

# Altiris™ IT Management Suite from Symantec™ Migration Guide version 6.x to 7.1

# Altiris™ IT Management Suite from Symantec™

## Migration Guide version 6.x to 7.1

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Symantec Corporation  
350 Ellis Street  
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<http://www.symantec.com>

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  - Troubleshooting that was performed before contacting Symantec
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# Introducing IT Management Suite

This chapter includes the following topics:

- [About IT Management Suite](#)
- [What's new in IT Management Suite](#)
- [Solutions of IT Management Suite](#)
- [Components of the Symantec Management Platform](#)
- [Where to get more information](#)

## About IT Management Suite

IT Management Suite combines client and server configuration management with IT asset and service management. It promotes effective service delivery and helps reduce the cost and complexity of managing corporate IT assets. These assets may include desktops, laptops, thin clients, and servers in heterogeneous environments running Windows, Linux, UNIX, and Mac. You can manage all of the features of the suite through a central console on a common platform: the Symantec Management Platform. This common platform integrates management functions to accelerate automation for better service, value, and IT efficiency.

IT Management Suite is comprised of the following management capabilities:

- **Server management**

The server management capabilities support not only the Windows operating system, but also the UNIX and the Linux operating systems. In addition, the same management disciplines are applied to both physical systems and virtual systems, including both Microsoft Hyper-V and VMware.

- **Client management**  
The client management capabilities support Windows and a growing number of other platforms, including Mac OS and Linux operating systems.
- **IT asset management**  
IT asset management builds upon solid inventory foundations for configuration management. It helps you accurately value both your discoverable and non-discoverable assets, and track your assets and your asset-related information. You can manage contracts, software license compliance, and procurement processes as well as the configuration items that are associated with your assets.
- **Service management**  
IT Management Suite includes fully featured service management capabilities. It provides the necessary components for any ITIL-based service management initiative and covers key functions. These functions include incident and problem management, change management, self service options, and a service catalog.

## What's new in IT Management Suite

In addition to full server-side 64-bit support, IT Management Suite includes many new features. The new workflow engine lets you automate human and system interactions to help you complete the sequential tasks that are required for efficient service management. Imaging, deployment, and remote control features are now integrated. The central catalog, the software library, and the new user views deliver a deeper functional integration. New IT Analytics capabilities and the central Software Catalog provide greater intelligence.

The following are some of the key new features in IT Management Suite:

- **Intuitive management interface**  
IT Management Suite 7.1 introduces an improved management interface that gets you where you want to be faster. The page load times are shorter and are more responsive. Common concepts such as managing computers, delivering software, and managing licenses and deployment are consolidated into an integrated experience. When you click on a computer, resource management details are immediately visible. Powerful search features help you drill down and build filters in a short period of time. You can quickly save the searches for future use. Drag-and-drop functionality lets you select tasks and drag them to one or more selected computers.
- **Streamlined software management**  
The Software Catalog interface is streamlined and redesigned. Any software that is found is stored in the newly discovered list. From this list you can

quickly determine whether you want to make the identified software a managed product. If not, you can assign it to unmanaged software. After you identify software as a managed software product, you can manage all elements of it in a single interface. Inventory, metering, delivery, and license tracking are all presented in a single interface.

In addition to improvements in the Managed Delivery interface, the Managed Delivery feature is more robust. The Managed Delivery feature now separates the schedule for delivery and the schedule for execution. You can first stage packages in advance, and then later schedule the execution.

- **Simplified license management**

License management and asset management and usage are tightly integrated. Within the software display is an at-a-glance view of the current deployments and cost details. These details are based on the current installations and the purchasing details. A graphic can help you to determine if a software product is over-deployed or under-deployed, and evaluate its current usage. It gives visibility into the financial effect of a product. You can see the potential savings from harvesting licenses, and you can see the cost effect when a product is over-deployed.

- **Advanced reporting and IT Analytics**

The executive dashboard and trend analysis give you a representative view of your IT assets. Key performance indicators let you measure critical success factors for your organization and quickly assess trends of how these measures change over time. You can use ad-hoc data mining to construct pivot table reports. The reports are based on predefined measures and dimensions. The functionality allows for easy manipulation of the data so you do not have to be a SQL expert to access the information you need. Multidimensional analysis and robust graphical reporting are incorporated to help you arrive at your answers with very little customization and without waiting.

The MultiCMDB feature provides global IT Analytics reporting across multiple CMDBs without the need to replicate large amounts of data.

- **Optimized scalability and performance**

This release increases the overall scalability of the Symantec Management Platform. Each Notification Server computer now scales to support more endpoints than the previous versions supported. The overall goal is to streamline your implementations by using less hardware. In addition to numerous improvements in overall performance, the two key changes are to user interaction and to reporting. With the new management interface, page loads are significantly improved. The advanced IT Analytics features let you gain the efficiency of OLAP cubes. The features create faster reporting times by off-loading report data from the operational database.

- **Microsoft Windows 7 application compatibility challenges addressed**

A key challenge to moving to Windows 7 is that many legacy Web applications depend on Internet Explorer 6. Symantec Workspace Virtualization includes a new update that solves this challenge. You can virtualize Internet Explorer 6 directly in Windows 7. This ability lets you concurrently run Internet Explorer 6, 7, and 8. You can also run multiple Java versions on the native operating system to achieve normal visibility.

This approach enables side-by-side usage, and offers a secure implementation that is invisible to the user. You can determine which applications should have access to that specific browser. Users are never prompted to choose a browser. The correct version automatically opens for them based on policy. This option helps you move faster and more efficiently to Microsoft Windows 7. Browser plug-ins such as Acrobat and Flash can be installed into the base or into a virtual layer. Multiple Java versions can be installed in the base, or in a layer, and used by a virtual Internet Explorer. Workspace Virtualization automatically supports any group policy objects that your enterprise may have in place for Internet Explorer.

- **Built-in process automation**

Workflow capabilities are now included so you can automate the processes that are core to your IT business. In addition to form builders and drag-and-drop process designer capabilities, you can use the full component generator capability for access to third-party technologies. These technologies include HR or finance systems, and the Workflow portal. The Workflow portal lets you track the overall process as a workflow moves through the various stages.

- **Migration and deployment enhancements**

Deployment Solution is now natively integrated with the Symantec Management Platform. Consequently, you work with Deployment Solution and Symantec Management Platform through a single console, database, and agent. IT Management Suite 7.1 provides many enhancements to the Deployment Solution console.

The DeployAnywhere capability supports all plug-and-play driver types for hardware-independent imaging. This addition complements the support for hardware abstraction layers (HAL), network interface cards, and mass-storage-controller drivers to provide a complete hardware-independent imaging solution. Management for the driver database is now available through the console. You can consolidate driver management because both imaging and scripted operating system installations consume the drivers in the DeployAnywhere database.

Ghost imaging supports the familiar style of RapiDeploy multicasting. PC transplant supports Microsoft Office 2010 (32-bit and 64-bit).

Enhanced Virtual Machine Management capabilities streamline configuration and extend the virtual machine creation wizard. The wizard can execute any



Deployment Solution job as part of the virtual machine creation process. This ability lets you leverage existing server provisioning jobs and apply them to virtual server provisioning.

## Solutions of IT Management Suite

IT Management Suite includes many solutions and components.

**Table 1-1** IT Management Suite 7.1 solutions and components

Suite/Platform	Solution/Component
Symantec Management Platform 7.1	<p>Includes the components such as Network Discovery, Notification Server, Symantec Management Console, and Symantec Management Agent</p> <ul style="list-style-type: none"><li>■ Symantec Workflow Solution 7.1</li><li>■ IT Analytics 7.1</li></ul>
Asset Management Suite 7.1	<ul style="list-style-type: none"><li>■ Asset Management Solution 7.1</li><li>■ Barcode Solution 7.1</li><li>■ CMDB Solution 7.1</li></ul>
Client Management Suite 7.1	<ul style="list-style-type: none"><li>■ Deployment Solution 7.1 SP1 with a license for 6.9 SP5</li><li>■ Inventory Solution 7.1</li><li>■ IT Analytics Client and Server Pack 7.1</li><li>■ IT Analytics SEP Pack 7.1</li><li>■ Out-of-Band Management Component 7.1</li><li>■ Patch Management Solution 7.1</li><li>■ pcAnywhere Solution 12.6</li><li>■ Real-Time System Manager 7.1</li><li>■ Software Management Solution 7.1</li><li>■ Symantec Endpoint Protection Integration Component 7.1</li><li>■ Wise Connector 7.1</li><li>■ Workspace Virtualization 7.1</li><li>■ Wise Connector 7.1</li></ul>

Table 1-1 IT Management Suite 7.1 solutions and components (continued)

Suite/Platform	Solution/Component
Server Management Suite 7.1	<ul style="list-style-type: none"><li>■ Deployment Solution 7.1 SP1 with a license for 6.9 SP5</li><li>■ Inventory Solution 7.1</li><li>■ Inventory Pack for Servers</li><li>■ IT Analytics Client and Server Pack 7.1</li><li>■ IT Analytics SEP Pack 7.1</li><li>■ Monitor Pack for Servers 7.1</li><li>■ Monitor Solution 7.1</li><li>■ Patch Management Solution 7.1</li><li>■ Real-Time System Manager 7.1</li><li>■ Software Management Solution 7.1</li><li>■ Symantec Endpoint Protection Integration Component 7.1</li><li>■ Virtual Machine Management 7.1</li><li>■ Wise Connector 7.1</li></ul>
Other	<ul style="list-style-type: none"><li>■ Symantec ServiceDesk 7.1</li><li>■ IT Analytics ServiceDesk Pack 7.1</li></ul>

See [“About IT Management Suite”](#) on page 13.

# Components of the Symantec Management Platform

- The Symantec Management Platform includes the following core components:
- Notification Server  
The Symantec Management Platform service that processes events, facilitates communications with managed computers, and coordinates the work of the other Symantec Management Platform services.
  - Symantec Management Console  
A Web-based user interface that lets you monitor and manage Notification Server and its solutions.
  - Configuration Management Database (CMDB)  
The database that stores all of the information about managed computers.
  - Site servers  
The Symantec Management Platform can host several types of middleware components, such as package servers and task servers. The official name for a middleware component is "site service." Any component that hosts a site service is known as a site server.

- **Symantec Management Agent**  
The software that is installed on a computer to enable Notification Server to monitor and manage it. After the Symantec Management Agent is installed, that computer becomes a managed computer.
- **Software Management Framework**  
An interface that lets you create and manage the software resources that are in the Software Catalog. It also lets you manage the packages that are in the Software Library. The Software Catalog page provides a central location for initiating the software-related tasks that are performed in your organization.
- **Reports**  
A way to gather automated information. You can view reports for any managed computer from the Symantec Management Console.

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**Note:** Symantec Management Agent was formerly called Altiris Agent, and Symantec Management Console was formerly called Altiris Console. The Data Connector Solution is also now part of the Symantec Management Platform.

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## Where to get more information

Use the following documentation resources to learn about and use this product.

See “[About IT Management Suite](#)” on page 13.

**Table 1-2** Documentation resources

Document	Description	Location
Release Notes	Information about new features and important issues.	The <b>Product Support</b> page, which is available at the following URL: <a href="http://www.symantec.com/business/support/all_products.jsp">http://www.symantec.com/business/support/all_products.jsp</a> When you open your product's support page, look for the <b>Documentation</b> link on the right side of the page.
User guides	Information about how to use this product, including detailed technical information and instructions for performing common tasks.	<ul style="list-style-type: none"><li>■ The Documentation Library, which is available in the Symantec Management Console on the <b>Help</b> menu.</li><li>■ The <b>Product Support</b> page, which is available at the following URL: <a href="http://www.symantec.com/business/support/all_products.jsp">http://www.symantec.com/business/support/all_products.jsp</a> When you open your product's support page, look for the <b>Documentation</b> link on the right side of the page.</li></ul>

**Table 1-2** Documentation resources (*continued*)

Document	Description	Location
Help	<p>Information about how to use this product, including detailed technical information and instructions for performing common tasks.</p> <p>Help is available at the solution level and at the suite level.</p> <p>This information is available in HTML help format.</p>	<p>The Documentation Library, which is available in the Symantec Management Console on the <b>Help</b> menu.</p> <p>Context-sensitive help is available for most screens in the Symantec Management Console.</p> <p>You can open context-sensitive help in the following ways:</p> <ul style="list-style-type: none"> <li>■ The F1 key when the page is active.</li> <li>■ The Context command, which is available in the Symantec Management Console on the <b>Help</b> menu.</li> </ul>

In addition to the product documentation, you can use the following resources to learn about Symantec products.

**Table 1-3** Symantec product information resources

Resource	Description	Location
Best practices Support Knowledgebase	Compilation of "how to" and best practice articles for IT Management Suite.	<a href="http://www.symantec.com/docs/HOWTO32608">http://www.symantec.com/docs/HOWTO32608</a>
SymWISE Support Knowledgebase	Articles, incidents, and issues about Symantec products.	<a href="http://www.symantec.com/business/theme.jsp?themeid=support-knowledgebase">http://www.symantec.com/business/theme.jsp?themeid=support-knowledgebase</a>
Symantec Connect	An online resource that contains forums, articles, blogs, downloads, events, videos, groups, and ideas for users of Symantec products.	<a href="http://www.symantec.com/connect/endpoint-management">http://www.symantec.com/connect/endpoint-management</a>

# Overview of migrating to IT Management Suite

This chapter includes the following topics:

- [About this migration guide](#)
- [How to use this guide](#)
- [Recommended reading](#)
- [About product parity between versions 6.x and 7.1](#)
- [About migrating to Symantec Management Platform 7.1](#)
- [About reusing existing hardware to migrate](#)

## About this migration guide

This guide is intended to help you upgrade and migrate your infrastructure to version 7.1.

The guide includes information about the following categories of information:

- Migration wizard instructions  
This release includes a tool that is called the migration wizard. Migration wizard is designed to automate the gathering of data from your previous system so you can bring it into your new system. When you run the wizard, it gathers this data and stores it in a file. After you install version 7.1 you can use the wizard to import the data in this file into your new system.  
See [“About data migration”](#) on page 49.
- Manual data migration instructions

Some data is not stored in your current installed database. The data migration wizard is unable to locate and migrate this data. You must manually copy this data from its previous location to its new equivalent location. After the data has been moved there may be additional steps you must take to make that data function in your new environment.

See [“About the 6.x data that you must manually migrate to Symantec Management Platform 7.1”](#) on page 61.

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**Note:** Notification Server was renamed Symantec Management Platform (SMP) on December 03, 2010. All previously categorized articles and references that are listed as Notification Server are now found under Symantec Management Platform. This document lists all Notification Server references for 7.1 as Symantec Management Platform. It lists version 6.0 of the comparable architectural objects by their previous names (Notification Server 6.0, etc.)

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See [“How to use this guide”](#) on page 22.

See [“Recommended reading”](#) on page 23.

## How to use this guide

This guide is intended to create a plan to migrate your infrastructure to version 7.1. This guide covers specific migration functions you need to follow for migrating data from older version of Altiris products.

In addition to this guide, you can use the following guides to help you migrate to IT Management Suite 7.1:

- *IT Management Suite Planning and Implementation Guide 7.1*
- *Symantec Management Platform 7.1 MP1 User Guide*
- Solution-specific user guides

See [“Where to get more information”](#) on page 19.

Each of the guides plays an important role in the migration process, and this guide references them and is a complement to them.

Many of the topics in the listed guides are not duplicated in this migration guide.

See [“Recommended reading”](#) on page 23.

## Recommended reading

Before you start the migration process it is important to create a plan to migrate your infrastructure to version 7.1.

The *IT Management Suite Planning and Implementation Guide v7.1* contains migration information about prerequisites, infrastructure architecture, performance tuning, and the installation:

- Prerequisites

As you develop your migration plan and before you attempt a migration, you should understand migration concepts. For example, you use the Symantec Installation Manager to access the migration wizard tool. This tool is made available to you when you complete a new installation of IT Management Suite. You can then copy the tool to your previous server to use it to harvest previous data.

This process works well if you use new hardware to host your new environment. However, if you attempt to reuse previous hardware, then you must access the migration wizard tool before you install IT Management Suite. At actual installation time, your previous Notification Server no longer exists because it was reconfigured with a 64-bit operating system.

- Infrastructure architecture

You must determine the best means to upgrade your specific infrastructure. Infrastructure components can include items such as agents, sub-agents, package servers, and task servers. The decisions you make for upgrading infrastructure components are dependent on your specific scenario. The means that you employ may also depend on the limitations of your IT policies or limitations of your network infrastructure.

For example, if your organization has many managed computers, you may not want to immediately enable many management settings during a large agent migration. By not enabling the settings, you reduce the initial load on your Notification Server when the agents initially check in and begin the upgrade. However, after the agents have been successfully migrated, you can then increase the amount of management operations according to your migration plan.

You can use your previous 6.x Notification Server to force managed computers to report to your new 7.1 Notification Server. However, if your previous Notification Server is not available at the time you choose to migrate your managed computers, then you cannot leverage this method of agent migration.

- Installation

You must complete a new IT Management Suite installation regardless of the migration path that you choose. IT Management Suite 7.1 requires a 64-bit operating system, but its previous versions did not run on a 64-bit operating

system. There is no automated way to upgrade your existing IT Management Suite 32-bit installation. For example, if you intend to reuse existing 64-bit capable Notification Server hardware, you must install the 64-bit operating system first. The *IT Management Suite Planning and Implementation Guide 7.1* contains the steps to install IT Management Suite.

You must make similar considerations when you upgrade agents.

See [“About this migration guide”](#) on page 21.

See [“How to use this guide”](#) on page 22.

## About product parity between versions 6.x and 7.1

In IT Management Suite 7.1, some products are replaced or absorbed by another product, or have a new product name. When you install IT Management Suite, you must install at least the same equivalent products that you installed on the 6.x Notification Server.

Table 2-1            6.x to 7.1 Product parity

6.x product	7.1 equivalent product	Comments
Inventory for Network Devices	Inventory	Inventory for Network Devices is now part of Inventory Solution.  See <a href="#">“About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard”</a> on page 70.
Application Metering	Inventory	Application Metering is now part of Inventory Solution.  See <a href="#">“About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard”</a> on page 70.
IT Analytics Reporting Pack	Symantec Management Platform	IT Analytics Reporting Pack is now part of the Symantec Management Platform.



**Table 2-1** 6.x to 7.1 Product parity (*continued*)

6.x product	7.1 equivalent product	Comments
Workflow	Symantec Management Platform	Workflow Management is now part of the Symantec Management Platform.  The full Workflow Management product is part of the Symantec Platform installation and is available to all customers.
Carbon Copy	pcAnywhere	Carbon Copy users are entitled to pcAnywhere.
Software Delivery	Software Management	Software Delivery is now called Software Management.
Application Management	Software Management	Application Management is part of Software Management.
Helpdesk	ServiceDesk	ServiceDesk does not upgrade or install over Helpdesk Solution.  See <a href="#">“About migrating from Helpdesk Solution 6.x”</a> on page 191.
Handheld Management	Mobile Management	Mobile Management Solution is not a part of IT Management Suite 7.1.  Handheld Management users are not entitled to Mobile Management 7.1.  See <a href="#">“About migrating Mobile Management Solution”</a> on page 187.  See <a href="#">“Further information about Mobile Management Solution”</a> on page 187.

**Table 2-1** 6.x to 7.1 Product parity (*continued*)

6.x product	7.1 equivalent product	Comments
VirtualCenter options	Virtual Machine Management	The VirtualCenter options that were part of Deployment Solution 6.9 are now part of Virtual Machine Management.
Software Virtualization	Workspace Virtualization	

See “[Solutions of IT Management Suite](#)” on page 17.

## About migrating to Symantec Management Platform 7.1

Symantec Management Platform 7.1 requires the Microsoft Windows Server 2008 R2 (64-bit) operating system to host Notification Server. Because Notification Server 6.x used a different operating system than Windows Server 2008 R2, you cannot do an automated, on-box upgrade to 7.1.

For more information, see topics on system requirements in the [IT Management Suite Planning and Implementation Guide](#).

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**Note:** If you have Notification Server 6.x installed on a 64-bit server, you can install the Symantec Management Platform 7.1 products on that computer. However, before you install the Windows 2008 R2 operating system, you must complete specific migration steps. Because some of these migration steps might not complete successfully, Symantec discourages the reuse of the current server. For more information about installing the Symantec Management Platform 7.1 products on your current server, see [HOWTO32427](#).

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When you migrate to Symantec Management Platform 7.1, you have to create a new database. However, you can migrate a lot of the data that is in your 6.x Notification Server Database although some of the migrated data is read-only. You can also migrate data that is not in the database.

See “[About data migration when migrating from Notification Server 6.x](#)” on page 50.

For more information, see the documents at <https://www-secure.symantec.com/connect/articles/altiris-endpoint-management-migrations-and-upgrades-71>.

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**Note:** Symantec Management Platform 7.1 does not support a mixed mode of Notification Servers. A 6.x Notification Server cannot communicate with a 7.1 Notification Server.

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The migration process consists of the following phases:

- **Prepare**  
To minimize downtime and ensure success, use the documentation to create a migration plan for your specific environment. Back up your existing data and create a test environment for evaluating and validating the entire installation and migration process. Symantec recommends that you maintain the test environment for ongoing validation and testing of updates, maintenance packs, and service packs.
- **Install and migrate**  
During this phase, you install Symantec Management Platform 7.1 on a computer running the Windows 2008 R2 operating system. You also migrate existing Notification Server 6.x data from your previous environment to Symantec Management Platform 7.1. You may also manually move some solution-specific data to Symantec Management Platform 7.1.
- **Validate**  
During the validation phase you confirm that you have set up and configured the new Symantec Management Platform and solutions according to your requirements. The migration wizard verifies the success of the data it imports. However, you should browse to the migrated data such as policies, reports, and packages and verify their state. After you validate the success of the installation and data migration, you redirect groups of managed computers to report to the new 7.1 Notification Server. Once the managed computers report to the 7.1 server, you use an agent upgrade policy to upgrade their agents.

## About testing IT Management Suite

A test server is recommended when you prepare for upgrades or migrations with IT Management Suite 7.1 and future versions.

Symantec recommends that you test the migration process, and then familiarize yourself with the new features of 7.1. Ensure that business functional parity is met on the 7.1 configuration. Many of the features have changed with 7.1, but the business functions the tools provide are much greater than with 6.x.

When the migration process is complete, Symantec recommends that you continue to maintain the test server to test each update, service pack, or maintenance release that you intend to use in production.

See [“About post migration configuration”](#) on page 28.

See [“About validating a migration”](#) on page 28.

## About post migration configuration

After you have migrated your data, browse through the product and ensure that the data is where it is expected to be. Data that gets migrated is available for different actions, and in some cases for review only.

Take some time to familiarize yourself with the data, and ensure that the product is configured to get the data that is not migrated.

See [“About validating a migration”](#) on page 28.

See [“About testing IT Management Suite”](#) on page 27.

## About validating a migration

Much of the effort you make to migrate data is in itself a validation. However, tools are also available to help validate data migration. For example, the migration wizard has a validation process.

Other types of data need to be validated manually by browsing through the content in the console.

Many of the migration steps in the solution sections of this document enable both the configuration and validation of the data. Because validation is often performed as part of the migration process, this document does not include validation-only procedures.

See [“About post migration configuration”](#) on page 28.

See [“About testing IT Management Suite”](#) on page 27.

## About reusing existing hardware to migrate

Symantec recommends that you use a new server to migrate to IT Management Suite 7.1.

Keep the 6.x Notification Server available for a duration that fits the needs of your organization.

By using a new server, you reduce the downtime that results from re-provisioning the operating system of the Notification Server computer.

Before you turn off or re-provision your old server, be sure that the new server meets your business need; otherwise, you may lose data.

Keep the old server running so that you can capture any data on it that was not migrated. Also, by keeping the old server running, you can use it for reporting and configuration reference.

If you must migrate using the existing hardware that currently houses Notification Server, you must take the following actions:

- Thoroughly test the migration process using a test computer to ensure that you capture the data properly before re-provisioning.
- Ensure that your business functional needs and requirements are not offline for lengths of time outside of SLAs
- Develop a reliable agent re-direct process. You must know the new server name before you re-provision Notification Server.

The agent migration process involves using 6.x policies and agents settings to point agents to the new server.



# Migrating Symantec Management Platform

This chapter includes the following topics:

- [Best practices for migrating to Symantec Management Platform 7.1](#)
- [Important things to know when migrating from Notification Server 6.x](#)
- [Migrating from Notification Server 6.x to Symantec Management Platform 7.1](#)
- [About data migration](#)
- [About the data store file](#)

## Best practices for migrating to Symantec Management Platform 7.1

Before you begin the migration process, you should develop a migration plan. As you develop your migration plan, you should consider these best practices.

See [“About migrating to Symantec Management Platform 7.1”](#) on page 26.

**Table 3-1** Best practices for migrating to Symantec Management Platform 7.1

Best practice	Description
Use a test environment.	Before you install Symantec Management Platform 7.1 in a production environment, create a test environment for evaluating and validating the entire installation and migration process. Symantec recommends that you maintain the test environment for ongoing validation and testing of updates, maintenance packs , and service packs.

**Table 3-1** Best practices for migrating to Symantec Management Platform 7.1  
*(continued)*

Best practice	Description
Use a pilot test group.	Use a small group of managed computers as a pilot group to test the migration to Symantec Management Platform 7.1. During this pilot test, leave the remaining managed computers supported by the previous version of Notification Server.
Redirect managed computers in stages.	<p>You can redirect 5,000 computers to a single Notification Server at the same time. After you have successfully redirected a group of computers, upgrade the Symantec Management Agent and agent plug-ins for that group. To upgrade an agent or an agent plug-in, you enable the upgrade policy for the agent or the agent plug-in.</p> <p><b>Note:</b> If you redirect more than 5,000 computers at a time, disable any policies and tasks that communicate frequently with the Symantec Management Agent. For example, disable the inventory, software delivery, and patch policies. Disabling the policies and tasks prevents the console and Notification Server from being very slow.</p> <p>See <a href="#">“About redirecting sites and agents to Notification Server 7.1”</a> on page 41.</p> <p>See <a href="#">“About the Symantec Management Agent upgrade policies”</a> on page 44.</p>
Keep your previous Notification Server.	<p>Maintain your previous Notification Server computers as a record for historical data, policy configuration details, and other settings and data.</p> <p>The following are some examples of when you might remove the old server:</p> <ul style="list-style-type: none"> <li>■ After the business functional uses on the old server are matched on the new server.</li> <li>■ After the data saturation on the new server has the needed depth.</li> <li>■ When the data in the new Configuration Management Database (CMDB) qualifies against your regulatory standards.</li> </ul>
Migrate using a new computer.	<p>You must install the Symantec Management Platform 7.1 products on a computer that is running the Windows Server 2008 R2 operating system. Because this operating system is different from what was required for 6.x, Symantec recommends that you install the 7.1 products on a new computer.</p> <p><b>Note:</b> If you have Notification Server 6.x installed on a 64-bit server, you can install the Symantec Management Platform 7.1 products on that computer. However, before you install the Windows 2008 R2 operating system, you must complete specific migration steps. Because some of these migration steps might not complete successfully, Symantec discourages the reuse of the current server. For more information about installing the Symantec Management Platform 7.1 products on your current server, see <a href="#">HOWTO32427</a>.</p>



# Important things to know when migrating from Notification Server 6.x

A migration from Notification Server 6.x involves many steps. You should be careful to complete these steps in the recommended order.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

You should also pay particular attention to the following items to avoid major problems during the migration process:

- **Required version of Notification Server 6.x**  
Before you migrate from Notification Server 6.x to Symantec Management Platform 7.1, you must have Notification Server 6.0 R13 and the latest solutions installed. If you do not have the latest version of Notification Server 6.x, upgrade to the latest version. You must also upgrade your 6.x solutions and the agents on your managed computers. For example, if you have Notification Server 6.0 R11 installed, you must upgrade to 6.0 R13 before you migrate to Symantec Management Platform 7.1.
- **Database and server backup**  
Before you begin the migration, you need to back up the 6.x Notification Server Database and the 6.x Notification Server. If you encounter problems during the migration process, you can then revert to these backups. Back up the Notification Server Database to a secure storage location. Making backups before major migration steps can provide more granular recovery from any issues or unplanned outages that might occur during the process.
- **New database requirement**  
When you install the Symantec Management Platform 7.1 products, you must create a new database. You cannot run Symantec Management Platform 7.1 against the 6.x database. Schema changes were made to the database to increase the speed and to unify the structure of the database.
- **Product parity**  
When you install the Symantec Management Platform 7.1 products, you must install at least the same equivalent products that you installed on the 6.x Notification Server. Before you begin the migration, create a list of the 6.x products that you currently have installed.

