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Overview

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

**PCmover 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

**Policy File**: Applies to and controls migrations.

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 Vista 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. Once the 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.

IMPORTANT: .Net 4.5.2 Framework must be installed on each machine on which PCmover Manager or PCmover Client will be run. See Microsoft’s website for more information and to download .Net 4.5.2 Framework if needed.

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

PCmover Manager UI Overview

Through the Start Page, you can view and edit policy files.
The first time you open PCmover Manager, click **New Policy File** and create the Policy File that you will edit.

The Policy Files you have created will be listed on the left side of the Start page. Click a Policy File to view and edit the settings. Click **Open File Location** to view the folder where the Policy Files are saved.

Once you have finished editing a policy file and want to use that specific file for a migration, click **Publish** and navigate to the folder where PCmover Enterprise is locally installed. Save the policy file as **Policy.pol**, choosing to replace the current **Policy.pol** file.

**IMPORTANT:** Policy files are encrypted and can only be edited through the PCmover Manager.

---

**PCmover Domain-Level Security**

When running on a domain, PCmover will check to see if the PCmover Admin and PCmover Users groups of users are defined. If these groups are defined, then PCmover will validate, prompting if necessary for domain credentials. If the necessary credentials are not entered, the requested action will be blocked.

If PCmover Enterprise is not on a domain or if the IT administrator does not require authentication, they need not create the domain groups. In this case, PCmover will be open and not prompt for credentials.

Users in the PCmover Admin group can run the PCmover Enterprise client and PCmover Manager software. Users in the PCmover Users group can run the PCmover Enterprise client.
Creating Domain Groups

In order to allow domain authentication, the following steps need to be performed on a domain controller.

1. On the Domain Controller, open the Server Manager.

2. Select the Tools Menu from the top and then the Active Directory Users and Computers.
3. In the **Active Directory Users and Computers** dialog, right-click on the Domain and select **New** and then **Group**.

4. Create 2 groups. Name one group PCmover Admin and a second group PCmover Users. Assign Users to the groups as needed.
Configuring a Policy File

Overview: Configurable settings are divided into two categories, each organized under the two named sections:

- **User Interface**: Each tab in this section corresponds to a specific screen in the PCmover Client. These settings affect the screens and selection options the user will see during the migration.
- **Engine**: Settings that affect the running of the PCmover Client, but do not correspond to a specific screen.

Showing changes made in the Policy File: All tabs that have been changed from the default will be shown with a blue box to the left of the name of each tab in the list.

User Interface Tabs

At the top of each **User Interface** tab is an option allowing the screen to be displayed to the user. This is pre-selected by default. If you make the necessary selections for the user, you can then uncheck this box if desired so the user will not see the specific screen.

If the **Display** checkbox is checked and grayed out, then one or more selections are still needed. The screen will be shown to the user during the migration so the necessary selection(s) can be made.

General

**Policy Type Dropdown** – Choose the default settings used by PCmover.

**Policy Mode Dropdown** – Sets how this policy file is handled:

- Normal – Execute this policy file normally (i.e., sets all the configuration based on this policy).
- New Default – Forces PCmover to just use the defaults.
- Recorded – Handle this policy as if it were a recorded policy file

General Options:

- **Record Policy** – Record users interaction into a policy file called RecordedPolicy.Pol stored in App Data. This recorded policy file can then be used for future migrations.
- **Run in Simulation** – Runs PCmover in simulation mode allowing a user to see a mock migration.
- **Minimum UI** – Runs PCmover in a very minimalistic fashion.
- **Make Advanced Options the initial page** - Skips the Welcome Screen and proceeds to the Advanced Options Page.
- **Show User Guide Button** - Determines if the User Guide button is displayed.
- **Show Reports Button** - Determines if the Reports Button is displayed - 3 states:
  - Solid – Indeterminate; No transfer has occurred. Program determines if button should be displayed.
  - Checked – Always show reports button.
  - Unchecked (blank) – Never show the reports button.
Suppress - Options to suppress certain items:

