data easier to find.

1.6 Configuring a Migration

Relations are the basic building blocks of the MigratePro application. Each Relation contains the root paths (source and destination paths) that apply to that Relation and the options for the Relation. Each Relation also contains one or more Rules that tell MigratePro how you want your migration performed. The Relation and the Rule are created together in a single wizard.

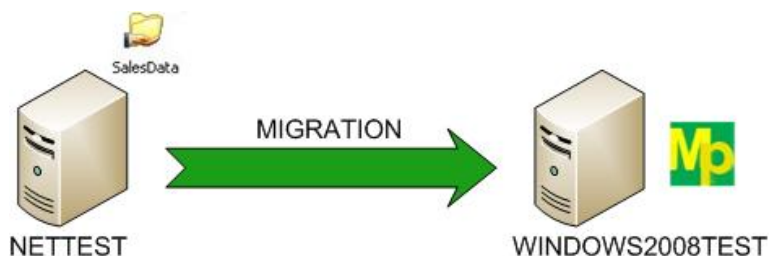
The Migration Rule is the most common Rule used in MigratePro. This is a general purpose migration rule that is used to migrate file shares from an old machine to a new machine. It can be used to aide in the migration to new file server hardware and can also be used to consolidate multiple file servers down into one new larger file server. This type of consolidation will result in power savings and saved resources related to the management of a number of file servers.

The wizards are designed to quickly and easily configure the basic options needed to get a Relation up and running. MigratePro is an extremely flexible product with many advanced options. Additional options can be specified on the properties panels for the Relation after it has been created.

You can create your first Relation by launching MigratePro and going to **File | New | Relation** to launch the Relation Wizard.

Our Example

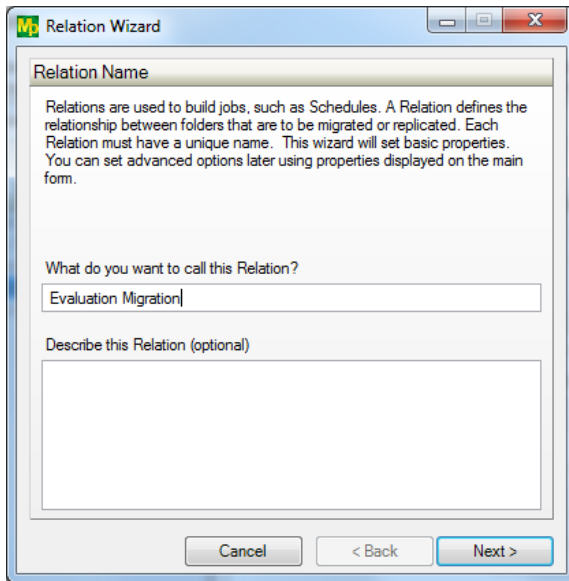
For this example, we will be configuring a Migrate job which will migrate a file share named SalesData that is stored on a machine named NETTEST to a new machine named WINDOWS2008TEST. The data on NETTEST is stored in c:\SalesData and that folder is shared. The share name is SalesData as well. We want to migrate the SalesData share including all of its settings and data to a new share on WINDOWS2008TEST.



The MigratePro software should be installed on the destination machine. The destination machine is the new machine which will host the new migrated file share. In this case, that machine is WINDOWS2008TEST.

Name Your Relation

The first panel in the wizard allows you to name your Relation. Enter the name of the Relation and an optional description and then click 'Next' to continue. We will refer to 'Evaluation Migration' as the name of this Relation for the remainder of this tutorial.



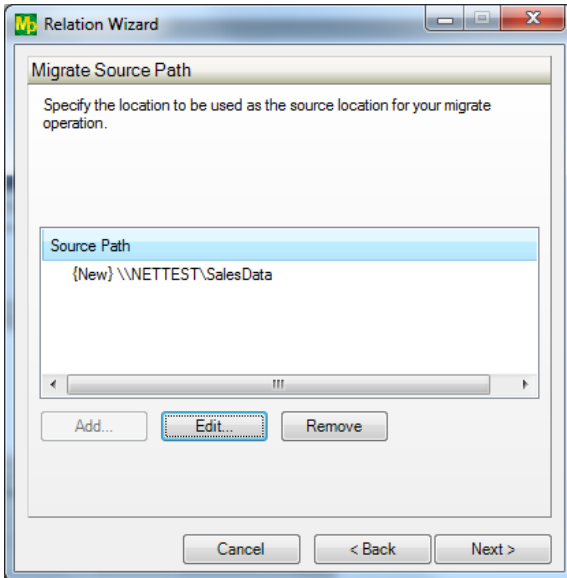
Specify the Source Path

The next panel of the wizard is where you define the source path for the migration Relation. This is the file share that already exists that you want to migrate to the new machine.

Only one source path can exist per Relation. If you're looking to perform a merge, you would create multiple Relations with Migrate Merge Rules. Please see the 'Creating a Migrate Merge Relation' section of this document for further details.

To add a path, click the 'Add' button and a browse panel will be displayed. Browse to the path and then click 'OK'. You can also type the path into the browser panel directly.

For this example, the source path is \\NETTEST\SalesData.