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**Warning:** Failure to have minimum product parity can result in the inability to migrate 6.x data to the 7.1 database.

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Keep in mind that some products have been replaced or absorbed by another product, or have a new product name as follows:

- Application Management Solution is now part of Software Management Solution.
- Application Metering Solution is now part of Inventory Solution.
- pcAnywhere Solution has replaced Carbon Copy Solution.
- ServiceDesk has replaced Helpdesk Solution.
- Out of Band Management Solution is now part of Symantec Management Platform.
- Real-Time System Manager Solution is now part of Client Management Suite.
- Software Delivery Solution is now Software Management Solution.
- Software Virtualization Solution is now Workspace Virtualization.
- Server name and IP address  
Symantec recommends that you give the 7.1 server a name and an IP address that is different from the name and IP address of the 6.x server.
- Mixed mode  
Symantec Management Platform 7.1 does not support mixed mode. A Symantec Management Platform 6.x server cannot communicate with a Symantec Management Platform 7.1 server.

## Migrating from Notification Server 6.x to Symantec Management Platform 7.1

You must install the Symantec Management Platform 7.1 products on a computer that is running the Windows Server 2008 R2 operating system. Because this operating system is different from what was required for 6.x, Symantec recommends that you migrate to a new computer.

For more information, see topics on system requirements in the [IT Management Suite Planning and Implementation Guide](#).

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**Note:** If you have Notification Server 6.x installed on a 64-bit server, you can install the Symantec Management Platform 7.1 products on that computer. However, before you install the Windows 2008 R2 operating system, you must complete specific migration steps. Because some of these migration steps might not complete successfully, Symantec discourages the reuse of the current server. For more information about installing the Symantec Management Platform 7.1 products on your current server, see [HOWTO32427](#).

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When you migrate from Notification Server 6.x to Symantec Management Platform 7.1, you have to create a new database. However, you can use the migration wizard to migrate much of the data that is in your 6.x Notification Server Database. Most of the data that the migration wizard migrates is actionable although some of it is read-only. You can also migrate data that is not in the database.

See “[Important things to know when migrating from Notification Server 6.x](#)” on page 33.

See “[About the data that the migration wizard migrates from Notification Server 6.x](#)” on page 51.

See “[About data migration when migrating from Notification Server 6.x](#)” on page 50.

For more information, see the documents at <https://www-secure.symantec.com/connect/articles/altiris-endpoint-management-migrations-and-upgrades-71>.

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**Note:** Symantec Management Platform 7.1 does not support a mixed mode of Notification Servers. A 6.x Notification Server cannot communicate with a 7.1 Notification Server.

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**Table 3-2** Process for migrating from Notification Server 6.x to Symantec Management Platform 7.1

Step	Action	Description
Step 1	Back up the 6.x Notification Server Database and the 6.x Notification Server.	<p>You must back up the 6.x Notification Server Database before you begin the migration process. You should also back up the 6.x Notification Server. If you encounter problems during the migration process you can then revert to these backups. Back up the database to a neutral storage location.</p> <p><b>Warning:</b> Before proceeding verify that the 6.x Notification Server Database and the 6.x Notification Server have been successfully backed up.</p> <p>See <a href="#">“Backing up the Notification Server Database”</a> on page 40.</p>
Step 2	Prepare for the migration.	<p>On the 6.x Notification Server, complete the following tasks in order:</p> <ul style="list-style-type: none"> <li>■ Verify the completion of all outstanding tasks and policies.</li> <li>■ Document the Windows Server user accounts you have set up on the 6.x server. You must recreate these accounts manually on the 7.1 server.</li> <li>■ Create a backup of your software package files.</li> <li>■ Create a list of the products that you currently have installed. You need to install the equivalent products on the 7.1 server so that the migration wizard can properly migrate the 6.x data.</li> <li>■ Copy your product licenses to a location that is accessible from the 7.1 server. You can reapply the licenses when you install the products. If your licenses are not downloaded or available, you can download them from the <a href="#">Symantec Licensing Portal</a>.</li> </ul> <p>For more information about licenses and using the licensing portal, see the <a href="#">Customer Care Information Center</a>.</p> <p>See <a href="#">“About migrating licenses to Symantec Management Platform 7.1”</a> on page 48.</p> <ul style="list-style-type: none"> <li>■ Back up the 6.x database again to capture the most recent data.</li> </ul>

**Table 3-2**      Process for migrating from Notification Server 6.x to Symantec Management Platform 7.1 (*continued*)

Step	Action	Description
Step 3	Prepare the 7.1 server for the installation.	<p>The 7.1 server must be running the Microsoft Windows 2008 R2 operating system. Symantec recommends that you give the 7.1 server a different name and IP address from the name and IP addresses of the 6.x server.</p> <p>Because the Windows server user accounts are not migrated during the migration, you must recreate them on the 7.1 server the migration process.</p> <p>You should also install the following items:</p> <ul style="list-style-type: none"> <li>■ SSL and certificates if you use them.</li> <li>■ Third-party plug-ins that the products you install require. These plug-ins include Microsoft Silverlight 4.0, Adobe Flash Player 10, and Sun Java Runtime 6.</li> </ul>
Step 4	Install Symantec Installation Manager on the 7.1 server.	<p>You use Symantec Installation Manager to install the Symantec Management Platform 7.1 products.</p> <p>For more information, see topics on installing Symantec Installation Manager in the <a href="#">IT Management Suite Planning and Implementation Guide</a>.</p>
Step 5	Install the Symantec Management Platform 7.1 products.	<p>You install the Symantec Management Platform 7.1 products with Symantec Installation Manager. Install the same or the equivalent products that you had installed on the 6.x server.</p> <p>When you install the Symantec Management Platform products, you should also install the migration wizard components. During the installation process an <b>Optional Installations</b> page appears where you have the option to install the migration wizard components. You can also install the migration wizard components at any time with Symantec Installation Manager.</p> <p>At the end of the installation process, Symantec Installation Manager prompts you to apply licenses to the solutions you installed. You can also run Symantec Installation Manager at a later time to apply the licenses.</p> <p>For more information, see topics on installing the Symantec Management Platform products in the <a href="#">IT Management Suite Planning and Implementation Guide</a>.</p>

**Table 3-2** Process for migrating from Notification Server 6.x to Symantec Management Platform 7.1 (*continued*)

Step	Action	Description
Step 6	Migrate Notification Server 6.x data to the 7.1 server with the migration wizard.	<p>You use the migration wizard to migrate 6.x data.</p> <p>See <a href="#">“Migrating data to Symantec Management Platform 7.1 with the migration wizard”</a> on page 55.</p> <p>See <a href="#">“About the data that the migration wizard migrates from Notification Server 6.x”</a> on page 51.</p> <p>The migration process consists of the following steps:</p> <ul style="list-style-type: none"> <li>■ Install the migration wizard on the 6.x Notification Server. See <a href="#">“About installing the Symantec Notification Server Migration Wizard”</a> on page 54.</li> <li>■ Export 6.x data from the 6.x Notification Server to a data store file. See <a href="#">“Exporting data from a data store file”</a> on page 64.</li> <li>■ Copy the data store file from the 6.x server to the 7.1 server or to a location that the 7.1 server can access. If a <b>PackageFiles</b> folder is in the same directory as the data store file, copy it to the same directory as the data store file.</li> <li>■ Import 6.x data from the data store file to the Symantec Management Platform 7.1 server. See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59.</li> </ul>
Step 7	Verify that the 6.x data was successfully migrated.	The migration wizard verifies the success of the data it imports. However, you should browse to the migrated data such as policies, reports, and packages and verify their state.
Step 8	Move solution-specific items from the 6.x server to the 7.1 server and configure the solutions.	<p>Some solution-specific items are not migrated with the Notification Server Database or with the migration wizard. You must manually move these items from the 6.x server to the 7.1 server.</p> <p>See <a href="#">“About the 6.x data that you must manually migrate to Symantec Management Platform 7.1”</a> on page 61.</p> <p>You must also configure each of the 7.1 solutions.</p> <p>For more information, see topics on configuration in the documentation for each solution.</p>

**Table 3-2**      Process for migrating from Notification Server 6.x to Symantec Management Platform 7.1 (*continued*)

Step	Action	Description
Step 9	Configure site servers.	<p>Before you configure your site servers, you should determine how many site servers you need. You must then create the sites and configure the site servers. If you had 6.x package servers, you must redirect them to the 7.1 Notification Server and upgrade their Altiris Agents with the Symantec Management Agent. The package servers are then upgraded automatically because their upgrade policy is enabled by default.</p> <p>See <a href="#">“About upgrading package servers”</a> on page 47.</p> <p>For recommendations on the number of site servers that you need, see the <a href="#">IT Management Suite Planning and Implementation Guide</a>.</p> <p>For more information, see topics on site servers in the <i>Symantec Management Platform User Guide</i>.</p>
Step 10	Remove sub-agents or agent plug-ins from your managed computers	<p>Symantec recommends that you remove all sub-agents or agent plug-ins from your managed computers. You should leave only the Altiris Agent on the managed computers. For package servers, you should also leave the Package Server Agent.</p> <p>See <a href="#">“About removing sub-agents or agent plug-ins from managed computers”</a> on page 47.</p>
Step 11	Redirect the Altiris Agents to the new server.	<p>The Altiris Agents that previously reported to the 6.x Notification Server need to be redirected to the 7.1 Notification Server.</p> <p>See <a href="#">“Redirecting managed computers to Notification Server 7.1”</a> on page 42.</p>

Table 3-2

Process for migrating from Notification Server 6.x to Symantec Management Platform 7.1 (continued)

Step	Action	Description
Step 12	Upgrade the Altiris Agent and the agent plug-ins.	<p>After you have successfully redirected a group of computers, upgrade the Altiris Agent and agent plug-ins for the clients in the group. Upgrade the Altiris Agent before you upgrade the plug-ins. You upgrade the Altiris Agent with the Symantec Management Agent. To upgrade an agent or an agent plug-in, you enable the upgrade policy for the agent or plug-in.</p> <p>See <a href="#">“Upgrading the Altiris Agent and the agent plug-ins”</a> on page 45.</p> <p>See <a href="#">“About the Symantec Management Agent upgrade policies”</a> on page 44.</p> <p>For more information, see topics on Symantec Management Agent settings and configuring the agent upgrade in the <i>Symantec Management Platform User Guide</i>.</p>

## Backing up the Notification Server Database

Backing up the Notification Server Database is the most important fail-safe measure that you can take during the migration process. You can use the backup to restore your database to a known good state if anything should happen to compromise your database.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

### To back up the Notification Server Database

- 1 Open Microsoft SQL Manager Studio.
- 2 In the left pane, expand the **Databases** folder.
- 3 In the left pane, under **Databases**, right-click the name of your database.
- 4 In the right-click menu, click **Tasks > Back Up**.
- 5 In the **Back up Database** dialog box, in the **Backup type** drop-down list, click **Full**.
- 6 In the **Backup set** section, enter a name for your backup.



- 7 In the **Destination** section, add the location where you want your backup file to be stored.

This location should be a secure storage location, and should not be on the local computer.

- 8 Click **OK**.

## About redirecting sites and agents to Notification Server 7.1

Before you redirect sites and agents to the new Notification Server computer, you should develop a redirection plan. Use the guidelines and information in this topic to help you develop that plan.

See [“Redirecting managed computers to Notification Server 7.1”](#) on page 42.

Symantec recommends that you keep the 6.x Notification Server and the Symantec Management Platform 7.1 server running at the same time. Over time you incrementally move groups of client computers to the Symantec Management Platform 7.1 server. By maintaining your 6.x Notification Server, you preserve a historical record of your settings and data. You also have more control over what client computers you move and when you move them.

Use the following guidelines when you redirect sites and their package servers to the 7.1 Notification Server:

- When you redirect a site, Symantec recommends that you redirect and upgrade its package server before you redirect any other agents within the site. If there is more than one package server for a location or logical group, migrate the package servers with their clients in proportional groups. You redirect and upgrade the package servers first so that they are available in the new environment when the agents in the site are redirected.
- After a package server is redirected to the 7.1 Notification Server, you must remove the package server from the 6.x Notification Server as soon as possible. You remove a package server from the 6.x Notification Server to prevent the agents that are still in the 6.x environment from communicating with it.
- After you redirect a package server to the 7.1 Notification Server, upgrade the package server immediately.

To upgrade a package server, upgrade the Altiris Agent. You use the Symantec Management Agent upgrade policies on the Symantec Management Platform 7.1 server to upgrade the agent. After the agent is upgraded, the package server is upgraded automatically because the upgrade policy is enabled by default.

See [“About upgrading package servers”](#) on page 47.

See [“About the Symantec Management Agent upgrade policies”](#) on page 44.

See [“Upgrading the Altiris Agent and the agent plug-ins”](#) on page 45.

How you redirect sites and agents depends on whether you have sites defined and the number of agents in your environment as follows:

- |                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No sites are defined. | <ul style="list-style-type: none"><li>■ If the number of agents is less than 5,000, any package servers should be redirected to the new Notification Server and then the Altiris Agents in the site.</li><li>■ If the number of agents is more than 5,000, Symantec recommends that you first define sites in the 6.x Notification Server. Each site should have at least one package server and no site should have more than 5,000 agents. After you define the sites, redirect each site to the new Notification Server. When you redirect a site, redirect the package servers and then the agents within the site.</li></ul>                                                                                                                                                                    |
| Sites are defined.    | <ul style="list-style-type: none"><li>■ If a site has less than 5,000 agents, redirect each package server to the new Notification Server. When you redirect a site, redirect the package servers and then the agents within the site.</li><li>■ If a site has more than 5,000 agents, Symantec recommends that you divide the site into smaller sites.</li><li>■ If multiple sites share a package server and the sites have a total of less than 5,000 agents, redirect the package servers and sites together.</li><li>■ If multiple sites share a package server and the sites have a total of more than 5,000 agents, temporarily remove the package server from the 6.x system. After you redirect all the sites to the new Notification Server, recreate the shared package server.</li></ul> |

## Redirecting managed computers to Notification Server 7.1

The Altiris Agents that previously reported to the 6.x Notification Server need to be redirected to the 7.1 Notification Server. When you redirect a group of computers, create a filter for the first group of computers that you want to move. You then target the filter with the targeted Altiris Agent Settings policy and exclude it from the targets of other policies. You can then expand the membership of the filter as needed until it includes all computers.

See [“About redirecting sites and agents to Notification Server 7.1”](#) on page 41.

Although 20,000 computers can be managed with a single Notification Server, Symantec recommends that you redirect no more than 5,000 computers at the same time. However, it is possible to redirect up to 15,000 computers to a single Notification Server at the same time.

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**Note:** If you redirect more than 5,000 computers at a time, disable any policies and tasks that communicate frequently with the Symantec Management Agent. Disabling the policies and tasks prevents the console and Notification Server from being very slow.

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See [“Best practices for migrating to Symantec Management Platform 7.1”](#) on page 31.

For more information, see topics on the Altiris Agent Settings in the *Altiris Notification Server 6.x Help*.

### To redirect computers to Symantec Management Platform 7.1

- 1 In the 7.1 environment, install a package service and a task service on a site server to handle clients as they are redirected.

By default, a task service is installed on the Symantec Management Platform server. However, Symantec recommends that you always set up at least one task server to service the client computers.

Your environment might require multiple site servers. You might elect to redirect a package server and then the clients that use that package server to ensure that packages are available regionally. You can also use virtual machines to serve as temporary site servers during the redirection process. After all the agents for those sites have upgraded, you should then remove the virtual machines.

- 2 Remove all sub-agents or plug-ins from your managed computers.  
However, on your Package Servers do not remove the Package Server Agent.  
See [“About removing sub-agents or agent plug-ins from managed computers”](#) on page 47.

- 3 On the **Configuration** menu, click **Altiris Agent > Altiris Agent Configuration**, and select the policy that contains the agents that you want to redirect to 7.1.

- 4 On the policy’s **Altiris Agent Settings** page, click the **Advanced Settings** tab.

- 5 In the **Alternate URL for accessing NS** section, specify the URL for the 7.1 Notification Server as follows:

- **Server Name**

Symantec recommends that you use the fully qualified domain name.

- **Server Web**

The Server Web address should be in the following format:

**https://<NS\_FQDN>:<port>/Altiris/**

- 6 Click **Apply**.

## About the Symantec Management Agent upgrade policies

You use a Symantec Management Agent upgrade policy to upgrade the Altiris Agent on your managed computers. To perform the upgrade, you select and enable the appropriate policy and apply it to a set of computers. Upgrade the Altiris Agent with the Symantec Management Agent before you upgrade the agent plug-ins.

See [“Upgrading the Altiris Agent and the agent plug-ins”](#) on page 45.

The Symantec Management Agent has a set of site server upgrade policies and a set of upgrade policies for all other computers. Both sets have two policies for upgrading 64-bit computers and another policy for upgrading 32-bit computers. One 64-bit upgrade policy upgrades a 64-bit computer with a 64-bit agent, while the other policy upgrades a 64-bit computer with a 32-bit agent.

The upgrade policies for the Symantec Management Agent are in a **Non Site Server** folder and a **Site Server** folder. To access these folders, on the **Settings** menu, click **Agents/Plug-ins > Symantec Management Agent** and expand the **Windows** folder.

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**Note:** The upgrade policy for the Symantec Management Agent for UNIX/Linux/Mac is in the **UNIX/Linux/Mac** folder.

---

When you install a 64-bit agent on a computer, 64-bit sub-agents or plug-ins are installed when they are available. If a 64-bit plug-in is not available, a 32-bit plug-in is installed, and it runs in a surrogate service that was created for this scenario. When you install a 32-bit agent on a 64-bit computer, 32-bit sub-agents or plug-ins are installed.

---

**Warning:** If you install the 32-bit agent on a 64-bit computer, the agent may have trouble returning some inventory data because it runs in the WOW64 memory space. Applications that run in the WOW64 memory space do not see the actual registry and file system on a 64-bit computer.

For more information, see topics on file system redirector and registry redirector in the Microsoft MSDN library.

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**Note:** When you install the Symantec Management Agent with a scheduled push install on a 64-bit computer, the 64-bit agent is installed by default. However, if you check the **Force installation of 32-bit Symantec Management Agent on 64-bit systems** option, the 32-bit agent is installed. The option to force a 32-bit installation is on the **Symantec Management Agent Installation Options** dialog box. You access this dialog box when you click the **Settings** option on the **Symantec Management Agent Install** page.

---

## Upgrading the Altiris Agent and the agent plug-ins

After you migrate to Symantec Management Platform 7.1, you need to upgrade the Altiris Agent and agent plug-ins on the client computers. Upgrade the Altiris Agent before you upgrade the agent plug-ins. You upgrade the Altiris Agent with the Symantec Management Agent.

See [“About the Symantec Management Agent upgrade policies”](#) on page 44.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

---

**Warning:** If you install the 32-bit agent on a 64-bit computer, the agent may have trouble returning some inventory data because it runs in the WOW64 memory space. Applications that run in the WOW64 memory space do not see the actual registry and file system on a 64-bit computer.

For more information, see topics on file system redirector and registry redirector in the Microsoft MSDN library.

---

---

**Note:** Symantec recommends that you keep your 6.x Notification Server running for six months to 12 months for reporting and configuration reference.

---

### To upgrade the Altiris Agent and the agent plug-ins

- 1 Remove the sub-agents or agent plug-ins from all of the managed computers.  
Symantec recommends that you remove all agent sub-agents or agent plug-ins from your managed computers to avoid any potential problems during the upgrade process. However, on your package servers, you should also leave the Package Server Agent.  
See [“About removing sub-agents or agent plug-ins from managed computers”](#) on page 47.
- 2 In Notification Server 6.x, redirect the managed computers to the 7.1 Notification Server.  
See [“About redirecting sites and agents to Notification Server 7.1”](#) on page 41.  
See [“Redirecting managed computers to Notification Server 7.1”](#) on page 42.
- 3 In Symantec Management Platform 7.1, use filters and targets to create a test group of clients on which to test the upgrade of the agent and the installation of the agent plug-ins.

---

**Note:** If you did not remove a 6.x sub-agent, you would use an upgrade policy to install the 7.1 plug-in. However, because Software Management Solution, pcAnywhere Solution, and Inventory Solution, do not have an equivalent 7.1 product, you must use an installation policy to install the plug-ins for these products.

---

- 4 For the test group, enable the Symantec Management Agent upgrade policy.
- 5 For the test group, enable the installation policies for the agent plug-ins that correspond to the plug-ins that were installed on client computers before you migrated to 7.1.
- 6 For the test group, validate that policies, tasks, and other functionality works correctly.
- 7 For the rest of your client computers, repeat the preceding steps that you performed on the test group.  
You can broaden the scope a few thousand clients at a time. Symantec recommends that you do not upgrade more than 5,000 clients at the same time. You can upgrade up to 15,000 clients at the same time. However, you should then disable any policies and tasks that communicate frequently with the Symantec Management Agent.
- 8 For the clients that are not available during the migration, ask your network team to make the following change:

- Delete the Altiris Notification Server 6.0 DNS A Record.
- Create DNS Alias (CNAME) to direct the host name for Notification Server 6.x to Symantec Management Platform 7.1.

Keep these settings in place until the upgrade of the agent and the agent plug-ins is completed on all of the remaining clients.

## About removing sub-agents or agent plug-ins from managed computers

Before you redirect your 6.x managed computers to Symantec Management Platform 7.1, Symantec recommends that you remove all sub-agents or agent plug-ins from those computers. You should remove these sub-agents from your managed computers to avoid any potential problems during the migration process. You should leave only the Altiris Agent on the managed computers. However, on your package servers, you should also leave the Package Server Agent installed.

See [“Upgrading the Altiris Agent and the agent plug-ins”](#) on page 45.

See [“Redirecting managed computers to Notification Server 7.1”](#) on page 42.

Before you remove the sub-agents, create a record of where the sub-agents are installed. You can use the collections that target the currently installed sub-agents to create the record. After the sub-agents are removed, you have no way to determine where they were installed. However, if you create a record, you can use this record to ensure that you use the same distribution when you install the 7.1 plug-ins. You can also export the 6.x collections for agent distribution to CSV files. You can then import the CSV files to create new static filters that you can use to distribute the 7.1 plug-ins.

The preferred method for removing the plug-ins is to use predefined collections and policies. You can also run AeXagentUtil.exe with the /UninstallAgents parameter.

## About upgrading package servers

You need to upgrade your package servers before you redirect your managed computers to the 7.1 Notification Server. To upgrade a package server, redirect it to the 7.1 Notification Server and upgrade its Symantec Management Agent. Because the policy that upgrades the package servers is enabled by default, the package server is then automatically upgraded. The Legacy Windows Package Server Agent Upgrade policy upgrades the package servers.

See [“Upgrading the Altiris Agent and the agent plug-ins”](#) on page 45.

See [“About redirecting sites and agents to Notification Server 7.1”](#) on page 41.

For a lengthy migration, Symantec recommends that you set up temporary package servers or move your package servers in proportional groups along with their clients. For example, suppose you have 10,000 clients pointing to a Notification Server and four package servers. You do not want to leave either your old or new Notification Server with no package servers. You should either add temporary site servers or move 1/4 of your package servers with 1/4 of your clients.

When you set up package servers, you prepare the network topology for the agent packages that are available from regional package servers. If you have remote sites with a slow connection, you should upgrade their package servers before you upgrade the agents on the clients. By upgrading the package servers, you reduce the load of the package traffic.

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**Warning:** Do not upgrade package servers before their client base is targeted to be upgraded.

---

If you upgrade the agent on a package server to a 64-bit agent, its 32-bit assemblies are removed and 64-bit assemblies are installed. The existing registry and folder structure for packages remains intact. If you upgrade the agent on a package server to a 32-bit agent, the package server is also upgraded to 32-bit.

After a package server is upgraded, it downloads any new 7.1 system-based packages that the 7.1 Notification Server hosts. These packages include all solution plug-ins. Any package that has not changed is not re-downloaded.

To access the package server agent upgrade policy, on the **Settings** menu, click **All Settings**. You then navigate to **Settings > Notification Server > Site Server Settings > Package Service > Advanced > Windows > Legacy Windows Package Server Agent Upgrade**.

## About migrating licenses to Symantec Management Platform 7.1

When you migrate from Notification Server 6.x to Symantec Management Platform 7.1, the licenses for your products are not migrated. You must copy the 6.x licenses to a location where you can access them on the Symantec Management Platform 7.1 server.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

After you migrate the licenses, you must apply them. You can apply the licenses when you install a product or at a later time. You apply the licenses on the **Product Licensing** page in Symantec Installation Manager.

For more information, see topics on applying licenses in the [IT Management Suite Planning and Implementation Guide](#).



If your licenses are not available, you can download them from the [Symantec Licensing Portal](#). If you cannot apply your old licenses in Symantec Installation Manager, then you must also download new licenses from the licensing portal.

For more information about licenses and using the licensing portal, see the [Customer Care Information Center](#).

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**Note:** Because some Notification Server 6.x solutions bundle with other solutions on Symantec Management Platform 7.1, their licenses cannot be reused.

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## About data migration

When you migrate to Symantec Management Platform 7.1, you can also migrate the Notification Server 6.x data to Symantec Management Platform 7.1.

See “[About data migration when migrating from Notification Server 6.x](#)” on page 50.

Symantec provides the following tools to assist in the process of migrating data to Symantec Management Platform 7.1:

- **Symantec Installation Manager**  
You use the Symantec Installation Manager to install the migration wizard components. The migration wizard components give you access to the Symantec Notification Server Migration Wizard.  
See “[About installing the Symantec Notification Server Migration Wizard](#)” on page 54.
- **Symantec Notification Server Migration Wizard**  
You use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data to Symantec Management Platform 7.1.  
See “[About the Symantec Notification Server Migration Wizard](#)” on page 50.  
See “[About the data that the migration wizard migrates from Notification Server 6.x](#)” on page 51.
- **Deployment Solution migration tools**  
Deployment Solution includes a tool for migrating 6.x images to 7.1.  
See “[Architectural and functionality concepts of Deployment Solution 7.1 SP1](#)” on page 122.

For more information, see the documents at <https://www-secure.symantec.com/connect/articles/altiris-endpoint-management-migrations-and-upgrades-71>.

## About data migration when migrating from Notification Server 6.x

When you migrate from Notification Server 6.x, you use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data. Some of the 6.x data that you can migrate is actionable, while some it is read-only.

See [“About the data that the migration wizard migrates from Notification Server 6.x”](#) on page 51.

See [“About data migration”](#) on page 49.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

Consider the following before you use the migration wizard to migrate 6.x data to Symantec Management Platform 7.x:

- Some 6.x data is more difficult to replace than other data.  
Asset data represents the physical items that you may not be able to gather automatically after you migrate to Symantec Management Platform 7.1. This data represents a lot of manual data entry and is an excellent candidate for data migration. On the other hand, inventory data is replaced within a week after you migrate to Symantec Management Platform 7.1. Consequently, the inventory data is not as good a candidate for migration as the asset data.
- Symantec Management Platform 7.1 cannot use some 6.x data.  
After you migrate data, some of it is not editable and some is not actionable because of fundamental changes in how Symantec Management Platform works. For example, when you migrate the 6.x collections, the collections are actionable but not editable. Because Symantec Management Platform 7.x uses filters instead of collections, Symantec recommends that you convert your collections to filters. Migrated 6.x custom reports are also read-only. You cannot update the 6.x custom reports to include 7.1 information. However, you can use your 6.x reports for audit and reference purposes.
- Some 6.x data requires your configuration after migration.  
Some 6.x data requires your configuration before you can use it in Symantec Management Platform 7.1. For example, you can migrate custom agent settings policies, but you should apply filters to the policies to replace the 6.x collections.