- Message Boxes - Auto close any message boxes so program can run silently.
- Create Transfer File - Auto click the Create Transfer File button.
- File Based Unload Dialogs - Don't display customization dialogs and accept the default values.
- Transfer Progress Page - Auto click Next on progress dialog for network and cable transfers.
- Profile Migrator Page - Auto click Next on the Profile Migrator User Mapping screen.
- Transfer Everything Summary Screen - Auto close the Transfer Everything Summary screen.
- Download Manager - Auto click Next on the Download Manager screen.
- Serial Number in About Screen - Hide serial number info in the About box.

Welcome

This screen welcomes the user to the migration.

Automatically Click Advanced Options - Automatically select the Advanced Options link and proceed to the Advanced Options screen.

Automatically Click Transfer Between PCs - Automatically select the Transfer Between PCs button and proceed to the next screen.

License

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.

Username – Enter the username used for activation.

E-Mail – Enter the E-Mail address to be used for activation.

Serial Number – Enter the serial number to be used for activation.

Is Serial Number Visible - Determine if the Serial Number and the Change Serial Number link is displayed on other pages.

Both PCs

Is Eula Accepted – Choose whether to accept the PCmover Enterprise EULA in advance - 3 States:

- Solid – Eula has been not been displayed.
- Checked – Eula is accepted.
• Unchecked (blank) – Eula is not accepted.

Advanced Options

Buttons Selected – Allows you to preselect one of the buttons

• Transfer Between PCs: A synchronous transfer through a connection (network, crossover Ethernet or Laplink USB cable).
• File Based Transfer: Uses a Transfer File, created from the data on the source machine. The file is stored on an internal drive or on external media.
• Image and Drive Assistant: A transfer from a mounted image of the source machine.
• Profile Migrator: A transfer of data between two user profiles on the same machine. PCmover supports transfers for Azure Active Directory users, local Active Directory users, and local non-domain users.

Hide Transfer Between PCs Button – Won’t display the Transfer Between PCs button.
Hide Files Based Transfer Button – Won’t display the Files Based Transfer button.
Hide Image and Drive Assistant Button – Won’t display the Image & Drive Assistant button.
Hide Profile Migrator Button – Won’t display the Profile Migrator button.

Find PC

Recorded PC Name – If you previously ran a transfer and chose to record it, this box will display the Target machine name from that transfer.

PC Mapping - Define machine pairs to allow PCmover to connect to target computers based on the name of the source computer. The Import button allows the machine pairs to be defined in a simple csv file, where each pair is on a line separated by a comma.

Analyze PC

Do Custom Transfer – Automatically select the Custom Transfer Link, which will then provide the option to select the type of transfer.

Custom Transfer

Option Selected – Select the type of transfer. If None is selected, then the user will be shown the four listed options.

• Standard: Transfer applications, files, and settings using the defaults.
• Files and Settings: Transfers only files and settings using the defaults, and no applications.
• Files Only: Transfer only files using the defaults, and no applications.
• Let Me Choose: User will have the option to choose what applications, user accounts, files, and settings transfer.
Note: For the first three options, the transfer will complete using the defaults set in PCmover, with no option for the user to select specific applications, settings, or files.

**Image Assist**
If running the transfer with Image & Drive Assistant, pre-select one drive or multiple drives if desired.
Use Single Drive – PCmover will restore from one image, mounted as a drive.
Multiple Drives – Select I am restoring from multiple images, mounted as drives.

**Files Based Transfer**
If running a file based transfer, you can set whether the current machine is the old (source) PC or the new (target) PC.
Select Old Computer – 3 states
- Solid - indeterminate – The old or new computer determination has not been made.
- Checked – Make this computer the old computer.
- Unchecked (blank) – Make this computer the new computer.
Transfer File – Name of the file to either store or restore the transfer data.