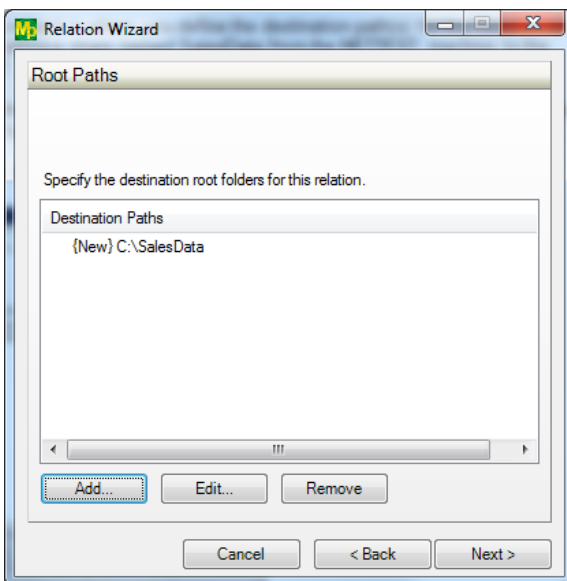
Click the 'Next' button to continue.

Specify the Destination Path(s)

The next panel of the wizard is where you define the destination path(s) for the Relation. In this instance, we are migrating a share named SalesData from the NETTEST machine to the WINDOWS2008TEST machine.

To add a path, click the 'Add' button and a browse panel will be displayed. Browse to the path and then click 'OK'. You can also type the path into the browser panel directly.

For this example, the destination path is C:\SalesData.



Click the 'Next' button to continue.

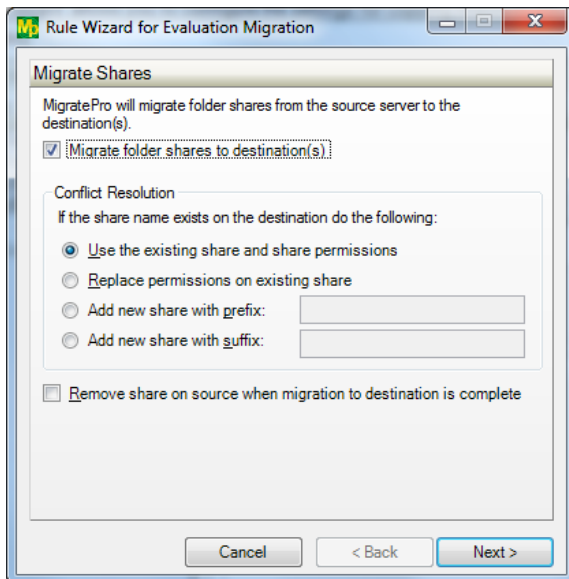
The wizard configures a Migrate Rule. There is no Rule selection option in the wizard. If you are planning on performing a Migrate Merge then you must switch the Rule type using the MigratePro desktop after the wizard is completed. Please see the 'Create a Migrate Merge Relation' section of this document for further details.

Configure Share Migration

The next panel in the wizard allows you to configure the settings for copying shares to the destination machine.

To migrate shares you must check the box for the 'Migrate folder shares to destination(s)' option.

For our example job, the default conflict resolution setting is appropriate. These settings are only used if a share of the same name already exists on the destination machine. This will not happen if you are migrating to new hardware. Further details can be found in the "Rule Properties - Migrate Shares" topic in the MigratePro help file.



Click the 'Next' button to continue.

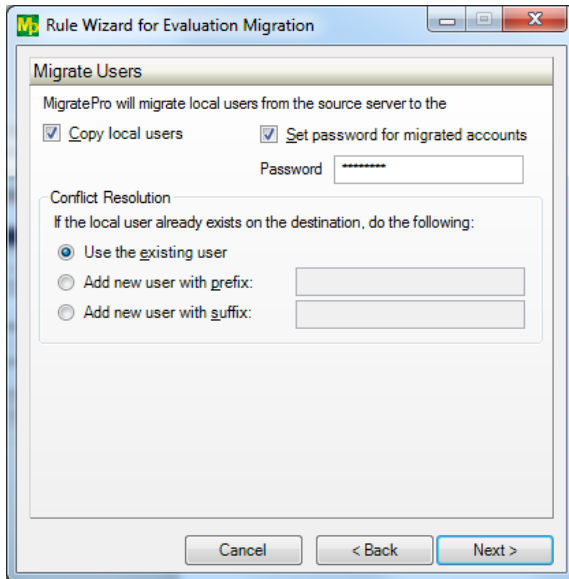
Configure Local User Migration

The next panel in the wizard allows you to configure the settings for copying local users to the destination machine.

To migrate local users, you must check the 'Copy local users' option. Security features in Windows prohibit the retrieval and copying of account passwords. To address this problem, when you select the option you must also enter a password that will be applied to all migrated users. This is accomplished by checking 'Set password for migrated accounts'. When the password is set, it is configured as a password that must change at next logon. The next time a user performs a login on the machine with a local account, Windows will prompt for a password change.

For our example job, the default conflict resolution setting is appropriate. These settings are only used if a user account of the same name already exists on the destination machine. This will not

happen if you are migrating to new hardware. Further details can be found in the “Rule Properties - Migrate Users” topic in the MigratePro help file.