## About the Symantec Notification Server Migration Wizard

When you migrate to Symantec Management Platform 7.1, you use the Symantec Notification Server Migration Wizard to migrate the existing Notification Server 6.x data.

See [“About the data that the migration wizard migrates from Notification Server 6.x”](#) on page 51.

See [“About data migration”](#) on page 49.

Migrating data with the migration wizard involves the following steps:

- Export the data to a data store file with the migration wizard.
- Copy the data store file to a location that the Symantec Management Platform 7.1 server can access.  
If a **PackageFiles** folder is in the same directory as the data store file, copy it to the same directory as the data store file.
- Import the data from data store file with the migration wizard.

See [“About the data store file”](#) on page 62.

To migrate data with the migration wizard, you must install the migration wizard on your 6.x server and on the 7.1 server. How you install the migration wizard varies depending on where you install it.

See [“About installing the Symantec Notification Server Migration Wizard”](#) on page 54.

The migration wizard uses exporters to export data and a corresponding set of importers to import data. Each product that has data to migrate has its own set of exporters and importers. By default, the migration wizard exports and imports all of the data. Symantec recommends that you use the default setting to export and import all of the data.

The EXE for the migration wizard is `NSUUpgradeWizard.exe`, and it is in the `C:\Program Files\Altiris\Upgrade` directory by default. To run the migration wizard, you must be a member of the local administrators group.

## About the data that the migration wizard migrates from Notification Server 6.x

When you migrate from Notification Server 6.x, you use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data. Some of the 6.x data that you can migrate is actionable, while some it is read-only.

See [“About data migration”](#) on page 49.

See [“About data migration when migrating from Notification Server 6.x”](#) on page 50.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

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**Note:** You cannot migrate 6.x custom menu items with the migration wizard. You must manually export the 6.x menus from the 6.x console and import them into the 7.1 console.

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**Table 3-3** Platform data that the migration wizard migrates from Notification Server 6.x

Data	Description
Security roles	<p>You can migrate predefined security roles and custom security roles.</p> <p><b>Note:</b> If you create a custom 6.x security role and give it permissions on predefined items such as reports or policies, the permissions are not migrated. However, permissions on custom items are migrated.</p>
Certificates - KMS/PPA keys	You can migrate KMS and Credential Manager keys.
Collections	You can migrate the non-default collections, and they are actionable but not editable. If you use the collections, you should validate that they work correctly. Because Symantec Management Platform 7.x uses filters instead of collections, Symantec recommends that you convert your collections to filters. After you migrate your custom collections, you can use them as a reference when creating filters.
Policies	You can migrate custom notification policies and custom agent settings policies. The custom notification policies are read-only, but the custom agent settings policies are actionable.
Task-based policies	You can migrate task-based policies, and they are actionable. These policies are referred to as client task schedules in the 6.x console.
Reports	<p>You can migrate predefined and custom reports, but they are read-only. You can use the reports for audit and reference purposes. You should replace the 6.x reports with 7.1 reports to reflect your current data.</p> <p>Some of the reports you migrate may try to use the data that did not migrate and the reports then have incomplete data. You should validate the migrated reports against the reports in the 6.x console.</p>
Jobs and Tasks	You can migrate 6.x jobs and tasks, and they are actionable.
Resource association	You can migrate 6.x resource associations, and they are actionable.

**Table 3-3** Platform data that the migration wizard migrates from Notification Server 6.x (*continued*)

Data	Description
Packages	<p>You can migrate the Software Delivery packages that are stored locally and their command lines. If a package and a command line are linked to a 6.x task, they are linked to the corresponding 7.1 task or policy after migration.</p> <p>A 6.x task becomes a 7.1 task or policy as follows:</p> <ul style="list-style-type: none"> <li>■ A Software Delivery task becomes a Legacy Delivery task.</li> <li>■ A Sequential Software Delivery task becomes a Managed Software Delivery policy.</li> <li>■ A Software Delivery Task Server task becomes a Package Delivery task.</li> </ul> <p>A migrated package is not associated with a software resource or placed in the Software Library by default. Before you deliver a package with Quick Delivery, Managed Software Delivery, or the Software Portal, associate the package with a software resource. When you import a software delivery package, it is imported to the same location it had on the 6.x server unless you specify an alternate location.</p> <p>See <a href="#">“Promoting migrated Software Packages into the Software Library”</a> on page 115.</p> <p>You can also migrate all patch packages regardless of where they are stored. The packages are imported into the default location.</p>
Portal pages and Web parts	You can migrate portal pages and Web parts, and they are actionable.
Console view	You can migrate console views, and they are actionable.
Right-click actions	You can migrate the user-defined actions that you have added to a right-click menu.
Rules	You can migrate predefined and custom 6.x Inventory Forwarding rules. When you migrate these rules, they are converted to 7.1 replication rules. You can also migrate Connector rules and Active Directory Import rules.

For information about the solution-specific data that the migration wizard migrates, see the following:

- Patch Management Solution  
See [“Data that can be migrated from the 6.x version of Patch Management Solution for Windows”](#) on page 102.
- Inventory Solution  
See [“About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard”](#) on page 70.
- Software Management Solution  
See [“Items that can and items that cannot be migrated from software delivery solutions 6.x”](#) on page 108.

- Asset Management Solution  
See “[About data migration special cases](#)” on page 172.

## About installing the Symantec Notification Server Migration Wizard

You use the Symantec Notification Server Migration Wizard to migrate data from Notification Server 6.x to Symantec Management Platform 7.1. To migrate data with the migration wizard, you must install the migration wizard on your 6.x server and on the 7.1 server. How you install the migration wizard varies depending on where you install it.

See “[About data migration](#)” on page 49.

See “[About the Symantec Notification Server Migration Wizard](#)” on page 50.

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**Note:** To install the migration wizard, .NET Framework 2.0 is required.

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**Note:** To run the migration wizard, you must be a member of the local administrators group.

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**Table 3-4**                      About installing the Symantec Notification Server Migration Wizard

Where the migration wizard is installed	How to install the migration wizard
Symantec Management Platform 7.1 server	<p>Use Symantec Installation Manager on the computer to install the migration wizard components.</p> <p>After you select the products to install, Symantec Installation Manager displays an <b>Optional Installations</b> page that includes the <b>Install Migration Wizard Components</b> option. If you check this option, the migration wizard components are installed with the selected products. You can also access the <b>Optional Installations</b> page at a later time to install the migration wizard components.</p>

Table 3-4

About installing the Symantec Notification Server Migration Wizard  
(continued)

Where the migration wizard is installed	How to install the migration wizard
Current Notification Server	<p>Copy the migration wizard installation package from the Symantec Management Platform 7.1 server. The migration wizard installation package has a 32-bit and a 64-bit version. Copy the 32-bit version. You then run the installation package to install the migration wizard.</p> <p>The migration wizard installation package is only available on the 7.1 server if you have installed the optional migration wizard components on that computer. By default, the migration wizard installation package is installed at C:\Program Files\Altiris\Symantec Installation Manager\MigrationPackage.</p> <p><b>Note:</b> The <b>MigrationPackage</b> folder contains four files. Two of the files include the word "silent" in their name. Use the migration package files that do not contain the word "silent" to install the migration wizard.</p> <p><b>Note:</b> You can install Symantec Installation Manager on another computer and install only the migration wizard components on that computer. You can then copy the migration wizard installation package to your current Notification Server and migrate its data. You might install just the migration wizard if you need to install the Symantec Management Platform 7.1 products on your current server. However, Symantec discourages the reuse of the current server. For more information about installing the Symantec Management Platform 7.1 products on your current server, see <a href="#">HOWTO32427</a>.</p>

## Migrating data to Symantec Management Platform 7.1 with the migration wizard

You use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data to Symantec Management Platform 7.1. This topic provides an overview of the process of migrating data with the migration wizard.

See “[About the Symantec Notification Server Migration Wizard](#)” on page 50.

See “[About the data that the migration wizard migrates from Notification Server 6.x](#)” on page 51.

**Table 3-5** Process for migrating data to Symantec Management Platform 7.1 with the migration wizard

Step	Action	Description
Step 1	Install the migration wizard on the 6.x Notification Server.	<p>Before you can migrate data with the migration wizard, you must first install it. You use Symantec Installation Manager to install the migration wizard components on the 7.1 server. You then copy the migration wizard installation package to your current Notification Server and install it.</p> <p>See <a href="#">“About installing the Symantec Notification Server Migration Wizard”</a> on page 54.</p>
Step 2	Export 6.x data to a data store file.	<p>After the migration wizard is installed on the 6.x Notification Server, it starts in export mode. The migration wizard lets you export 6.x data to a data store file. You can also manually run the migration wizard and export data multiple times.</p> <p>See <a href="#">“Exporting Notification Server 6.x data to a data store file”</a> on page 57.</p> <p>See <a href="#">“About the data store file”</a> on page 62.</p>
Step 3	(Optional) View the data in the data store file.	<p>After you export data to a data store file, you can use Store Browser to view the data that was exported.</p> <p>See <a href="#">“Viewing the data in a data store file”</a> on page 63.</p>
Step 4	(Optional) Compare two data store files.	<p>If you export 6.x data multiple times, you can use StoreDiff to compare two data store files. StoreDiff creates a data store file that contains the differences between the two data store files. You can then use Store Browser to view these differences.</p> <p>See <a href="#">“Comparing two data store files”</a> on page 65.</p>
Step 5	Copy the migration data to the Symantec Management Platform 7.1 server.	<p>You need to copy the migration data to a location that is accessible to the Symantec Management Platform 7.1 server. By default, a data store file is created in the Altiris\Upgrade\Data directory. If package files are exported, this directory also contains a <b>PackageFiles</b> folder. You must put the <b>PackageFiles</b> in the same directory where you put the data store file.</p> <p>You may also want to copy this data to a neutral location to back up the data.</p>



**Table 3-5** Process for migrating data to Symantec Management Platform 7.1 with the migration wizard (*continued*)

Step	Action	Description
Step 6	Import the 6.x data to Symantec Management Platform 7.1.	<p>On the Symantec Management Platform 7.1 server, use the migration wizard to import the 6.x data. If the migration wizard is not installed on this computer, you must first install it.</p> <p>See <a href="#">“About installing the Symantec Notification Server Migration Wizard”</a> on page 54.</p> <p>See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59.</p>
Step 7	Configure 6.x data that is not compatible with 7.x features.	<p>You must configure some 6.x data after it is migrated to make it compatible with new 7.x features. For example, a migrated 6.x software delivery package is not compatible with Quick Delivery and Managed Software Delivery in Software Management Solution. Before you can use these delivery methods to deliver the migrated package, you must promote the package to the Software Library.</p> <p>See <a href="#">“Promoting migrated Software Packages into the Software Library”</a> on page 115.</p>

## Exporting Notification Server 6.x data to a data store file

When you migrate to Symantec Management Platform 7.1, you use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data. When you use the migration wizard, one step in the migration process is to export the 6.x data to a data store file. By default, the data store file is saved in the C:\Program Files\Altiris\Upgrade\Data directory.

See [“Migrating data to Symantec Management Platform 7.1 with the migration wizard”](#) on page 55.

See [“About data migration”](#) on page 49.

See [“About the data store file”](#) on page 62.

When the migration wizard runs in export mode, it uses exporters to export data. Each product that has data to migrate has its own set of exporters. By default, the migration wizard exports all of the data. Symantec recommends that you use the default setting to export all of the data.

When you export data, additional data migration files may be created and saved in this same directory. For example, when you export locally saved software

package files, a **PackageFiles** folder is created that contains folders for all of the package files.

#### To export Notification Server 6.x data to a data store file

- 1 Install and run the migration wizard on the 6.x Notification Server.

After the migration wizard is installed on the 6.x Notification Server, it starts in export mode. You can also manually run NSUpgradewizard.exe to start the migration wizard manually. The migration wizard EXE is in the C:\Program Files\Altiris\Upgrade directory by default.

See [“About installing the Symantec Notification Server Migration Wizard”](#) on page 54.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

- 2 If the **Welcome** page of the migration wizard appears, click **Next**.
- 3 On the **Export / Import Task Selection** page, specify a name and location for the data store file, and click **Next**.

The default name has three parts: the word Store, the date, and the time. The data store extension must be .adb.

- 4 On the **Password Protection** page, if you want to encrypt the data, enter a password.

You must then use this password when you import the data on the Symantec Management Platform 7.1 server.

- 5 On the **Exporter Configuration** page, select the data to export, and click **Next**. Symantec recommends that you select all of the available data.

See [“Exporter Configuration or Importer Configuration page”](#) on page 60.

- 6 On the **Product Readiness Check** page, review the messages, and click **Next**.

This page displays each product that has data that is not included in the export. To view an explanation of why the data is not included, click in the **Message** column.

- 7 If the product readiness warning message appears, click **Yes**.

This message indicates that not all products meet the product readiness check. To view the explanations for any product readiness warnings, click **No**, and then click **Back**.

- 8 On the **Task Summary** page, verify that the migration wizard is about to perform the correct tasks, and click **Next**.

- 9 When the message that the data export has completed successfully appears, click **OK**.

If the data is not exported successfully, a message with instructions appears.

- 10 (Optional) To display details about each action, check **Show Details**.

- 11 Click **Finish**.

## Importing Notification Server 6.x data from a data store file

You use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data to Symantec Management Platform 7.1. When you use the migration wizard, one step in the migration process is to import the 6.x data from a data store file.

See [“Migrating data to Symantec Management Platform 7.1 with the migration wizard”](#) on page 55.

See [“About the data store file”](#) on page 62.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

When the migration wizard runs in import mode, it uses importers to import data. Each product that has data to migrate has its own set of importers. By default, the migration wizard imports all of the data.

You can import all of the data at one time or perform multiple imports and import the data in stages. For example, you can perform an import for each product and then check the data after each import. If you do not import all of the data initially, you must manually run the migration wizard for subsequent imports. If you import the same data twice, the last import overwrites any previous import.

### To import Notification Server 6.x data from a data store file

- 1 Do one of the following to start the migration wizard in the import mode:
  - Install the migration wizard on the Symantec Management Platform 7.1 server with Symantec Installation Manager. By default, the migration wizard starts after it is installed.  
See [“About installing the Symantec Notification Server Migration Wizard”](#) on page 54.  
See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.
  - Run the migration wizard EXE manually.  
When you install the optional migration wizard components, the migration wizard EXE is installed. The EXE for the migration wizard is

NSUpgradeWizard.exe, and by default it is in the C:\Program Files\Altiris\Upgrade directory.

- 2 If the **Welcome** page appears, click **Next**.
- 3 On the **Export / Import Task Selection** page, select the data store file you created when you exported the 6.x data, and click **Next**.
- 4 On the **Password Protection** page, if a password was used when the data was exported, enter that password.
- 5 On the **Importer Configuration** page, select the data to import, and click **Next**.  
See [“Exporter Configuration or Importer Configuration page”](#) on page 60.
- 6 On the **Product Readiness Check** page, review the messages, and click **Next**.  
This page displays each product that has data that is not included in the import. To view an explanation of why the data is not included, click in the **Message** column.
- 7 On the **Task Summary** page, verify the migration tasks the wizard is about to perform, and click **Next**.
- 8 When the message that the data import has completed successfully appears, click **OK**.  
If the data is not imported successfully, a message with instructions appears.
- 9 (Optional) To display each action’s sub-actions, check **Show Details**.
- 10 Click **Finish**.

## Exporter Configuration or Importer Configuration page

These configuration pages let you select the products whose data you want to migrate. For each product, you can select the exporters or importers to use. These exporters or importers define what data is migrated. For each exporter or importer, you can filter the data to export or import. To access these configuration pages, run Symantec Notification Server Migration Wizard. The Exporter Configuration page appears when the migration wizard runs in export mode. The Importers Configuration page appears when the migration wizard runs in import mode.

See [“About data migration”](#) on page 49.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

**Table 3-6** Options on the configuration pages

Option	Description
<b>Products</b>	Displays the products whose data you can migrate. Data is exported or imported only for the products that are checked.
<b>Importers or Exporters</b>	Displays the exporters or importers for the product that is selected in the <b>Products</b> section. Data is exported or imported only for the exporters or importers that are checked in the <b>Enabled</b> column.
<b>Filters</b>	<p>Displays a dialog box that lets you filter the data that an exporter or importer migrates as follows:</p> <ul style="list-style-type: none"><li>■ You can uncheck any item that you do not want to migrate.</li><li>■ The <b>Details</b> option lets you display the <b>Filter Details</b> dialog box.</li></ul> <p>You can sometimes change a value on the <b>Filter Details</b> dialog box. For example, when you import a locally stored package file, you can sometimes change the drive to which it is migrated.</p>

## About the 6.x data that you must manually migrate to Symantec Management Platform 7.1

When you migrate from Notification Server 6.x to Symantec Management Platform 7.1, not all of the data is migrated with the migration wizard. You must manually migrate some data from the 6.x server to the 7.1 server. For some of the migrated data, you must also complete additional manual steps to make the data fully functional.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About migrating licenses to Symantec Management Platform 7.1”](#) on page 48.

The following products require some manual migration steps:

- **Inventory Solution**  
See [“About manually migrating to Inventory Solution 7.1”](#) on page 72.
- **Software Delivery Solution**  
See [“Migrating from Software Delivery Solution 6.x to Software Management Solution 7.1”](#) on page 112.
- **Patch Management Solution**

See [“Gathering and restoring your files and settings for Patch Management Solution for Windows”](#) on page 104.

- Asset Management Solution  
See [“About migrating Asset Management Solution”](#) on page 171.
- Barcode Solution  
See [“Manually migrating your Barcode Solution files and settings”](#) on page 166.
- Out-of-band Management Solution  
See [“Manually migrating Out of Band Management Component to version 7.1”](#) on page 158.
- Real-Time System Management Solution  
See [“About manually migrating Real-Time System Manager Solution files and settings”](#) on page 146.
- Real-Time Console Infrastructure Solution  
See [“About manually migrating Real-Time Console Infrastructure files and settings”](#) on page 150.

You must also copy the licenses of your Notification Server 6.x products to a location that is accessible from the 7.1 server.

## About the data store file

A data store file stores Notification Server data. When you migrate Notification Server 6.x to Symantec Management Platform 7.1 with the migration wizard, you use a data store file. First, you export the 6.x data to a data store file. You then import the data from the data store file into Symantec Management Platform 7.1.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

By default, the data store file is saved in the C:\Program Files\Altiris\Upgrade\Data directory. It has an .adb extension, is easy to copy and back up, and is not dependent on SQL.

You can view the data in a data store file with the Store Browser. If you perform multiple imports, you can view the data to determine which data to import next. The data store file organizes all the data except key data by product. The data for each product is stored in tables. The name of each table is *ProductName.TableName*.

See [“Viewing the data in a data store file”](#) on page 63.

## About the Store Browser

The Store Browser lets you do the following with data store files:

- Analyze the data before you import it.  
The Store Browser lets you view each table and the data in each row of a table before you import the data. If you perform multiple imports, you can view the data to determine what data to import next.
- Export specific data to create a smaller data store file.  
If you encounter errors when you import data, you may need to send a data store file that contains the data to Symantec Technical Support. The Store Browser lets you export specific data to create a smaller data store file that is more portable.  
See [“Exporting data from a data store file”](#) on page 64.
- View differences between two data store files.  
If you have two similar data store files, you can use the StoreDiff utility to create a data store file that highlights their differences. The Store Browser lets you open this data store file and view the differences.  
See [“Comparing two data store files”](#) on page 65.  
See [“About the data store file”](#) on page 62.  
See [“Viewing the data in a data store file”](#) on page 63.  
By default, the EXE for the Store Browser is installed at C:\Program Files\Altiris\Upgrade. It is installed whenever the migration wizard is installed.

## Viewing the data in a data store file

You use Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data to Symantec Management Platform 7.1. When you migrate data with the migration wizard, you export the data to a data store file and then import the data from the data store file. After you create a data store file, you can use the Store Browser to view the data in the data store file.

See [“About data migration”](#) on page 49.

See [“About the data store file”](#) on page 62.

See [“About the Store Browser”](#) on page 62.

### To view the data in a data store file

- 1 Start the Store Browser.  
By default, this file is installed at C:\Program Files\Altiris\Upgrade.
- 2 In the **Store Browser**, on the **File** menu, click **Open** and select the data store file.
- 3 In the **Table Name** column, select a table.  
The rows of the table appear in the right pane.

- 4 To search for specific data in a table, use the following options at the bottom of the right pane:

<b>Starting index</b>	Type a number of a table row, and click <b>Refresh</b> . The table row becomes the first row in the right pane.
<b>Find</b>	Type the search criteria, and select the columns of the table in which to perform the search. All rows in the table that match the search criteria are highlighted. To use regular expressions for the search criteria, check <b>Regex</b> .
<b>Inverse</b>	Check this option to highlight the text that does match the search criteria.
<b>Regex</b>	Check this option to perform a search with regular expressions. You then type the regular expression in <b>Find</b> .
<b>Refresh</b>	Click this option to complete the search.
<b>Find Next</b>	Click this option to move to the next row that matches the search criteria.

- 5 If a table row has an **Xml** column, do the following to view the XML:
- Double-click the row.
  - In the **Data View for table** dialog box, on the first **Column** drop-down list, click the XML entry.  
The XML appears in the **Value** pane.
  - On the second **Column** drop-down list, click **View as XML**.

## Exporting data from a data store file

If you encounter errors when you import data from a data store file, you may need to send the file to Symantec Technical Support. For a large file, you can use Store Browser to create a data store that is a subset of the original data store file. You can export the data that causes the errors and then send this smaller file to support so that they can help resolve the problem.

See [“About the Store Browser”](#) on page 62.

See [“About the data store file”](#) on page 62.

When you export data with the Store Browser, you can select the data tables to export and the specific rows in the data tables. You can specify the rows to export with row numbers, row ranges, or a data string.



### To export data from a data store file

- 1 Double-click `StoreBrowser.exe`.

By default, this file is installed at C:\Program Files\Altiris\Upgrade. It is installed whenever the migration wizard is installed.

- 2 In the **Store Browser**, on the **File** menu, click **Open**, and select the data store file that contains the data.
- 3 On the **File** menu, click **Export Data**.
- 4 In the **Export Data Form** dialog box, in the **Export** column, check the tables whose data you want to export.

The NSCore.ExporterVersionInfo table is always exported. It contains the data that the migration wizard needs to import the data from the data store file.

- 5 To export the data for specific rows of a table, click in the **Rows to Export** column and specify the rows as follows:
  - In the **Export Options Form** dialog box, click **Specified Rows**.
  - To specify rows by row number, check **Row Ranges**, and list the rows.
  - To specify the rows that contain a data string, check **Containing String**, and define the string.
  - Click **OK**.
- 6 In the **Export Data Form** dialog box, in **Destination Store**, specify the name and location for the new data store file.
- 7 Click **Export**.

## Comparing two data store files

You can export the same type of 6.x data to a data store file multiple times. If the data on the 6.x server changes between exports, then subsequent data store files contain differences. You can use the StoreDiff utility to compare two data store files.

When you compare two data store files that are different, a data store file is created that contains the differences. You then use Store Browser to view this data store file and see the differences. You can use this information to determine the data to import. The data store file that StoreDiff creates cannot be used to import data into Symantec Management Platform 7.1.

See [“About the data store file”](#) on page 62.

See [“About the Store Browser”](#) on page 62.

### To compare two data store files

- 1 Start the StoreDiff utility.  
By default, the EXE for the StoreDiff utility is installed in the C:\Program Files\Altiris\Upgrade directory. It is installed whenever the migration wizard is installed.
- 2 On the **Compare Data Stores** dialog box, click **Browse** to select each of the data store files.
- 3 In **Diff Store**, specify the name and location for the new data store file.  
This data store file highlights the differences between the two data stores.
- 4 Click **Generate Diff**.
- 5 On the message that appears, click **OK**.  
The message either states that the two data store files are identical or that a new data store file is generated. If a new data store file is generated, the **Store Browser** opens.
- 6 In the **Store Browser**, on the **File** menu, click **Open**, and select the new data store file.
- 7 On the **Diff Store Summary** dialog box, click **OK**.  
This dialog box lists the data store files that are compared in this new data store file.  
This dialog box also has the following color key for the differences between the two data store files:

Green	New data that exists only in the second data store.
Yellow	Deleted data that exists only in the first data store.
Salmon	Data that exists in both data stores but is different.
- 8 In the left pane of the **Store Browser**, select a table that is shaded with one of the three colors.  
Only the tables that have differences between the two data store files are shaded.
- 9 In the right pane, view the rows that have differences between the two data store files.
- 10 If a table row has an **Xml** column, do the following to view the XML:
  - Double-click the row.

- In the **Data View for table** dialog box, on the first **Column** drop-down list, click the XML entry.  
The XML appears in the **Value** pane.
- On the second **Column** drop-down list, click **View as XML**.



# Migrating Inventory Solution

This chapter includes the following topics:

- [Before you migrate to Inventory Solution 7.1](#)
- [About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard](#)
- [About manually migrating to Inventory Solution 7.1](#)
- [Process for manually migrating your custom inventory script files](#)
- [Process for manually migrating your Inventory Solution baseline configuration files](#)
- [Data migration to Inventory for Network Devices 7.1](#)

## Before you migrate to Inventory Solution 7.1

To successfully migrate to Inventory Solution 7.1, perform the following preliminary actions:

- If your Inventory Solution version is earlier than 6.1.1075 SP2, you must upgrade it to the latest 6.x Service Pack before you migrate to 7.1. Before the upgrade to the latest Service Pack, ensure that the following steps are performed:
  - Normalize the inventory data classes that are available for normalization. In the **Altiris Console 6.0**, you can view these data classes at **Configuration > Solutions Settings > Assets and Inventory > Inventory > Windows > Normalize**.

In the **Altiris Console 6.5**, you can view these data classes at **Configure > Solutions > Inventory > Windows > Normalize**.

Normalization can take a long time depending on the size of the tables of the data classes' target.

- Remove predefined special groups. You can leave your custom special groups, though no upgrade is supported for them.

In the **Altiris Console 6.0**, you can view your special groups and AeX SW data classes at **Configuration > Resource Settings > Data Classes > Inventory > Software**.

In the **Altiris Console 6.5**, you can view your special groups and AeX SW data classes at **View > Configuration > Resource Settings > Data Classes > Inventory > Software**.

For more information about removing the predefined special groups, see the article at <http://www.symantec.com/docs/HOWTO7373>.

- Check which items are not migrated with Symantec Notification Server Migration Wizard, and then back up the items.

See “[About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard](#)” on page 70.

See “[About manually migrating to Inventory Solution 7.1](#)” on page 72.

## About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard

To successfully migrate Inventory Solution, you perform the following types of product migration:

- Migration to Symantec Management Platform 7.1 with the Symantec Notification Server Migration Wizard.

See “[Before you migrate to Inventory Solution 7.1](#)” on page 69.

See “[Migrating from Notification Server 6.x to Symantec Management Platform 7.1](#)” on page 34.

See “[About data migration](#)” on page 49.

See “[About the Symantec Notification Server Migration Wizard](#)” on page 50.

---

**Note:** When the Altiris Agent 6.x is upgraded to the Symantec Management Agent 7.1, error messages appear in Notification Server logs. The messages notify you about failure to process some Notification Server events and load inventory.

This behavior is expected in the transition period because the 6.x inventory policies and data classes do not yet exist in the 7.1 database. After Inventory agents (known as plug-ins in the 7.1 environment) get installed, the new inventory policies and items are referenced. As a result, the errors no longer occur in the logs.

---

- Manual migration.

See [“About manually migrating to Inventory Solution 7.1”](#) on page 72.

The following items are automatically migrated during the upgrade from Notification Server 6.x to Symantec Management Platform 7.1:

- Predefined and custom 6.x inventory policies and tasks are upgraded to the equivalent 7.1 task-based policies.

---

**Note:** For successful migration, 6.x custom inventory tasks should be located in the predefined folders. Currently, migration is not supported for custom created folders with custom inventory tasks.

The schedules and advanced options of the policies are not migrated. The tasks are not scheduled.

---

- Predefined and custom 6.x application metering policies are migrated. The migrated policies preserve their settings. That is, the policies that are enabled in 6.x stay enabled, and the policies that are disabled in 6.x stay disabled. The policies are applied to all computers with the Application Metering Plug-in installed.

