IBM System Migration Assistant 4.1

User's Guide

SC90-P288-70

Note: Before using this information and the product it supports, read the general information in Appendix D, “Notices”, on page 81.

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About this book

This book provides information about installing and using IBM® System Migration Assistant (SMA) 4.1.

How this book is organized

Chapter 1, “Introducing System Migration Assistant”, on page 1 contains an overview of System Migration Assistant (SMA) and its features.

Chapter 2, “Installing and uninstalling System Migration Assistant”, on page 5 contains instructions for installing and uninstalling SMA.

Chapter 3, “Performing a standard migration”, on page 11 describes how to perform a standard migration using the SMA graphical user interface (GUI).

Chapter 4, “Performing a migration in batch mode”, on page 37 contains information about performing a migration in batch mode.

Chapter 5, “Performing a peer-to-peer migration”, on page 49 contains information about performing a peer-to-peer migration in both standard and batch modes.

Chapter 6, “Advanced administrative topics”, on page 57 discusses advanced administrative tasks, such as customizing the SMA GUI, migrating registry settings, and creating custom application files to enable the migration of additional application settings.

Appendix A, “Application settings available for migration”, on page 71 contains detailed lists of the supported applications and the settings that can be migrated.

Appendix B, “File and registry exclusions”, on page 77 contains information about files, directories, and registry entries that are excluded from migration.

Appendix C, “Getting help and technical assistance”, on page 79 contains information about accessing IBM Support Web sites for help and technical assistance.

Appendix D, “Notices”, on page 81 contains product notices and trademarks.

Notices that are used in this book

This book contains the following notices designed to highlight key information:

- **Notes:** These notices provide important tips, guidance, or advice.
- **Important:** These notices provide information or advice that might help you avoid inconvenient or difficult situations.
- **Attention:** These notices indicate possible damage to programs, devices, or data. An attention notice is placed just before the instruction or situation in which damage could occur.

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Syntax conventions that are used in this book

The syntax in this book adheres to the following conventions:

- Commands are shown in lowercase letters.
- Variables are shown in italics and explained immediately afterward.
- Optional commands or variables are enclosed in brackets.
- Where you must type one of two or more parameters, the parameters are separated by vertical bars.
- Default values are underlined.
- Repeatable parameters are enclosed in braces.

IBM System Migration Assistant resources on the World Wide Web

The following Web pages provide resources for understanding, using, and troubleshooting SMA and systems-management tools.

IBM xSeries® Systems Management page
http://www.ibm.com/pc/ww/eserver/xseries/systems_management/index.html

Use this Web page to see an overview of IBM systems-management software. Click **Systems Management** for the latest information and downloads.

IBM System Migration Assistant 4.1 home page
http://www.ibm.com/servers/eserver/xseries/systems_management/sys_migration/sma.html

Use this Web page to download the latest SMA software and documentation.

IBM Systems Management Software: Download/Electronic Support page
http://www.ibm.com/pc/us/eserver/xseries/systems_management/dwnl.html

Use this Web page to download the latest IBM systems-management software, including SMA and readme files.

IBM ServerProven® page
http://www.ibm.com/pc/us/compat/index.html

Use this Web page to find information about IBM hardware compatible with SMA 4.1.

IBM Support page
http://www.ibm.com/pc/support/

Use this Web page to access the IBM Support Web site for IBM hardware and systems-management software. For systems-management software support, click **Products and Services** → **Systems management**.

Chapter 1. Introducing System Migration Assistant

System Migration Assistant (SMA) is a software tool that system administrators can use to migrate a user's *work environment* from one system to another. A user's work environment includes the following items:

- Operating-system preferences, such as desktop and network connectivity settings
- Files and directories
- Customized application settings, such as bookmarks in a Web browser or editing preferences in Microsoft® Word

System administrators can use SMA either to set up a standard work environment for a company or to upgrade an individual user's computer. Individual users can use SMA either to backup a computer or to migrate settings and files from one computer system to another, for example, from a desktop computer to a mobile computer (laptop).

Overview and components

This section contains an overview of SMA and its components.

How SMA works

SMA works by taking a snapshot of the work environment of a system. It then uses the snapshot as a blueprint and duplicates the work environment on another system. The system that SMA takes a snapshot of is the *source system*. The system where the snapshot is duplicated is the *target system*. The source and target systems can be in different physical locations and even in different time zones. When you use SMA to backup or restore settings and files, the source and target system can be the same system.

SMA migrates the work environment of one system to another system in two phases: the capture phase and the apply phase.

In the *capture phase*, the following items can be selected and copied from the source system:

- Desktop settings
- Printer settings
- Network settings
- Application settings
- Files and directories
- Operating-system user profiles

These settings and files are stored in an *SMA profile file*.

During the *apply phase*, SMA applies the profile to the target system. You can apply the entire profile or you can specify the components of the profile that you want to apply.

SMA can be run either from the graphical user interface (GUI) or from a command-line prompt.

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SMA components

SMA has the following components:

sma.exe
An executable file that captures settings and files from a source system and copies them to a profile. This executable file also applies the profile to a target computer.

config.ini
A configuration file used to customize SMA.EXE and the GUI.

smabat.exe
An executable file that provides a command-line interface for use in batch mode.

commandfile.txt
A command file used to drive the capture and apply process in batch mode.

System requirements

This section contains information about hardware requirements, supported operating systems, and valid migration scenarios.

Hardware requirements

The source and target systems must meet the following conditions:

- A supported Microsoft Windows® operating system must be installed.
- The hard disk must have 10 MB of space free for the SMA installation files.
- (Source systems only.) There must be hard disk space free for the temporary files that are created during the capture phase. The disk space required depends on the size of the SMA profile created.
- (Target systems only) The target system must be able to access the SMA profile file. You can use a local area network (LAN), a removable medium (such as a zip disk), or an Ethernet crossover cable.

Supported operating systems

You can install SMA 4.1 on the following operating systems:

- Microsoft Windows 95 OEM Service Release 2 (OSR2)
- Windows 98
- Windows 98 Second Edition (SE)
- Windows NT® 4.0 Workstation
- Windows NT 4.0 Server
- Windows 2000 Professional
- Windows 2000 Server
- Windows XP Professional

Hereafter, Windows 98 and Windows 98 SE are referred to as Windows 98 (unless a distinction must be made between the two operating-system versions). Windows 95 OSR2 is referred to as Windows 95.

Supported migration scenarios

The following table shows valid migration scenarios.

Operating system running on the source system	Operating system running on the target system		
	Windows 2000 Professional	**Windows 2000 Server**	**Windows XP Professional**
Windows 95 OSR2	**Yes**	**No**	**Yes**
Windows 98	**Yes**	**No**	**Yes**
Windows 98 SE	**Yes**	**No**	**Yes**
Windows NT 4.0 Workstation	**Yes**	**No**	**Yes**
Windows NT 4.0 Server	**No**	**Yes**	**No**
Windows 2000 Professional	**Yes**	**No**	**Yes**
Windows 2000 Server	**No**	**Yes**	**No**
Windows XP Professional	**No**	**No**	**Yes**

The source and target system must run the same-language version of Windows. SMA is not supported on any 64-bit versions of Microsoft Windows.

Upgrading from previous releases

You can upgrade to SMA 4.1 from SMA 3.0 or SMA 3.1. You do not have to uninstall the earlier version of SMA before installing SMA 4.1.

New features in System Migration Assistant 4.1

SMA 4.1 includes the following new features and enhancements:

- Support for peer-to-peer migration
- Ability to include or exclude files based on size and date created
- Support for migrating additional application settings
- New batch mode features
  - Ability to capture a self-extracting, executable file as output
  - Ability to run a capture operation and create only a log file
  - Ability to migrate the default printer only
- Improved error code handling
- Enhanced desktop icon handling
- Additional restrictions on passwords
- Non-English-language versions of SMA and the *System Migration Assistant 4.1 User's Guide*

Chapter 2. Installing and uninstalling System Migration Assistant

This chapter contains information about installing and uninstalling SMA.

Installing SMA 4.1

There are two types of SMA installations:

- **Standard installation**: To perform a standard installation of SMA, you log on locally to the target or source system and run the installation from that system.
- **Silent installation**: To perform a silent installation, you first create a response file, and then use that response file to install the application without any interaction from a user. Typically, silent installations are performed remotely. You log in to a networked environment and remotely install SMA on one or more systems using the response file.

Performing a standard SMA installation

Complete the following steps to install SMA:

1. Log on to the system using an operating-system account with administrative privileges.
2. Run the SMA*version*setup_*lang*.EXE program, where *version* stands for the release number and *lang* stands for the language version that you are using. For example, the English version of the SMA 4.1 executable file is SMA4.1setup_en.exe. The InstallShield wizard starts and the “SMA Setup” window opens.

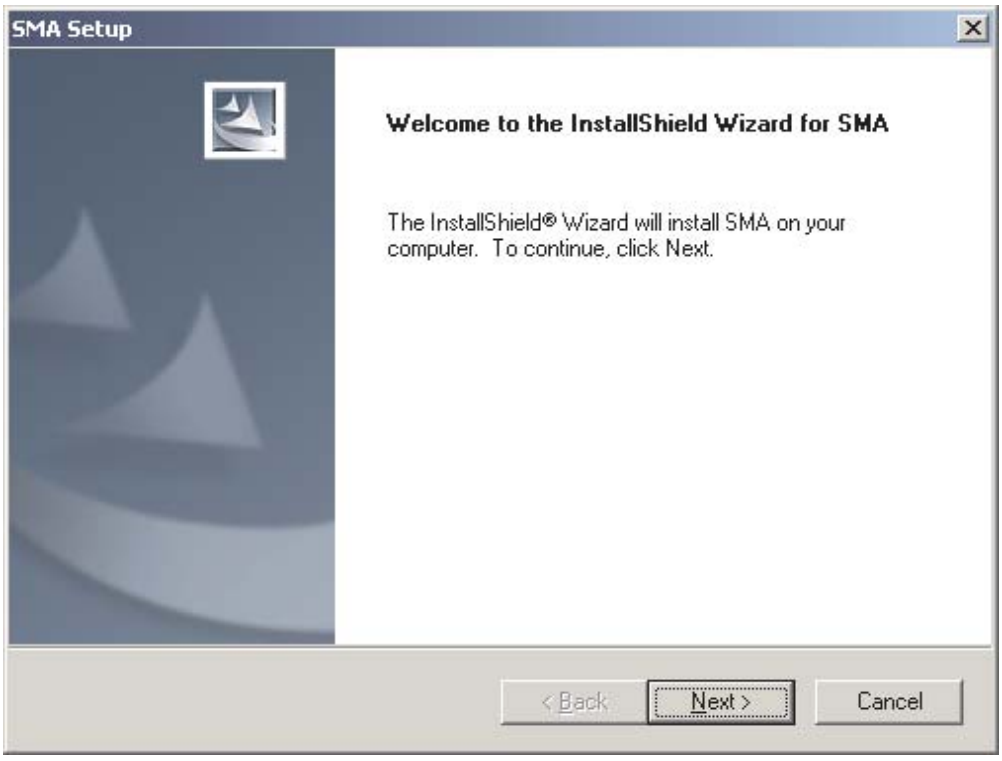

Figure 1. Installing SMA: “SMA Setup” window

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3. Click **Next**. The “Choose Destination” window opens.