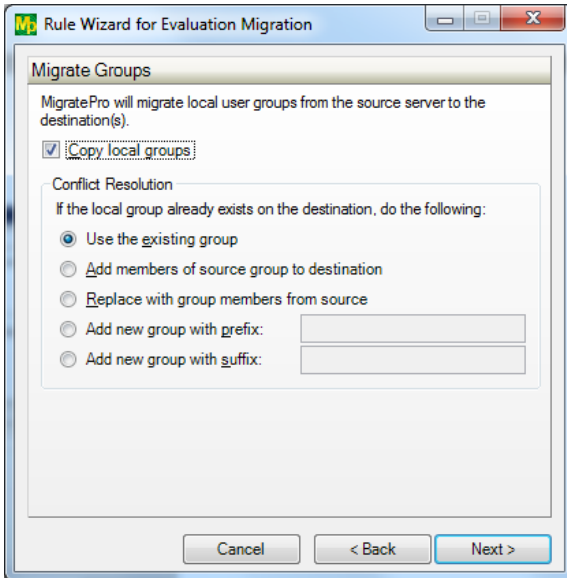
Click the 'Next' button to continue.

Configure Local Group Migration

The next panel in the wizard allows you to configure the settings for copying local groups to the destination machine.

To migrate local groups you must check the 'Copy local groups' option. This will tell MigratePro to copy all local groups encountered while copying the files defined for the migration.

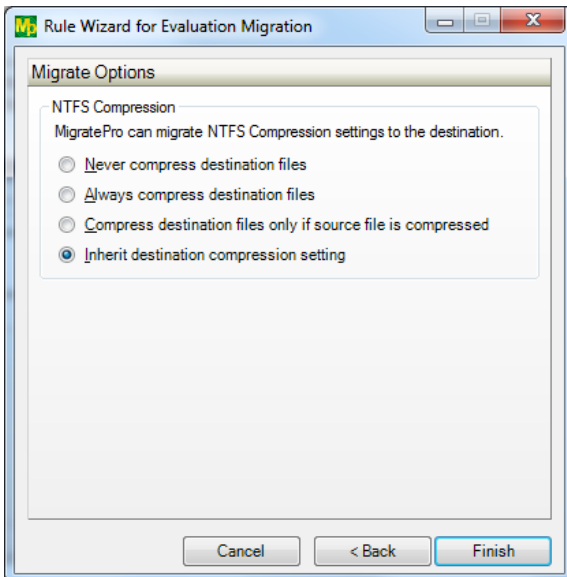
For our example job, the default conflict resolution setting is appropriate. These settings are only used if a group of the same name already exists on the destination machine. This will not happen if you are migrating to new hardware. Further details can be found in the “Rule Properties - Migrate Groups” topic in the MigratePro help file.



Click the 'Next' button to continue.

Configure Migrate Options

This panel of the wizard lets you configure some final options such as how to handle copying NTFS compression settings for the files being migrated. In this example, the default settings are appropriate. Further details can be found in the "Rule Properties - Migrate Options" topic in the MigratePro help file.



Click the 'Finish' button to finish creating your Relation.

Previewing Your Relation

When you click 'Finish' to create the Relation you will be prompted to preview the Relation. The preview displays the actions that MigratePro would perform without actually doing them. This is a

great way to determine if your Relation will perform as expected. You should always preview a Relation after making changes.

1.7 Configuring a Migrate Merge

The Migrate Merge Rule can be used to combine multiple source directories down into one destination directory. This is useful for consolidating file shares that have the same name. For instance, if you have file servers in multiple offices and each contains the same share then it is highly likely that different files exist in each machine's share. If you're moving to a single file server that all users can access, then a need exists to merge the content of these shares together.

If MigratePro encounters a file with the same name, in the same folder when using a Migrate Merge Rule then it will copy the file only if it has a newer date than the version of the file which already exists on the destination. The end result is that the merged destination directory will have the latest time and date stamped version of each file.

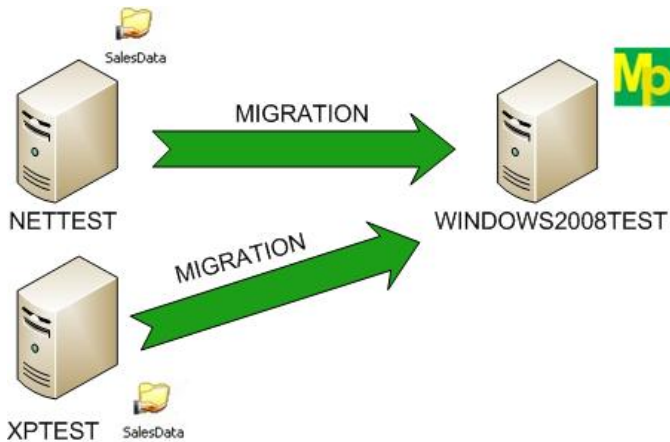
When configuring a Migrate Merge, you must create a separate Relation for each Source path that you are merging into the destination. For example, if you are migrating a share named SalesShare which is located on C:\SalesData on three different source machines to one destination then you will need to create three different Relations. Each Relation will have one of the source paths listed and all will have the same destination. This will be detailed further in our example.

The wizards are designed to quickly and easily configure the basic options needed to get a Relation up and running. MigratePro is an extremely flexible product with many advanced options. Additional options can be specified on the properties panels for the Relation after it has been created.

To create your first Relation, launch MigratePro and then go to the 'File' menu, select 'New' and then 'Relation' to launch the Relation Wizard.