---

**Note:** The schedules and advanced options of the policies are not migrated.

---

- 6.x predefined data classes are migrated into the legacy 6.x data classes in the 7.1 database for reporting purposes.  
New inventory data that is collected in the 7.1 environment goes into the 7.1 predefined data classes.
- 6.x custom data classes are migrated into the legacy 6.x data classes in the 7.1 database for reporting purposes.

New relevant custom inventory data that is collected in the 7.1 environment goes into these migrated data classes.

- 6.x inventory data from 6.x data classes.

The following items are not migrated with the Symantec Notification Server Migration Wizard to the 7.1 database due to extensive changes in the database structure:

- Inventory agent is not upgraded but Inventory Plug-in gets installed instead.
- Inventory Solution 6.x configuration settings.
- Predefined and custom 6.x inventory reports.

---

**Note:** During the upgrade, 7.1 inventory reports are updated to show the 6.x data. So you can view the information from 6.x predefined inventory reports in 7.1 reports.

---

- Application Metering Solution 6.x configuration settings.
- 6.x application metering predefined and custom reports, data classes, and data.
- 6.x history data classes.
- Stand-alone inventory packages.  
You cannot migrate your stand-alone packages from version 6.x to version 7.1. The data class schema for stand-alone packages is different in version 7.1. The format for sending Notification Server events is different in version 7.1. Consequently, if you attempt to use your version 6 stand-alone packages in version 7, the information fails to load into the Symantec Configuration Management Database.
- Custom inventory script files for Windows and for UNIX, Linux, and Mac.  
See [“Process for manually migrating your custom inventory script files”](#) on page 73.
- Inventory baseline configuration and snapshot files.  
See [“Process for manually migrating your Inventory Solution baseline configuration files”](#) on page 93.

## About manually migrating to Inventory Solution 7.1

When you use the Symantec Notification Server Migration Wizard to migrate to 7.1, some of your Inventory Solution files and settings do not migrate. This situation occurs because of the extensive changes in the database structure. To



preserve these files and settings, you must manually migrate them from your previous Notification Server computer to your Notification Server 7.1 computer. After you move these files to your new environment, you must complete configuration steps to make them operate correctly.

See [“Before you migrate to Inventory Solution 7.1”](#) on page 69.

See the following for information about manually migrating Inventory Solution items:

- Custom inventory script files for Windows and for UNIX, Linux, and Mac.  
You can manually migrate your custom inventory script files. However, you must perform custom configuration steps to make them operate correctly in the 7.1 environment.  
See [“Process for manually migrating your custom inventory script files”](#) on page 73.
- Inventory baseline configuration and snapshot files.  
You can use the Symantec Notification Server Migration Wizard to migrate the baseline files. However, you have to perform some additional steps to verify that the data has migrated successfully.  
See [“Process for manually migrating your Inventory Solution baseline configuration files”](#) on page 93.

## Process for manually migrating your custom inventory script files

You can manually migrate your custom inventory script files. However, you must perform custom configuration steps to make them operate correctly in the 7.1 environment.

**Table 4-1**      Process for manually migrating your custom inventory script files for Windows from 6.x to 7.1

Step	Action	Description
Step 1	Create a backup of your custom inventory script files.	Before you migrate your custom inventory files, create a backup copy of them in a neutral storage location.  See <a href="#">“Backing up your custom inventory script files”</a> on page 78.

**Table 4-1** Process for manually migrating your custom inventory script files for Windows from 6.x to 7.1 (*continued*)

Step	Action	Description
Step 2	Perform the migration to Inventory Solution 7.1 with the Symantec Notification Server Migration Wizard.	<p>Migration to Inventory Solution 7.1 with the Symantec Notification Server Migration Wizard lets you automatically migrate a number of Inventory Solution items.</p> <p>See <a href="#">“About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard”</a> on page 70.</p>
Step 3	Copy your custom inventory script files to your Notification Server 7.1 computer.	<p>Copy your custom inventory script files to your Notification Server 7.1 computer.</p> <p>When you install or upgrade to Symantec Management Platform 7.1 on Windows computers, it automatically creates a package directory for storing your custom inventory.</p> <p>See <a href="#">“Copying your custom inventory script files to your Notification Server 7.1 computer”</a> on page 78.</p>
Step 4	Create .INI files.	<p>In version 6.x, there are several .INI files that control the inventory processes that run on client computers.</p> <p>To run 6.x custom inventory in the 7.1 environment, you need to create similar .INI or batch files to execute the desired command lines.</p> <p>See <a href="#">“About creating an .INI file for custom inventory”</a> on page 80.</p>
Step 5	Meet the prerequisites to create a custom inventory software resource package.	<p>Before setting up the software resource package, you must ensure that the certain prerequisites are met on your Notification Server 7.1 computer.</p> <p>See <a href="#">“Prerequisites for creating a custom inventory software resource package”</a> on page 81.</p>

Table 4-1

Process for manually migrating your custom inventory script files for Windows from 6.x to 7.1 *(continued)*

Step	Action	Description
Step 6	Create a software resource with a package and a command line.	<p>You need to create a software resource with a package and a command line before performing <b>Quick Delivery</b> tasks.</p> <p>A software resource is similar to the software delivery package in 6.x.</p> <p>A software resource contains the package definition that includes the path to the package, and the program definition that includes the desired command line.</p> <p>See <a href="#">“Creating a software resource with a package and a command line for custom inventory script files”</a> on page 81.</p>
Step 7	Create a <b>Quick Delivery</b> task for a custom inventory script file.	<p>To successfully use your manually migrated custom inventory script files in the 7.1 environment, you need Software Management Solution to create and perform <b>Quick Delivery</b> tasks.</p> <p>See <a href="#">“Creating a Quick Delivery task for a custom inventory script file”</a> on page 83.</p>
Step 8	Create a custom data class.	<p>Create a custom data class for a custom inventory script task.</p> <p>When you create the custom data class, ensure that you enter the name and the description for the data class from your manually migrated custom inventory script file.</p> <p>See <a href="#">“Creating and customizing a data class”</a> on page 84.</p>

**Table 4-1** Process for manually migrating your custom inventory script files for Windows from 6.x to 7.1 (*continued*)

Step	Action	Description
Step 9	Create a custom inventory script task.	<p>Create a custom inventory script task that gathers the custom inventory.</p> <p>See <a href="#">“Creating a custom inventory script task”</a> on page 85.</p> <p>When you customize the custom inventory script task, ensure that you add the logic to gather the data and populate the attribute variables in the script according to the data in your manually migrated custom inventory script file.</p> <p>See <a href="#">“Customizing the custom inventory sample script for Windows”</a> on page 87.</p>

**Table 4-2** Process for manually migrating your custom inventory script files for UNIX, Linux, and Mac from 6.x to 7.1

Step	Action	Description
Step 1	Create a backup of your custom inventory script files.	<p>Before you migrate your custom inventory files, create a backup copy of them in a neutral storage location.</p> <p>See <a href="#">“Backing up your custom inventory script files”</a> on page 78.</p>
Step 2	Perform the migration to Inventory Solution 7.1 with the Symantec Notification Server Migration Wizard.	<p>Migration to Inventory Solution 7.1 with the Symantec Notification Server Migration Wizard lets you automatically migrate a number of Inventory Solution items.</p> <p>See <a href="#">“About migrating to Inventory Solution 7.1 with Symantec Notification Server Migration Wizard”</a> on page 70.</p>

**Table 4-2**      Process for manually migrating your custom inventory script files for UNIX, Linux, and Mac from 6.x to 7.1 (*continued*)

Step	Action	Description
Step 3	Copy your custom inventory script files and packages to your Notification Server 7.1 computer.	<p>Copy your custom inventory script files and packages to your Notification Server 7.1 computer.</p> <p>During installation or upgrade on UNIX, Linux, and Mac platforms, Symantec Management Platform 7.1 does not create any special directory for storing your custom inventory. You can define by yourself where to store your custom inventory script files for UNIX, Linux, and Mac.</p> <p>See <a href="#">“Copying your custom inventory script files to your Notification Server 7.1 computer”</a> on page 78.</p>
Step 4	Create a custom data class.	<p>Create a custom data class for a custom inventory script task.</p> <p>When you create the custom data class, ensure that you enter the name and the description for the data class from your manually migrated custom inventory script file.</p> <p>See <a href="#">“Creating and customizing a data class”</a> on page 84.</p>
Step 5	Create a custom inventory script task.	<p>Create a custom inventory script task that gathers the custom inventory.</p> <p>See <a href="#">“Creating a custom inventory script task”</a> on page 85.</p> <p>When you customize the custom inventory script task, ensure that you copy and paste the script text from your manually migrated custom inventory script file.</p> <p>See <a href="#">“Customizing the custom inventory sample script for UNIX, Linux, and Mac”</a> on page 91.</p>

## Backing up your custom inventory script files

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

Before you migrate your custom inventory files, create a backup copy of them in a neutral storage location.

### To back up your custom inventory script files for Windows

- 1 On your previous Notification Server computer, copy all of your custom inventory script files (.CIT, .XML, etc.) to a neutral storage location.

By default, your custom inventory script files are located on your previous Notification Server computer in the following location:

```
■ C:\Program Files\Altiris\Notification  
Server\NSCap\Bin\Win32\X86\Inventory Solution
```

The default location may not include other locations where you have placed your custom inventory script files. Ensure that you also back up the custom inventory script files that you have created outside of the default location.

- 2 On your previous Notification Server computer, copy all of your custom inventory .INI files to a neutral storage location. These .INI files invoke the `AeXCustInv.exe` file. By default, the naming convention for these files is `aexinvsoln*.EXE`.

### To back up your custom inventory script files for UNIX, Linux, and Mac

- ◆ On your previous Notification Server computer, copy all of your custom inventory script files (.CIT, .XML, etc.) to a neutral storage location.

By default, your custom inventory script files are located on your previous Notification Server computer in the following locations:

```
■ C:\Program Files\Altiris\Notification  
Server\NSCap\Bin\Mac\Inventory  
  
■ C:\Program Files\Altiris\Notification  
Server\NSCap\Bin\Unix\Inventory\<PLATFORM>\<PROCESSOR TYPE>
```

## Copying your custom inventory script files to your Notification Server 7.1 computer

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

When you install or upgrade to Symantec Management Platform 7.1 on Windows computers, it automatically creates a package directory for storing your custom inventory.

By default, the path to the custom inventory directory for Windows is `C:\Program Files\Altiris\Notification Server\NSCap\bin\Win32\X86\Inventory\Custom Inventory 6.1`.

The package directory for Windows contains the following files:

- `AeXInvSoln.exe`  
 This file is the same as the file in 6.1 SP2. This file launches `AeXCustInv.exe` and `AeXNSInvCollector.exe` as specified in `AeXInvSoln.ini`.
- `AeXCustInv.exe`  
 This file differs from the file in 6.1 SP2. This file has bug fixes.
- `AeXNSInvCollector.exe`  
 This file differs from the file in 6.1 SP2. This file behaves in a similar way to the 6.1 SP2 file. However, this file generates Notification Server events (NSEs) in the new format that is required to store inventory to your Notification Server 7.1 computer.
- `AeXNSEvent.dll`  
 This file is new. `AeXNSInvCollector.exe` uses this file for generating NSEs in the new format.
- `AeXInvSoln.ini`  
 This file specifies an example of how to launch the `AeXCustInv.exe` and `AeXNSInvCollector.exe` files.
- `AeXCustInvStd.cit`  
 This file is a sample custom inventory script from version 6.1 SP2.

On UNIX, Linux, and Mac platforms, Symantec Management Platform 7.1 does not create any special directory for storing your custom inventory. You can define by yourself where to store your custom inventory script files for UNIX, Linux, and Mac.

### To copy your custom inventory files to a Notification Server 7.1 computer

- 1 Copy all of your custom inventory script files for Windows (.CIT, .XML, etc.) to C:\Program Files\Altiris\Notification Server\NSCap\bin\Win32\X86\Inventory\Custom Inventory 6.1.

Copy all of your custom inventory script files for UNIX, Linux, and Mac to the directory previously defined by you.

- 2 (Windows only) Copy all of your custom inventory .INI files to C:\Program Files\Altiris\Notification Server\NSCap\bin\Win32\X86\Inventory\Custom Inventory 6.1.

By default, the naming convention for these files is `aexinvsoln*.EXE`.

## About creating an .INI file for custom inventory

(Windows only)

The task of creating an .INI file is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

In version 6.x, there are several .INI files that control the inventory processes that run on client computers.

These .INI files contain batch type commands, similar to the following:

```
aexauditpls.exe /hidden /output xml
aexmachinv.exe
aexcustinv.exe /in .\AeXCustInvStd.cit /out AeXCustInvStd.nsi
aexsnplus.exe /output xml
aexnsinvcollector.exe /hidden /nsctransport /v default /useguid
```

To run 6.x custom inventory in the version 7.1 environment, you need similar .INI or batch files to execute the desired command lines. These files need to be in the same directory as the source .CIT or .XML files. By default, this directory is C:\Program Files\Altiris\Notification Server\NSCap\bin\Win32\X86\Inventory\Custom Inventory 6.1.

A sample .INI file `AeXInvSoln.ini` is included in this directory by default.

You can include all desired custom inventory script files in a single .INI file and have a single software resource, package, command line, and task. However, you may prefer to create multiple .INI files: one for each custom inventory or set of custom inventory processes. Then each .INI file contains a software resource, package, command line, and task for each custom inventory script file.



Typically, the updated .INI file should do nothing more than run one or more `aexcustinv.exe` command lines, followed by `aexnsinvcollector.exe` as the last command in the file. However, it may also be necessary to include custom commands or programs in the .INI file. In this scenario, it may be necessary to run a third-party or custom application to collect data, create output data, and have custom inventory gather that data and report it to Notification Server. The .INI file is essentially a batch file that the client agent executes. Consequently, it is possible to include other pertinent commands in the .INI file.

Following is an example of how an .INI file for a custom inventory task can look:

```
aexcustinv.exe /in .\win32_useraccount.xml /out win32_useraccount.nsi
aexnsinvcollector.exe /hidden /nsctransport /v default /useguid
```

A good practice is to keep the source .XML file name and the .nsi output file name identical.

## Prerequisites for creating a custom inventory software resource package

(Windows only)

The task of meeting the prerequisites is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

Before setting up the software resource package, you must ensure that the following prerequisites have been met on your Notification Server 7.1 computer:

- Java 2 JRE 1.6 is required for some Symantec Management Console screens.
- The appropriate interpreters for Perl, Python, VBScript, etc. must be installed.
- The Symantec Management Agent and Software Management Solution plug-in must be installed on each client computer.
- The 7.1 version of `aexinvcollector.exe` must exist on the 7.1 Notification Server computer. This file is installed by default as part of the installation.
- Ensure that the 6.x custom inventory data classes are migrated. Create new custom inventory data classes if needed.

## Creating a software resource with a package and a command line for custom inventory script files

(Windows only)

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

A software resource is similar to the software delivery package in 6.x.

A software resource contains the package definition that includes the path to the package, and the program definition that includes the desired command line.

To create a software resource for custom inventory script files

- 1 In the **Symantec Management Console**, on the **Manage** menu, click **Software Catalog**.
- 2 On the **Manage Software Catalog** page, click **Import**.
- 3 On the **Import Software: Specify Software** page, perform the following steps:

<b>Software type</b>	Select <b>Software Release</b> .
<b>Package source</b>	In the <b>Source</b> field, select <b>Access Package from an existing UNC</b> .  In the <b>Location</b> field, browse to: <code>\\local_N57_servername\nscap\bin\win32\x86\Inventory\Custom Inventory 6.1</code>
<b>Package contents</b>	Click <b>Display Location</b> and select <code>AeXInvSoln.exe</code> .  Click <b>Set Installation File</b> .  Click <b>Next</b> .

- 4 Select **Create a new software resource** and enter a name for the package.
- 5 Make sure that **Open software resource for editing when finished** is checked.
- 6 Click **OK**.
- 7 On the **Software Resource** editing page, click the **Package** tab.
- 8 In the **Command Lines** section, click **Add command**. `aexinvsoln.exe` should be the command line.
- 9 Click **Edit**.

**10** On the **Add or Edit Command Line** page, perform the following steps:

<b>Name</b>	Enter <i>Custinv - Win32_UserAccount - CommandLine</i>
<b>Command line requires a package</b>	Select this option.
<b>Package</b>	Select the name that you entered when you created the software resource package.
<b>Installation File Type</b>	Select <b>EXE Software Installation File</b> .
<b>Command Type</b>	Select <b>Custom</b> .
<b>Command Line</b>	Enter <i>AeXInvSoln.exe /s win32_useraccount</i>

- 11** Click **OK**.
- 12** Click **Save Changes**.

## Creating a Quick Delivery task for a custom inventory script file

(Windows only)

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

To successfully use your manually migrated custom inventory script files, you need Software Management Solution to perform **Quick Delivery** tasks.

For more information, see the topics about managed software delivery in the *Software Management Solution Help*.

**To create a Quick Delivery task for a custom inventory script file**

- 1** In the **Symantec Management Console**, on the **Manage** menu, click **Jobs and Tasks**.
- 2** In the left pane, expand **System Jobs and Tasks > Software**.
- 3** Right-click the **Quick Delivery** folder under which you want to create a task, and then click **New > Task**.
- 4** In the **Create New Task** dialog box, in the left pane, under **Software**, click **Quick Delivery**.
- 5** Change the **Name** of the task.

- 6 Under **Software**, select a custom inventory software resource package to deliver.
- 7 Under **Command line**, select a command line.
- 8 Under **Package**, select an installation package.
- 9 Click **OK**.
- 10 (Optional) To run the task immediately, click **Quick Run**.  
Alternatively, you can click **New Schedule** to schedule the task.

## Creating and customizing a data class

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

From the Symantec Management Console, you can create a custom data class. You can add, edit, and delete attributes of the data class and you can change the position of the attribute. You can also find the GUID and view the data in the data class.

Be aware that every time you modify an attribute and you save the changes, the data class is assigned a new GUID.

For more information, see the topics about custom inventory data classes and about gathering custom inventory in the *Inventory Solution Help*.

### To create and customize a data class

- 1 In the Symantec Management Console, on the **Settings** menu, click **All Settings**.
- 2 In the left pane, under **Settings**, expand **Discovery and Inventory > Inventory Solution**, and then click **Manage Custom Data classes**.
- 3 To create a data class, do the following:
  - On the **Manage Custom Data Classes** page, click **New data class**.
  - Enter a name and a description for the data class and click **OK**.  
The name of the new data class must be unique.
- 4 To customize a data class, on the **Manage Custom Data Classes** page, in the data classes list, click the data class.
- 5 (Optional) To add an attribute to the data class, do the following:
  - Click **Add attribute**.

- In the **Data Class Attribute** dialog box, specify the details of the attribute. To add an attribute that uniquely defines a row in the data class, click **Yes** in the **Key** drop-down list. You enforce that the attribute always has a unique value that is other than NULL.  
 If the attribute should never be empty or blank, click **Yes** in the **Data required** drop-down list. If you click **Yes** in the **Key** drop-down list, the **Data required** option is automatically set to **Yes**. You cannot change it unless you click **No** in the **Key** drop-down list.
  - Click **OK**.
- 6 (Optional) To edit or delete the attributes, select the attribute, and then click the **Edit** or **Delete** symbols.
  - 7 (Optional) To let the data class store inventory of multiple objects, check **Allow multiple rows from a single computer resource**. The data class can store the inventory of services, user accounts, files, network cards, and other objects.  
  
 When you report inventory values for the columns in a Notification Server Event (NSE), the attributes are identified by the column ID and not by the column name. As a result, the order of attributes in a data class must be correct. On the **Manage Custom Data Classes** page, you can also specify the sequence of the attributes.
  - 8 Click **Save changes**.

---

**Warning:** The final step of saving changes is very important. When you create any data class or add any attributes, all the information is stored in memory. Nothing is created in the database and on details page, no GUID is yet assigned. As a result, a 00000000-0000-0000-0000-000000000000 GUID is displayed in the property of the data class. Only after you click **Save changes** on the **Manage Custom Data Classes** page, the data class is saved in the database, and the GUID is generated. Note that the GUID changes every time you make changes to the definition of the data class and save it.

---

## Creating a custom inventory script task

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

After you have created the custom inventory data class, you create a custom inventory script task that gathers the custom inventory. The script task is configured with the script to gather the custom inventory and the schedule of the task.

See [“Creating and customizing a data class”](#) on page 84.

To create a custom inventory script task, you can clone a sample script task and modify it with the custom data classes that you created. You can also create an inventory script task on the **Jobs and Tasks Portal** page.

---

**Note:** The process of creating a custom inventory script task is the same across all platforms: Windows, UNIX, Linux, and Mac. However, the scripting language and the logic that is used in the scripts are different.

---

For more information, see the topics about gathering custom inventory in the *Inventory Solution Help*.

#### To clone a sample custom inventory script task

- 1 In the Symantec Management Console, on the **Manage** menu, click **Jobs and Tasks**.
- 2 In the left pane, under **Jobs and Tasks**, expand **Samples > Discovery and Inventory > Inventory samples > Custom**.
- 3 Right-click the sample custom inventory script task and click **Clone**.
- 4 In the **Clone Item** dialog box, give the cloned script a descriptive name and click **OK**.
- 5 (Optional) Customize the sample script and click **Save changes**.

Depending on the selected script type, you have different options to customize the script.

See [“Customizing the custom inventory sample script for Windows”](#) on page 87.

See [“Customizing the custom inventory sample script for UNIX, Linux, and Mac”](#) on page 91.

- 6 Under **Task Status**, schedule the task to run on client computers.

For more information, see the topics about running a task in the *Symantec Management Platform Help*.

### To create a custom inventory script task

- 1 In the Symantec Management Console, on the **Manage** menu, click **Jobs and Tasks**.
- 2 In the left pane, right-click **Jobs and Tasks**, and then click **New > Task**.
- 3 In the **Create New Task** dialog box, in the left pane, click **Run Script**.
- 4 In the right pane, enter a descriptive name for the task.
- 5 In the **Script type** drop-down list, select the script type.
- 6 Enter your own script or copy a sample custom inventory script to the script editor.

To access a sample custom inventory script, do the following:

- In the Symantec Management Console, on the **Manage** menu, click **Jobs and Tasks**.
  - In the left pane, under **Jobs and Tasks**, expand **Samples > Discovery and Inventory > Inventory samples > Custom**.
- 7 (Optional) Customize the sample script and click **OK**.

Depending on the selected script type, you have different options to customize the sample script.

See [“Customizing the custom inventory sample script for Windows”](#) on page 87.

See [“Customizing the custom inventory sample script for UNIX, Linux, and Mac”](#) on page 91.

- 8 Under **Task Status**, schedule the task to run on client computers.

For more information, see the topics about running a task in the *Symantec Management Platform Help*.

## Customizing the custom inventory sample script for Windows

(Windows only)

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

The easiest way to create a new custom inventory script task is to clone the existing sample and customize it according to your needs. The sample script for Windows already contains the required code for a WMI query. You only need to add your

own logic to gather the data that you want and to populate the attribute variables in the script.

Note that every time you create or edit an existing custom data class, the data class is assigned a new GUID. You must manually update the script with the new GUID, if it refers to the older GUID for the same custom data class.

See [“Creating a custom inventory script task”](#) on page 85.

For more information, see the topics about gathering custom inventory in the *Inventory Solution Help*.

### To customize the custom inventory sample script for Windows

- 1 Clone or open an existing sample of the custom inventory script task.
- 2 Specify the values that you want to gather.

Example:

```
strComputer = "."

Set objWMIService = GetObject("winmgmts:" &
"{impersonationLevel=impersonate}!\\" & strComputer &
"\root\cimv2")

'Fire WMI Query

Set objCIMObj = objWMIService.ExecQuery("select * from
CIM_processor")
```

- 3 Replace the GUID with the GUID of the data class that you created.

Example:

```
set objDCInstance = nse.AddDataClass ("{e8220123-4987-4b5e-bc39-ec6eaea312ef}")
```

To access the GUID of the data class that you created, do the following:

- In the Symantec Management Console, on the **Settings** menu, click **All Settings**.
- In the left pane, under **Settings**, expand **Discovery and Inventory > Inventory Solution**, and then click **Manage Custom Data classes**.
- On the **Manage Custom Data Classes** page, select the data class and click the **Details** symbol.



#### 4 Update attributes of the data class.

**Example:**

```
For each objInfo in objCIMObj
    'Add a new row
    dim objDataRow
    set objDataRow = objDataClass.AddRow
    'Set columns
    objDataRow.SetField 0, objInfo.DeviceID
    objDataRow.SetField 1, objInfo.L2CacheSize
    objDataRow.SetField 2, objInfo.L2CacheSpeed
Next
```

#### 5 Click **Save changes**.

### Custom inventory sample script for Windows

The sample inventory script for Windows does the following:

- Creates a WMI object, runs a WMI query, and stores the result set.
- Creates an Notification Server event (NSE) object.
- Creates an Inventory data block and associates it with a specific custom data class.
- Loops through each row in the result set and populates each row of the result set into a row in the data block.
- Processes and sends the NSE to Notification Server.

See [“Customizing the custom inventory sample script for Windows”](#) on page 87.

The following is a sample script:

```
'The following is a sample custom inventory script gathering
information about the processor of a computer and posting data to
the server using Altiris NSE Component

'=====

' On Error Resume Next

'Create instance of Wbem service object and connect to namespace
strComputer = "."
```

```
Set objWMIService = GetObject("winmgmts:" &
"{impersonationLevel=impersonate}!\\" & strComputer & "\root\cimv2")
'Fire WMI Query
Set objCIMObj = objWMIService.ExecQuery("select * from CIM_processor")
'=====
'Create instance of Altiris NSE component
dim nse
set nse = WScript.CreateObject ("Altiris.AeXNSEvent")
' Set the header data of the NSE
' Please don't modify this GUID
nse.To = "{1592B913-72F3-4C36-91D2-D4EDA21D2F96}"
nse.Priority = 1
'Create Inventory data block. Here assumption is that the data class
with
below guid is already configured on server
dim objDCInstance
set objDCInstance = nse.AddDataClass ("{e8220123-4987-4b5e-bc39-
ec6eaea312ef}")
dim objDataClass
set objDataClass = nse.AddDataBlock (objDCInstance)
For each objInfo in objCIMObj
'Add a new row
dim objDataRow
set objDataRow = objDataClass.AddRow
'Set columns
objDataRow.SetField 0, objInfo.DeviceID
objDataRow.SetField 1, objInfo.L2CacheSize
objDataRow.SetField 2, objInfo.L2CacheSpeed
Next
```

```
nse.SendQueued
```

## Customizing the custom inventory sample script for UNIX, Linux, and Mac

(UNIX, Linux, and Mac only)

This task is a part of the process for manually migrating your custom inventory script files.

See [“Process for manually migrating your custom inventory script files”](#) on page 73.

The custom inventory script for UNIX, Linux, and Mac generates a text output that contains the collected inventory data in a specified format. This data is used to create the NSE and is posted into the Configuration Management Database (CMDB). The logic of creating the NSE and posting the data is hidden from the user.

When you customize the sample script, you can modify the output that the script generates.

See [“Creating a custom inventory script task”](#) on page 85.

For more information, see the topics about gathering custom inventory in the *Inventory Solution Help*.

### To customize the custom inventory sample script for UNIX, Linux, and Mac

- 1 Clone or open an existing sample of the custom inventory script task.

Note that the first lines of the script should not be changed. Changes should be made after the `# SCRIPT_BEGINS_HERE` label.

- 2 Specify the data class.

Example:

```
echo UNIX_PS_List
```

- 3 Specify the delimiters.

Example:

```
echo "Delimiters=\" \" \" "
```

- 4 Specify the data type and the length of each column.

Example:

```
echo string20 string20 string20 string256
```

**5 Specify the column names.**

Example:

```
echo PID Terminal Time Command
```

Note that the column names are not used in 7.x custom inventory. The column names are left for backward compatibility with 6.x Inventory Solution. You can leave this line empty in 7.x.