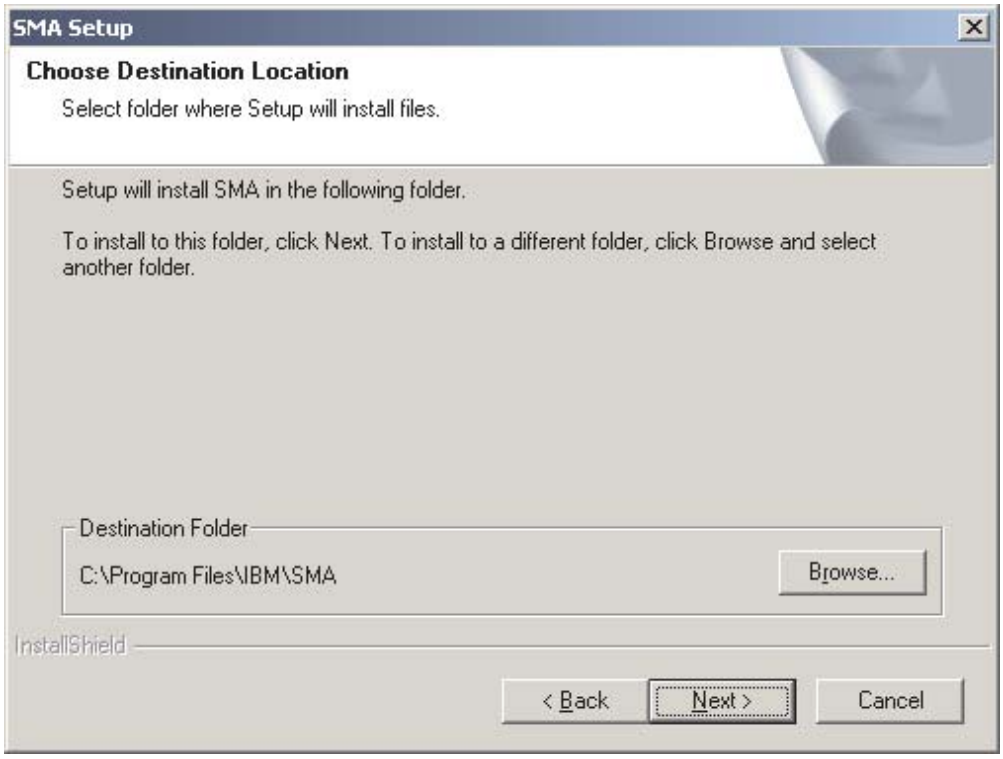

Figure 2. Installing SMA: “Choose Destination Location” window

4. By default, SMA is installed in *d*:\Program Files\IBM\SMA, where *d* is the drive letter of the hard disk drive. To install SMA in a different location, click **Browse**; then, select an alternate directory.

5. Click **Next**. The “Select Program Folder” window opens.

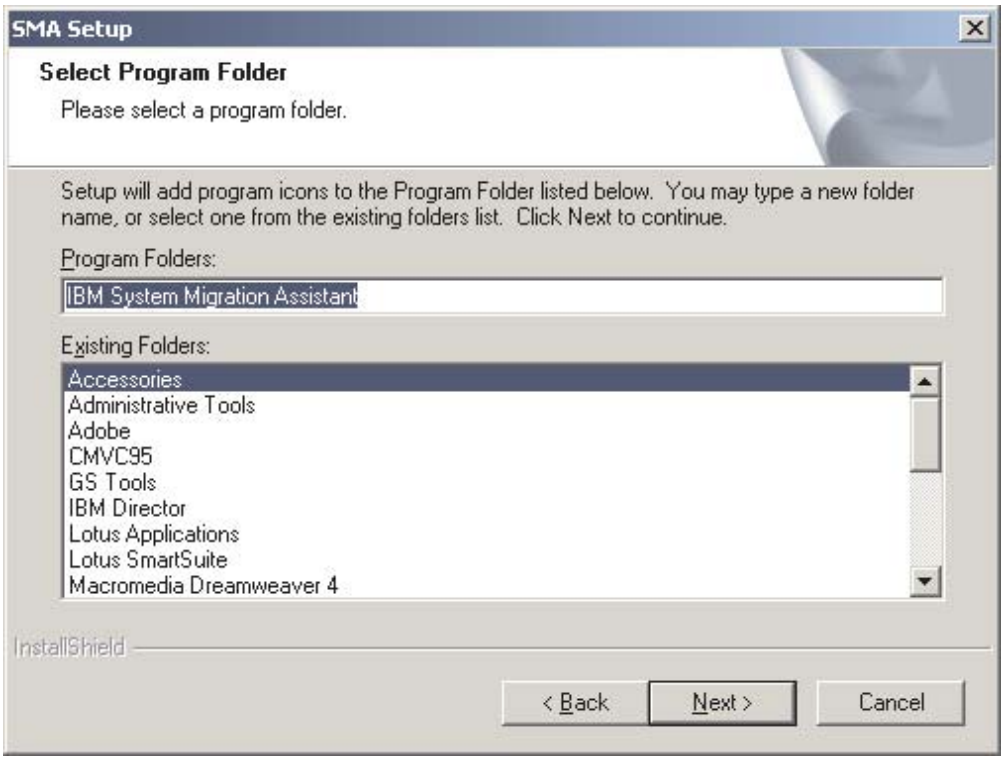

Figure 3. Installing SMA: “Select Program Folder” window

6. By default, the name of the SMA program folder is set to IBM System Migration Assistant. To select a program folder other than the default, use one of the following procedures:
   - To create a new program folder name, in the **Program Folders** field, type the name you want of the new program folder.
   - To select an existing program folder, in the **Existing Folders** list, double-click the program folder.
7. Click **Next**.

   Note: The SMA installation might require an updated dynamic link library (DLL) file. If your system requires an updated DLL file, a notification window opens and specifies the steps that you must follow to complete the installation.

After the InstallShield wizard installs SMA, the “SMA Setup” window opens.

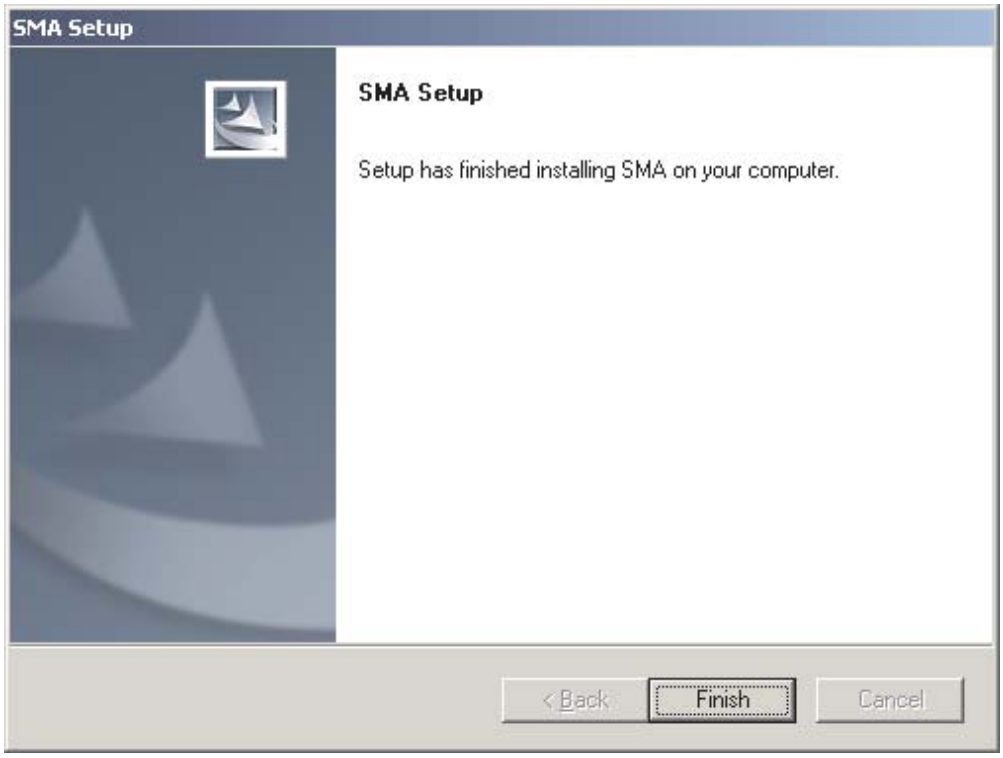

Figure 4. Installing SMA: “SMA Setup” window

8. Click **Finish**.

Performing a silent SMA installation

To perform a silent installation, you must create a response file, and then run the SMA installation using the response file.

Creating the response file

The response file is a text file that is read by the SMA installation program. It contains all of the values that are used by the InstallShield wizard.

Complete the following steps to create the response file:

1. Log on to a system using an operating-system account with administrative privileges.

   Note: You do not to have use a target or source system to create the response file. You can create the response file on any system on which you have administrative privileges and access to the SMA installation program.

2. Run the SMA*version*setup_*lang*.exe program, where *version* stands for the release number and *lang* stands for the language version that you are using. For example, the English version of the SMA 4.1 executable file is SMA4.1setup_en.exe. The InstallShield wizard starts and the “SMA Setup” window opens.

   A `pftx~tmp` directory is created in the temporary directory of your operating system, where *x* is one or more random characters. This directory contains the SMA installation files that were extracted when you started the installation.

3. Minimize the “SMA Setup” window.
4. Locate the `pftx~tmp` directory. (Windows Explorer must be configured to show hidden files and folders.) This directory is in one of the following locations:

Operating system	Directory
Windows 95 and Windows 98	*d*:\Windows\TEMP\
Windows NT 4.0 Workstation and Windows NT 4.0 Server	*d*:\Temp\
Windows 2000 Professional, Windows 2000 Server, and Windows XP Professional	*d*:\Documents and Settings*UserName*\Local Settings\Temp\

   where *d* is the drive letter of the hard disk drive, and *UserName* is the user name of the operating-system account.
5. Copy the `pftx~tmp` directory to the location where you want to store the installation files.