Our Example

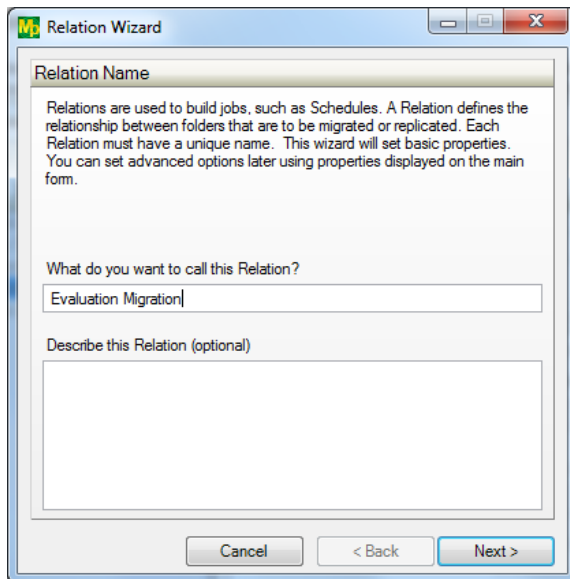
For this tutorial we will be configuring a Migrate Merge job which will migrate a file share named SalesData that is stored on c:\SalesData from two different source machines to a destination machine named WINDOWS2008TEST. This enables you to "merge" the data from the two source directories into a single destination directory on a new server.



The MigratePro software should be installed on the destination machine (the WINDOWS2008TEST in this example).

Name Your Relation

The first panel in the wizard allows you to name your Relation. Enter the name of the Relation and an optional description and then click 'Next' to continue. We will refer to 'Evaluation Migration' as the name of this Relation for the remainder of this tutorial.



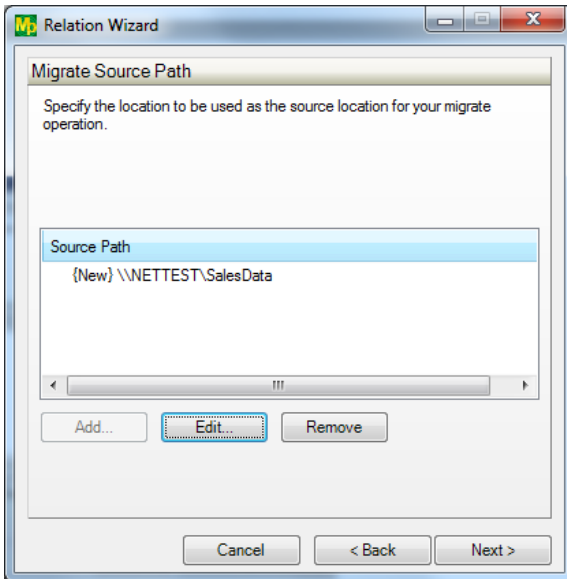
Specify the Source Path

The next panel of the wizard is where you define the source path for the migration Relation. This is the file share that already exists that you want to migrate to the new machine.

Please note that only one source path can exist per Relation.

To add a path, click the 'Add' button and a browse panel will be displayed. Browse to the path and then click 'OK'. You can also type the path into the browser panel directly.

For this example, the source path is \\NETTEST\SalesData.



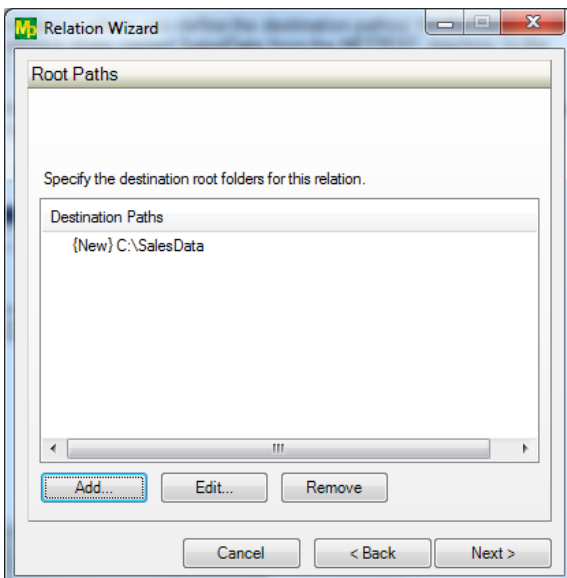
Click the 'Next' button to continue.

Specify the Destination Path(s)

The next panel of the wizard is where you define the destination path(s) for the Relation. In this instance, we are migrating a share named SalesData from the NETTEST machine to the WINDOWS2008TEST machine.

To add a path, click the 'Add' button and a browse panel will be displayed. Browse to the path and then click 'OK'. You can also type the path into the browser panel directly.

For this example, the destination path is C:\SalesData.



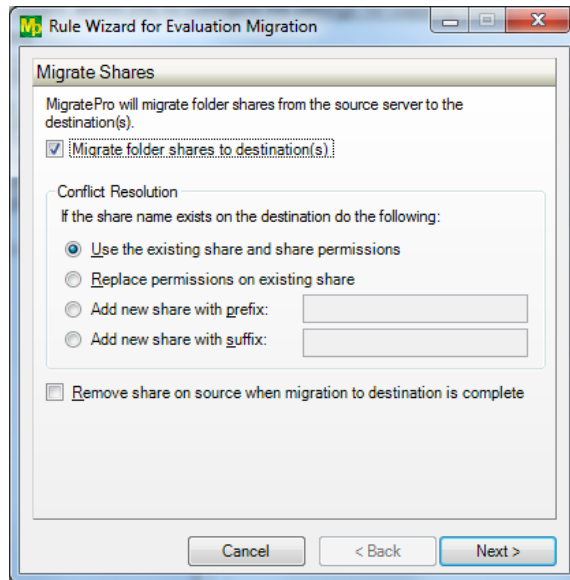
Click the 'Next' button to continue.