**6 Specify commands to retrieve data from system.**

Example:

```
ps -e
```

**7 Click **Save changes**.**

## Custom inventory sample script for UNIX, Linux, and Mac

The sample inventory script for UNIX, Linux, and Mac does the following:

- Includes a helper script that implements the logic of creating NSE and posting it to Configuration Management Database (CMDB).
- Specifies the data class.
- Specifies delimiters for use in parsing the data that is returned from the command that runs.
- Specifies the data type and length of each column.
- Specifies the column names. The column names are only required when the command that runs does not already include column headings.
- Runs the desired command. In this case, appropriate platform-specific commands run.

See [“Customizing the custom inventory sample script for UNIX, Linux, and Mac”](#) on page 91.

The following is a sample script:

```
. `aex-helper info path -s INVENTORY`/lib/helpers/custominv_inc.sh
#

# Sample script for custom inventory

# The first line of code should be always included at the begin of
the script

# Actual script for collecting inventory data begins after the
following label:
```

[illegible]

## Process for manually migrating your Inventory Solution baseline configuration files

You can use the Symantec Notification Server Migration Wizard to migrate the baseline files. However, you have to perform some additional steps to verify that the data has migrated successfully.

**Table 4-3** Process for manually migrating your Inventory Solution baseline configuration files

Step	Action	Description
Step 1	Create a backup of your baseline configuration files.	<p>Before you decommission your previous Notification Server computer, back up your baseline configuration files to a neutral storage location.</p> <p>See <a href="#">“Backing up your Inventory Solution baseline configuration files”</a> on page 95.</p>

**Table 4-3** Process for manually migrating your Inventory Solution baseline configuration files (*continued*)

Step	Action	Description
Step 2	Export your baseline configuration file data.	<p>Export your baseline configuration file data to a data store file.</p> <p>You perform this step with the Symantec Notification Server Migration Wizard.</p> <p>During the export, make sure that the following actions are done on the <b>Exporter Configuration</b> page:</p> <ul style="list-style-type: none"> <li>■ Under <b>Products</b>, select <b>Application Management Solution</b>.</li> <li>■ Under <b>Exporters</b>, make sure that <b>Enable</b> is checked for <b>Baseline Package Resource File Exporter</b>.</li> <li>■ Click <b>Filters</b> to view the <b>Filters for Baseline Package Resource File Exporter</b> dialog box, and then ensure that the dialog entry is populated and enabled.</li> </ul> <p>See <a href="#">“Exporting Notification Server 6.x data to a data store file”</a> on page 57.</p>
Step 3	Copy your baseline configuration files and the data store file to the 7.1 Notification Server computer.	<p>After you install the Symantec Management Platform, copy your baseline configuration files and the exported data store file to the 7.1 Notification Server computer.</p> <p>See <a href="#">“Copying your Inventory Solution baseline configuration files to the 7.1 Notification Server computer”</a> on page 95.</p>
Step 4	Import your baseline configuration file data.	<p>Import your baseline configuration file data from a data store file.</p> <p>You perform this step with the Symantec Notification Server Migration Wizard.</p> <p>See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59.</p>

**Table 4-3**      Process for manually migrating your Inventory Solution baseline configuration files *(continued)*

Step	Action	Description
Step 5	Verify that your baseline configuration files are successfully migrated.	After you imported your baseline configuration files on the 7.1 Notification Server computer, you should verify that your baseline configuration files are successfully migrated.  See <a href="#">“Verifying the migration of your baseline configuration files”</a> on page 96.

Backing up your Inventory Solution baseline configuration files

This task is a part of the process for manually migrating your Inventory Solution baseline configuration files.

See [“Process for manually migrating your Inventory Solution baseline configuration files”](#) on page 93.

Before you decommission your previous Notification Server computer, back up your baseline configuration files to a neutral storage location.

To back up your Inventory Solution baseline configuration files

- ◆ On your previous Notification Server computer, copy all of your baseline configuration files in the folders **FileBaselinePackage** and **RegBaselinePackage** to a neutral storage location.

By default, your baseline configuration files are located on your previous Notification Server computer in the following location:

```
■ %InstallDir%\Altiris\Notification
   Server\NSCap\Bin\Win32\X86\Application Mgmt Solution
```

The default location may not include other locations where you have placed your baseline configuration files. Ensure that you also back up the baseline configuration files that you have created outside of the default location.

Copying your Inventory Solution baseline configuration files to the 7.1 Notification Server computer

This task is a part of the process for manually migrating your Inventory Solution baseline configuration files.

See [“Process for manually migrating your Inventory Solution baseline configuration files”](#) on page 93.

After you install the Symantec Management Platform, copy your baseline configuration files and the exported data store file to the 7.1 Notification Server computer.

See [“Backing up your Inventory Solution baseline configuration files”](#) on page 95.

See [“Exporting Notification Server 6.x data to a data store file”](#) on page 57.

**To copy your Inventory Solution baseline configuration files and the exported data store file to the 7.1 Notification Server computer**

- 1 Copy the **FileBaselinePackage** and **RegBaselinePackage** folders with your baseline configuration files from your neutral storage location.
- 2 Copy the exported data store file from your previous Notification Server computer.

By default, the data store file is saved in the `C:\Program Files\Altiris\Upgrade\Data` directory.

The data store file has an .adb extension, is easy to copy and back up, and is not dependent on SQL.

See [“About the data store file”](#) on page 62.

- 3 On your 7.1 Notification Server computer, paste your baseline configuration and the exported data store file to the same location. The recommended location is `%InstallDir%\Program Files\Altiris\Upgrade\Data`

Create the **Data** folder if it is not already created.

## Verifying the migration of your baseline configuration files

This task is a part of the process for manually migrating your Inventory Solution baseline configuration files.

See [“Process for manually migrating your Inventory Solution baseline configuration files”](#) on page 93.

After you imported your baseline configuration files on the 7.1 Notification Server computer, you should verify that your baseline configuration files are successfully migrated.

See [“Importing Notification Server 6.x data from a data store file”](#) on page 59.

**To verify the migration of your baseline configuration files**

- 1 Verify that the imported baseline configuration files are located at the following locations:



- The entire file that is related to the file baseline should be located at  
`%InstallDir%\Altiris\Notification  
Server\NSCap\bin\Win32\X86\Inventory\Application  
Management\FileBaselinePackage\6.x.`
  - The entire file that is related to the registry baseline should be located at  
`%InstallDir%\Altiris\Notification  
Server\NSCap\bin\Win32\X86\Inventory\Application  
Management\RegBaselinePackage\6.x.`
- 2 Verify that the 6.x baseline task is imported into the Configuration Management Database.  
  
You can view the baseline task in the **Symantec Management Console**, on the **Manage** menu, at **Jobs and Tasks > System Jobs and Tasks > Discovery and Inventory > Inventory > Baseline Task 6.x**.
  - 3 On the **Run sample baseline** page, verify that the files that are associated with the 6.x baseline task are associated with the imported baseline task in 7.1.
  - 4 (Optional) Perform manual steps to associate the unassociated baseline configuration files to the imported baseline task.

#### To manually associate a baseline configuration file to a baseline task

- 1 Copy a baseline configuration file from the 6.x Notification Server computer to the 7.1 Notification Server computer.
  - For the file baseline .bls files, the recommended folder is  
`%InstallDir%\Altiris\Notification  
Server\NSCap\bin\Win32\X86\Inventory\Application  
Management\FileBaselinePackage.`
  - For the registry baseline .bls files, the recommended folder is  
`%InstallDir%\Altiris\Notification  
Server\NSCap\bin\Win32\X86\Inventory\Application  
Management\RegBaselinePackage.`
- 2 On the 7.1 Notification Server computer, in the **Symantec Management Console**, on the **Manage** menu, click **Jobs and Tasks**.
- 3 In the left pane, under **Jobs and Tasks**, click **System Jobs and Tasks > Discovery and Inventory > Inventory > Baseline Task 6.x > Run sample baseline**.
- 4 On the **Run sample baseline** page, perform one of the following steps, depending on your requirement:

- Click **Compile a baseline snapshot**, and then click **Use custom baseline configuration**.
  - Click **Compare with a baseline snapshot**, and then click **Compare with custom baseline snapshot**.
- 5 Click **Browse**, and then browse to the baseline configuration file that you have copied in step 1.
- The following is an example of the baseline configuration file path:
- ```
\\localhost\NSCap\bin\Win32\X86\Inventory\Application  
Management\FileBaselinePackage\6.x\sample.bls.
```
- 6 Click **Save changes**.

## Data migration to Inventory for Network Devices 7.1

You perform the product migration from 6.x to 7.1 according to the migration scenario for Inventory Solution and IT Management Suite.

See [“Before you migrate to Inventory Solution 7.1”](#) on page 69.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.

During the migration from Inventory for Network Devices version 6.x , the following data is migrated:

The data class list from 6.x to 7.x.

- Inv\_SNMP\_Host\_Devices
- Inv\_SNMP\_Host\_Resources
- Inv\_SNMP\_NW\_Adapters
- Inv\_SNMP\_NW\_Disk\_Storage
- Inv\_SNMP\_NW\_NLM
- Inv\_SNMP\_NW\_Partitions
- Inv\_SNMP\_NW\_Printers
- Inv\_SNMP\_NW\_Server
- Inv\_SNMP\_NW\_Settings
- Inv\_SNMP\_NW\_Settings\_Descriptions
- Inv\_SNMP\_NW\_Volume
- Inv\_SNMP\_Physical\_Entities
- Inv\_SNMP\_Printer (changes its name to Inv\_SNMP\_HP\_Printer in 7.x)
- Inv\_SNMP\_Software
- Inv\_SNMP\_Storage
- Inv\_SNMP\_Win32\_Print\_Queues
- Inv\_SNMP\_Win32\_Services
- Inv\_SNMP\_Win32\_Shares

SNMP data mapping tables.

- SNMPDeviceMap
- SNMPTableMap

MIB files.

All MIB files in the 6.0  
 NetworkInventory\Mibs directory are  
 imported into the database during the  
 upgrade.



# Migrating Patch Management Solution

This chapter includes the following topics:

- [About upgrading Patch Management Solution for Windows](#)
- [About upgrading Patch Management Solution for Linux](#)
- [About upgrading Patch Management Solution for Mac](#)
- [Data that can be migrated from the 6.x version of Patch Management Solution for Windows](#)
- [About migrating downloaded software update package files](#)
- [Gathering and restoring your files and settings for Patch Management Solution for Windows](#)

## About upgrading Patch Management Solution for Windows

Migration Wizard migrates most of your Patch Management Solution for Windows 6.x data and settings. There are a few key areas that do not migrate or require some additional manual configuration, but these are not labor intensive areas.

# About upgrading Patch Management Solution for Linux

Upgrading from Patch Management Solution for Linux 6.x is not supported and no data can be migrated. Install and use the clean installation of Patch Management Solution for Linux 7.1.

# About upgrading Patch Management Solution for Mac

There was no 6.x version of Patch Management Solution for Mac.

# Data that can be migrated from the 6.x version of Patch Management Solution for Windows

Some of the Patch Management Solution for Windows 6.x items can be migrated.

**Table 5-1** Patch Management Solution for Windows 6.x data migration reference

| Item in 6.x                             | Can it be migrated? | Description                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Software Update Agent policies          | Yes                 | Your existing Software Update Agent policies (for example, your patch reboot settings) are migrated and converted into their version 7.1 equivalents.                                                                                                                                                                                           |
| Core Patch Management Solution policies | Yes                 | The core patch policies are migrated and converted into their version 7.1 equivalents.                                                                                                                                                                                                                                                          |
| Historical patch reporting data         | Yes                 | Your historical patch reporting data is migrated to version 7.1.                                                                                                                                                                                                                                                                                |
| Patch package staging status            | Yes                 | The information about whether the package is staged or not is migrated to 7.1.                                                                                                                                                                                                                                                                  |
| Patch packages                          | Yes                 | The migration wizard lets you export the downloaded software update package files from the 6.0 server and store them in the same location as the .adb file. You can then use the migration wizard to import the files to the new 7.1 server.<br><br>See <a href="#">“About migrating downloaded software update package files”</a> on page 103. |

**Table 5-1** Patch Management Solution for Windows 6.x data migration reference (*continued*)

| Item in 6.x                            | Can it be migrated? | Description                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PMImport                               | No                  | <p>You should run the PMImport Task as soon as possible after the installation of Patch Management Solution. Before you migrate, review your 6.x import and staging settings so that you can recreate them in the 7.1 environment.</p> <p>This step should be the first post-installation configuration step you take once you have installed Patch Management 7.1 (and/or other solutions) on the 64-bit server.</p>        |
| Reporting History for each client      | No                  | <p>Your reporting history is recreated after you install the Symantec Management Agent 7.1 and Software Update Plug-in 7.1 on the target computers. The Reporting history will recreate automatically once the plug-in is installed and has sent the data to the Notification Server computer. A new agent database is used on the client computer, but the same data classes are used in version 7.1 as in version 6.x.</p> |
| Default patch collections              | No                  | Default patch collections are not migrated.                                                                                                                                                                                                                                                                                                                                                                                  |
| Status of bulletins (Enabled/Disabled) | Yes                 | You must import patch metadata (PMImport) on the 7.1 server before you migrate data. After migration the bulletin status will be the same as in 6.x.                                                                                                                                                                                                                                                                         |
| Custom severities                      | Yes                 | Custom severities list and bulletin custom severities are migrated.                                                                                                                                                                                                                                                                                                                                                          |

## About migrating downloaded software update package files

In 7.1, the migration wizard lets you export the downloaded software update package files from the 6.x server and store them in the same location as the .adb file. You can then use the migration wizard to import the files to the new 7.1 server.

Migration wizard will import the exported packages to the location that is specified on the **Core Settings** page. This setting can be migrated from the 6.x server. In case the migrated path is not available on the new server, the default location will be used, which is `C:\Program Files\Altiris\Patch Management\Packages\Updates`.

---

**Note:** Currently, migration wizard can migrate packages only if the Symantec Management Platform is installed at the default location. If you installed Symantec Management Platform to a custom location, you must manually move the software update package files from migration folder to the desired location.

---

When you run the **Import Patch Data** task, the packages will be recreated (but not redownloaded), and then appear in the Symantec Management Console.

## Gathering and restoring your files and settings for Patch Management Solution for Windows

You use the migration wizard to gather your files and settings for Patch Management Solution. Some manual configuration is required.

To gather your files and settings for Patch Management:

- 1 One or two weeks before you migrate, on your previous Notification Server computer, set the patch removal settings within the update policies for a future date. This step retains the patches on the client computers and the package servers within the architecture throughout the migration. You can change these settings back to the previous settings after the updating of package servers and the updating of agents is complete. Consider setting this setting far in advance: for example, 1 year.
- 2 On your 7.1 Notification Server computer, mirror the **Import Patch Data for Microsoft** task settings from the 6.x Notification Server's **Microsoft Patch Management Import** task.
- 3 On the 7.1 Notification Server computer, run the **Import Patch Data for Microsoft** task and allow it to complete.



- 4 On the 7.1 Notification Server computer, stage the patches that your policies need. You must stage these patches before the client computers check in to the new 7.1 server.

---

**Warning:** If your package servers check in before your packages are staged, then the packages may be deleted from the package servers in the architecture. This situation can be harmful for slow link package servers because the client computers that use them for their security patches will be unable to get them.

---

- 5 On the 6.x server, run the migration wizard to export your patch data from the 6.x installation. When you run the wizard, ensure that all of the Patch Management Solution data elements are selected for migration. This step ensures that the software update packages are also exported and stored in the same location as the .adb file.
- 6 On the 7.1 Notification Server computer, run the migration wizard to import patch data and packages.
- 7 On the 7.1 Notification Server computer, verify that the package files were migrated.  
See [“About migrating downloaded software update package files”](#) on page 103.
- 8 Verify that the settings and policies match the 6.x server settings.  
See [“Data that can be migrated from the 6.x version of Patch Management Solution for Windows”](#) on page 102.



# Migrating Software Delivery to Software Management Solution

This chapter includes the following topics:

- [Things to know about migrating from 6.x to 7.1](#)
- [Items that can and items that cannot be migrated from software delivery solutions 6.x](#)
- [Migrating from Software Delivery Solution 6.x to Software Management Solution 7.1](#)

## Things to know about migrating from 6.x to 7.1

The following are things to consider if you want to migrate from Software Delivery Solution 6.x to Software Management Solution 7.1:

- Only upgrade from Software Delivery Solution 6.1 SP3 or SP4 is supported.
- The Software Virtualization Solution must be upgraded to the latest released version, which is 2.1.3062.
- Symantec recommends that you apply any additional point hot fixes to Software Delivery SP3 before upgrade. Having the hot fixes installed does not affect the upgrade if you do have them applied.
- The only physical packages that are migrated are the ones that are on the local Notification Server drive. The packages are not converted into the software library resources. You must take additional steps to move these packages into

software resources in the library. For packages physically located on a UNC share, the UNC path will be migrated.

- For 7.1, you are not conducting an actual in-place upgrade, but are exporting supported data from the old database and then using a migrating wizard to put that data into the new structure after 7.1 is installed. This is called an off-box upgrade.

Because you perform an off-box upgrade, take the following into consideration:

- If the software library was located on the 6.x Notification Server computer, you must manually move the physical files to the new 7.1 server. Migration Wizard does not move these files.
- If you were using a custom local path for the software resources on the 6.x Notification Server, you must recreate the same file structure on the new 7.1 server.  
For example, if the software resources were located on disk F:, you must have disk F: on the new 7.1 computer too, otherwise the Software Management Solution will not work.
- If a path that is used in a software resource is longer than 248 characters, the physical files cannot be migrated.  
For example, Microsoft SQL Server 2008 folder structure can exceed 248 symbols. You can recreate the folder structure and migrate such files manually.
- The packages on the client computers are not kept and will be re-downloaded.

## Items that can and items that cannot be migrated from software delivery solutions 6.x

Data from the following 6.x software delivery solutions can be migrated to 7.1:

- Software Delivery Solution (for Windows) 6.x
- Software Delivery Solution for Linux, UNIX, and Mac 6.x
- Software Vitalization Solution 6.x

Data from the following 6.x software management solutions cannot be migrated to 7.1:

- Application Management Solution 6.x

The following tables show the 6.x items that can or cannot be migrated.

Table 6-1 Software delivery items that can and cannot be migrated

| Item in 6.x                | Can it be migrated? | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Software Delivery packages | Yes                 | <p>Software packages from Software Delivery Solution 6.x and Software Vitalization Solution 6.x are imported as Software Package resources</p> <p>Packages can be migrated however, you must manually promote each package into the Software Library. The estimated manual effort is about 1 minute per package to promote a package into the new framework.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Software Delivery programs | Yes                 | <p>Software programs from Software Delivery Solution 6.x and Software Vitalization Solution are imported as Program items. The association between a software package and program is maintained during the migration process.</p> <p>Migrated software packages and programs do not get automatically associated with an entry in the Software Catalog. Following the migration process, administrators can use the migrated software packages (and related program data) to create new entries in the Software Catalog or associate them with existing entries in the Software Catalog.</p> <p>In case a 6.x program had the uninstall command defined, in 7.1 it will appear as a separate Software Command Line resource with “uninstall” prefix in its name. The association of migrated uninstall command line with Software Resource is maintained.</p> <p>The Execution Environment details set in the actual Program object have been moved to their equivalent in 7.1; execution environment resides in Tasks, not in the Program Items.</p> |

**Table 6-1** Software delivery items that can and cannot be migrated *(continued)*

| Item in 6.x                                                                                              | Can it be migrated? | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Software Delivery tasks                                                                                  | Yes                 | <p>Software Delivery Solution 6.x tasks are migrated using the following rules:</p> <ul style="list-style-type: none"> <li>■ Software Delivery tasks are imported as Legacy Software Delivery policies</li> <li>■ Software Delivery Task Server tasks are imported as Package Deliveries</li> <li>■ Sequential Software Delivery tasks are imported as “Managed Deliveries”</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                             |
| Sequential Software tasks                                                                                | Yes                 | Sequential Software Tasks are imported as Managed Delivery Objects.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Software Virtualization Solution tasks<br><br>Symantec Workspace Virtualization (SWV) Solution 6.x tasks | Yes                 | <p>Symantec Workspace Vitalization (SWV) Solution 6.x tasks are migrated using the following rules:</p> <ul style="list-style-type: none"> <li>■ Virtual Software tasks are imported as “Legacy Software Delivery policies”</li> <li>■ SWV Task Server tasks are imported as “SVS Command tasks”</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Software Delivery custom reports                                                                         | Yes and No          | <p>Software Management Solution has more robust, comprehensive reports that consolidate like data and provide a greater range of flexibility.</p> <p>Some custom reports can be migrated from 6.0 to 7.1 for historical reporting purposes and configuration only. Other Custom Reports are not migrated.</p> <p>This is due to the following reasons:</p> <ul style="list-style-type: none"> <li>■ The events/tables, etc. are not the same between Software Delivery 6.x and the Software Management Solution 7.1</li> <li>■ Task migrations do not include any event data captured from the 6.x framework</li> <li>■ Event data is not migrated with the Core Notification Server migration</li> <li>■ Task Server drives the majority of Tasks in the 7.1 Framework</li> </ul> |

Table 6-1 Software delivery items that can and cannot be migrated (continued)

| Item in 6.x                                                                                                                           | Can it be migrated? | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|---------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Application Management                                                                                                                | No                  | <p>Application Management Solution 6.x installation state policies cannot be migrated to 7.1.</p> <p>Application Management is joined with Software Management Solution. The functionality can then be incorporated into the larger Software Management Framework, extending the possibilities. The drawback is the lack of migration support available between Application Management 6.x and Software Management Solution. No Application Management policies are migrated between 6.x and 7.1.</p> <p>Record Settings and Configurations for all active policies being used within Application Management must be re-created.</p> <p>The Windows Installer applications and tasks to update Windows Installer source paths must be re-created as Application Management tasks.</p> <p>The Installation state management policies must be re-created as Managed Delivery policies.</p> |
| Application Management Solution 6.x tasks to repair Windows Installer applications and tasks to update Windows Installer source paths | No                  | <p>Application Management Solution 6.x tasks to repair Windows Installer applications and tasks to update Windows Installer source paths must be re-created as Application Management tasks in Software Management Solution.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Data for new features                                                                                                                 | No                  | <p>There are new software features for which there is not equivalent migration data to populate. This includes metadata within the Software Catalog. These are new areas where there currently is no data defined.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

**Table 6-1** Software delivery items that can and cannot be migrated (*continued*)

| Item in 6.x                            | Can it be migrated? | Details                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Software Portal Requests               | No                  | No Software Portal requests can be migrated. This includes the automatically generated items of a software request type, data related to Software Portal requests submitted by users and the policies created to fulfill requests.                                                                                                                                 |
| Software Portal Tasks                  | No                  | Software Portal tasks are not migrated. This includes tasks that are generated either by an automatically approved request or generated by a manually approved request. The inks to the single computer collections generated, including sequential tasks, are not migrated.                                                                                       |
| Software Portal Alert Manager requests | No                  | Alert Manager Portal Requests are not migrated. This includes the Helpdesk/Alert Manager incidents that are created when someone requests software that requires approval.                                                                                                                                                                                         |
| Software Portal Security settings      | No                  | Software Portal Security settings are not migrated. Security determines what software a user can see based on what permissions that user has been given to the Package/Program. Take snapshots of all of your Portal configurations before you migrate. These configurations can be found under the Software Portal tab of a Package/Program or a Sequential Task. |
| Software Portal configuration settings | Yes                 | Software Portal configuration settings for a software delivery package (e.g. "Install Software" and "Install on Approval") can be migrated.                                                                                                                                                                                                                        |

## Migrating from Software Delivery Solution 6.x to Software Management Solution 7.1

To upgrade Software Delivery Solution you must understand how its old data structure relates to the new data structure of the Software Management Framework. Many Software Delivery objects are upgraded into Symantec Management Platform 7.1; however, not all objects can be migrated.



**Table 6-2** Process for migrating Software Delivery Solution 6.x to Software Management Solution 7.1

| Step   | Action                                                                                                        | Description                                                                                                                                                                                                                                                                                                                                |
|--------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Use the Symantec Management Platform Migration Wizard to migrate the majority of your Software Delivery data. | See topics about ITMS migration in this guide.<br>See <a href="#">“Migration Wizard objects”</a> on page 113.<br>See <a href="#">“Things to know about migrating from 6.x to 7.1”</a> on page 107.<br>See <a href="#">“Items that can and items that cannot be migrated from software delivery solutions 6.x”</a> on page 108.             |
| Step 2 | Validate package migration.                                                                                   | You must complete additional manual migration steps to reach complete functional parity.<br>See <a href="#">“About validating Software Package Migration”</a> on page 114.                                                                                                                                                                 |
| Step 3 | Convert the Software Delivery packages.                                                                       | You must convert each of your Software Delivery packages into the equivalent resource detail in the Software Catalogue.<br>See <a href="#">“Promoting migrated Software Packages into the Software Library”</a> on page 115.<br>See <a href="#">“Viewing promoted packages as software resources in the Software Library”</a> on page 117. |
| Step 4 | Enable legacy software delivery policies.                                                                     | See <a href="#">“Enabling legacy software delivery policies”</a> on page 117.                                                                                                                                                                                                                                                              |
| Step 5 | Review the sequential software delivery tasks.                                                                | See <a href="#">“About migrated Software Delivery sequential tasks”</a> on page 118.                                                                                                                                                                                                                                                       |
| Step 6 | Review the task server infrastructure tasks.                                                                  | See <a href="#">“Viewing migrated task server infrastructure software delivery tasks”</a> on page 118.                                                                                                                                                                                                                                     |

## Migration Wizard objects

The following table lists the objects of the Migration Wizard.

**Table 6-3** Software Delivery Solution objects in Migration Wizard

| Object                                                                       | Description                                                                                                                   |
|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Software Delivery Solution for Windows License Certificate Exporter/Importer | Migrates your Software Delivery Solution license over to the new Software Management Solution.                                |
| Software Delivery Package and Program Exporter/Importer                      | Exports or imports all Packages and Programs, as they were previously defined.                                                |
| Software Delivery Package File Exporter/Importer                             | Exports or imports locally stored package files, not UNC or HTTP based. This option is deselected by default.                 |
| Software Delivery Task Exporter/Importer                                     | Exports or imports standard Software Delivery Tasks.                                                                          |
| Virtual Software Package and Program Exporter/Importer                       | Similar to the software delivery package and program exporter/importer except only SVS objects of the same kind are targeted. |
| Virtual Software Package File Exporter/Importer                              | Exports or imports physical VSPs stored locally on the Notification Server computer . This option is deselected by default.   |
| Virtual Software Task Exporter/Importer                                      | Similar to SWD but for SVS Tasks.                                                                                             |
| Sequential Software Delivery Task Exporter/Importer                          | Exports or imports specific Sequential Tasks, including the links to the multiple Packages and Programs.                      |
| Delivery Software Task Exporter/Importer                                     | Exports or imports Task Server-based Tasks run by the Software Delivery Agent for the Task Server Plug-in.                    |
| Virtual Software Command Task Exporter/Importer                              | SVS Tasks contained within Task Server.                                                                                       |
| Virtual Software Data Class Data Exporter /Importer                          | Exports or imports Events and Inventory for SVS.                                                                              |

## About validating Software Package Migration

After you migrate, the data can be used. By default the migrated packages can be used with Delivery Software and Quick Delivery Tasks within the Task Server infrastructure.

The packages are located in the Symantec Management Console under **Manage > Resources > Organizational Views > Default > All Resources > Package > Software Package**. You should review the list to ensure that the packages you had created on the 6.x platform are displayed correctly in this location.

The following article contains information about how to use these objects using the same basic structure and functions from Software Delivery 6.1 in the 7.1 framework:

<https://www-secure.symantec.com/community/article/5929/introduction-software-management-notification-server-70-part-1-software-delivery>

## Promoting migrated Software Packages into the Software Library

Packages can be migrated; however you must manually promote each package into the Software Library. The estimated manual effort is about 1 minute per package to promote a package into the new framework.

To promote your packages to the Definitive Software Library, use the following procedures:

- See [“To promote a package to a new software resource”](#) on page 115.
- See [“To promote a package to an existing software resource”](#) on page 116.
- See [“To promote several packages to new software resources”](#) on page 116.

Once you have complete the wizard for a given package, you cannot promote that package again. Verify the accuracy of the options before completing the wizard.