   You must be able to access the directory from the systems on which you perform the silent installation.
6. Stop the InstallShield wizard:
   a. Maximize the “SMA Setup” window; then press **Cancel**. The “Exit Setup” window opens.
   b. Click **Yes**.
7. From a command-line prompt, change to the `pftx~tmp` directory that you created in step 5.
8. Change to the `Disk1` subdirectory.
9. Type the following command and then press Enter:

   ```
   setup -r
   ```

   The InstallShield wizard starts and the “SMA Setup” window opens. Starting the InstallShield wizard from the command line generates an InstallShield response file, setup.iss. The selections and values that you enter during the installation are saved to this file.
10. Follow the instructions on the screen to complete the installation.
11. Copy the `setup.iss` file to the `pftx~tmp` directory that you created in step 5. The `setup.iss` file is in one of the following locations:

Operating system	Directory
Windows 95 and Windows 98	*d*:\Windows
Windows NT 4.0 Workstation, Windows NT 4.0 Server, Windows 2000 Professional, Windows 2000 Server, and Windows XP Professional	*d*:\winnt

    where *d* is the drive letter of the hard disk drive.

Installing SMA from a command prompt

Complete the following steps to install SMA:

1. Using an operating-system account with administrative privileges, log on to the system on which you want to perform a silent installation of SMA.
2. Copy the installation-file directory and setup.iss file to the system; then, change to the directory that contains the installation files. Alternately, you can change to the network directory where the installation files and the `setup.iss` file are stored.
3. From the command-line prompt, type the following command and press Enter:

   `setup.exe -s -sms -f1"`*`path`*`\setup.iss"`

   Where `-f1"`*`path`*`\setup.iss"` is an optional parameter that specifies the location of the response file, and *path* is the fully qualified name of the response file, for example, c:\temp\setup.iss. By default, the installation program looks for the response file in the same location as the installation files.

   The installation starts and status information is written to the setup.log file.
4. After you install SMA, open the setup.log file and locate the ResultCode variable. The log file is located in the same directory as the installation files. If the ResultCode = 0, the installation completed successfully. Possible error codes include the following values:

Error codes	Explanation
-3	The setup.iss file does not include the required data.
-5	The setup.iss file does not exist.
-8	The path of the setup.iss file is invalid.

Uninstalling SMA

To uninstall SMA, complete the following steps:

1. Click **Start** → **Settings** → **Control Panel**. The “Control Panel” window opens.
2. Double-click **Add/Remove Programs**. The “Add/Remove” window opens.
3. Click **IBM System Migration Assistant 4.1**.
4. Click **Remove**. The confirmation window opens.
5. Click **Yes** and follow the on-screen instructions.

Uninstalling SMA might not delete all SMA files. You might need to delete the following files manually:

- SMA log files that are generated when you run SMA. If you installed SMA in the default location, these files are located at the root of the *d* drive, where *d* is the drive letter of the hard disk drive.
- Temporary files specific to SMA. By default, these files are located in the *d*:\sma\temp directory, where *d* is the drive letter of the hard disk drive.
- SMA profiles. These are files with an SMA extension.

Chapter 3. Performing a standard migration

This chapter contains information about capturing and applying a profile using the SMA GUI.

Logon considerations

For Windows NT 4.0 Workstation, Windows NT 4.0 Server, Windows 2000 Professional, Windows 2000 Server, and Windows XP Professional, you must have an operating system user account with administrative privileges to use the full functionality of SMA (a systems administrator account would also be sufficient for full functionality). If you are not working with one of these systems, or if you use SMA to migrate only your desktop settings, application settings, and files, you can do so without administrative rights to your system.

You must use an operating-system account with administrative privileges to capture the following settings:

- Computer name
- Computer description
- Shared folders and drives
- TCP/IP configuration
- Workgroup/Domain

You must use an operating-system account with administrative privileges to capture and apply the following settings:

- NTFS file permissions
- Registry settings
- User profiles

Creating an SMA profile

During the capture phase, you log on to a source system and create an SMA profile that contains the settings and files that you want to migrate. The profile file then can be applied to one or more target systems.

Note: Be sure to close all applications before you start a migration.

Complete the following steps to create an SMA profile:

1. Log on to the source system using an operating-system user account with administrative privileges.

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2. Click **Start** → **Programs** → **IBM System Migration Assistant** → **System Migration Assistant**. The “System Migration Assistant window” opens.

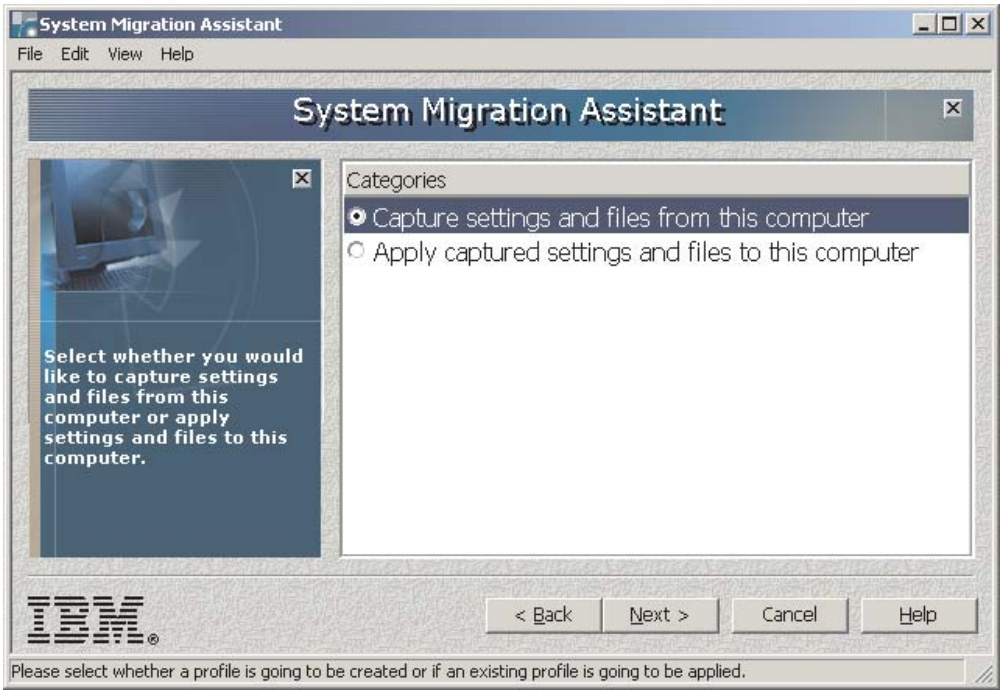

Figure 5. Capturing settings: “System Migration Assistant” window

3. Click **Capture settings and files from this computer**, and then click **Next**. The “Migration Options” window opens.

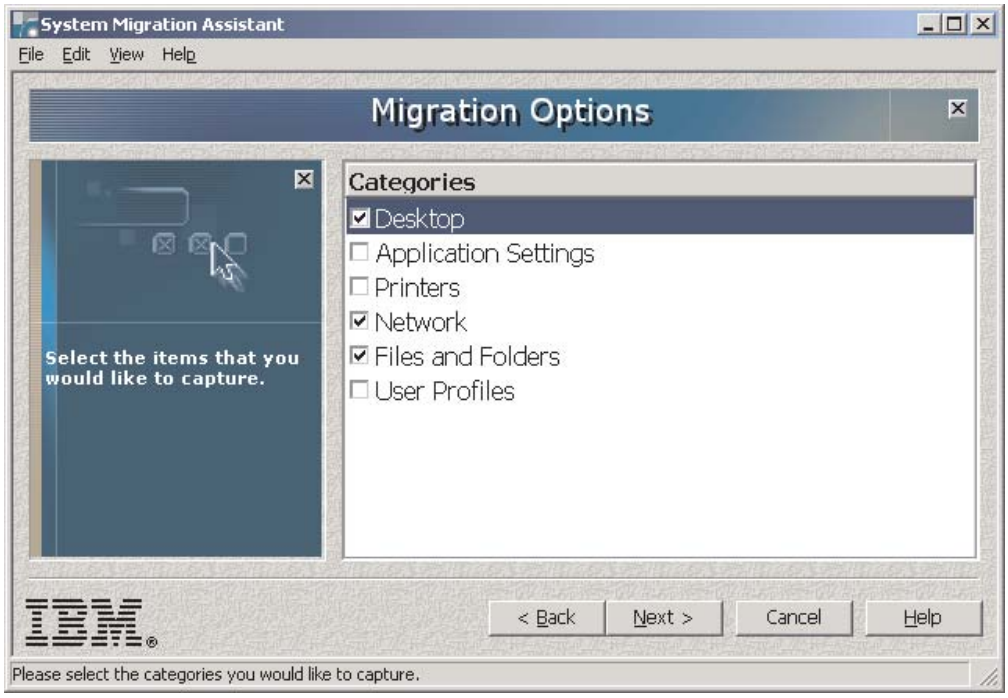

Figure 6. Capturing settings: “Migration Options” window

4. Select the categories that you want to capture.
5. Click **Next**. If you selected the **Desktop** check box in step 4, the “Desktop Settings” window opens. Otherwise, go to step 8 on page 15.

Figure 7. Capturing settings: “Desktop Settings” window

6. Select the desktop settings that you want to migrate:

   Accessibility
   The accessibility settings for the keyboard, sound, mouse, and other settings

   Active Desktop
   The active state (not supported on Windows XP Professional)

   Colors
   Desktop and window colors

   Desktop Icons
   All desktop contents, including folders, files, shortcuts, icons, and icon positions

   Display
   Desktop width, height, and color depth

   Icon Font
   The font used for the desktop icons

Keyboard
Keyboard repeat rate, cursor blink rate, and delay

Mouse
Left or right-handed mouse settings, speed, and double-click rate

Pattern
The pattern used for the desktop (not supported in Windows XP Professional)

Screen Saver
Current screen saver settings

Send To Menu
Send To menu settings

Shell View sort order, view type (larger icon or small icon), status bar and toolbar show/hide status

Sound
Sound settings

Start Menu
Start menu commands

Task Bar
Docking edge, size, always-on-top, auto hide, show clock, show small icons in Start menu

Wallpaper
Desktop wallpaper

Window Metrics
Spacing and arrangement order of minimized windows, dialog message font, menu size, and scroll bar sizes

The following restrictions apply to the desktop settings:

- **Accessibility:** If you migrate from Windows 95 or Windows 98 to Windows 2000 Professional, you cannot migrate the ShowSounds, SoundSentry, and Stickykeys settings.
- **Active Desktop:** To migrate the Active Desktop including the wallpaper, you must select the wallpaper setting also.
  - The vertical and horizontal spacing between desktop icons do not migrate precisely.
  - Only the icons that are in the current user's desktop directory are migrated.
- **Mouse:** You cannot migrate mouse speed to a target system running Windows XP Professional.
- **Screen Saver:** If you migrate from Windows 95 or Windows 98 to Windows 2000 Professional or Windows XP Professional, you cannot migrate the screen saver.
- **Shell:** To migrate the Windows Explorer shell settings, you must migrate both your shell desktop settings and the Microsoft Internet Explorer application settings. If the target system uses Windows 2000 Professional, Windows 2000 Server, or Windows XP Professional, the folder view settings (such as large icons, tiles, and details) do not migrate.