Configure Share Migration

The next panel in the wizard allows you to configure the settings for copying shares to the destination machine.

To migrate shares you must check the box for the 'Migrate folder shares to destination(s)' option.

For our example job, the default conflict resolution setting is appropriate. These settings are only used if a share of the same name already exists on the destination machine. This will not happen if you are migrating to new hardware. Further details can be found in the "Rule Properties - Migrate Shares" topic in the MigratePro help file.



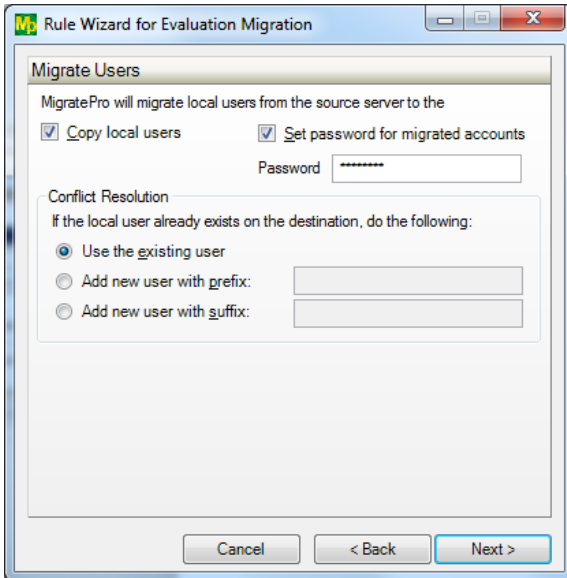
Click the 'Next' button to continue.

Configuring Local User Migration

The next panel in the wizard allows you to configure the settings for copying local users to the destination machine.

To migrate local users, you must check the 'Copy local users' option. Windows security features prohibit the retrieval and copying of account passwords. To address this problem, when you select the option you must also enter a password that will be applied to all migrated users. This is accomplished by checking 'Set password for migrated accounts'. When the password is set, it is configured as a password that must change at next logon. The next time a user performs a login on the machine with a local account, Windows will prompt for a password change.

For our example job, the default conflict resolution setting is appropriate. These settings are only used if a user account of the same name already exists on the destination machine. This will not happen if you are migrating to new hardware. Further details can be found in the "Rule Properties - Migrate Users" topic in the MigratePro help file.



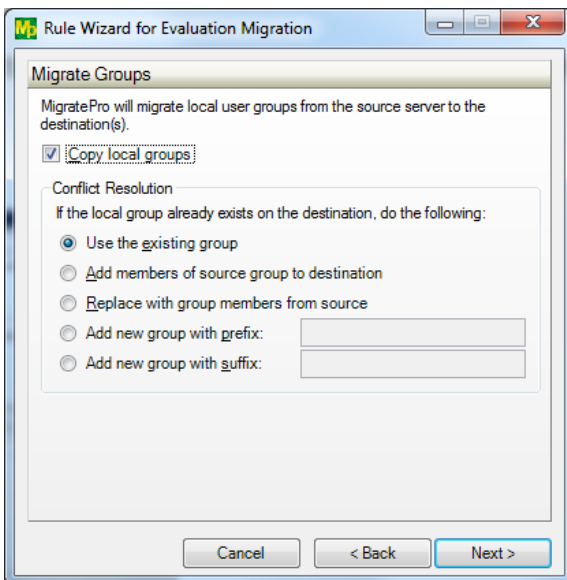
Click the 'Next' button to continue.

Configuring Local Group Migration

The next panel in the wizard allows you to configure the settings for copying local groups to the destination machine.

To migrate local groups you must check the 'Copy local groups' option. This will tell MigratePro to copy all local groups encountered while copying the files defined for the migration.

For our example job, the default conflict resolution setting is appropriate. These settings are only used if a group of the same name already exists on the destination machine. This will not happen if you are migrating to new hardware. Further details can be found in the "Rule Properties - Migrate Groups" topic in the MigratePro help file.



Click the 'Next' button to continue.

Configuring Migrate Options

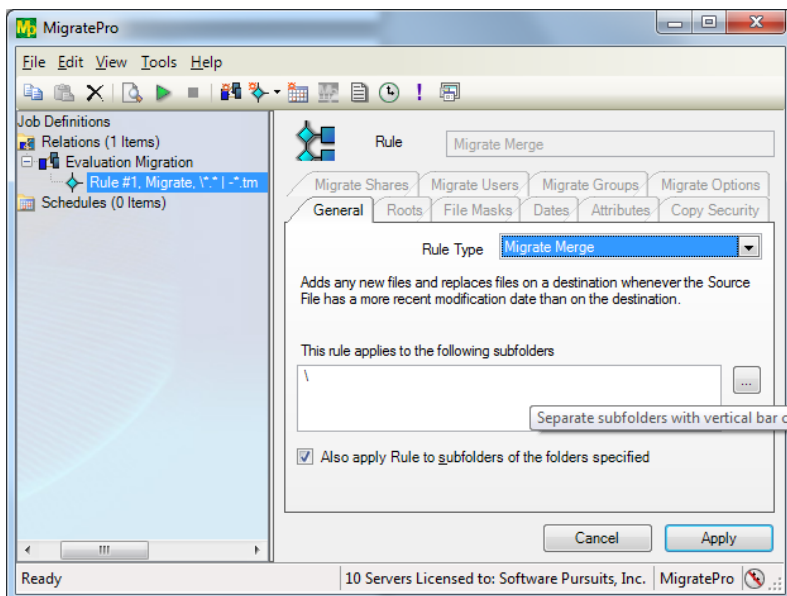
This panel of the wizard lets you configure some final options such as how to handle copying NTFS compression settings for the files being migrated. In this example, the default settings are appropriate. More details can be found in the "Rule Properties - Migrate Options" topic in the MigratePro help file.