### To promote a package to a new software resource

- 1 In the Symantec Management Console, on the **Manage** menu, go to **Resources > Organizational Views > Default > All Resources > Package > Software Package**.
- 2 On the package that you want to promote, right-click on the package and click **Resource Manager**.
- 3 In the left pane, click **Assign to Software Resource**.
- 4 In the **Assign Package to Software Resource** wizard, in the **Select software resource** dialog, click **Create new software resource**.
- 5 Enter a name for the software resource.
- 6 Choose a **Type** for the software resource. If you are unsure of what type to use, select **Software Release**.
- 7 Use the **Version** field to track updates and changes to the software resource.
- 8 **Software Product** is not required but can be entered here.

**9 Click Next.**

The conversion takes a Package/Program from 6.x and converts it into a Package and Command-line for the 7.1 Platform. When promoting the package, the command line goes with it and can be configured at this point. During the migration, the installation file type is set to what is believed that the type should be. Review to ensure that it is accurate.

**10 Click Finish.**

**To promote a package to an existing software resource**

- 1** In the Symantec Management Console, on the **Manage** menu, go to **Resources > Organizational Views > Default > All Resources > Package > Software Package**.
- 2** Right-click the package that you want to promote, and click **Resource Manager**.
- 3** In the left pane, click **Assign to Software Resource**.
- 4** Select **Use Existing software resource**.
- 5** Click **Select software resource**.
- 6** In the list of software resources, select the resource that you want to promote your package to become.
- 7** Review the command-line parameters to ensure that they are set correctly.
- 8** Click **Finish**.

**To promote several packages to new software resources**

- 1** In the Symantec Management Console, on the **Manage** menu, go to **Resources > Organizational Views > Default > All Resources > Package > Software Package**.
- 2** In the left pane, Ctrl+click to multi-select the packages that you want to promote.  
  
If the packages you want do not display in the window, you may need to enter a filter to access them. In this case the multi-select feature still functions correctly and you can continue to select multiple packages.
- 3** Right-click one of the packages that you selected and then click **Assign to Software Resources**.
- 4** In the **Assign Packages to Software Resources** page, verify that all the packages you intended to assign are displayed. Schedule the task to **Run now**.  
  
This task converts the packages into software resources, and stores them in the software library.

## Viewing promoted packages as software resources in the Software Library

After you promote your migrated packages into software resources, they are available in the Software Library. In the Software Library you can view and modify each software resource.

### To view your promoted packages as software resources in the Software Library

- 1 In the Symantec Management Console, on the **Manage** menu, go to **Software > Software Catalog > Deliverable Software > Releases**.
- 2 Double-click a package that you want to view.
- 3 In the software resource window, click the tabs to view and edit the configuration settings of the resource **Software publishing**.

## Enabling legacy software delivery policies

The migration wizard converts your previous software delivery tasks into software delivery legacy policies. It stores these policies in a folder called Legacy Software Delivery. After migration, these legacy policies are disabled by default.

If you want a specific policy to run you must enable it. You should review the configuration and settings carefully before you choose to enable a legacy software delivery policy. Some policies may fail to work correctly because not all settings are migrated precisely due to the changes in Software Delivery version 7.

For example, in version 6 you may have chosen to have a task target the collection **all computers with software delivery agent**. The software delivery agent is no longer used. In this example the policy would be migrated, but the target for that policy would be blank. You might need to target the policy to the filter of computers, **all computers with software management agent/plugin** to make it work as you expect.

### To enable legacy software delivery policies

- 1 In the Symantec Management Console, on the **Manage** menu, go to **Policies > Software > Legacy Software Delivery**.
- 2 Select a policy that you want to enable.
- 3 Review the settings to make sure that they meet your requirements.

Consider the following items:

- The **Go to Package** link opens a page with details about the legacy package. It does not reference the resource in the Software Library.
- The **Go to Program** link opens the command-line interface. In version 7, the resource type **Program** has been replaced by **Command-line**.

- The **Advanced** tab displays the execution environment as it was previously defined in the type **Program** in version 6.
  - The former collection that was assigned to the Software Delivery task is now called **Target**. Depending on the previous collection, the policy may have a correct target assigned. You can now view and modify the policy's target in the **Applies To** section.
- 4 Expand the schedule section and create a schedule for the policy.
  - 5 Click **Save Changes**.
  - 6 On the **Policy Rules/Actions** bar turn the policy on.

## About migrated Software Delivery sequential tasks

The sequential tasks you created previously are converted into managed software delivery policies. Even though they have been migrated, not all sequential tasks convert into managed software delivery policies correctly. Before you attempt to use one of these migrated managed delivery policies, you should review its settings carefully to determine if it meets your expectations.

You can access the migrated sequential tasks in the Symantec Management Console on the **Manage** menu at **Policies > Software > Managed Software Delivery**.

Determine whether creating a new managed delivery policy or a new task server job can better meet the needs that you met with a sequential task. You can still use your migrated packages (software resources) and your migrated programs (command lines) when you create new policies and jobs. Task server jobs are best for the following: multiple software rollouts, additional complex operations such as AMT functions or scripting, or working on unmanaged targets. Managed delivery policies are best for application state management, versioning control, and intelligent deployment.

## Viewing migrated task server infrastructure software delivery tasks

During migration, the migration wizard converts the task server software delivery tasks into the new standard software management tasks. You can still use a Quick Delivery task with the task server.

However, for these tasks to work correctly, you must manually convert your packages and programs into software resources with command lines.

The new package delivery task contains links to the package and program (software resource and command line).

**To view your migrated task server plug-in tasks**

- 1** In the Symantec Management Console, on the **Manage** menu, click **Jobs and Tasks > System Jobs and Tasks > Software > Package Delivery**.
- 2** Select the task that you want to view.
- 3** The window displays what package and command line the task uses. Click **Advanced** to view task-related information, including the execution environment.
- 4** If you modify the task, click **Save Changes**.
- 5** To schedule the task, use the schedule utility in the **Task Status** section.





# Migrating Deployment Solution

This chapter includes the following topics:

- [About migrating from Deployment Solution 6.9](#)
- [Architectural and functionality concepts of Deployment Solution 7.1 SP1](#)
- [Advantages of using Deployment Solution 7.1 SP1 over 6.9](#)
- [Comparison of Deployment Solution 6.9 tasks with 7.1 SP1](#)
- [Migrating from Deployment Solution 6.9 to 7.1 SP1](#)
- [Importing an existing image](#)
- [Adding drivers to a driver database](#)
- [About predefining computers in Deployment Solution 7.1 SP1](#)
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- [Installing the Deployment Solution 7.1 SP1 agent and plug-in](#)
- [Uninstalling the Deployment Solution 6.9 agent](#)
- [Limitations of migrating from to Deployment Solution 7.1 SP1](#)

## About migrating from Deployment Solution 6.9

Deployment Solution 6.9 is a standalone product and is not designed to be integrated with Symantec Management Platform. Deployment Solution 7.1 SP1 offers the core imaging and deployment capabilities of Deployment Solution 6.9 that are natively integrated on the Symantec Management Platform. Hence,

Deployment Solution 7.1 SP1 does not require its own agent, console, or database infrastructure separate from what is already provided with Symantec Management Platform. Instead, Deployment Solution 7.1 SP1 plugs in and extends the capabilities natively offered by Symantec Management Platform.

Though Deployment Solution 7.1 SP1 supports most of the functionalities of Deployment Solution 6.9, you cannot migrate jobs and tasks from version 6.9. You have to manually recreate the supported functionalities. The process for recreating these tasks is exceptionally valuable since many of the attributes of these items can be made broadly consumable by many tasks.

See [“Comparison of Deployment Solution 6.9 tasks with 7.1 SP1 ”](#) on page 128.

See [“Migrating from Deployment Solution 6.9 to 7.1 SP1”](#) on page 132.

You can only migrate Ghost and RapiDeploy images. If you want to migrate your existing images, you must create a backup copy of them on a neutral storage location before you upgrade. After you upgrade to version 7.1 SP1, you can then restore them to their correct location.

# Architectural and functionality concepts of Deployment Solution 7.1 SP1

[Table 7-1](#) lists the key architectural and functionality concepts of Deployment Solution 7.1. It focuses on the areas that are different from Deployment Solution 6.9.

**Table 7-1** Architectural and functionality concepts of Deployment Solution 7.1 SP1

| Architecture/Functionality               | Description                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Symantec Management Platform integration | Deployment Solution 7.I SP1 is integrated with Symantec Management Platform, which has centralized management capabilities. It leverages the capabilities of Symantec Management Platform's agent, console, servers, and database infrastructure.                                                                                                   |
| Agent                                    | With Deployment Solution 7.1 SP1, AClient and DAgent are no longer necessary. The Symantec Management Agent and two plug-ins (the Altiris Client Task Agent and the Deployment Solution plug-in) provide the required imaging, deployment, and other functionalities. These plug-ins can be viewed through the Symantec Management Agent's console. |

**Table 7-1** Architectural and functionality concepts of Deployment Solution 7.1 SP1 (*continued*)

| Architecture/Functionality | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CMDB                       | Symantec Management Platform’s Configuration Management Database (CMDB) stores all inventory, configuration, and settings information that Deployment Solution collects or requires. This information is available to Deployment Solution 7.1 SP1 processes and any other solution that is implemented on the same Symantec Management Platform environment. Likewise, the information and the capabilities that are made available by other SMP solutions are available to Deployment Solution 7.1 SP1.                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Console                    | The configuration and on-going administration of Deployment Solution 7.1 SP1 relies on the Symantec Management Console. Configuration of initial settings, infrastructure management, job creation and execution, and access to Deployment Solution reports can be performed from the console.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Task server                | <p>Task Server provides the task-execution capabilities in Deployment Solution 7.1 SP1. It supports immediate task execution immediacy matching that of Deployment Solution 6.9. Deployment Solution 7.1 SP1 jobs can also include the tasks from other solutions that are installed on the same server as Deployment Solution. Furthermore, in Deployment Solution 6.9 the task engine was embedded in the Deployment Solution Server functionality. However, with Deployment Solution 7.1 SP1, this functionality can co-reside or execute remotely from the back-end server. Symantec Management Platform allows multiple task servers to be assigned to the same back-end server. For example, Notification Server. This feature gives Deployment Solution 7.1 SP1 unprecedented task-execution scalability.</p> <p>For more information, search for topics on Task Server in the <i>Symantec Management Platform User Guide</i>.</p> |

**Table 7-1** Architectural and functionality concepts of Deployment Solution 7.1 SP1 (*continued*)

| Architecture/Functionality | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tasks and jobs             | <p>Deployment Solution 7.1 SP1 offers both tasks and jobs as the means for performing work. Tasks are individual units of work, while jobs are sequences of tasks or other jobs. Jobs can include branching a logic that causes different paths in the job to be executed, depending on the result of previous operations. Unlike Deployment Solution 6.9, where only jobs can be executed, Deployment Solution 7.1 SP1 allows individual tasks to be scheduled. It eliminates the need for the jobs that contain only a single task. Jobs and tasks can be scheduled to be run immediately, at a later time, or with a specific frequency.</p> <p>The tasks that are available in Deployment Solution 6.9 and the jobs that are provided in 7.1 are correlated. All tasks types in Deployment Solution 7.1 SP1 are located in the console, under the <b>Manage &gt; Jobs and Tasks &gt; Deployment and Migration</b> folder. From there, you can right-click <b>Add &gt; New Job</b> to bring up the <b>Add Task</b> dialog box.</p> <p>See <a href="#">“Comparison of Deployment Solution 6.9 tasks with 7.1 SP1 ”</a> on page 128.</p> |
| Imaging tasks              | <p>The following are the important differences to keep in mind as you create the imaging tasks:</p> <ul style="list-style-type: none"> <li>■ Tasks do not make assumptions about the environment they are running on, such as the preboot operating system or production operating system. The job that invokes imaging tasks needs to make sure that the computer is rebooted to the appropriate environment. It ensures the reboot environment by specifying whether a computer should reboot to production or automation, independent of the current environment and its place of execution inside a job.</li> <li>■ The traditional imaging tasks have been divided into smaller tasks to enable custom processing from within an imaging job. These tasks need to be placed in an imaging job in the correct sequence to ensure proper execution.</li> </ul> <p>See <a href="#">“Comparison of Deployment Solution 6.9 tasks with 7.1 SP1 ”</a> on page 128.</p>                                                                                                                                                                     |

**Table 7-1** Architectural and functionality concepts of Deployment Solution 7.1 SP1 (*continued*)

| Architecture/Functionality   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| System configurations        | In Deployment Solution 7.1 SP1, system configurations are centralized resources. They are the means for remotely assigning computer and domain names, as well as local account and network settings, to a computer. Multiple configurations can be defined using the console and then applied as part of imaging jobs and configuration tasks.                                                                                                                                                                                              |
| Predefined and custom tokens | Deployment Solution 7.1 SP1 includes the 6.9 tokens. Tokens can be used inside scripts, as parameters in tasks, and in answer files. Users can specify custom tokens in the console. After tokens are centrally specified, they can be used in the same manner as predefined tokens. This functionality removes the need to include and maintain SQL queries inside various scripts.                                                                                                                                                        |
| PXE                          | Deployment Solution 7.1 SP1 provides PXE capabilities as the means to accomplish zero-touch, bare-metal deployments. In Deployment Solution 7.1 SP1, PXE servers are configured though a centralized policy. After the PXE policy is configured and enabled from the Symantec Management Console, PXE services are installed. Then, the automation configurations are created on all targeted computers.<br><br><b>Note:</b> Each PXE server generates its automations using the Boot Disk Creator that is installed on its own hard drive. |
| Automation folder            | Deployment Solution 7.1 SP1 provides zero-touch re-imaging through its automation folder feature. This feature provides the same benefit as the automation partition capability of Deployment Solution 6.9. Using the automation folder rather than PXE for re-imaging is encouraged because of its speed and lower bandwidth requirements.                                                                                                                                                                                                 |

**Table 7-1** Architectural and functionality concepts of Deployment Solution 7.1 SP1 *(continued)*

| Architecture/Functionality | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Stand-alone tools          | <p>Many of the Deployment Solution 6.9 stand-alone tools are still available in Deployment Solution 7.1 SP1. Their use is integrated with the normal operation of Deployment Solution.</p> <p>The most commonly used tools are as follows:</p> <ul style="list-style-type: none"><li>■ PC Transplant Editor</li><li>■ Boot Disk Creator</li><li>■ Image Explorer</li><li>■ Ghost Explorer</li></ul>                                                                                                                                                        |
| DeployAnywhere             | <p>DeployAnywhere is used to implement hardware independent imaging (HII). If DeployAnywhere is selected in the image task, it ensures that the critical drivers in an image match the target system. Otherwise, DeployAnywhere reconciles the differences.</p> <p>Deployment Solution 7.1 SP1 includes a database of NIC and mass storage drivers that DeployAnywhere uses to retarget an image to a specific computer. You can add drivers through <b>Symantec Management Console &gt; Settings &gt; Deployment &gt; Driver Database Management</b>.</p> |

# Advantages of using Deployment Solution 7.1 SP1 over 6.9

[Table 7-2](#) lists the key benefits that Deployment Solution 6.9 users gain by implementing Deployment Solution 7.1.

**Table 7-2** Advantages of using Deployment Solution 7.1 SP1 over 6.9

| New capability                             | Details                                                                                                                                                                                                                   |
|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Server configuration synchronization       | Automatic synchronization of computers, jobs, scripts, security settings, system configurations, drivers, images, software packages, pre-OS, personality templates, and custom tokens across Deployment Solution servers. |
| PXE management reliability and scalability | A central policy manages the PXE servers. Each PXE server generates images based on the configuration policy.                                                                                                             |

**Table 7-2** Advantages of using Deployment Solution 7.1 SP1 over 6.9  
*(continued)*

| New capability                             | Details                                                                                                                                                                                                                        |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| UI customization / role-based management   | Full customization of the menus, computers, and tasks that are visible to custom-defined roles. You can specify what roles have sufficient rights to modify jobs and tasks and what roles can only run those jobs and tasks.   |
| Reports                                    | Out-of-the-box reports listing deployment run jobs, success status, and other pertinent information. Ability to create custom reports (grids, charts, etc.).                                                                   |
| Dynamic groups                             | Computer groups can be defined in terms of any given number of characteristics. Any computers that match the specified criteria automatically appear as members of those groups. A computer can belong to one or more groups.  |
| Decision branching in jobs                 | Branch the logic that is supported inside jobs. Visual display shows the portions of the job that execute if a certain condition is true. The decision check can be a multi-part logic statement that includes ANDs and ORs.   |
| Enhanced AD integration                    | Superior capabilities for importing data from Active Directory and keeping it synchronized. Includes the ability to map roles to AD groups and leverage AD authentication information on an ongoing basis.                     |
| Extended scripting support                 | Support for: Command Script, JavaScript, Perl Script, PowerShell, Python Script, and VBScript.                                                                                                                                 |
| Filtered computer and job views            | Filter the computer list by any substring in the name, OS, IP address, and filters. You can also filter jobs by any substring in their name. This process expedites use and significantly reduces the drag-and-drop accidents. |
| Automation folder                          | No pre-allocation is required of contiguous disk sectors. Greater reliability and improved compatibility with full disk encryption.                                                                                            |
| Horizontal scalability through Task Server | Task engine operation can be offloaded to one or more servers, adding to the already superior scalability of Symantec Management Platform.                                                                                     |
| Central custom tokens                      | Custom tokens are extensions to predefined tokens. You can change a custom token in one place and all tasks, scripts, and answer files can access that change.                                                                 |

**Table 7-2** Advantages of using Deployment Solution 7.1 SP1 over 6.9  
(continued)

| New capability                                      | Details                                                                                                                                                                                   |
|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Streamlined scripted OS install                     | Keep track of the licenses employed. The Linux Scripted OS Install has been streamlined and closely follows the recommended practices.                                                    |
| Tasks can be reused in multiple jobs                | Tasks are reusable, you do not need to re-defined them each time they are required in a job. Changing a task in one place automatically updates all jobs that include it.                 |
| Extensibility through other IT management solutions | Being integrated with Symantec Management Platform, Deployment Solution 7.1 SP1 supplements the core imaging and deployment capabilities of Symantec Management Platform-based solutions. |

## Comparison of Deployment Solution 6.9 tasks with 7.1 SP1

You can manually recreate the tasks that you had created in Deployment Solution 6.9, but with some limitations.

[Table 7-3](#) lists the equivalent tasks that you can recreate in Deployment Solution 7.1 SP1 and their limitations.



**Table 7-3** Comparison of Deployment Solution 6.9 tasks with 7.1 SP1

| Tasks in Deployment Solution 6.9 | Tasks in Deployment Solution 7.1 SP1                                                                                        | Comments                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Run Script</b>                | <b>Run Script</b>                                                                                                           | <p>aeximport utility, aexschedule utility, and WLogEvent utility are not supported in Deployment Solution 7.1 SP1. Modify the run script tasks that are created using these utilities in Deployment Solution 6.9 while recreating them in Deployment Solution 7.1 SP1.</p> <p>Review the script tasks that are created using tokens as some of the Deployment Solution 6.9 tokens are not supported.</p> |
| <b>Power Control</b>             | <b>Power Control</b>                                                                                                        | No limitation                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Distribute Software</b>       | <p><b>Copy file</b> task with option to execute the task.</p> <p>Another option is to use Software Management Solution.</p> | No limitation                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Copy file</b>                 | <b>Copy file</b> task with the option to execute task                                                                       | No limitation                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Modify Configuration</b>      | <b>Apply system configuration</b>                                                                                           | <p>First create the system configuration settings from <b>Settings &gt; Deployment and Migration &gt; System Configuration</b>. Then you can create and execute the <b>Apply system configuration</b> task.</p>                                                                                                                                                                                          |

Table 7-3

Comparison of Deployment Solution 6.9 tasks with 7.1 SP1

(continued)

| Tasks in Deployment Solution 6.9 | Tasks in Deployment Solution 7.1 SP1                                                                                                                                                                                                                                                                                                                                                     | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create Disk Image                | <p>You can create two equivalent tasks:</p> <ul style="list-style-type: none"><li>■ Create Image task to capture backup image. This task is created to take a backup of a computer. The backup image is deployed on the same computer.</li><li>■ Create Image task to capture disk image. This task is created to take a generic image that is deployed on multiple computers.</li></ul> | <p>Only Ghost and RapiDeploy imaging tools are supported in Deployment Solution 7.1 SP1 for creating and deploying images.</p> <p>To create a backup image, perform the following tasks sequentially:</p> <ul style="list-style-type: none"><li>■ <b>Reboot to Automation</b></li><li>■ <b>Create Image</b> (backup image )</li><li>■ <b>Reboot to Production</b></li></ul> <p>To create a disk image task, perform the following tasks sequentially:</p> <ul style="list-style-type: none"><li>■ <b>Prepare for Image Capture</b></li><li>■ <b>Reboot to Automation</b></li><li>■ <b>Create Image</b> (disk image)</li><li>■ <b>Reboot to Production</b></li></ul> |

**Table 7-3** Comparison of Deployment Solution 6.9 tasks with 7.1 SP1  
(continued)

| Tasks in Deployment Solution 6.9 | Tasks in Deployment Solution 7.1 SP1                                                                                                                                                                                                            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Distribute Disk Image</b>     | <p>You can create two equivalent tasks:</p> <ul style="list-style-type: none"> <li>■ <b>Restore Back-up Image</b> task to deploy the backup image.</li> <li>■ <b>Deploy Image</b> task to a deploy disk image on multiple computers.</li> </ul> | <p>You can import Deployment Solution 6.9 images to Deployment Solution 7.1 SP1 using the resource import tool. The Deployment Solution 6.9 images do not contain the Symantec Management Agent. When you deploy these images on client computers, they become unmanaged computers.</p> <p>To perform a <b>Restore Back-up Image</b> task, perform the following tasks sequentially:</p> <ul style="list-style-type: none"> <li>■ <b>Reboot to Automation</b></li> <li>■ <b>Restore Back-up Image</b></li> <li>■ <b>Reboot to Production</b></li> </ul> <p>To perform a <b>Deploy Image</b> task, perform the following tasks sequentially:</p> <ul style="list-style-type: none"> <li>■ <b>Reboot to Automation</b></li> <li>■ <b>Deploy Image</b></li> <li>■ <b>Reboot to Production</b></li> </ul> |
| <b>Capture Personality</b>       | <b>Capture Personality</b>                                                                                                                                                                                                                      | No limitation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Deploy Personality</b>        | <b>Deploy Personality</b>                                                                                                                                                                                                                       | No limitation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

**Table 7-3** Comparison of Deployment Solution 6.9 tasks with 7.1 SP1  
(continued)

| Tasks in Deployment Solution 6.9 | Tasks in Deployment Solution 7.1 SP1                                                                                                               | Comments                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scripted OS Install              | You can create two equivalent tasks: <ul style="list-style-type: none"><li>■ <b>Install Windows OS</b></li><li>■ <b>Install Linux OS</b></li></ul> | To perform an <b>Install Windows OS</b> task, perform the following tasks sequentially: <ul style="list-style-type: none"><li>■ <b>Reboot to Automation</b></li><li>■ <b>Install Windows OS</b></li></ul> To perform a <b>Install Linux OS</b> task, perform the following tasks sequentially: <ul style="list-style-type: none"><li>■ <b>Reboot to Automation</b></li><li>■ <b>Install Linux OS</b></li></ul> |

See “[Migrating from Deployment Solution 6.9 to 7.1 SP1](#)” on page 132.

See “[About migrating from Deployment Solution 6.9](#)” on page 121.

# Migrating from Deployment Solution 6.9 to 7.1 SP1

Deployment Solution 6.9 is a standalone product and is not designed to be integrated with a centralized management system. However, Deployment Solution 7.I SP1 is integrated with Symantec Management Platform, which has centralized management capabilities. Deployment Solution 7.I SP1 supports most of the functionalities of Deployment Solution 6.9. You can manually recreate the supported functionalities.

**Table 7-4** Process for migrating from Deployment Solution 6.9 to 7.1 SP1

| Step   | Action                                                                                     | Description                                                                                                                            |
|--------|--------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Create a backup of Deployment Solution 6.9 images, CSV files, and Deploy Anywhere drivers. | Create the backup and make the backed up items accessible from the Deployment Solution 7.1 SP1 server database from the eXpress share. |

**Table 7-4** Process for migrating from Deployment Solution 6.9 to 7.1 SP1  
(continued)

| Step   | Action                                                                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 2 | Install a new 7.1 SP1 server.                                                 | <p>Install ITMS 7.1 SP1 on a Windows Server 2008 R2 x64 and ensure that you have selected Deployment Solution from the Product list.</p> <p>For more information on installing the ITMS 7.1 SP1 server, see <i>ITMS Implementation Guide</i>.</p>                                                                                                                                                                                                                                                                                        |
| Step 3 | Import the DS 6.9 images into ITMS 7.1 SP1 by using the Resource Import Tool. | <p>Import Deployment Solution 6.x images to Deployment Solution 7.I SP1 using the Resource Import Tool.</p> <p>ResourceImportTool.exe is located at the<br/>\\%NSSERVER%\Deployment\tools folder.</p> <p>Ensure that the image package is created for the imported image.</p> <p>The imported image package is created under <b>Settings &gt; Deployment and Migration &gt; Disk Images</b>. You can use the imported images for the <b>Deploy Image</b> task.</p> <p>See <a href="#">“Importing an existing image”</a> on page 135.</p> |
| Step 4 | Copy the required Deployment Solution 6.9 drivers.                            | <p>Copy the required drivers from the following Deployment Solution 6.9 driver database:</p> <p>\\[Backup Server]\eXpress\DriversDB</p> <p>All default drivers are present in Deployment Solution 7.1 SP1. Only the drivers that you added to Deployment Solution 6.9 need to copied.</p>                                                                                                                                                                                                                                                |

**Table 7-4** Process for migrating from Deployment Solution 6.9 to 7.1 SP1  
(continued)

| Step   | Action                                                                   | Description                                                                                                                                                                                                                                                                                                                                                                              |
|--------|--------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 5 | Add the backed up drivers to Deployment Solution 7.1 SP1.                | Add the backed up drivers to the Deployment Solution 7.1 SP1 driver database from the <b>Symantec Management Console &gt; Settings &gt; Deployment &gt; Driver Management</b> page.<br><br>See <a href="#">“Adding drivers to a driver database”</a> on page 136.                                                                                                                        |
| Step 6 | Import the predefined computers.                                         | Import the predefined computers which were imported in Deployment Solution 6.9 and are not yet managed in the network. You can use the existing CSV file for importing client computers with few changes.<br><br>See <a href="#">“Importing predefined computers”</a> on page 140.<br><br>See <a href="#">“About predefining computers in Deployment Solution 7.1 SP1 ”</a> on page 138. |
| Step 7 | Recreate Deployment Solution 6.9 jobs and tasks.                         | Recreate equivalent Deployment Solution 6.9 jobs and tasks in Deployment Solution 7.1 SP1.<br><br>See <a href="#">“Comparison of Deployment Solution 6.9 tasks with 7.1 SP1 ”</a> on page 128.                                                                                                                                                                                           |
| Step 8 | Install <b>Symantec Management Agent</b> and <b>Deployment Plug-in</b> . | Install <b>Symantec Management Agent</b> using the <b>Symantec Management Agent Install</b> page.<br><br>Install <b>Deployment Plug-in</b> using the appropriate Plug-in policy for Windows (x86/x64) and Linux computers.<br><br>See <a href="#">“Installing the Deployment Solution 7.1 SP1 agent and plug-in”</a> on page 140.                                                        |

**Table 7-4** Process for migrating from Deployment Solution 6.9 to 7.1 SP1  
(continued)

| Step   | Action                                       | Description                                                                                                                                                           |
|--------|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 9 | Uninstall the Deployment Solution 6.9 agent. | Uninstall the Deployment Solution 6.9 Agent using the <b>Runscript</b> task.<br><br>See <a href="#">“Uninstalling the Deployment Solution 6.9 agent”</a> on page 141. |

## Importing an existing image

You can use the **Deployment Solution Resource Import Tool** to import an existing image. You can import images and then use them to deploy on client computers. **Deployment Solution Resource Import Tool** needs all the splitted files for a RapiDeploy image to be selected for the effectual import of the RapiDeploy image. Partial selection of files would show up as successful import, but will not lead to a valid image. If you want to import a splitted Ghost image, selection of one split automatically selects the other splits also.