- **Sound:** SMA migrates the active sound scheme from the source system to the target system. The sound scheme is set in the “Sounds and Multimedia Properties” window of the Windows control panel. If the sound scheme in the source system is set to `No Sounds`, sounds will not be migrated to the target system. If the source system uses custom sounds, you must migrate the sound files in addition to migrating the sound scheme.
- **Taskbar:** If you migrate to a target computer that uses Windows XP Professional, the taskbar location does not migrate.
- **Wallpaper:** If the wallpaper that you want to migrate is a JPEG file, you also must capture the Active desktop setting. It is not necessary to capture the Active desktop setting when you migrate wallpaper that is a BMP file.

7. Click **Next**.
8. If you selected the **Application Settings** check box in step 4 on page 13, the “Settings for Applications” window opens. Otherwise, go to step 11.

Figure 8. Capturing settings: “Settings for Applications” window

9. Select the applications for which you want to migrate the settings.

   SMA can capture the user settings and customizations. Customizations to Internet Explorer and Netscape Navigator might include bookmarks, cookies, and preferences. For Lotus® Notes® and Microsoft Outlook, these settings might include the address book and locally stored e-mail.

   For more information about the restrictions that apply to the application settings, see Appendix A, “Application settings available for migration”, on page 71.
10. Click **Next**.
11. If you selected the **Printers** check box in step 4 on page 13, the “Printers” window opens. Otherwise, go to step 14 on page 16.

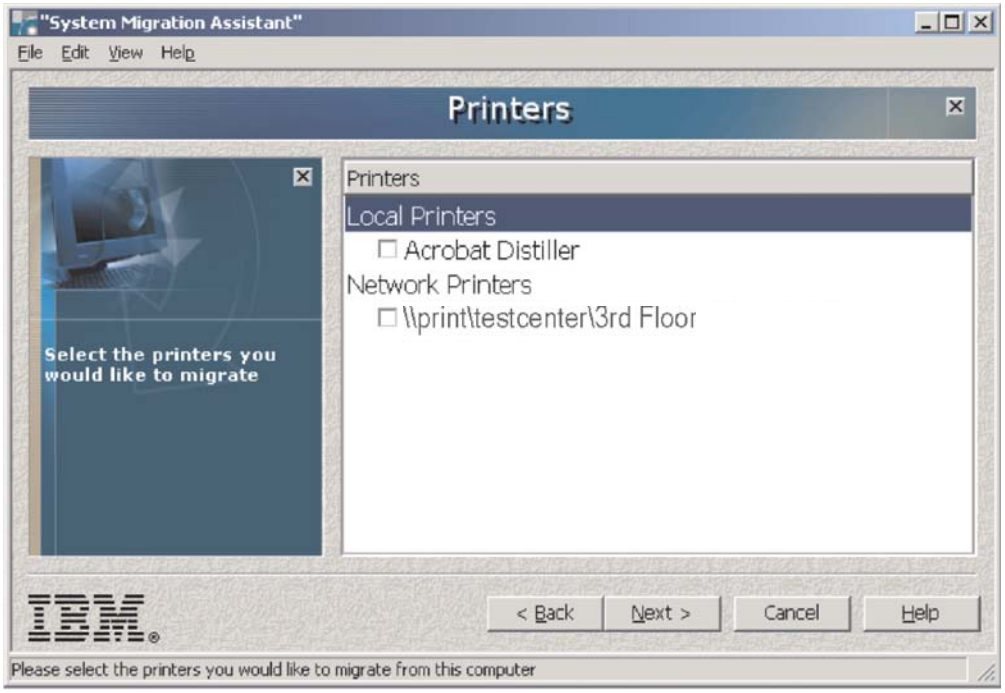

Figure 9. Capturing settings: "Printers" window

12. Select the printers for which you want to migrate the printer links and device drivers. The default printer is selected automatically.

    Note: You cannot migrate local printers to a target system that uses a different operating system than the source system.

13. Click **Next**.
14. If you selected the **Network** check box in step 4 on page 13, the "Network Settings" window opens. Otherwise, go to step 17 on page 18.

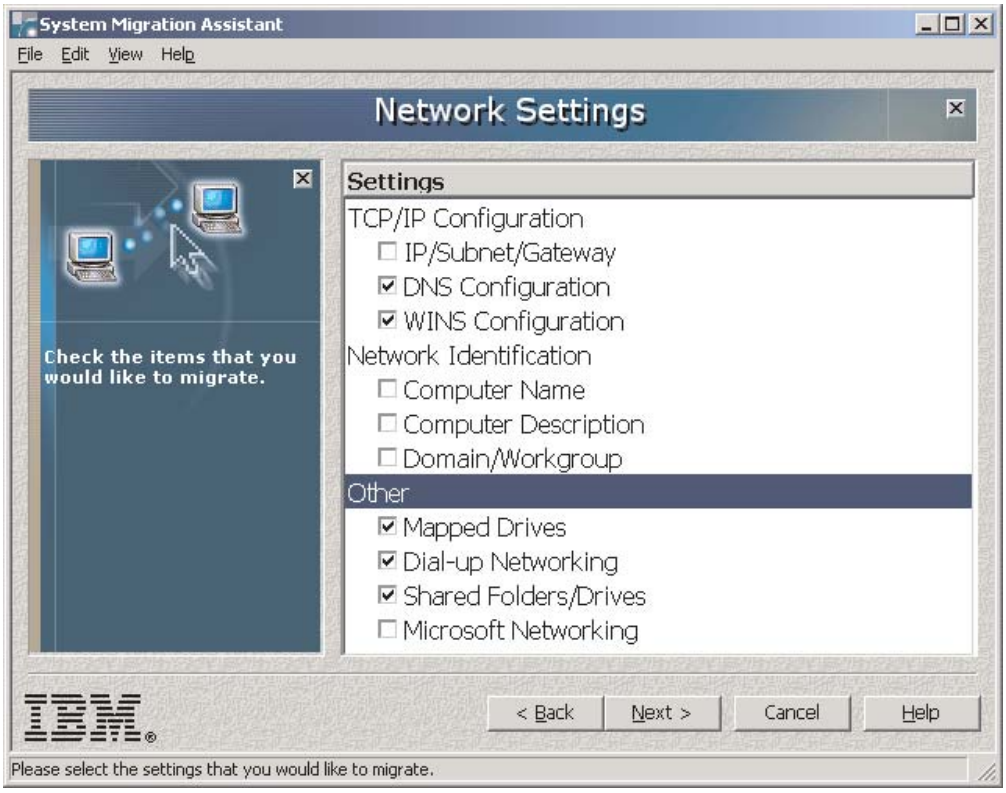

Figure 10. Capturing settings: "Network Settings" window

15. Select the network settings that you want to migrate:

    TCP/IP Configuration

    - IP/Subnet/Gateway
    - DNS Configuration
    - WINS Configuration

    Network Identification

    - Computer Name
    - Computer Description
    - Domain/Workgroup name

    Other

    - Mapped Drives
    - Dial-up networking
    - Shared Folders/Drives
    - Microsoft Networking
    - ODBC Data Sources

    The following restrictions apply to the network settings:

    - **Domain/Workgroup:** If the source system is a member of a domain and you want the target system to be a member of the same domain, create an account for the target system on the domain controller. If the domain controller is running Windows 2000 Server, make sure to select the **Allow pre-Windows 2000 computers to use this account** check box.

- **DNS Configuration:** The DNS settings do not migrate when you perform a peer-to-peer migration.
- **Microsoft Networking:** (Windows 95 and Windows 98 only) The target system must have Client for Microsoft Network installed before applying these migration settings. The following Client for Microsoft Network settings are captured:
  - Primary Network Logon
  - Logon Options
  - Logon Validation
  - Domain Name
  - Access Control

16. Click **Next**.
17. If you selected the **File and Folders** check box in step 4 on page 13, SMA scans the hard disk. Otherwise, go to step 23 on page 21.

    When the scanning process is completed, the “File Selection” window opens, and the “Association” page is displayed.

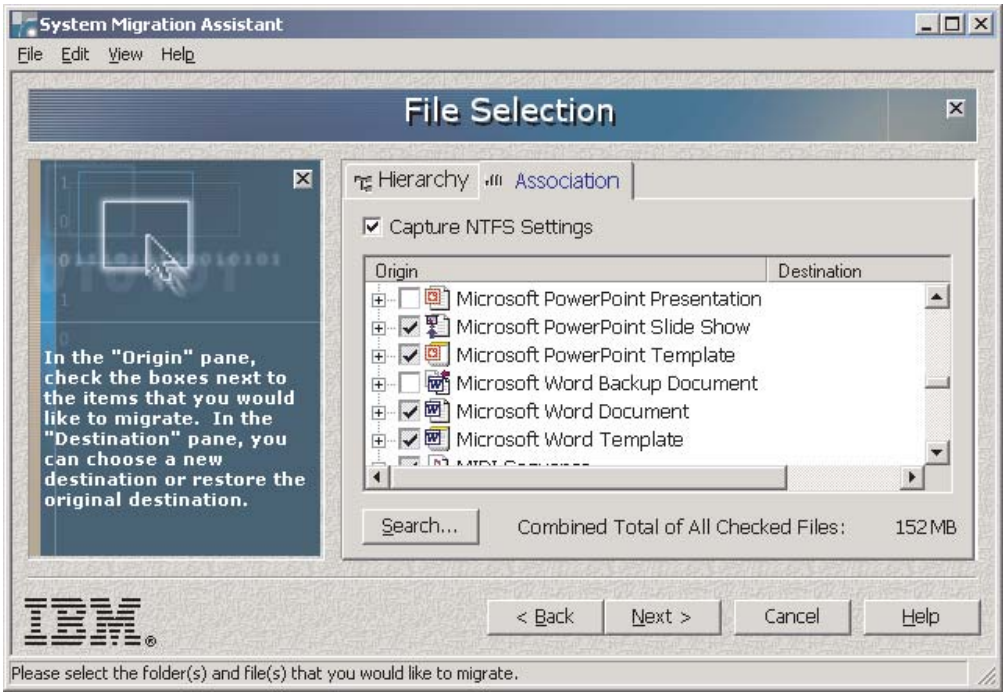

Figure 11. Capturing settings: “File Selection-Association” page

18. Select the files that you want to migrate. You can select individual files, all files of a specific type, or all files located in a specific directory. If you select a directory, all of the files that the directory contains are selected automatically.

    The “Association” page lists the files on the source system sorted by file type. You can select all the files of a specific type, or you can expand a file type and select individual files.

    To view the files sorted by location, click **Hierarchy**. The “Hierarchy” page is displayed.