Click the 'Finish' button to finish creating your Relation.

Change Rule Type to Migrate Merge

Once the Relation is created you need to change the Rule type to Migrate Merge. This is done by using the MigratePro desktop application. Branch out the 'Evaluation Migration' Relation by clicking the + sign next to the name, displaying the Rule. Select the Rule and on the General tab switch the Rule type to Migrate Merge as shown in the screenshot below.

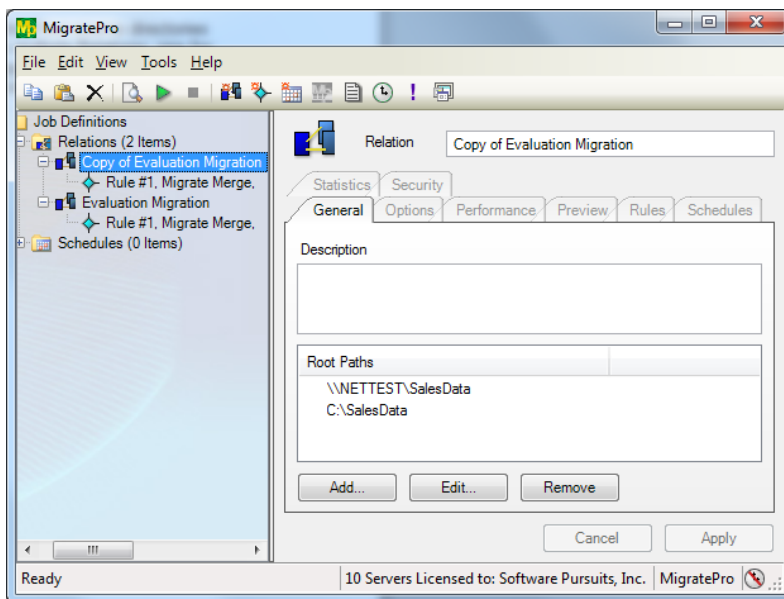


Previewing Your Relation

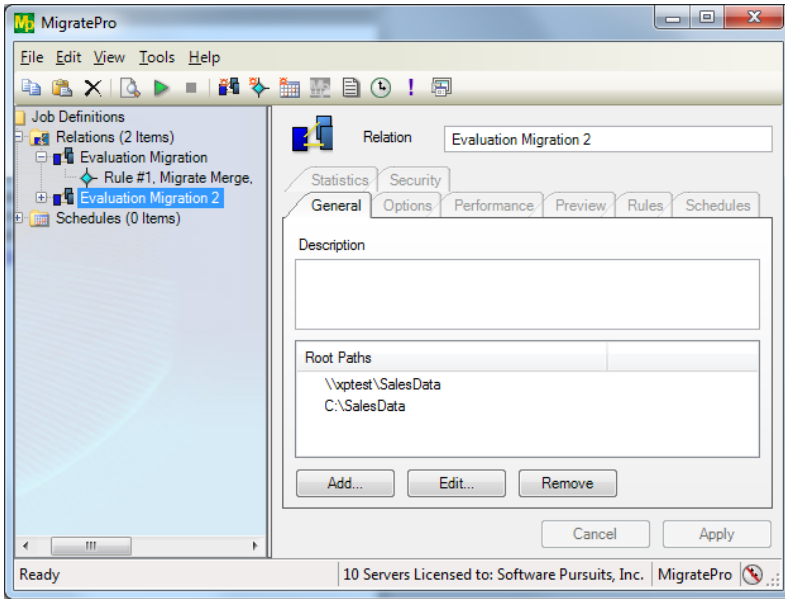
When you click 'Finish' to create the Relation you will be prompted to preview the Relation. The preview displays the actions that MigratePro would perform without actually doing them. This is a great way to determine if your Relation will perform as expected. It is recommended that you preview a Relation after making changes.

Configuring the Second Relation

A Migrate Merge Rule is only used when you are merging the contents of two source directories down into a single destination directory. As a result, you must create multiple Relations, one for each source path. The simplest way to accomplish this task is to copy and paste the existing Relation. This will carry over all the settings of the first Relation you created. This can be done using the Edit menu or the Ctrl + C and Ctrl + V keyboard shortcuts.

