

ALTIRIS.
SMART MOVE.



Vista Migration

WITH ALTIRIS BUSINESS SOLUTIONS

ALTIRIS: NOW PART OF SYMANTEC



About Altiris

Altiris, now part of Symantec, is a pioneer of IT lifecycle management software that allows IT organizations to easily manage desktops, notebooks, thin clients, handhelds, industry-standard servers, and heterogeneous software including Windows, Linux, and UNIX. Altiris automates and simplifies IT projects throughout the life of an asset to reduce the cost and complexity of management. Altiris client and mobile, server, and asset management solutions natively integrate via a common Web-based console and repository. For more information, visit www.altiris.com.

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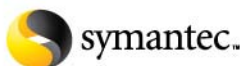


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Migrating with Altiris Business Solutions

Migrating to Microsoft Windows Vista can be a daunting task. You want to take advantage of Vista's improved security and reliability, but how do you implement an efficient, cost-effective migration that doesn't disrupt end-user productivity? While challenging, migration also presents an opportunity. It's the perfect time to wipe the slate clean; to implement standard configurations and structured change management procedures that will help ensure the long-term rewards that come from a manageable, sustainable environment.

Altiris, now part of Symantec, has migrated more than 20 million desktops and notebooks to Windows 98, 2000, XP, and now Vista operating systems. With years of experience and millions of successful hands-free, fully-automated hardware refreshes and OS migrations, Altiris is an acknowledged leader in operating system migration, and we've engineered that knowledge into our solutions.

WHY USE ALTIRIS FOR VISTA MIGRATION?

Integration—Altiris solutions not only deploy the OS image. They perform inventory and assessment, virtualize applications, capture application settings and user data, conditionally install applications based on the user or department, and reconfigure the migrated computer—all from a single console. This integrated, automated approach eliminates the need for custom scripting, and ensures that when the migration finishes the machine is ready to use, eliminating hundreds of hours in unnecessary help desk support calls.

Automation—Altiris customers have migrated millions of computers to new operating systems using a single job and a single hardware independent image. Most organizations don't have the time or personnel to manually perform each part of a migration, so we've designed our tools to fully automate the process, allowing you the option to remotely carry out full migrations without touching the computers being migrated.

Proven technology—Altiris provides native support for sector-based imaging as well as the new WIM image format introduced with Vista. Your migration starts from wherever you are at—even Windows 95 or 98 machines. We believe that your technology decisions should be based on business needs, not the limitations of your software.

As the key deployment partner for desktops, notebooks, workstations, thin clients, and servers for Dell, HP, Fujitsu Siemens Computers and IBM servers, Altiris works closely with all major hardware manufacturers. We also support hardware-based management technologies such as Wake on LAN, PXE, and Intel® vPro™, ensuring you can take full advantage of hardware features.

Continued management after migration—as part of a migration project, you will be building all of the pieces (standard images, software packages, etc.) necessary to put an on-going management system in place. Altiris solutions allow you to leverage this investment and to continue to secure and manage your IT resources long after the migration is complete.

General Migration Guidelines

Having a sound migration plan and an integrated, automated solution is important for migration. Making sure your team is prepared can be just as important. As you prepare for Vista migration, be sure your team is ready.

Communication—a successful migration involves coordination with people across your organization. As part of your migration plan, identify who within your organization will need to see and/or approve various aspects of the migration, and make a plan for how you will make sure they are informed and involved at the right time.

Set expectations—even a good process can be considered a failure if expectations are not met. As you make your migration plan, work with key stakeholders to understand their objectives and to make sure that you are setting achievable goals.

Identify other opportunities—as you work through your migration plan, look for ways to take advantage of the migration to improve processes or address current objectives in areas such as standardization, automated management, compliance and security.

Some improvements you might want to consider include:

- Implementing computer naming standards
- Standardizing software versions
- Resolving security vulnerabilities
- Harvesting and consolidating software licenses

Stay focused—while migrations present natural opportunities to improve, watch for distracting, out-of-scope projects, such as network upgrades. By staying focused on projects related to the migration, you can limit cost and scope creep that might ultimately jeopardize your success.

10 Steps for Vista Migration

Successful migration is only possible with a thorough strategy. We have used our years of expertise to develop the Altiris 10-step Vista Migration process. This process includes three phases: Assessment, Build and Test, and Execute and Report.

Assessment Phase

In this initial phase, you will assess resources and plan a strategy to ensure a successful migration. This includes evaluating the hardware and software in your end user environment, assessing security, and identifying network and management issues across your organization.

Altiris solutions assist with this assessment and planning stage, providing pre-built reports to assist in determining hardware readiness, identifying applications for migration, and overcoming infrastructure barriers to ensure a smooth migration. This assessment phase provides the basis for your deployment plan.

STEP 1: ASSESS YOUR RESOURCES AND ENVIRONMENT

Gathering real information about your hardware, software applications, and security will help determine when to migrate and what resources are required for the migration. During this phase you will:

- Running an inventory scan
- Assessing hardware readiness and run reports
- Assessing software readiness and prioritize applications to test and migrate.
- Running a security audit to verify policy levels before and after migration.