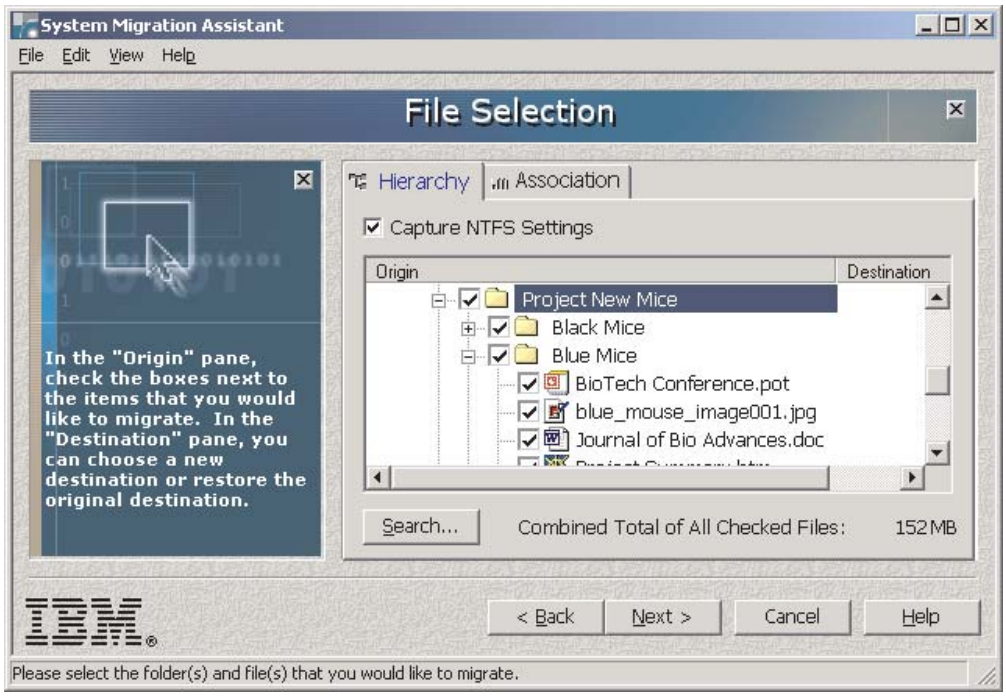

Figure 12. Capturing settings: "File Selection-Hierarchy" page

19. To search for specific files or file extensions, click **Search**. The "Search" window opens.

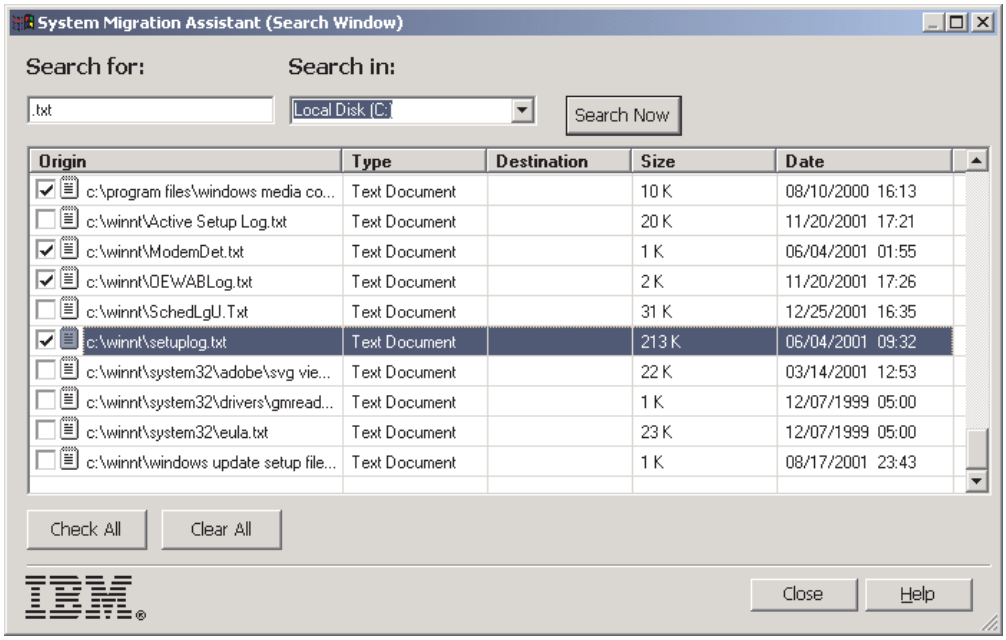

Figure 13. Capturing settings: "File Selection-Search" window

20. In the **Search for** field, type a file name. You can use wildcard characters, such as an asterisk (*) to match zero or more characters or a question mark (?) to match exactly one character. In the **Search in** field, select the hard disk that you want to search. Click **Search Now**.

Attention:

a. Do not migrate operating-system files. Doing so might cause the target system to malfunction.

b. Do not select the entire contents of the hard disk drive, because this selects all files, including the operating-system files.

c. Be cautious about selecting files with a DLL, EXE, or COM extension. SMA does not adjust the Windows registry entries; if you select application files, the application might not run properly on the target system.

21. Consider where you want the selected files to be located on the target system. If the source and target systems do not have similar hard disk configurations, you must select alternative destinations for files and directories.

    To change the destination location of a file, right-click the file. A menu is displayed.

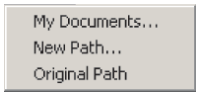

Figure 14. Capturing settings: Selecting file location

You can choose to locate the file in the “My Documents” directory, choose a new path, or keep the original path of the document.

- To locate the file in the “My Documents” directory, click **My Documents**. The “My Documents Destination” window opens. Select an option and click **OK**.

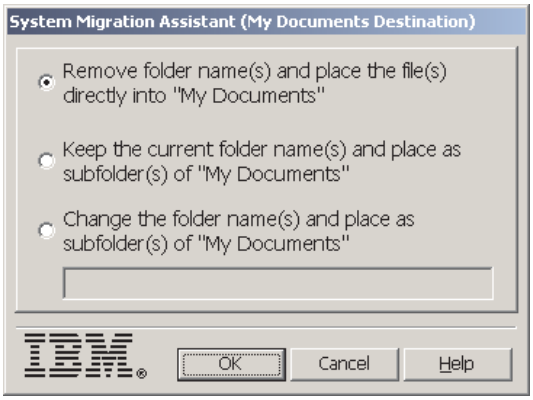

Figure 15. Capturing settings: “My Documents Destination” window

- To select an alternate path for the file, click **New Path**. The “New Path Destination” window opens. Select an option and click **OK**.

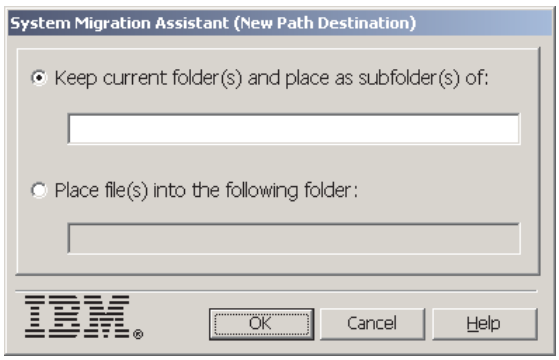

Figure 16. Capturing settings: "New Path Destination" window

- To keep the original path of the file, click **Original Path**. By default, when SMA migrates a file to a directory that contains a file with the same name, the file is overwritten. (You can customize the config.ini file to prevent files from being overwritten; for more information, see "Customizing the standard migration" on page 57.)

  Attention: Be careful when changing the location of files. Batch and configuration files might contain fully qualified path names; if you change the location of the files and directories to which the batch and configuration files refer, the programs or tasks will not run successfully.

22. Click **Next**.
23. If you selected the **User Profiles** check box in step 4 on page 13, the "User Profiles" window opens. Otherwise, the "Profile Location" window opens; go to step 26 on page 22.

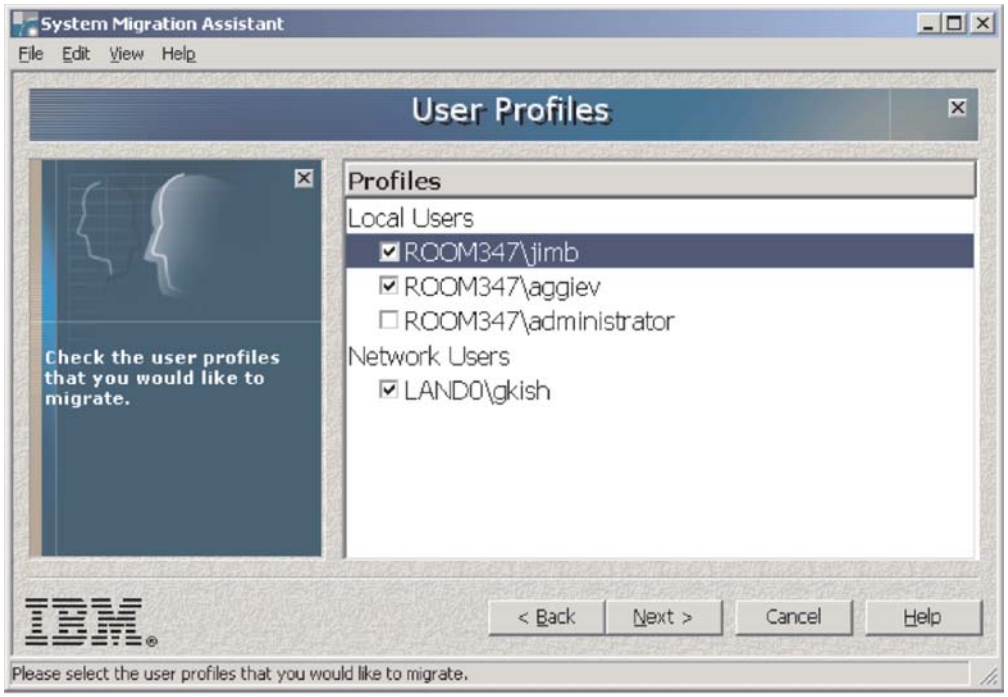

Figure 17. Capturing settings: "User Profiles" window

The profiles of the current user and the guest account are not displayed.

24. Select the user profiles that you want to migrate. SMA migrates the user-specific settings stored in the profile in addition to the contents of the “My Documents” folder. For a local profile, the user password is not migrated, it is reset to the user name.

    The following restrictions apply to the user profiles:

    - You cannot migrate user profiles from a source system running Windows 95 or Windows 98 to a target system running Windows 2000 Professional or Windows XP Professional.
    - (Windows 2000 and Windows XP Professional) To migrate user profiles, the operating-system account that you use must have administrative privileges and it must have the “Act as part of the operating system” privilege selected in the local security policy. You can set this privilege manually before you migrate a user profile to a target system.