**Deployment Solution Resource Import Tool** lets you import images that are located on HTTP Web server. User credentials are not required to access the located on HTTP Web server.

You can also import OS packages using the **Deployment Solution Resource Import Tool**.

### To import an existing image

- 1 Browse to `\C:\Program Files\Altiris\Altiris Agent\Agents\Deployment\Task Handler\Tools` or `[Altiris Agent Install Dir]\Agents\Deployment\Task Handler\Tools` and execute the `ResourceImportTool.exe`.

You can execute this tool from Symantec Management Platform or from Site Server.

Ensure that you run this tool only from Symantec Management Platform.

- 2 On the **Deployment Solution Resource Import Tool**, click browse to `C:\DS_Resources\Win7 Image`, and open required `.gho` or `.img` file.
- 3 From the **Select OS**, select **Windows 7 Professional**.
- 4 Click **Import**.
- 5 A message indicating the successful upload of image is displayed. Acknowledge the message and close the **Deployment Solution Resource Import Tool**.

## Adding drivers to a driver database

Deployment Solution lets you add drivers to the driver database to ensure the successful completion of Windows OS installation and Windows image deployment tasks. By adding drivers to the driver database, you eliminate the need for manual driver installations. When you add drivers to the driver database, missing drivers and newly discovered drivers are automatically added to the image.

You can add drivers to the following driver databases:

**DeployAnywhere** Adding drivers to the DeployAnywhere driver database helps in making the task of imaging and scripted OS installation hardware independent. Hence, deploying of image to client computers and performing an OS installation do not fail due to hardware dependencies.

The DeployAnywhere driver database supports only the Windows operating system.

See [“Adding drivers to the DeployAnywhere database”](#) on page 137.

**Preboot** Adding drivers to the Preboot database helps the preboot images to support mass storage devices (MSDs) and network interface cards (NICs). These drivers are added to the preboot images. These preboot images are deployed through the preboot environment. It ensures that you can reboot the client computers successfully to automation or to PXE.

The Preboot driver database supports the Windows and Linux operating systems.

See [“Adding drivers to the Preboot database”](#) on page 136.

Driver databases lets you perform the following functionalities:

- List drivers for DeployAnywhere and Preboot databases.
- Add drivers to DeployAnywhere and Preboot databases by folder.
- Delete drivers from the DeployAnywhere database only.
- Search for drivers in DeployAnywhere and Preboot databases.  
The search does not display any results if you use \ in your search string.
- View device details of the selected driver by clicking **More Info**.

## Adding drivers to the Preboot database

You can add drivers to the Preboot database. You can use these drivers for your preboot PXE configurations needs.



BootWiz.exe is stored in the `\Program Files\Altiris\Altiris Agent\Agents\Deployment\Task Handler\bootwiz` directory.

If a preboot configuration that you already created needs a new driver, you must regenerate that preboot configuration.

You can also add drivers to the DeployAnywhere database.

See [“Adding drivers to the DeployAnywhere database”](#) on page 137.

#### To add drivers to the Preboot database

- 1 In the Symantec Management Console, on the **Settings** menu, click **Deployment > Driver Management**.
- 2 Click the **Preboot** tab.
- 3 (Optional) To view details of a driver, select the driver from the list and click **More Info**.
- 4 Click **Add**.
- 5 Browse to select the required the driver to add.
- 6 Select the relevant operating system: **WinPE**, or **Linux**.
- 7 Select the relevant architecture: **x86** or **x64**.
- 8 Click **OK**.

The new driver is used when you create a new configuration.

## Adding drivers to the DeployAnywhere database

The DeployAnywhere driver database helps make image deployment and scripted operating system installation tasks hardware-independent. DeployAnywhere focuses on the device drivers that are critical because the retargeted system has to be managed remotely. During a Windows scripted operating system installation, if any required driver is missing, it takes the missing drivers from the DeployAnywhere driver database.

See [“Adding drivers to a driver database”](#) on page 136.

DeployAnywhere supports only the Windows operating system.

DeployAnywhere supports the following critical driver types:

- Mass storage device (MSD)
- Network interface card (NIC)

The MSDs are critical because they allow the resident operating system to boot while network drivers ensure that the retargeted node is managed remotely.

DeployAnywhere supports the following non-critical driver types:

- Graphics
- Audio
- Keyboard
- Mouse
- USB
- CD-ROM
- Printer
- Bluetooth
- Multimedia
- Modem

You can also add drivers to the Preboot database.

See [“Adding drivers to the Preboot database”](#) on page 136.

**To add a new driver to the DeployAnywhere driver database**

- 1 In the Symantec Management Console, on the **Settings** menu, click **Deployment > Driver Management**.
- 2 Click the **DeployAnywhere** tab.
- 3 (Optional) To view details of a driver, select the driver from the list and click **More Info**.
- 4 Click **Add**.
- 5 Browse to select the driver to add .
- 6 Click **OK**.

## About predefining computers in Deployment Solution 7.1 SP1

If you intend to use the Deployment Solution 6.9 CSV file in Deployment Solution 7.1 SP1, you can use it after modifying it to adhere to Deployment Solution 7.1 SP1 CSV template. In the new Deployment Solution 7.1 SP1 CSV template file, the MAC, UUID, and serial number are mandatory fields. If information in any of these fields is not provided, the mapping to the actual computer fails. When the mapping fails, a duplicate resource is created for the actual computer. Some of the fields in Deployment Solution 6.9 CSV file template are ignored in the Import predefined computer feature of Deployment Solution 7.1 SP1. The following are the fields that are ignored:

- Computer Name
- Domain Flag
- Domain Controller Name
- Use Preferred Tree Flag
- Preferred Server
- Preferred Tree
- NetWare User
- NDS Context
- Run Scripts Flag
- User
- Organization
- Key
- Password Never Expires Flag
- Cannot Change Password Flag
- Must Change Password Flag
- Username
- Full Name
- Groups
- Password
- Contact
- Department
- Email
- Mailstop
- Phone
- Site
- Computer Group
- Event
- Event Start Time

## Importing predefined computers

You can import a predefined computer to assign jobs to unmanaged computers. An unmanaged computer does not yet have the Symantec Management Agent or the Deployment plug-in installed on it.

When a computer performs a PXE Boot, the PXE process reports the new computer's name, MAC address, serial number, and BIOS or motherboard UUID. From this information, Symantec Management Platform can identify the computer and run any tasks or jobs that are assigned to that computer. If information is not available in any of these fields, the mapping to the actual computer fails. When the mapping fails, a duplicate resource is created for the actual computer. Hence, name, MAC address, serial number, and UUID are mandatory fields. If any of these fields is not specified, the mapping of the defined computer to the actual computer fails.

Ensure that you have set the preboot image to respond to predefined computers. In case the preboot image is not set, an error is displayed when you import the predefined computers.

### To import predefined computer

- 1 In the Symantec Management Console, on the **Settings** menu, click **Deployment > Predefined Computers**.
- 2 Click **Import Computers**, and then navigate to the .txt or the .csv file containing the information about the computers to import.

You can copy a sample `Pre-DefinedComputers.csv` file from the `\Program Files\Altiris\Notification Server\NSCap\bin\Win32\X86\Deployment\Sample\PreDefinedComputers` folder.

- 3 From the **Manage** menu, select **Computers** to view the details of imported predefined computers.

## Installing the Deployment Solution 7.1 SP1 agent and plug-in

The Symantec Management Agent and the Deployment plug-in replace the Deployment Solution 6.9 clients and agent software (DAgent and adlagent).

### To install the 7.I SP1 agent and plug-in

- 1 Install Symantec Management Agent using the **Symantec Management Agent** Install page.
- 2 Install the Deployment Plug-in using the appropriate Plug-in policy for Windows (x86 or x64) and Linux computers.
- 3 Uninstall the DAgent/adlagent from the client.

See [“Uninstalling the Deployment Solution 6.9 agent”](#) on page 141.

## Uninstalling the Deployment Solution 6.9 agent

You can uninstall Deployment Solution 6.9 agents using the **Runscript** task to execute the following commands for different agents:

|                                               |                                                                                  |
|-----------------------------------------------|----------------------------------------------------------------------------------|
| Vista and earlier version computers (AClient) | <code>"C:\Program Files\Altiris\AClient\aclient.exe" -remove -silent -all</code> |
| Vista and later version computers (DAgent)    | <code>msiexec.exe /X {6C8D5E56-CA12-42B2-9075-044B4C7067A9} /qn</code>           |
| For Linux or UNIX (adlagent)                  | <code>/opt/altiris/deployment/adlagent/bin/uninstall</code>                      |

## Limitations of migrating from to Deployment Solution 7.1 SP1

The following is the list of limitations that you encounter when you migrate from Deployment Solution 6.9 to Deployment Solution 7.I SP1:

- Return code handling in DS 6.9 is different.
- Few tokens from DS 6.9 are supported.
- No support for standalone utilities like aexschedule and aeximport.
- Functionalities of Deployment Solution 6.9, like imaging, Scripted OS install, Copy File, and Script are provided, but you have to recreate these tasks.
- Script task functionality does not work due to limitations in command-line utilities, token, and lack of WLogEvent utility.
- Drivers that are added to the Preboot driver database need to be added manually.

- Client computers become unmanaged when the images are imported from Deployment Solution 6.9 using the import tool, ResourceImportTool.exe. The Deployment Solution 6.9 images do not contain the Symantec Management Platform Agent. To manage the client computers, install the Symantec Management Platform Agent on them.

See [“About migrating from Deployment Solution 6.9”](#) on page 121.

See [“Migrating from Deployment Solution 6.9 to 7.1 SP1”](#) on page 132.

# Migrating Monitor Solution

This chapter includes the following topics:

- [About Monitor Solution migration](#)
- [About Monitor Pack for Servers migration](#)

## About Monitor Solution migration

You perform the product migration to version 7.1 according to the migration scenario for IT Management Suite. The majority of the solution-specific data is migrated when you migrate according to the process that is defined in the Migrating Symantec Management Platform chapter.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.

Agent-based resources are not available after migration. To make agent-based resources available, you need to first upgrade the Symantec Management Agent with the Monitor Plug-in. To upgrade you need to redirect the needed resources to the Symantec Management Platform 7.1 from the old platform. For more information, see topics on Symantec Management Agent in the *Symantec Management Platform User Guide*. You then need to enable the applicable upgrade policy for the Monitor Plug-in.

See [“About Monitor Pack for Servers migration”](#) on page 143.

## About Monitor Pack for Servers migration

When migrating Monitor Solution 6.x items to Monitor Solution 7.1, modified items (such as policies, metrics, rules, and new monitor packs) are all migrated. If an item that is not modified and another item that has been modified references

it, this referenced item is migrated. For example, if you modified a metric, but not a rule that the metric references, then both the metric and the rule are migrated. Default unchanged policies, metrics, and rules do not migrate.

See [“About Monitor Solution migration”](#) on page 143.



# Migrating Real-Time System Manager Solution

This chapter includes the following topics:

- [About Real-Time System Manager Solution migration to version 7.1](#)
- [Manually migrating Real-Time System Manager Solution to version 7.1](#)
- [About manually migrating Real-Time System Manager Solution files and settings](#)
- [How to validate Real-Time System Manager Solution after the migration](#)

## About Real-Time System Manager Solution migration to version 7.1

You can migrate from Real-Time System Manager Solution 6.x to Real-Time System Manager Solution 7.1. In addition to using the migration wizard to migrate, you must complete some manual steps. You need to manually move and store some .XML files on the 7.1 computer.

See [“Manually migrating Real-Time System Manager Solution to version 7.1”](#) on page 145.

## Manually migrating Real-Time System Manager Solution to version 7.1

You can use the Symantec Notification Server Wizard to help you migrate Real-Time System Manager Solution to version 7.1.

**Table 9-1**                      Process for manually migrating Real-Time System Manager Solution to version 7.1

| Step   | Action                                                                                                           | Description                                                                                                                                                                                                                                                                                                                                                           |
|--------|------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Export the data from the previous Notification Server computer.                                                  | <p>When you migrate to Symantec Management Platform 7.1, you use the Symantec Notification Server Wizard to migrate the previous Notification Server data. When you use the migration wizard, you must export Notification Server data to a data store file.</p> <p>See <a href="#">“Exporting Notification Server 6.x data to a data store file”</a> on page 57.</p> |
| Step 2 | Import the exported data from the previous Notification Server computer to the Symantec Management Platform 7.1. | <p>You use the Symantec Notification Server Migration Wizard to migrate the previous Notification Server data to Symantec Management Platform 7.1. When you use the migration wizard, you must import the data from a data store file.</p> <p>See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59.</p>                     |
| Step 3 | Move and store Real-Time System Manager Solution files and settings.                                             | <p>You need to move and store some XML files from the old Notification Server computer to the Symantec Management Platform 7.1 computer.</p> <p>See <a href="#">“About manually migrating Real-Time System Manager Solution files and settings”</a> on page 146.</p>                                                                                                  |

# About manually migrating Real-Time System Manager Solution files and settings

The Real-Time System Manager Solution Migration Wizard contains the following exporter and importer objects:

- Boot Redirection task

- Network Filtering task
- Password Management task
- Process Management task
- Service Management task
- Network Filtering task

The majority of your Real-Time System Manager Solution data is migrated using the migration wizard. However, to have full predefined functionality, you must move some files. You need to manually move and store these files from the old Notification Server computer to the new 7.1 computer.

By default, the files that need to be moved are located on your previous Notification Server in specific locations.

**Table 9-2** Real-Time System Manager Solution files path

| Notification Server path                           | Symantec Management Platform 7.1 path                                                                                                       |
|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| C:\Program Files\Altiris\RTSM\UIData\CBFilters.xml | <p>To the following location on the new 7.1 Symantec Management Platform:</p> <p>C:\Program Files\Altiris\RTSM\Web\UIData\CBFilters.xml</p> |

# How to validate Real-Time System Manager Solution after the migration

After you finish the migration process, it is necessary to validate the migrated items. In fact, you need to make sure that these items have been correctly migrated to your new 7.1 Symantec Management Platform environment. They still should have the same predefined functionality. You need to check the following items:

- Connection settings and credential profiles
 

If you have used a security certificate in your connection settings, you need to make sure that it has a correct server name and location.

For more information, see the topics about connection profiles in the *Symantec Management Platform Help*.
- Network filters
 

For more information, see the topics about filtering network traffic on multiple computers in the *Real-Time System Manager User Guide*.
- Boot Redirection

You need to manually move and store your redirection images from your old Notification Server to your new 7.1 Symantec Management Platform environment.

For more information, see the topics about booting multiple computers from another device in the *Real-Time System Manager User Guide*.

■ **Network Filtering**

You need to manually move and store your predefined custom network filters from your old Notification Server to your new 7.1 Symantec Management Platform environment.

For more information, see the topics about filtering network traffic on multiple computers in the *Real-Time System Manager User Guide*.

■ **Password Management**

For more information, see the topics about resetting a local user password on multiple computers in the *Real-Time System Manager User Guide*.

■ **Process Management**

For more information, see the topics about running or stopping a process on multiple computers in the *Real-Time System Manager User Guide*.

■ **Service Management**

For more information, see the topics about running or stopping a service on multiple computers in the *Real-Time System Manager User Guide*.

# Migrating Real-Time Console Infrastructure

This chapter includes the following topics:

- [About Real-Time Console Infrastructure migration to version 7.1](#)
- [Manually migrating Real-Time Console Infrastructure to version 7.1](#)
- [About manually migrating Real-Time Console Infrastructure files and settings](#)
- [How to validate Real-Time Console Infrastructure after the migration](#)

## About Real-Time Console Infrastructure migration to version 7.1

You can migrate from Real-Time Console Infrastructure 6.x to Real-Time Console Infrastructure 7.1. In addition to using the migration wizard to migrate, you must complete some manual steps. You need to manually move and store some .XML files on the 7.1 computer.

See [“Manually migrating Real-Time Console Infrastructure to version 7.1”](#) on page 149.

## Manually migrating Real-Time Console Infrastructure to version 7.1

You can use the Symantec Notification Server Migration Wizard to help you migrate Real-Time Console Infrastructure to version 7.1.

Table 10-1

Process for manually migrating Real-Time Console Infrastructure to version 7.1

| Step   | Action                                                                                                           | Description                                                                                                                                                                                                                                                                                                                                                                     |
|--------|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Export data from the previous Notification Server computer                                                       | <p>When you migrate to Symantec Management Platform 7.1, you use the Symantec Notification Server Migration Wizard to migrate the previous Notification Server data. When you use the migration wizard, you must export Notification Server data to a data store file.</p> <p>See <a href="#">“Exporting Notification Server 6.x data to a data store file”</a> on page 57.</p> |
| Step 2 | Import the exported data from the previous Notification Server computer to the Symantec Management Platform 7.1. | <p>You use the Symantec Notification Server Migration Wizard to migrate the previous Notification Server data to Symantec Management Platform 7.1. When you use the migration wizard, you must import the old data from a data store file.</p> <p>See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59.</p>                           |
| Step 3 | Move and store Real-Time Console Infrastructure files and settings.                                              | <p>You need to move and store some XML files from the old Notification Server computer to the Symantec Management Platform 7.1 computer.</p> <p>See <a href="#">“About manually migrating Real-Time Console Infrastructure files and settings”</a> on page 150.</p>                                                                                                             |

# About manually migrating Real-Time Console Infrastructure files and settings

The majority of your Real-Time Console Infrastructure Solution data is migrated when you migrate your Real-Time Console Infrastructure to your new 7.1 Symantec Management Platform. However, you must manually migrate some files. To migrate these files, you use your previous Notification Server computer files and move them to your new 7.1 Symantec Management Platform environment.

Table 10-2 Real-Time Console Infrastructure files path

| Old Notification Server path                       | Symantec Management Platform 7.1 path                                                                                                |
|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| C:\Program Files\Altiris\RTSM\UIData\PortCheck.xml | <p>The following location on the 7.1 Symantec Management Platform:</p> <p>C:\Program Files\Altiris\RITC\Web\UIData\PortCheck.xml</p> |

# How to validate Real-Time Console Infrastructure after the migration

You need to check if your previous settings and options have been correctly migrated. In addition, if you had any scheduled tasks on your old Notification Server computer, check that those predefined tasks have been correctly migrated.

Predefined tasks may consist of the predefined time schedule, computer profiles, connection profiles, and credential profiles as follows:

- Connection and credential profiles
 

If you have used a security certificate in your connection settings, you need to make sure that it has a correct server name and location.

For more information, see the topics about connection profiles in the *Symantec Management Platform Help*.
- Get out-of-band inventory
 

For more information, see the topics about collecting and viewing Intel AMT and DASH inventory in the *Real-Time Console Infrastructure User Guide*.
- Power management
 

For more information, see the topics about managing the power state of computers remotely in the *Real-Time Console Infrastructure User Guide*.
- Update Intel AMT credentials
 

For more information, see the topics about updating Intel AMT credentials in the *Real-Time Console Infrastructure User Guide*.
- Update Intel AMT settings
 

For more information, see the topics about updating Intel AMT settings and configuring Intel AMT in the *Real-Time Console Infrastructure User Guide*.
- Update out-of-band alert settings
 

You need to make sure that you have a correct **SNMP server** for Intel AMT and ASF and also correct **Destination URL** for DASH.

For more information, see the topics about updating Intel AMT and DASH alert settings in the *Real-Time Console Infrastructure User Guide*.



# Migrating Carbon Copy Solution

This chapter includes the following topics:

- [About migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1](#)
- [Advantages of using pcAnywhere over Carbon Copy](#)
- [Before you begin the 6.x to 7.1 migration with pcAnywhere](#)
- [Migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1](#)

## About migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1

pcAnywhere 12.6 replaces Carbon Copy 6.x in IT Management Suite 7.1.

When you install the pcAnywhere plug-in on a client computer, it automatically removes the Carbon Copy agent. If you have client computers with the Carbon Copy agent installed and you do not install the pcAnywhere plug-in on them, the Carbon Copy agent does not uninstall automatically.

When you install the pcAnywhere plug-in on a client computer, it installs the pcAnywhere host on each targeted client computer. The installation package that is sent to each targeted computer is approximately 50MB.

If you customize the communication ports on the 6.x server, be sure to customize the ports on the 7.1 server as well.

You can migrate Carbon Copy events and inventory data to 7.1. However, you can only use the data to view legacy reports and view historical data. The data is not usable by pcAnywhere.

In the migration wizard export settings, Carbon Copy data is included under the pcAnywhere node.

See [“Before you begin the 6.x to 7.1 migration with pcAnywhere”](#) on page 154.

See [“Migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1 ”](#) on page 155.

See [“Advantages of using pcAnywhere over Carbon Copy”](#) on page 154.

## Advantages of using pcAnywhere over Carbon Copy

The advantages of using pcAnywhere over Carbon Copy are as follows:

- pcAnywhere has native support for Windows NT 4.0/Vista
  - Remote/Viewer supports Windows Mobile
- pcAnywhere supports Mac OS X
- pcAnywhere supports Linux
- pcAnywhere includes cross-platform support
- pcAnywhere includes robust security in the form of serialization and mandatory passwords
- pcAnywhere includes platform improvements such as a client-side mirror driver
- pcAnywhere includes an access server, which provides remote session connectivity

See [“About migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1”](#) on page 153.

See [“Migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1 ”](#) on page 155.

## Before you begin the 6.x to 7.1 migration with pcAnywhere

Before you begin the migration from 6.x, complete the following tasks:

- Back up your current 6.x server and database.
- Validate the success of the backups before you proceed.
- Review the solutions you have currently installed in the source 6.0 system and capture the information. You should have the same installed solutions on the target server (wherever applicable) for the migration wizard to properly place the data that has been gathered from the 6.0 source computer.

- Verify that all IT Management Suite licenses are stored in a safe location to be used on the 7.1 server. If the licenses are not downloaded or available, you can regain them from the **Symantec Licensing Portal**.

## Migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1

In IT Management Suite 7.1, pcAnywhere Solution 7.1 replaces Carbon Copy 6.x. After pcAnywhere is integrated with Symantec Management Platform, it leverages the platform capabilities.

Ensure that you have completed the required tasks before you start migrating to IT Management Suite 7.1 and upgrade to pcAnywhere Solution 7.1 SP1.

See [“About migrating from Carbon Copy 6.x to pcAnywhere Solution 7.1”](#) on page 153.

See [“Before you begin the 6.x to 7.1 migration with pcAnywhere”](#) on page 154.

### To migrate from Carbon Copy 6.x to pcAnywhere Solution 7.1

- 1 Prepare the target server for the installation of IT Management Suite 7.1.  
IT Management Suite 7.1 requires and is currently only supported on Microsoft Windows 2008 R2 x64. For SSL and other certificates, make sure that they are in place on the 7.1 target server before you install Symantec Installation Manager or solutions.
- 2 Install IT Management Suite 7.1 on the target server (including the migration components within the optional components).
- 3 Use the migration wizard to export 6.x data from the source 6.x server.
- 4 Copy the x86 migration package from the IT Management Suite 7.1 server.  
The package is located at `Program Files\Symantec Installation Manager\Migration Package\`  
Multiple migration packages are launched and installed for pcAnywhere.
- 5 From the `Program files/upgrade` directory on the 6.x server, run the migration wizard (NSUpgrade.exe).  
This exports KMS and CM keys into a data store file (\*.adb)
- 6 Back up the data store file (\*.adb).
- 7 Restore the backed up data store file from Notification Server 6.x to 7.1.

- 8 Run the x64 migration wizard and import the backed up.adb file.
- 9 Enable deploy policies for the Symantec Management Agent and the pcAnywhere plug-ins.

The Symantec Management Agent and the pcAnywhere agents replace the older Altiris Agent and the Carbon Copy Agent.

# Migrating Out of Band Management Component

This chapter includes the following topics:

- [About Out of Band Management Component migration to version 7.1](#)
- [Manually migrating Out of Band Management Component to version 7.1](#)
- [Redirecting the Altiris Agent from Notification Server 6.x to Symantec Management Platform 7.1](#)
- [Migrating the Intel AMT database](#)
- [Configuring the Intel AMT database](#)
- [Fine-tuning Out of Band Management Component 7.1 after the migration](#)

## About Out of Band Management Component migration to version 7.1

This chapter provides details of migration from the Out-of-Band Management Component 6.x to the Out-of-Band Management Component 7.1. In addition to using the migration wizard to migrate, you must complete some manual steps. You need to manually move and store some databases on the 7.1 computer.

See [“Manually migrating Out of Band Management Component to version 7.1”](#) on page 158.

# Manually migrating Out of Band Management Component to version 7.1

**Table 12-1** Process for manually migrating Out of Band Management Component 6.x to version 7.1

| Step   | Action                                                                                          | Description                                                                                                                                                                                                                                                                                                                                                     |
|--------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Export data from the previous Notification Server 6.x using the migration installation package. | When you migrate to Symantec Management Platform 7.1, you use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data. When you use the migration wizard, you must export Notification Server data to a data store file.<br><br>See <a href="#">“Exporting Notification Server 6.x data to a data store file”</a> on page 57. |
| Step 2 | Detach the <i>Intel AMT database</i> from the old Notification Server database.                 | The <i>Intel AMT database</i> is not migrated through the migration process. To preserve it, you must manually migrate it from the old Notification Server to Symantec Management Platform 7.1.<br><br>See <a href="#">“Migrating the Intel AMT database”</a> on page 160.                                                                                      |
| Step 3 | Attach the <i>Intel AMT database</i> to the 7.1 database.                                       | The <i>Intel AMT database</i> is not migrated through the migration process. To preserve it, you must manually migrate it from the old Notification Server to Symantec Management Platform 7.1.<br><br>See <a href="#">“Migrating the Intel AMT database”</a> on page 160.                                                                                      |
| Step 4 | Reconfigure the <i>Intel AMT database</i> on the Symantec Management Platform 7.1.              | After you move the <i>Intel AMT database</i> to your new environment, you must validate it and make sure that it operates correctly.<br><br>See <a href="#">“Configuring the Intel AMT database”</a> on page 160.                                                                                                                                               |

**Table 12-1** Process for manually migrating Out of Band Management Component 6.x to version 7.1 *(continued)*

| Step   | Action                                                                                         | Description                                                                                                                                                                                                                                                                                                                           |
|--------|------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 5 | Import the exported data from 6.x Notification Server to the Symantec Management Platform 7.1. | You use the Symantec Notification Server Migration Wizard to migrate Notification Server 6.x data to Symantec Management Platform 7.1. When you use the migration wizard, you must import the 6.x data from a data store file.<br><br>See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59. |
| Step 6 | Redirect the Altiris Agent from Notification Server 6.x to Symantec Management Platform 7.1.   | You need to redirect the existing clients pointing to 6.x Notification Server to the new Symantec Management Platform 7.1.<br><br>See <a href="#">“Redirecting the Altiris Agent from Notification Server 6.x to Symantec Management Platform 7.1”</a> on page 159.                                                                   |
| Step 7 | Fine-tune Out of Band Management Component 7.1 after the migration.                            | After you have finished all the migration steps, you can fine-tune Out of Band Management Component 7.1.<br><br>See <a href="#">“Fine-tuning Out of Band Management Component 7.1 after the migration”</a> on page 161.                                                                                                               |

# Redirecting the Altiris Agent from Notification Server 6.x to Symantec Management Platform 7.1

You need to redirect the existing clients that point to 6.x Notification Server to the new Symantec Management Platform 7.1.

See [“About Out of Band Management Component migration to version 7.1”](#) on page 157.

See [“Manually migrating Out of Band Management Component to version 7.1”](#) on page 158.

**To redirect the Altiris Agent from Notification Server 6.x to Symantec Management Platform 7.1**

- 1 In the Altiris Console 6.5, click **Configure > Agents > Desktop Settings**.
- 2 Under **Altiris Agent Settings**, click the **Advanced Settings** tab.
- 3 Under **Alternative URL for accessing NS**, check **Specify an alternative URL for the Altiris Agent to use to access the NS** and specify the 7.1 **Server Name** and **Server Web**.