**Files Based Analyze**
Allow Customization – Enables or disables the Customize Transfer File link.
Select Custom Transfer – Selects the Customize Transfer File Link.

**Profile Migrator**
If transferring between user profiles on the same machine, you can set up source and target user profile pairs for the transfer. If transferring from one domain to another domain, you can also enter the domains as well.

**Advanced Modifications**
Drive Mapping: 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.

File Filters: The PCmover Client will normally transfer all files that do not already exist to the target computer. File Filters 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)

Application Options
This allows you to control applications that may have been defined when someone recorded a policy. Normally application control is done as part of the Engine Policy pages.

Transfer Summary
Each Button can be shown (checked) or suppressed (unchecked).

Documents
The PCmover Client will normally transfer all files and 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.

On this tab, you can preset the full directory or file path of those directories or files that should be transferred to a different location than the default. You can also preset directories or files to not transfer.

User Selection
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.

On this tab, you can preset how user accounts are transferred by mapping a particular user from the source computer to a particular user on the target computer. Click Add, enter the Source User name, the Target User name, and set the user account type.
Logon Days – This specifies a number of days since last login to use as a filter for which users PCmover should transfer. For example, if Logon Days="60", PCmover will only transfer users that have logged on in the last 60 days. If the number that is specified is "0", which is the default, there is no login restriction.

**Transfer Complete**

Restart PC: Leave this checked if you want the target PC to restart after finishing the transfer.

**Engine Tabs**

**Settings**

Use this page to specify miscellaneous settings.

Compress Others: If checked, settings for the transfer (moving journal and snapshot files) are compressed when they are saved.

Compress Van: If checked, the transfer file (moving van) is compressed when it is saved.

Rename MAPI: If checked, PCmover will automatically rename Outlook data files and profiles that are migrated.

**Connection**

Use this page to configure or restrict the connection methods that are used.

**Network**

- Enabled: Enables the network connection method, including the Laplink Ethernet Cable.

**File**

- Enabled: Enables the file connection method.
- Require Van Password: If checked, a password will be required before unloading the Transfer File (moving van).
- Allow User to Modify: If checked, the user will be able to change the password.
- Van Password: The password for unloading the Transfer File (moving van).
- Span Multiple Files: Breaks the transfer file up into multiple files. Useful when saving to removable media.
- Prompt When Spanning Multiple Files: If checked, the user will be notified between files during spanning.
- Span File Size: This specifies the span size, the size that the transfer file is broken up into. The value is a number followed optionally with "B", "K", "M", or "G" to specify units of bytes, kilobytes, megabytes, or gigabytes. If no letter is specified, the units are bytes.
USB
• Enabled: Enables the USB connection method.

Laplink Ethernet Cable
• Enabled: Enables the USB connection method.

Reports
Use this page to specify which reports should be automatically generated at the end of a transfer. All reports will be generated in the Reports Directory (absolute or relative to the PCmover client) unless the report specifies an absolute directory path.

Format: Specifies the format of the reports.

Encoding: Specifies how the text is output in the reports.

Directory: Specifies the default directory for reports on disk. This can be an absolute directory name or relative to the PCmover Client directory.

Detail Reports
• Detail Type: Specifies the type of detail report to generate.
• File Name: Specifies the file name of the report, absolute or relative to the Reports directory.
• Append: Specifies whether the file is appended to an existing file or created.
• Exceptions Only: Specifies if this should be the "exceptions only" version of the report. Each report has a shorter version available which contains, for example, only the failed items or only the created users, which are considered the exceptions and might be of more interest than the full report.

Summary Reports
• File Name: Specifies the file name of the report, absolute or relative to the Reports directory.
• Show Components: If checked, the specific components are used instead of the collections of components.
• Append: Specifies whether the file is appended to an existing file or created.
• Exceptions Only: Specifies if this should be the "exceptions only" version of the report. Each report has a shorter version available which contains, for example, only the failed items or only the created users, which are considered the exceptions and might be of more interest than the full report.
**Configuration**

Use this page to specify the location of directories used by PCmover. Please note that these directories must be valid for the users running PCmover. Do not specify directories that are specific to individual computers or use mapped drives that are not set up for the end user.