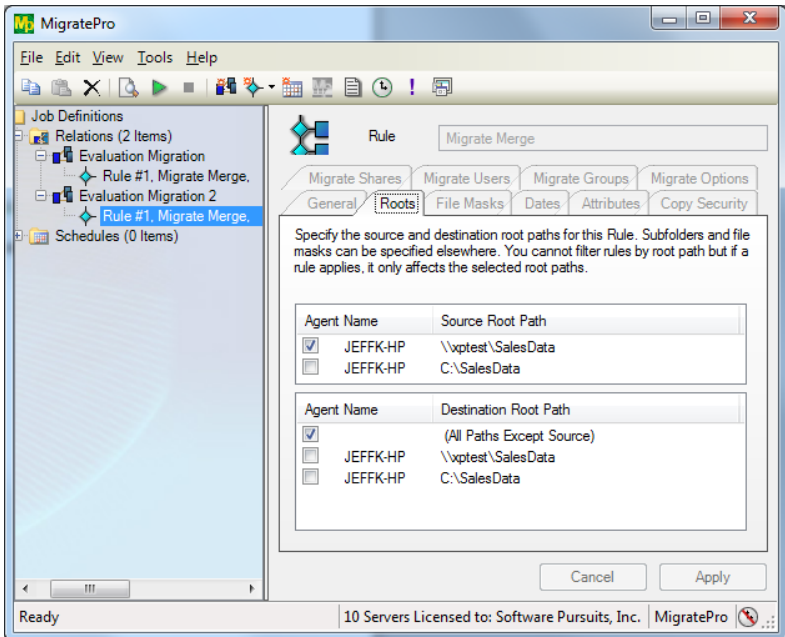


You must then rename the Relation name and modify the Root Paths so it has the new source. This can all be done from the General tab of the Relation. Simply change the Relation name in the field on the top of the panel and then highlight the source path you want to change. For this example it is the \\nettest\salesdata path. Clicking the 'Edit' button will allow you to select a new source path. In our example, the new source path would be \\xptest\salesdata.



When you are done making your changes to the Relation, click the 'Apply' button to save them.

You should also verify that the correct source and destination paths are defined on the Roots tab of the Migrate Merge Rule as in the screenshot below.

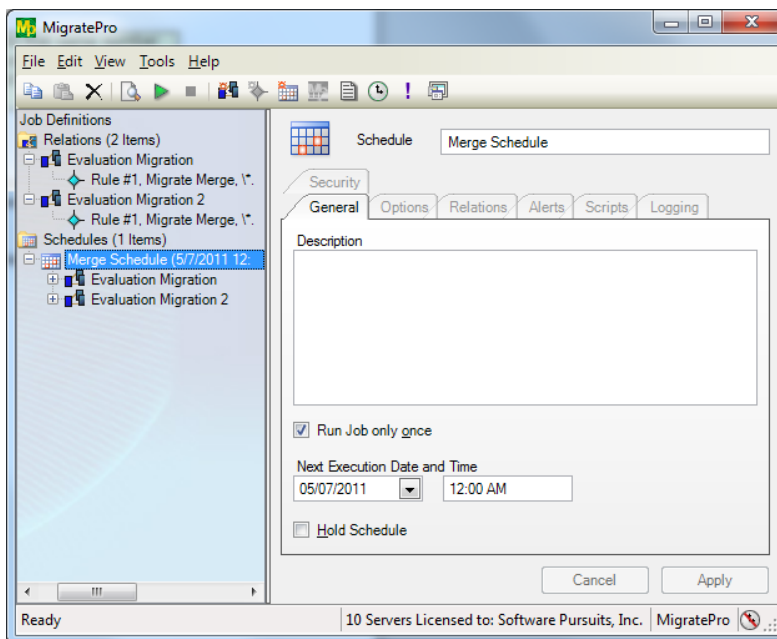


For each source path you are migrating, you would create that same number of Relations. For example, if you were merging 4 source directories from 4 different servers into one destination directory then you would have 4 Relations created with Migrate Merge Rules.

How to Run the Relations

Each of the Relations must now be run one after another. This can be done manually but it is easier to create a Schedule with all the Relations selected. The Schedule will then run the Relations one after another until all the Relations have finished.

For details on configuring a Schedule please see the 'Creating a Schedule' section of this document.



1.8 Creating a Schedule

A Schedule is used to specify when one or more Relations should be run. Schedules are very flexible and can be configured to run a Relation at a specified time, specified time intervals, or only on specific days of the month, days of the week, weeks of the month, or months of the year. This allows a very granular level of control over when your migration jobs are run.

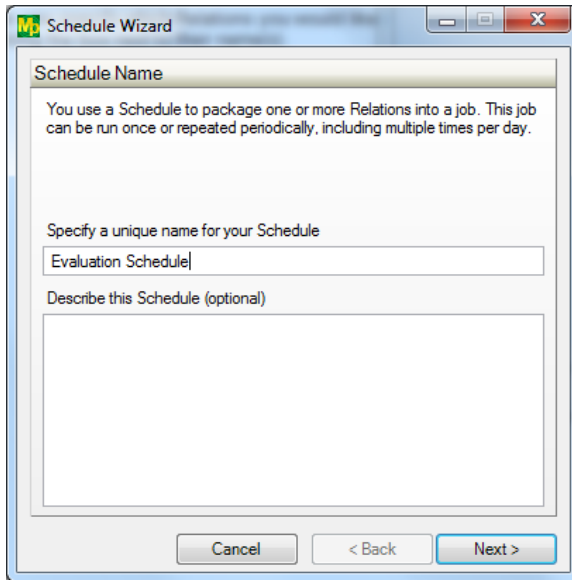
In this example we will create a Schedule that will run the Evaluation Migration Relation created in the 'Configure a Migrate Relation' section of this guide. We will configure the Schedule to run once at midnight. This is a common scenario for MigratePro where a user configures the migration job and then schedules it to run in the middle of the night when no one will be accessing the shares.