## Migrating the Intel AMT database

The *Intel AMT database* is not migrated through the migration process. To preserve it, you must manually migrate it from the previous Notification Server to Symantec Management Platform 7.1. You must manually move the *Intel AMT database* to your new environment by using Microsoft SQL Management Studio.

See [“About Out of Band Management Component migration to version 7.1”](#) on page 157.

See [“Manually migrating Out of Band Management Component to version 7.1”](#) on page 158.

**To move the Intel AMT database**

- 1 On the old Notification Server computer, open Microsoft SQL Manager Studio.
- 2 In the left pane, expand the **Databases** folder.
- 3 In the left pane, under **Databases**, right-click on the *Intel AMT database*.
- 4 In the right-click menu, click **Tasks > Detach**.

**To restore the Intel AMT database**

- 1 On the 7.1 computer, open Microsoft SQL Manager Studio.
- 2 In the left pane, expand the **Databases** folder.
- 3 In the left pane, right-click the **Databases**.
- 4 In the right-click menu, click **Tasks > Attach**.

## Configuring the Intel AMT database

After you move the *Intel AMT database* to your new environment, you must validate it and make sure that it operates correctly. In addition, make sure that the correct address of the SQL Server and SQL Login is specified in the Out of Band Management Component settings.



See [“Migrating the Intel AMT database”](#) on page 160.

See [“About Out of Band Management Component migration to version 7.1”](#) on page 157.

See [“Manually migrating Out of Band Management Component to version 7.1”](#) on page 158.

#### To configure the Intel AMT database

- 1 In the Symantec Management Console, on the **Home** menu, click **Remote Management > Out of Band Management**.
- 2 In the left pane, under **Configure Additional OOB Site Server**, click **Configure and Assign OOB Site Server**.
- 3 Click **Site Management > Settings > OOB Service > OOB Service Settings**.
- 4 Under **Global OOB site service installation settings**, edit **SQL server**. You must specify the SQL Server name where the *Intel AMT database* is now located.

If you have used the default Intel AMT database name (*NS\_Database\_Name\_AMT*) on your previous Notification Server and transferred it to a 7.1 computer database with the same name, Out of Band Management Component 7.1 automatically accepts the previous database. In some cases, before the installation of out-of-band site servers, you need to modify out-of-band site server settings with your custom database name.

For more information, see the topics about configuring the out-of-band site server installation settings in the *Out of Band Management Component Implementation Guide*.

## Fine-tuning Out of Band Management Component 7.1 after the migration

You can start to fine-tune Out of Band Management Component 7.1 after you complete the steps for manual migration.

See [“Manually migrating Out of Band Management Component to version 7.1”](#) on page 158.

You might experience the following errors on different pages:

- Configuration saved but cannot be applied. Please check that currently selected Intel SCS is installed and running in Service Location page

After you have configured the Intel AMT database, you can receive this error on the page.

This message is an expected issue and it means that you do not have an Out of Band Management Component site server installed. It needs to apply the SQL settings to the out-of-band site server. You need to install an out-of-band site server.

For more information, see the topics about installing an out-of-band site server in the *Out of Band Management Component Implementation Guide*.

- One or more of Intel® AMT Setup and Configuration Servers in outdated. You have to upgrade it by turning on the 'Out of Band Service Agent' policy. If you don't want to use this server, you can delete it

When you try to view configured Intel AMT computers on the **Intel AMT Computers** page, you may see this error message.

You can remove all site servers from the current computer. The other workaround is to remove an entry inside the URL from *dbo.Inv\_OOB\_Site\_Server\_State* and also *dbo.csto\_servers*. It is a common resolution in case your old Notification Server is not functional. You also need to verify the out-of-band site server installation by checking the general settings for the Intel AMT computers.

#### ■ **Obsolete Intel AMT Setup and Configuration Services**

During the migration of Out of Band Management Component 6.2 to version 7.1, an exception about obsolete site servers on the Out of Band Management Component portal page comes up. It means that data about the 6.2 Notification Server persists on the Symantec Management Platform 7.1 Out of Band Management Component site server database. If you click on the exception link, it opens an **Obsolete Intel AMT Setup and Configuration Services** page. On this page, you can choose to delete the obsolete site server or upgrade it.

#### ■ **Active Directory integration reinitiation**

Active Directory integration cannot be migrated during the migration from the Out of Band Management Component 6.2 to version 7.1. You must manually reinitiate the Active Directory integration on the **Configure General Settings** page in the Out of Band Management Component portal.

#### ■ **Secure TLS profiles**

If you previously used Secure TLS profiles, then you need to request a new security certificate for the new 7.1 Symantec Management Platform.

For more information, see the topics about configuring TLS in the *Out of Band Management Component Implementation Guide*.

# Migrating CMDB Solution

This chapter includes the following topics:

- [Migrating to CMDB Solution 7.1](#)

## Migrating to CMDB Solution 7.1

You perform the product migration from 6.x to 7.1 according to the migration scenario for Asset Management Solution and IT Management Suite.

See [“About migrating Asset Management Solution”](#) on page 171.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.



# Migrating Barcode Solution

This chapter includes the following topics:

- [About migrating Barcode Solution](#)
- [Manually migrating your Barcode Solution files and settings](#)
- [Synchronizing data](#)
- [Verifying asset data](#)
- [Backing up the Barcode Solution default synchronization profile](#)
- [Restoring the Barcode Solution default synchronization profile](#)

## About migrating Barcode Solution

In addition to using the migration wizard to migrate Barcode Solution, you must complete some manual steps.

See [“Manually migrating your Barcode Solution files and settings”](#) on page 166.

Before you migrate your data, you need to take the following actions:

- Ensure that handheld devices have uploaded their data to the previous Notification Server computer.  
See [“Synchronizing data”](#) on page 167.
- Ensure that all batches in the upload verification section have been processed.  
See [“Verifying asset data”](#) on page 168.
- Back up the default synchronization profile.  
See [“Backing up the Barcode Solution default synchronization profile”](#) on page 169.

# Manually migrating your Barcode Solution files and settings

The majority of your Barcode Solution data is migrated when you migrate your Configuration Management Database (CMDB) using the migration wizard. However you must first manually migrate your default synchronization profile settings. To migrate these settings you use the console to export them into an XML file. You then import this XML file after you install your new Symantec Management Platform. In addition, Symantec recommends that you finish synchronizing all your data from the handheld devices. Also, ensure that you verify your asset data before you load it into the CMDB by processing all batches.

See [“About migrating Barcode Solution”](#) on page 165.

**Table 14-1**      Process for manually migrating your Barcode Solution files and settings

| Step   | Action                                                                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------|-----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Handheld devices have uploaded their data to the previous Notification Server computer. | You must finish synchronizing all your data from the handheld device to the Barcode Solution before you migrate. Failure to do this means you may lose data. You cannot upload the data from the old version of Barcode to the new version Barcode Solution. You have to upload to the old version of the Barcode Solution first and then migrate the data over again.<br><br>See <a href="#">“Synchronizing data”</a> on page 167. |
| Step 2 | All batches in the upload verification section have been processed.                     | All batches in the upload verification section have been processed.<br><br>See <a href="#">“Verifying asset data”</a> on page 168.                                                                                                                                                                                                                                                                                                  |
| Step 3 | Back up the Barcode Solution default synchronization profile.                           | Use the Symantec Management Console to export your default synchronization profile settings into an XML file. Store this file on a neutral storage location.<br><br>See <a href="#">“Backing up the Barcode Solution default synchronization profile”</a> on page 169.                                                                                                                                                              |

**Table 14-1** Process for manually migrating your Barcode Solution files and settings (*continued*)

| Step   | Action                                                                                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 4 | Use the Symantec Notification Server Migration Wizard to export and import your data. | <p>Use the Symantec Notification Server Migration Wizard to export and import your data.</p> <p>See <a href="#">“Exporting Notification Server 6.x data to a data store file”</a> on page 57.</p> <p>See <a href="#">“Importing Notification Server 6.x data from a data store file”</a> on page 59.</p> <p><b>Warning:</b> Since Barcode Solution relies on CMDB Solution, the CMDB data must be imported at the same time or before you import your barcode data. For this reason ensure that you have <b>CMDB Solution</b> selected in the <b>Exporter Configuration</b> page of the Symantec Notification Server Migration Wizard .</p> |
| Step 5 | Restore the Barcode Solution default synchronization profile file                     | <p>Use the Symantec Management Console to import your default synchronization profile settings from an XML file.</p> <p>See <a href="#">“Restoring the Barcode Solution default synchronization profile”</a> on page 169.</p>                                                                                                                                                                                                                                                                                                                                                                                                               |

## Synchronizing data

Any data that is specified in the user profile and the **Manage Handheld Device** page is uploaded to the barcode device in the initial synchronization. It may involve the transfer of a significant amount of data. Ensure a good connection (either wireless or through a cradle) with the Notification Server computer.

This task is part of the process for manually migrating your Barcode Solution files settings. After you complete this task, you can complete the rest of the process.

See [“Manually migrating your Barcode Solution files and settings”](#) on page 166.

#### To synchronize data

- 1 Make sure that the barcode device has a connection to the host computer, either wireless or through a synchronization cradle.
- 2 On the barcode device, click **Start > Programs > Symantec Altiris Barcoder**.
- 3 Select **Synchronize** from the menu option.
- 4 Enter your security credentials and click **Login**.  
  
Your password and user name are cached for an hour on the handheld device. If you do not use it for over an hour, you must reenter your security credentials. Closing the application clears the cached credentials; they need to be reentered on launching the application again.
- 5 Select the synchronization profile to use, and click **Next**.
- 6 Choose one of the synchronization options, and click **Sync**.

## Verifying asset data

By default, you need to verify your asset data before you load it into the Configuration Management Database. You verify asset data from the **Upload Verification** page.

This task is part of the process for manually migrating your Barcode Solution files settings. After you complete this task, you can complete the rest of the process.

See [“Manually migrating your Barcode Solution files and settings”](#) on page 166.

#### To verify asset data

- 1 In the Altiris Console 6.5, on the **Home** menu, click **Tasks**.
- 2 In the left pane, click **Tasks > Barcode > Manage Changes > Upload Verification**.
- 3 In the **Batch Summary Table** in the right pane, select the batch of uploaded data that you want to verify.
- 4 Click **Batch Details**.
- 5 In the **Batch Details** dialog box, select a resource and click **Resource Details** to view its changed details.
- 6 Click **Apply**, and close the **Batch Details** dialog box.
- 7 In the **Batch Summary Table** select the relevant batch and click **Apply** to save changes.



## Backing up the Barcode Solution default synchronization profile

Before you decommission your previous Notification Server computer, back up your Barcode Solution default synchronization profile to a neutral storage location.

Name the clone default profile `Default profile 6.x` or similar. Since the default profile already exists on 7.1, renaming the cloned default profile ensures that it can be identified differently in the 7.1 environment. By being uniquely identifiable, the cloned default profile is not overwritten.

This task is part of the process for manually migrating your Barcode Solution files settings. After you complete this task, you can complete the rest of the process.

See [“Manually migrating your Barcode Solution files and settings”](#) on page 166.

**To back up the Barcode Solution default synchronization profile:**

- 1 On your previous Notification Server computer, in the Altiris Console 6.5 , select the **Configuration** tab.
- 2 In the left pane, expand **Configuration > Solutions Settings > Assets and Inventory > Barcode Solution > Synchronization Profile > Default**.
- 3 Right-click **Default**, and click **Export**.
- 4 Save the `Default.xml` file to a neutral storage location.
- 5 Clone the default profile to ensure that it can be identified in the 7.1 environment.

## Restoring the Barcode Solution default synchronization profile

After you install Symantec Management Platform and have run the migration wizard, you can restore your Barcode Solution default synchronization profile.

This task is part of the process for manually migrating your Barcode Solution files settings. After you complete this task, you can complete the rest of the process.

See [“Manually migrating your Barcode Solution files and settings”](#) on page 166.

**To restore the Barcode Solution default synchronization profile:**

- 1 On your new Notification Server computer, in the **Symantec Management Console**, go to **Home > Service and Asset Management > Barcode**.
- 2 In the left pane, expand **Barcode Solution > Synchronization Profiles > Default**.

- 3 Right-click the **Synchronization Profiles** folder, and click **Import**.
- 4 Browse to the default synchronization file.
- 5 Click **Open**.

# Migrating Asset Management Solution

This chapter includes the following topics:

- [About migrating Asset Management Solution](#)
- [About data migration special cases](#)
- [Migrating legacy software license items](#)

## About migrating Asset Management Solution

You perform the product migration from Asset Management Solution 6.x to version 7.1 according to the migration scenario for IT Management Suite.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.

After you migrate your data from a Notification Server 6.x environment, you must do the following:

- Review and reconfigure the asset-specific security access rights because they are not copied to the corresponding 7.1 roles automatically.  
See [“About data migration special cases”](#) on page 172.
- Migrate the legacy software license items.  
See [“Migrating legacy software license items”](#) on page 173.

# About data migration special cases

When you migrate from Notification Server 6.x, there are some data migration special cases that you need to know about.

See [“About migrating Asset Management Solution”](#) on page 171.

Table 15-1      About data migration special cases

| Data                                                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pre-6.5 Legacy Receiving Types                      | Legacy Receiving Types are not upgraded.<br><br>If any existing Legacy Receiving Type is found, the <b>Legacy Receiving Types Check</b> exporter fails and gives a warning message.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| The Configuration Items that are converted to tasks | The following CMDB Solution schedules become tasks and are accessible from <b>Jobs/Tasks</b> page: <ul style="list-style-type: none"><li>■ Assign Computer's Ownership to be the Primary User</li><li>■ Clean Ownership</li><li>■ Duplicate Computer Merge</li><li>■ Duplicate User Merge</li><li>■ Inventory Clean Up</li><li>■ Inventory To Asset Synchronization</li><li>■ Resource Merge Rule</li><li>■ Update Network Resource Location</li></ul> The following Asset Management Solution schedules become tasks and are accessible from <b>Jobs/Tasks</b> page: <ul style="list-style-type: none"><li>■ Depreciable Items Cost Evaluation</li><li>■ Software License Evaluation</li></ul> |
| Notification Policies                               | The 6.x Notification Policies are moved to the <b>Legacy Notification Policies</b> folder under <b>Settings &gt; Notification Server</b> . Existing folder structure is retained.<br><br>Note that Asset Management Solution and CMDB Solution do not upgrade the Task/Job and Message Action Policy items because the Task Management Solution owns them.                                                                                                                                                                                                                                                                                                                                      |
| Accounting Period                                   | If the accounting period is configured in 6.5, then it is also regenerated in 7.1 based on the accounting period item details.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Cost Model Upgrade logic                            | 6.5 data class is not able to record a situation where all owners are removed from an asset. A new upgrade logic is able to populate the correct tables even when all the ownership information is deleted.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Asset Roles                                         | All Asset 6.5 roles are renamed to <b>Role Name+(legacy)</b> . You must review their security access rights and make appropriate changes if necessary.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

# Migrating legacy software license items

After you complete the task of migrating data from a Notification Server 6.x environment, you must migrate legacy software license items to Symantec Management Platform 7.1. Asset Management Solution 7.1 includes a wizard that helps you go through this process.

See [“About migrating Asset Management Solution”](#) on page 171.

## To migrate legacy software license items

- 1 Complete the steps to migrate data from Notification Server 6.x.
- 2 Make sure that your **Migrate Legacy Software Licenses** settings are correct.  
For more information, see the topics about configuring settings for migrating legacy software licenses in the *Asset Management Suite Help*.
- 3 Make sure that the Software Catalog is populated and current. You can use manual entry, run the Software Discovery task, or run an inventory policy.  
For more information, see the topics about populating the Software Catalog in the *Symantec Management Platform Help*.
- 4 In the Symantec Management Console, on the **Home** menu, click **Service and Asset Management > Software Licensing**.
- 5 In the right pane, in the **Legacy Licenses Requiring Migration** Web part, click **Legacy License Count: n**.  
The Legacy License Count **n** indicates the number of legacy software license items that need to be migrated.
- 6 In the **List of legacy 6.5 Software Licenses to be migrated** list, right-click a license that you want to migrate, and then click **Migrate Legacy Software License**.  
Note that you migrate each software license one by one and it takes two to three minutes to migrate each license in case you have all the software purchase and software product data available in the Configuration Management Database (CMDB).
- 7 In the **Migrate Legacy Software License** wizard, follow the on-screen instructions for each software license item that you need to migrate.
- 8 Click **Finish**.

After a software license item is migrated, it appears in the **Software License** list. The **Legacy License Count** indicates the number of software license items that still need to be migrated. Note that you must right-click in the Web part, and then click **Refresh** to display the changes.



# Migrating Workflow Solution

This chapter includes the following topics:

- [About migrating Workflow Solution](#)
- [Upgrading Workflow processes](#)
- [Determining a project's persistence settings](#)
- [Versioning a process](#)

## About migrating Workflow Solution

You perform the Workflow Solution data migration from 6.x to 7.1 according to the migration scenario for IT Management Suite.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.

After you migrate your data, you must upgrade your Workflow processes.

See [“Upgrading Workflow processes”](#) on page 175.

## Upgrading Workflow processes

If you already have a Workflow Server running on a Symantec Management Platform computer, installing Workflow does not upgrade Workflow Server. Upgrading Workflow Server would break running processes. Instead, the Workflow installation adds a message in the Symantec Management Console that the Workflow Server should be upgraded manually.

Symantec recommends that you schedule a service stop, upgrade Workflow Server, test the published processes, and then resume the service.

**Warning:** You can disrupt currently-running processes by installing Workflow if you do not keep the same persistence settings. Ideally, you should use the same persistence settings for Workflow that you used for the earlier versions of Workflow. During installation you can set the persistence setting for Workflow. If the persistence settings in the earlier versions of Workflow are not supported in the current version of Workflow, version your projects so that you do not overwrite the currently-running processes.

See [“Determining a project's persistence settings”](#) on page 177.

See [“Versioning a process”](#) on page 179.

**Table 16-1**            Process for upgrading Workflow processes

| Step   | Action                                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 1 | Back up your projects                  | Create packages for all your projects, and store these packages on a safe directory.<br><br>For more information on creating a project package, see the <i>Symantec Workflow Solution User Guide</i> .                                                                                                                                                                                                                                                                                                                                                  |
| Step 2 | Back up the Ensemble database          | Create a backup of your Ensemble database. Store the database backup on a safe directory.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Step 3 | Install Workflow on a testing computer | When you install Workflow on your testing computer, make sure that you do the following:<br><br>■ Use the same Workflow persistence settings as in your earlier version of Workflow configuration.<br>See <a href="#">“Determining a project's persistence settings”</a> on page 177.<br>If you use the persistence settings that are not supported by Workflow, version your projects.<br>See <a href="#">“Versioning a process”</a> on page 179.<br><br>■ Set Workflow to have access to a Symantec Management Platform server (Notification Server). |
| Step 4 | Revise your projects                   | Open each project and make the necessary changes for it to be compatible with Workflow and the Symantec Management Platform. Change any old Notification Server components and settings.<br><br>If possible use the same persistence setting for your Workflow projects as you used for your earlier versions of Workflow projects.<br><br>See <a href="#">“Determining a project's persistence settings”</a> on page 177.                                                                                                                              |



**Table 16-1** Process for upgrading Workflow processes (*continued*)

| Step   | Action                                                | Description                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step 5 | Publish revised projects to Workflow testing computer | Publish the revised projects to the Workflow testing computer.<br><br>For more information on publishing projects, see the <i>Symantec Workflow Solution User Guide</i> .                                                                                                                                                                                                                                                     |
| Step 6 | Test revised projects                                 | Conduct thorough tests to ensure that your projects work properly in a Workflow and Symantec Management Platform environment. If you encounter any problems, fix the project and republish.<br><br><b>Warning:</b> Publishing untested processes in a production environment can cause significant problems. Symantec recommends that you test all processes thoroughly, before you publish them to a production environment. |
| Step 7 | Install Workflow on a production computer             | When you install Workflow on your production computer, make sure that you use the same persistence settings as in your earlier version of configuration.<br><br>See <a href="#">“Determining a project's persistence settings”</a> on page 177.                                                                                                                                                                               |
| Step 8 | Publish revised projects to production computer       | Publish all of your revised projects to the Workflow production computer.<br><br>For more information on publishing projects, see the <i>Symantec Workflow Solution User Guide</i> .                                                                                                                                                                                                                                          |

## Determining a project's persistence settings

Persistence refers to how a running process is stored in memory to improve the performance of Workflow. Persistence is set at the project level, but most projects use the default setting that is set when Workflow is installed (almost always file-based). For the earlier versions of Workflow projects, the persistence settings are configured under the project's **Publishing** data tab in the **Work Queue Service Name** property.

See [“Upgrading Workflow processes”](#) on page 175.

**Table 16-2** Persistence options

| Persistence option                        | Description                                                                                                                                                          |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| LogicBase.Components.Ensemble.WSWorkQueue | Uses Process Manager SQL database settings. The workflow project uses the Ensemble database for persistence.<br><br>There is no Workflow equivalent of this setting. |

**Table 16-2** Persistence options (*continued*)

| Persistence option                                                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| LogicBase.Components.Default.ExchangeAdapters.<br>LogicBaseExchangeWorkQueue | <p>Uses Exchange for persistence. This is the most common persistence setting. This setting uses either file-based or SQL-based persistence over Exchange.</p> <p>For information on determining whether this setting uses file-based or SQL-based persistence, see the following section:</p> <p>The Workflow equivalent of this is Exchange (file-based) or SQL-based persistence. You can set this when you install Workflow.</p> |
| LogicBase.Core.Workflow.FileSystemAdapters.<br>FileSystemWorkQueue           | <p>Uses direct file-based persistence.</p> <p>There is no Workflow equivalent of this setting.</p>                                                                                                                                                                                                                                                                                                                                   |
| LogicBase.Core.Models.Workflow.InMemoryWorkQueue                             | <p>Uses internal Workflow memory.</p> <p>There is no Workflow equivalent of this setting.</p>                                                                                                                                                                                                                                                                                                                                        |
| LogicBase.Core.Workflow.SQLServerAdapters.<br>SQLServerWorkQueue             | <p>Uses direct SQL-based persistence.</p> <p>There is no Workflow equivalent of this setting.</p>                                                                                                                                                                                                                                                                                                                                    |

Your projects are probably set to use **LogicBase.Components.Default.ExchangeAdapters.LogicBaseExchangeWorkQueue**. In this case, you can determine whether the exchange is set to file-based or SQL-based persistence in the Configuration and Logging Tool.

If any of your projects use a persistence setting other than **LogicBase.Components.Default.ExchangeAdapters.LogicBaseExchangeWorkQueue**, you should version them to avoid losing process data.

See “[Versioning a process](#)” on page 179.

#### To determine the default persistence setting in the Workflow Explorer

- 1 Open the Configuration and Logging Tool.  
Click **Start > Programs > Symantec > Workflow Designer > Tools > Workflow Explorer**.
- 2 Click the **SymQ Configuration** tab.

- 3 In the left pane, click **SymQ\_Local\_Defaults**.
- 4 In the right pane, double-click **local.workflow-**.  
  
If the **Deliver To Queue** property is set to **LBME.Workflow** (with a prefix), the default persistence setting is file-based.  
  
If the **Deliver To Queue** property is set to **workflowsqlexchange** (with a prefix), the default persistence setting is SQL-based.

## Versioning a process

If you have an earlier version of Workflow project that uses a persistence setting that is not supported in the current version of Workflow, version the project so that you do not lose any process data (such as tasks). Process versioning is handled in IIS. When you publish a workflow project, a new virtual directory is created in IIS, unless one of the same name already exists. If an identical one exists, the new process overwrites the process that is already published there. You must create a new virtual directory to contain the updated process while the old process runs in its virtual directory. The following steps assume that you have a currently running process that you replace with an updated version.

Versioning works only with the “Publish Application to Server” publishing option. Because the other publishing options do not let you set the virtual directory name, you cannot use versioning with them.

See [“Upgrading Workflow processes”](#) on page 175.

See [“Determining a project's persistence settings”](#) on page 177.

### To version a process

- 1 In Workflow Designer, when you are ready to publish your updated process, click **File > Deploy Project > Publish Project**.
- 2 In the **Virtual Directory** field, add the updated version number to the end of the name of the virtual directory.

For example, if the old process is in a virtual directory called “PurchaseOrder”, call the new virtual directory “PurchaseOrder2.0.”

---

**Warning:** If you publish without changing the name of the virtual directory, your new process completely replaces the old one and breaks any of its current instances.

---

- 3 Complete the publishing process as normal.

- 4 Repoint the invocation links to the virtual directory of the updated process.  
In other words, whatever invoked the old process (such as Process Manager service catalog item or external link) must be repointed to the new virtual directory that contains the process.
- 5 After the old process has finished all activity, delete its virtual directory.

# Migrating Inventory Pack for Servers Solution

This chapter includes the following topics:

- [Migrating to Inventory Pack for Servers 7.1](#)

## Migrating to Inventory Pack for Servers 7.1

You perform the product migration from 6.x to 7.1 according to the migration scenario for Inventory Solution and IT Management Suite.

See [“Before you migrate to Inventory Solution 7.1”](#) on page 69.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.

See [“About the Symantec Notification Server Migration Wizard”](#) on page 50.



# Migrating Power Scheme Solution

This chapter includes the following topics:

- [About migrating Power Scheme](#)

## About migrating Power Scheme

No manual solution-specific migration steps are required. The solution-specific data is migrated when you migrate the product data according to the process that is defined in the Migrating Symantec Management Platform chapter.

You should verify and validate that the solution data and settings have been migrated correctly.

See [“Migrating from Notification Server 6.x to Symantec Management Platform 7.1”](#) on page 34.

See [“About data migration”](#) on page 49.





## Migrating Recovery Solution

This chapter includes the following topics:

- [About migrating Recovery Solution](#)
- [Further information about Recovery Solution](#)

### About migrating Recovery Solution

Recovery Solution is not a part of IT Management Suite 7.1.

Do not upgrade from 6.x to IT Management Suite 7.1 if you want to keep the Recovery Solution features.

Until Recovery Solution 7.1 is released, you must run a dual environment if you want to use both IT Management Suite 7.1 and Recovery Solution.

### Further information about Recovery Solution

For more information about new versions and upgrades, visit the [support page](#) for Recovery Solution. You can also contact the [Symantec Business Sales team](#).



## Migrating Mobile Management Solution

This chapter includes the following topics:

- [About migrating Mobile Management Solution](#)
- [Further information about Mobile Management Solution](#)

### About migrating Mobile Management Solution

Mobile Management Solution is not a part of IT Management Suite 7.1.

Do not upgrade from 6.x to IT Management Suite 7.1 if you want to keep the Mobile Management Solution features.

Until Mobile Management Solution 7.1 is released, you must run a dual environment to use both IT Management Suite 7.1 and Mobile Management Solution.

### Further information about Mobile Management Solution

For more information about new versions and upgrades, visit the [support page](#) for Mobile Management Solution. You can also contact the [Symantec Business Sales team](#).



# Migrating Wise Connector Solution

This chapter includes the following topics:

- [About migrating Wise Connector](#)

## About migrating Wise Connector

You cannot upgrade from a previous version of Wise Connector. Upgrading is not supported. You must install and use a clean installation of Wise Connector.

For more information, see *Wise Connector User Guide*.



# Migrating from Helddesk Solution

This chapter includes the following topics:

- [About migrating from Helpdesk Solution 6.x](#)

## About migrating from Helpdesk Solution 6.x

Symantec ServiceDesk 7.1 replaces the functionality of Helpdesk Solution 6.5 and earlier. ServiceDesk does not upgrade or install over Helpdesk Solution because ServiceDesk is installed on a different server and uses different databases. During the migration process you upgrade Altiris 6.x to Symantec Management Platform 7.1 and install Symantec ServiceDesk 7.1. Helpdesk Solution data can be migrated with ServiceDesk application software.

For more information, see *ServiceDesk Implementation Guide*.





# Migrating Virtual Machine Management Solution

This chapter includes the following topics:

- [About migrating Virtual Machine Management data](#)

## About migrating Virtual Machine Management data

Virtual Machine Management is not a component of ITMS 6.x. Deployment Solution 6.9 has a Virtual Machine Management function but it has been taken out of Deployment Solution in the 7.1 release. This function is therefore not migrated. Virtual Machine Management replaces this functionality in 7.1.



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