- **Logs Folder:** location of the journal and other log files generated during a migration, by default the `{Common AppData}\Laplink\PCmover` directory local to the user's machine.
- **Rule Folder:** Location of the rule files, by default the Rules sub-directory of PCmover.
- **App Profiles Folder:** Location of the App Profile files, by default the App Profiles sub-directory of PCmover.
- **Redist Folder:** Location of redistributable information, by default the Redist sub-directory of PCmover.

**Note:** For most users, the only setting that should be changed is the Logs Folder location.

**Auto-Run**

Use this page to specify other programs to be run after a migration and at certain other times.

Click **Add** and create the program to be run automatically.

- **Name:** specifies a display name for this program. It is used for the Run Once registry value for When ="Login".
- **File:** The path to the program to run.
- **Parameters:** Specifies command line parameters to pass in when launching the program.
- **Trigger:** Specifies the event that triggers the program to run. The choices are:
  - Start: PCmover starts up and has not yet displayed the Wizard.
  - End: PCmover is terminating.
  - Success: PCmover is terminating and has completed a successful transfer.
- **When:** Specifies when the program will run, given that the trigger has occurred. The choices are:
  - Immediate: Launch the program directly and wait for it to terminate.
  - Login: Launch the program the next time the specified user logs in. This option is not available if the "Trigger" is "Start".
- **Timeout:** Specifies the maximum number of seconds to wait for an "Immediate" launch to complete.

**Applications**

Use this page to specify applications that should or should not be transferred.

Migrate by Default: Controls whether applications migrate by default. If unchecked, only applications that are specifically requested to migrate in the policy file or interactively requested by the user will transfer to the new computer. This attribute is ignored in a "Files and Settings" migration, where only settings for applications that already exist on the new computer migrate by default.
Migrate Untested Apps: Controls the default selection state for any applications which have no App Profile File, and as such are considered untested. If set to "Same Bitness", it means to migrate untested applications only when going from Win32 to Win32 or Win64 to Win64.

Click **Add** and enter details about a specific application:

- **Application Id**: Specifies the unique ID that identifies the application that this entry refers to. The ID codes correspond to the registry key names under the `HKEY_LOCAL_MACHINE\Software\Microsoft\Windows\CurrentVersion\Uninstall` key for each application.
- **Application Name**: Specifies the name of the application that this entry refers to. The name supports "*" and "?" as wild cards for partial matching.
- **Application Publisher**: Specifies the publisher of the application that this entry refers to. The name supports "*" and "?" as wild cards for partial matching. The Id or the Name or the Publisher must be specified to identify what application this entry refers to.
- **Transfer**: Specifies whether this application should transfer to the new computer.
- **Allow Modification**: Specifies whether the user is allowed to change the selection state of this application.

**Pre-registration**

Use this page to pre-register transfers for users who will not have Internet access.

Note: To pre-register, you must first enter the license information under the License tab under User Interface.

**Alerts**

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.

Enter the name, email, and message for either an interactive or non-interactive alert.

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.

**Rules**

Use this tab to specify additional rule files that will be loaded.

Relative paths: If the Rule folder in the Configuration tab is set, the path to the rule file must be relative to that folder. If the Rules folder is not set, the path to the rule file must be relative to the Rules folder in the PCmover App Directory.

Absolute paths: You can specify an absolute path to the rule file.
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 an additional parameter to the policy file during run time.

PCmover Command Line Parameter

- policy="{full path to file name}": This parameter overrides the default policy file.

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 inquiries about other Laplink products, contact your Laplink Corporate Sales Representative, or send an e-mail to:

Corpsales@laplink.com