25. Click **Next**.The “Profile Location” window opens.

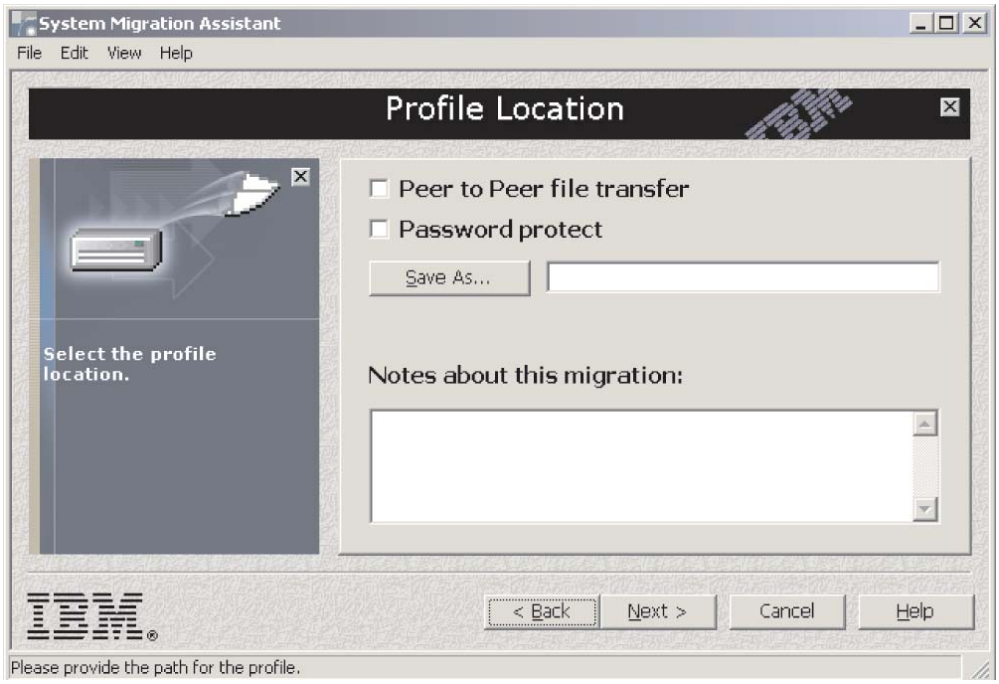

Figure 18. Capturing settings: “Profile Location” window

26. To perform a peer-to-peer migration, select the **Peer to Peer file transfer** check box.

    When you complete the remaining selections in the window and click **Next**, the peer-to-peer instructions are displayed. For more information on peer-to-peer migration, see “Performing a standard peer-to-peer migration” on page 50.

27. To password protect the SMA profile, select the **Password protect** check box.

    When you complete the remaining selections in the window and click **Next**, you are prompted to select a password.

28. In the **Notes about this migration** field, type a brief description (maximum of 1024 characters) to help identify the SMA profile.

29. Complete the following steps to save the SMA profile:
    a. Click **Save As...**. The “Save As” window opens.
    b. In the **Save in** field, navigate to the folder in which you want to save the profile.
    c. In the **Save As** field, type a descriptive name for the profile.
    d. Click **Save**.
30. Click **Next**. If you selected the Password protect option in step 27 on page 22, the “Password” window opens. Complete the following steps:
    a. In the **Password** field, type a password. The password must be between 6 and 16 characters long, contain a non-numeric character in the first and last positions, and cannot contain consecutive identical characters.
    b. In the **Confirm Password** field, re-type the password.
    c. Click **OK**. The “Copy Progress” window opens.

    If you did not select the Password protect option, the “Copy Progress” window opens.

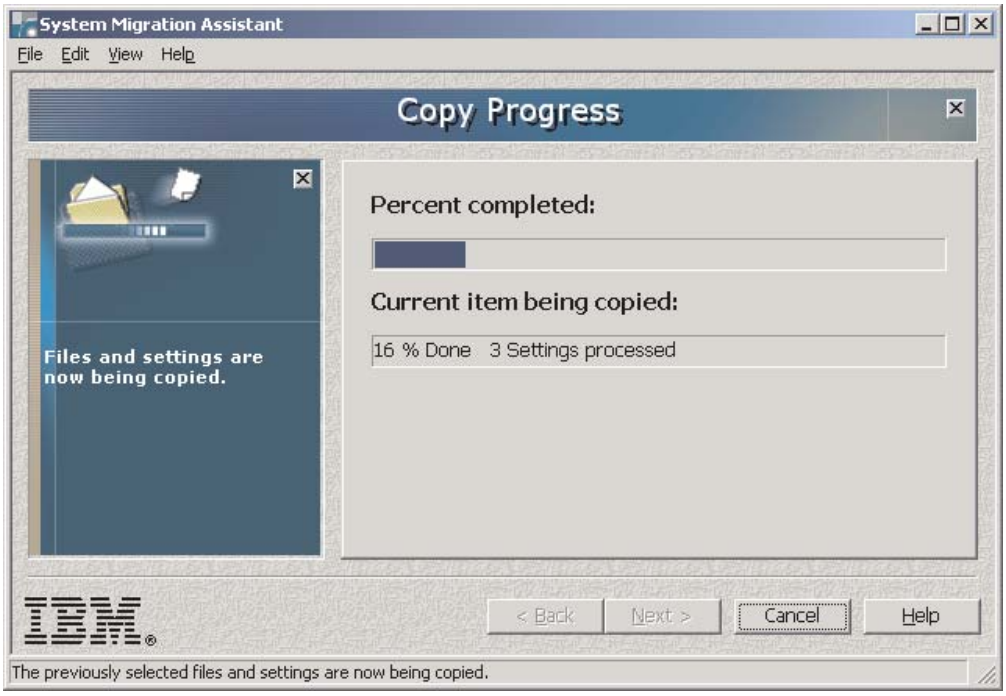

Figure 19. Capturing settings: “Copy Progress” window

SMA copies your settings and files to the profile file. This might take several minutes, depending on how many settings and files are being copied.

When the profile file is created, a “Migration Summary” window opens. The summary lists only errors that occurred and the location of the log file.

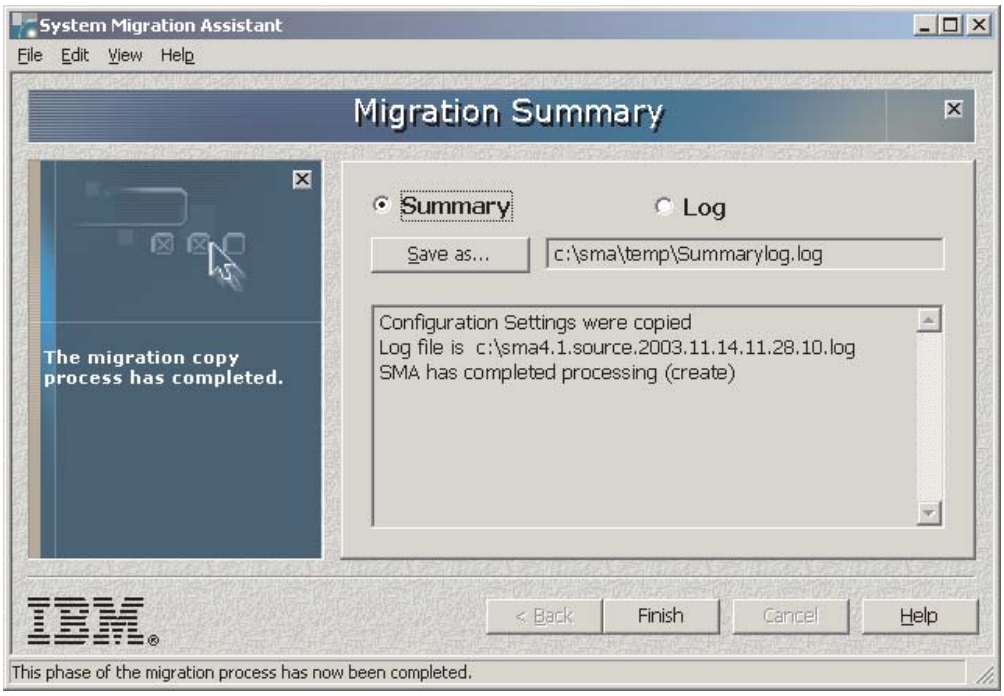

Figure 20. Capturing settings: "Migration Summary" window

31. To view the log file, click **Log**. The log file is displayed in the pane at the bottom of the window.
32. Complete the following steps to save the summary or log file to a different location:
    a. Click **Summary** or **Log**.
    b. Click **Save As...**. The "Save As" window opens.
    c. In the **Save in** field, navigate to the directory where you want to save the file.
    d. In the **Save As** field, type a descriptive name for the file.
    e. Click **Save**.
33. Click **Finish**.

Applying an SMA profile

If you want to edit the profile before applying it, go to "Editing and applying a profile" on page 27. If you want to perform a peer-to-peer migration, go to Chapter 5, "Performing a peer-to-peer migration", on page 49.

Note: If the profile contains domain settings, you must create a new operating-system account on the target system before applying the profile.

Complete the following steps to apply an SMA profile to a target system:

1. Log on to the target system using the same operating-system account that you used to create the profile.

   Note: If you log on to the target system using an operating-system account other than the one used on the source system, some application-specific user settings might not be applied.

2. Click **Start** → **Programs** → **IBM System Migration Assistant** → **System Migration Assistant**. The “System Migration Assistant window” opens.

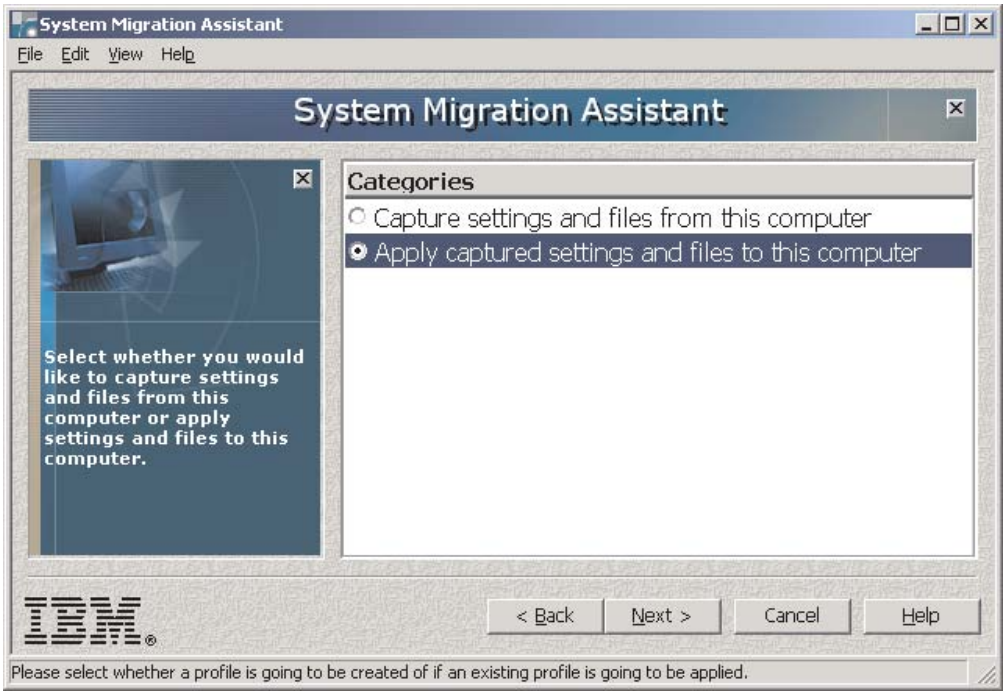

Figure 21. Applying settings: “System Migration Assistant” window

3. Click **Apply captured settings and files to this computer**; then, click **Next**. The “Profile Location” window opens.