To start configuring your Schedule, go to the **File | New | Schedule**.

The wizards are designed to quickly and easily configure the basic options needed to get a Schedule up and running. MigratePro's Schedules can be configured with many advanced options that are not displayed in the wizard. These additional options can be configured using the property panels for the Schedule after it has been created.

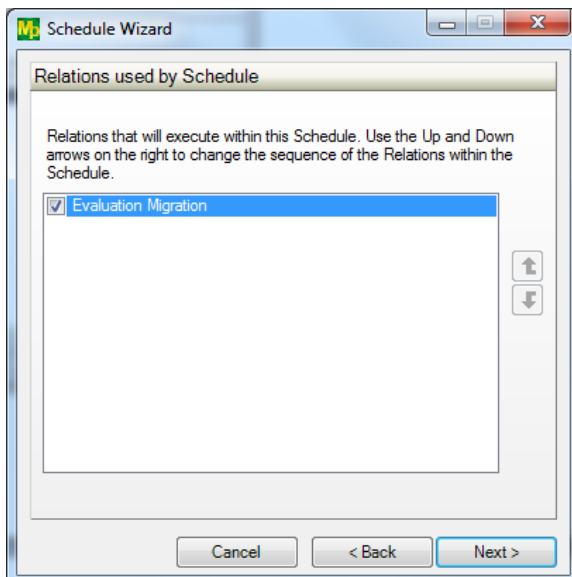
Name Your Schedule

The first panel allows you to name your Schedule. Enter the name of the Schedule and an optional description. Then click "Next" to continue.



Select What Relations to Run

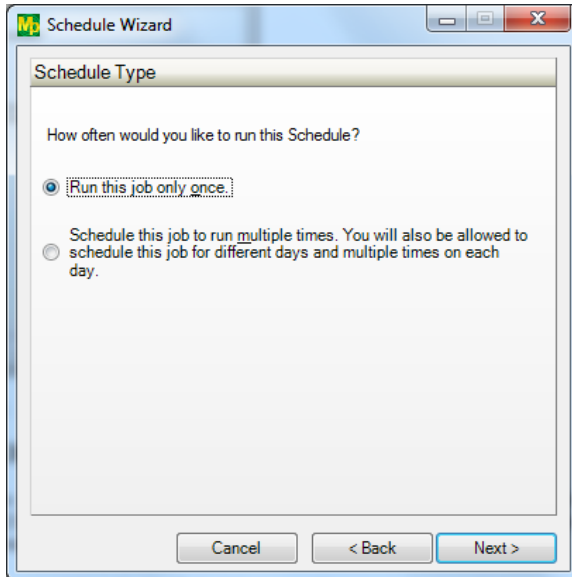
This next panel is where you specify which Relations you would like the Schedule to run. Specify these Relations by checking the box next to their name(s).



Setting Schedule Frequency

The next panel provides options on how often you want the Schedule to run.

By default, the 'Run this job only once' button is selected. This is the option which we will use to configure the Schedule to run once at midnight. The option to 'Schedule this job to run multiple times' can be used to tell the Schedule to run once an hour for example.



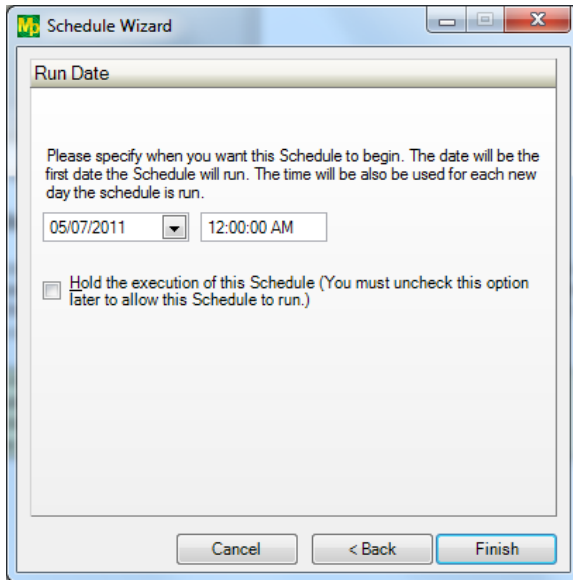
Click 'Next' to continue.

Setting the Schedule Start Date

The next panel is where you specify the start date and time for the Schedule. The default time for all new Schedules is 12:00AM. The default time can be configured in **Tools | Options** on the Scheduler tab if you would like it to be something different.

You can pick a future date and time for the Schedule to run. You can enter in a date and time manually or you can pull down the menu to select the date from a calendar.

In this case we will select today's date and midnight.



Click the 'Finish' button to create your Schedule.

Modifying Your Schedule

Your Schedule is now complete and has been created. You can make changes to the options of your Schedule in the main SureSync window by first clicking on the Schedule you wish to modify and then you can look through the tabs on the right side for options to change. Pressing F1 while on any tab will bring up context sensitive help, describing the options on the tab in detail.

You must have a Scheduler running for your Schedule to run at the scheduled times. A Scheduler can be installed by going to the Tools menu, selecting Schedulers, clicking on the Install button and then providing a username and password for the Scheduler to run under.