STEP 2: ASSESS YOUR NETWORK AND INFRASTRUCTURE



Is your network ready for a large-scale rollout? Evaluating your organization's physical requirements and topology is key. The following network issues should be addressed before migrating:

- Discovering devices across your network.
- Preparing for the data transfer required for your organization. Large-scale, centralized deployments may require transferring large amounts of data.
- Determining where and how you will utilize multicasting, local file shares and package servers to position files and leverage network features.



STEP 3: PLAN YOUR DEPLOYMENT

Outline a deployment plan and build a migration business case addressing topics such as:

- Costs, timeframes, and required hardware and personnel
- Dependencies unique to your organization
- Service Level Agreements (SLAs)
- Communication plans
- Potential issues and risks

Build and Test Phase

During the second phase of migration, you can prepare for migration by building image files, identifying application compatibility issues and building application packages, and generating personality templates. During this phase, you will also build and test your migration workflow job to ensure all files and templates are in place and ready to go.



STEP 4: BUILD STANDARD VISTA IMAGES

Deploying standard hard disk images is the fastest, most consistent way to install a new operating system. Altiris allows you to use our native sector-based image format, Ghost images, or the new Microsoft WIM image format, depending on what makes sense for your environment. You also can choose to create a single-hardware independent image, or build and maintain a small set of base images. Depending on the complexity of your environment, a small set of base images may most effective. As a best practice, to keep images as small and generic as possible, only include applications that must be installed on all computers in the base image, and install other applications in the same job, but separately from the OS image. Regardless of what image strategy you choose, the steps for building standard images include:

- Creating standard images with settings and configuration for multiple users
- Providing device drivers for the various hardware configurations
- Including applications that are required on all computers in the base image

STEP 5: APPLICATION COMPATIBILITY AND PACKAGING



Applications are at the center of user productivity, and in the case of the Vista migration, may be at the heart of your migration challenges as well. While most commercial applications will eventually support Vista, responsibility for verifying and remediating legacy or custom applications will fall to you. Up-front testing and consistent packaging can reduce the number of problems that require intervention and desktop visits. This includes:

- Identifying applications supported on Vista
- Testing applications to identify conflicts with Vista or with each other and ensuring compatibility in your environment
- Remediating issues through policies, packaging, virtualization, or—if absolutely necessary—debugging and code changes



STEP 6: BUILD PERSONALITY TEMPLATES

If there is one thing that will make or break an OS migration, it is the successful transfer of each computer and end users' unique network, operating system, application and data settings, along with other customizations. To ensure a successful transfer includes:

- Identifying global settings to migrate (printer and network drive mappings, favorites, security settings, etc.)
- Identifying application settings to migrate, including custom applications
- Identifying data files to migrate and which ones to leave or require end users to transfer



STEP 7: BUILD MIGRATION WORKFLOW

Now that the pieces are in place, you need to hook them together and encapsulate the templates and files into an automated job or a workflow sequence. This ensures that when one task completes, the next is triggered automatically. Pre-defined sample jobs and wizards can help you through the process, ensuring your ultimate success. A typical migration job should include:

- Capturing personality settings (using the template built in Step 6)
- Deploying the OS image (using the image built in Step 4)
- Installing required applications (using the applications packaged and tested in Step 5)
- Restoring personality settings

Execute and Report Phase

This final phase leads you to the production rollout. This phase begins with a small scale test and pilot, leads you through implementing the migration infrastructure you planned in Phase 1, and finishes with the production rollout and review of final migration reports.



STEP 8: RUN PILOT AND TEST

Before you can successfully migrate on a large scale, you need to know what is in front of you. Gathering real information about your hardware, applications, and security helps you determine when to make the move and what resources are required. A test program includes:

- Identifying test candidates
- Documenting test cases
- Creating a phased pilot



STEP 9: DEPLOY MIGRATION INFRASTRUCTURE

You've done all the planning, completed a successful test, and adjusted your processes accordingly. It's time to deploy the migration infrastructure into your production environment by:

- Positioning any additional servers purchased as part of the deployment plan in Step 3
- Making any required network adjustments, such as enabling multicasting
- For smaller locations or larger locations with multiple subnets: identifying desktop computers to act as multicast masters



STEP 10: MIGRATE AND REPORT

Everything is in place; now it's time to migrate. After a successful automated migration, there's one last important step: post-migration reporting and analysis. Good reporting will enable your executive team to track the migration from a distance and will help you analyze aspects of migration such as:

- Total systems successfully migrated
- Problems encountered during migration
- Real-time migration status
- Missing patches
- License verification

Additional Vista Migration Information

Here are some helpful places you can go to get more information about Vista migration:

The Altiris Vista Resource Center has everything you need to successfully plan and execute an enterprise-wide Vista migration including best practices, white papers, events, downloads, and more at www.easyvistamigration.com.

Altiris Juice, an online community where you can collaborate, learn and share ideas about Altiris solutions at <http://juice.altiris.com/>.

Learn more about how Symantec solutions for businesses can help you successfully manage Vista at <http://www.symantec.com/enterprise/theme.jsp?themeid=vista>.