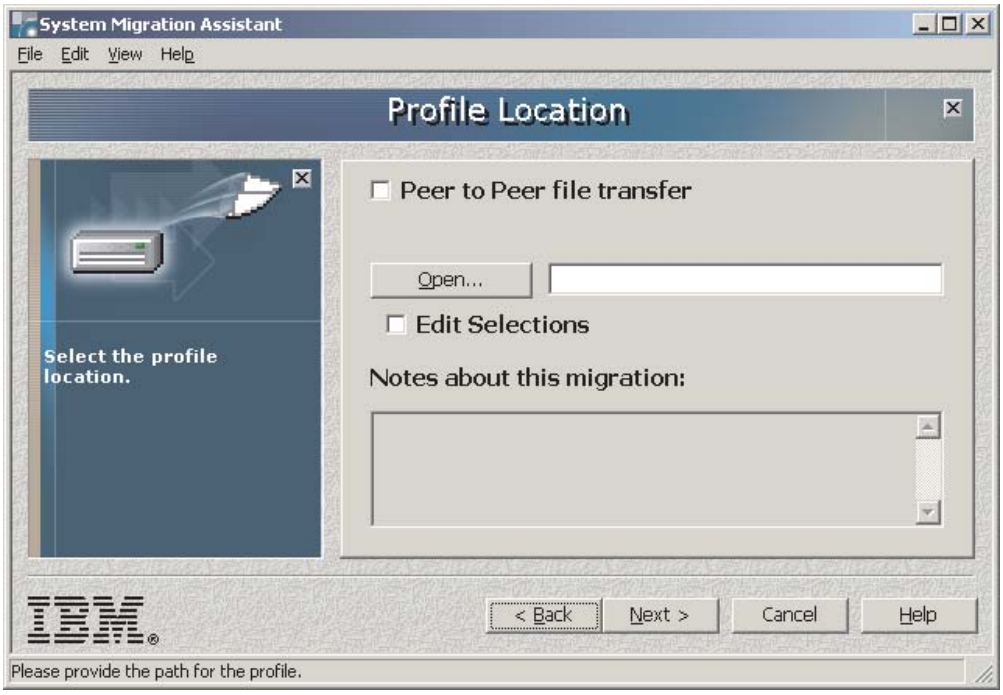

Figure 22. Applying settings: “Profile Location” window

4. Click **Open...**. The “Open” window opens.
5. Navigate to the SMA profile and click **Open**. Notes about the selected profile are displayed in the **Notes about this migration** field.
6. Click **Next**. If the profile file is password protected, you are prompted to provide a password. The “Copy Progress” window opens.

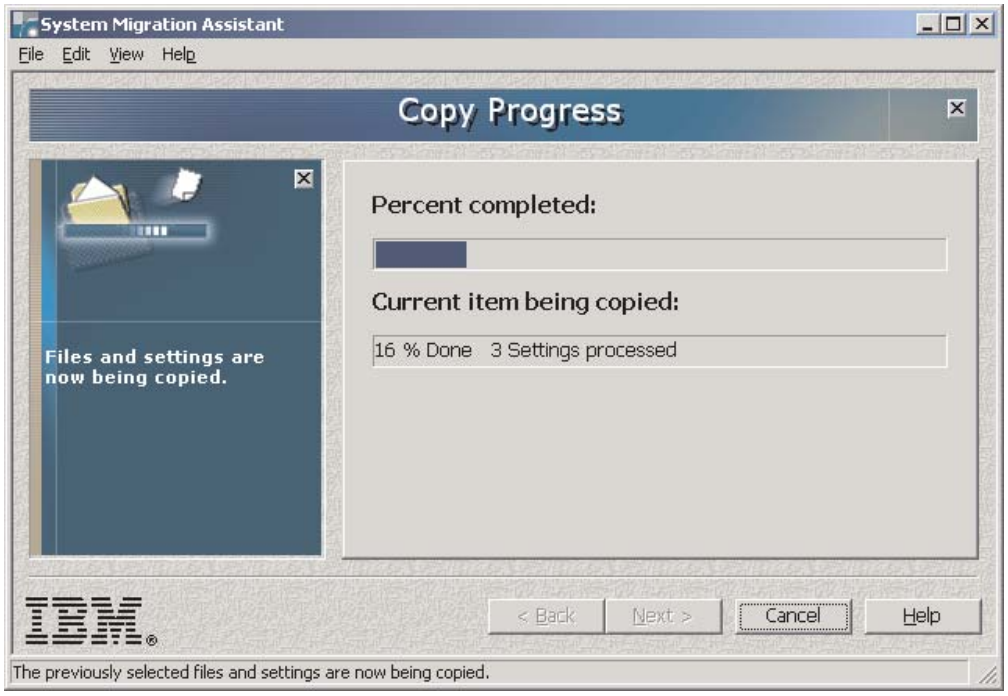

Figure 23. Applying settings: “Copy Progress” window on target system

SMA copies the profile to the target system. This might take several minutes, depending on how many settings and files are being copied.

After the profile is applied, a “Migration Summary” window opens. The summary lists any errors that occurred and the location of the log file.

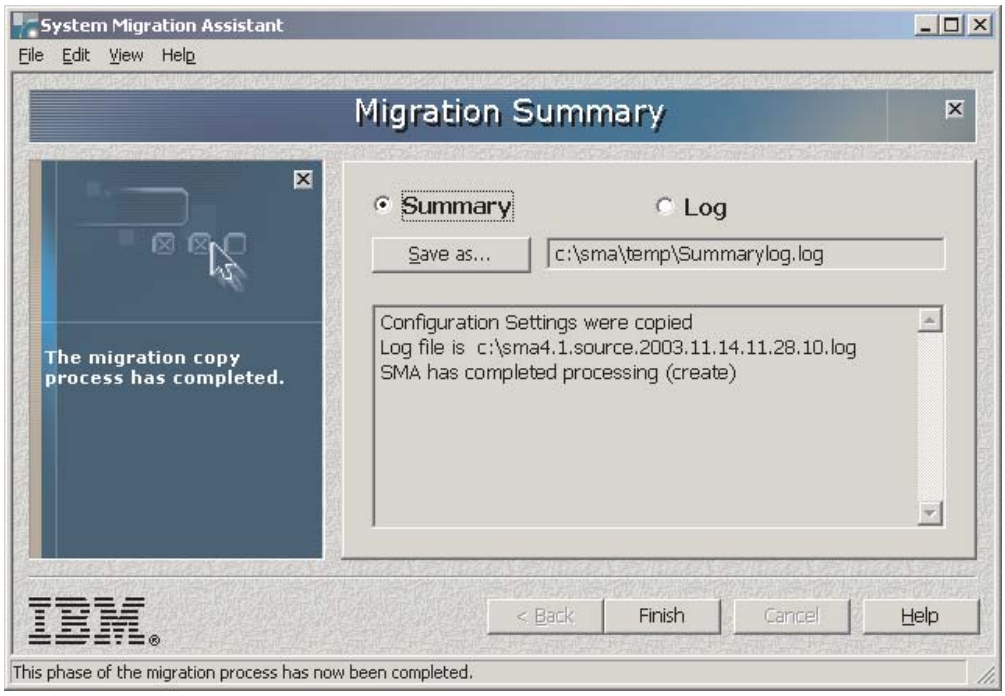

Figure 24. Applying settings: "Migration Summary" window

7. To view the log file, click **Log**. The log file is displayed in the pane at the bottom of the window.
8. Complete the following steps to save the summary or log file to a different location:
   a. Click **Summary** or **Log**.
   b. Click **Save As...**. The "Save As" window opens.
   c. In the **Save in** field, navigate to the directory where you want to save the file.
   d. In the **Save As** field, type a descriptive name for the file.
   e. Click **Save**.
9. Click **Finish**.

Editing and applying a profile

You can edit the profile during the apply phase to change which settings and files are applied. To customize the profile, you use the Edit Selections function.

Note: If the profile contains domain settings, you must create a new operating-system account on the target system before applying the profile.

Complete the following steps to edit and apply a profile to a target system:

1. Log on to the target system using the same operating-system account that you used to create the profile.

   Note: If you log on to the target system using an operating-system account other than the one used on the source system, some application-specific user settings might not be applied.

2. Click **Start** → **Programs** → **IBM System Migration Assistant** → **System Migration Assistant**. The “System Migration Assistant window” opens.

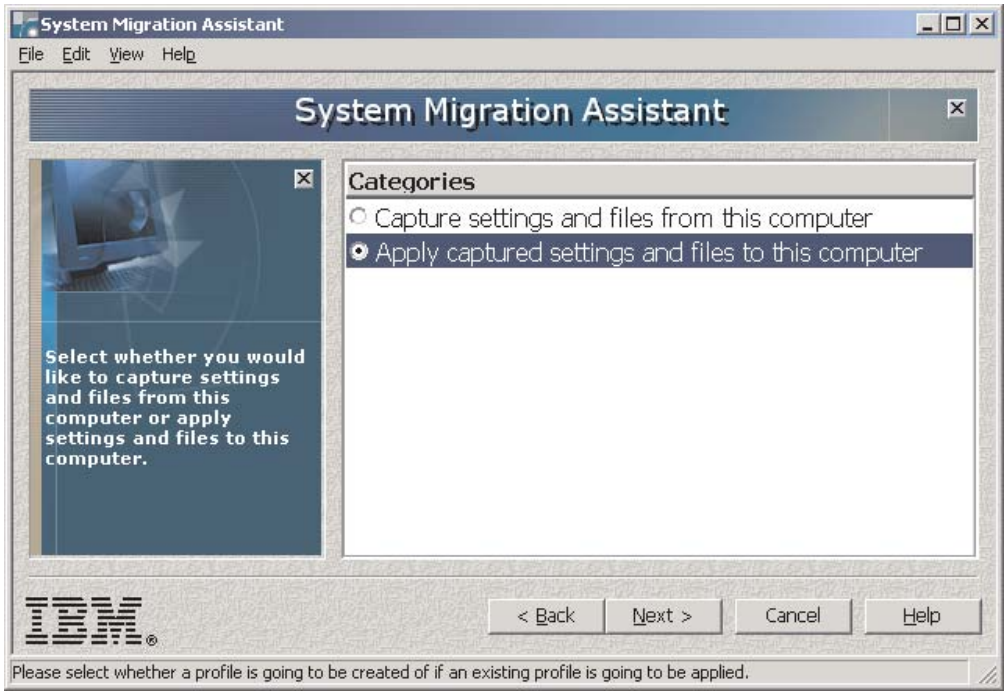

Figure 25. Editing and applying a profile: “System Migration Assistant” window

3. Select **Apply captured settings and files to this computer**; then, click **Next**. The “Profile Location” window opens.

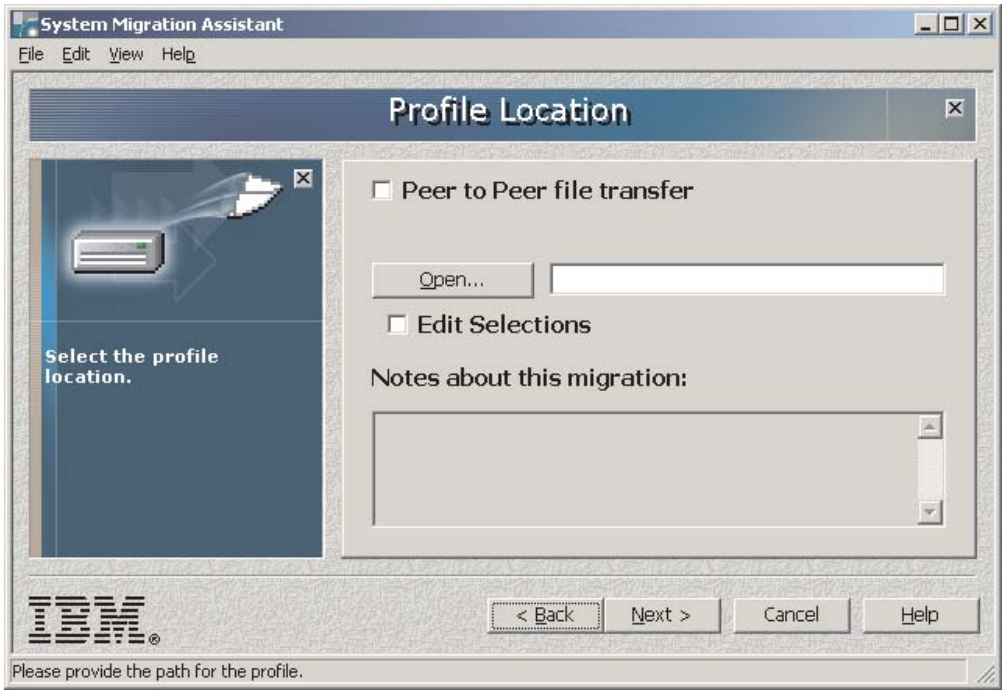

Figure 26. Editing and applying a profile: “Profile Location” window

4. Click **Open...**. The “Open” window opens.
5. Navigate to the SMA profile and click **Open**. Notes about the selected profile are displayed in the **Notes about this migration** field.
6. Select the **Edit Selections** check box; then, click **Next**.
7. If you selected the Desktop option when you captured the profile, the “Desktop Settings” window opens. Otherwise, go to step 9.

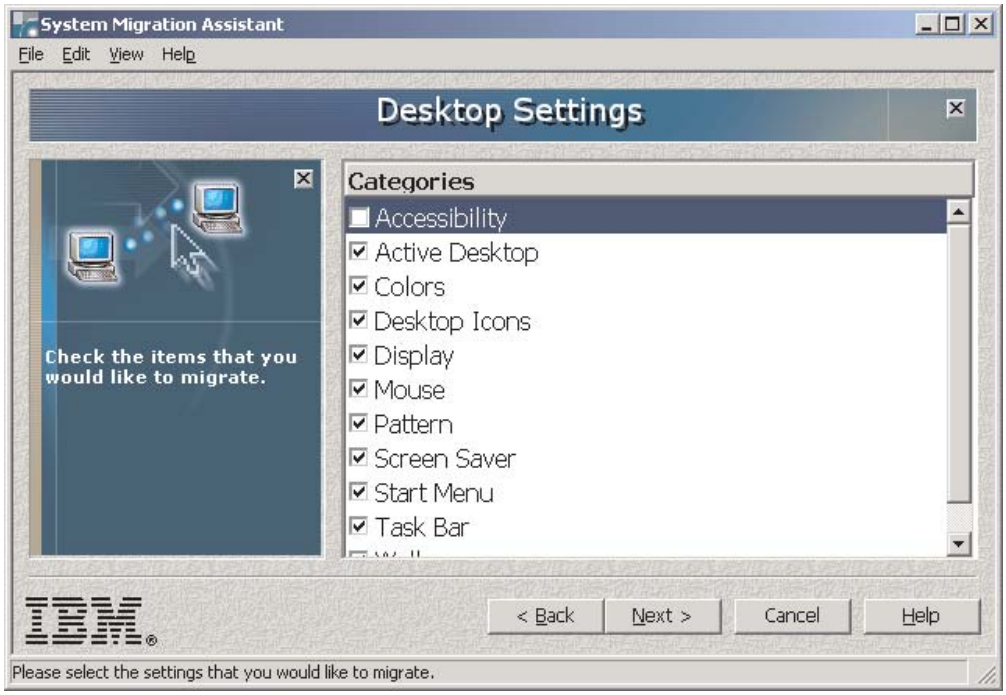

Figure 27. Editing and applying a profile: “Desktop Settings” window

The desktop settings selected during the capture phase are displayed. You can clear one or more of the check boxes.

8. Click **Next**.
9. If you selected the Application Settings option when you captured the profile, the “Application Settings” window opens. Otherwise, go to step 11 on page 30.

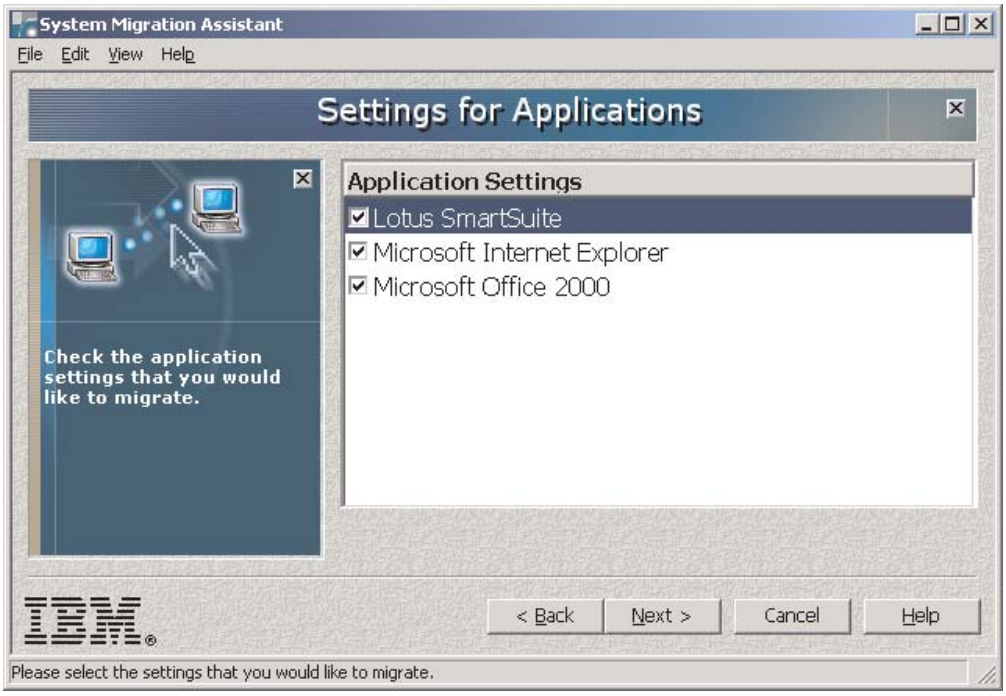

Figure 28. Editing and applying a profile: "Settings for Applications" window

The application settings selected during the capture phase are displayed. You can clear one or more of the check boxes.

10. Click **Next**.
11. If you selected the Printer option when you captured the profile, the "Printer Settings" window opens. Otherwise, go to step 13 on page 31.

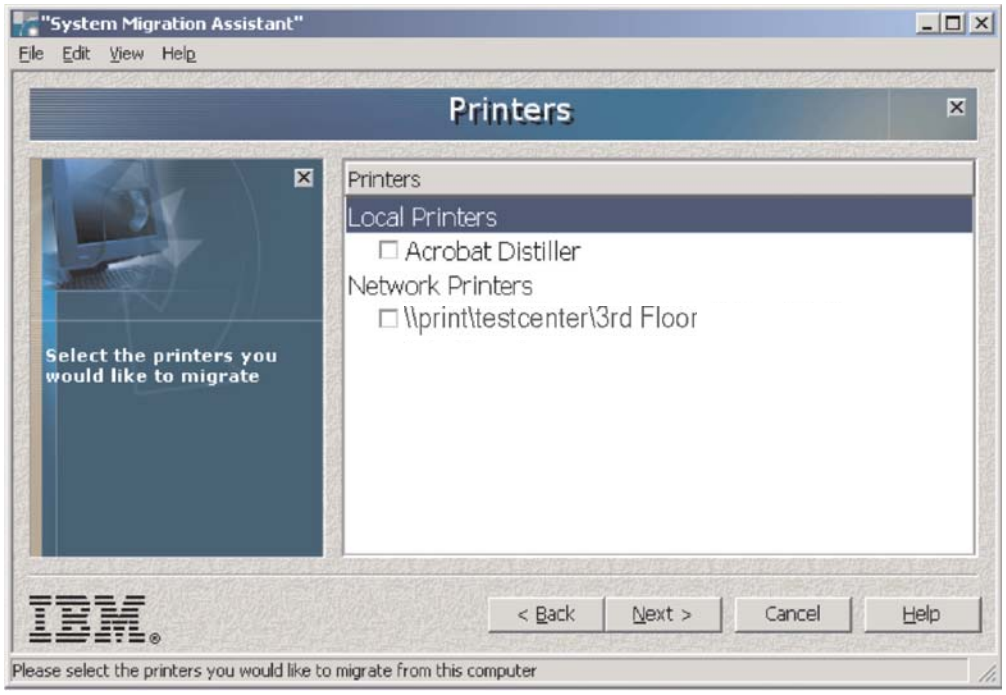

Figure 29. Editing and applying a profile: "Printers" window

The printers selected during the capture phase are displayed. You can clear one or more check boxes

12. Click **Next**.
13. If you selected the Network option when you captured the profile, the “Network Settings” window opens. Otherwise, go to step 17 on page 32.

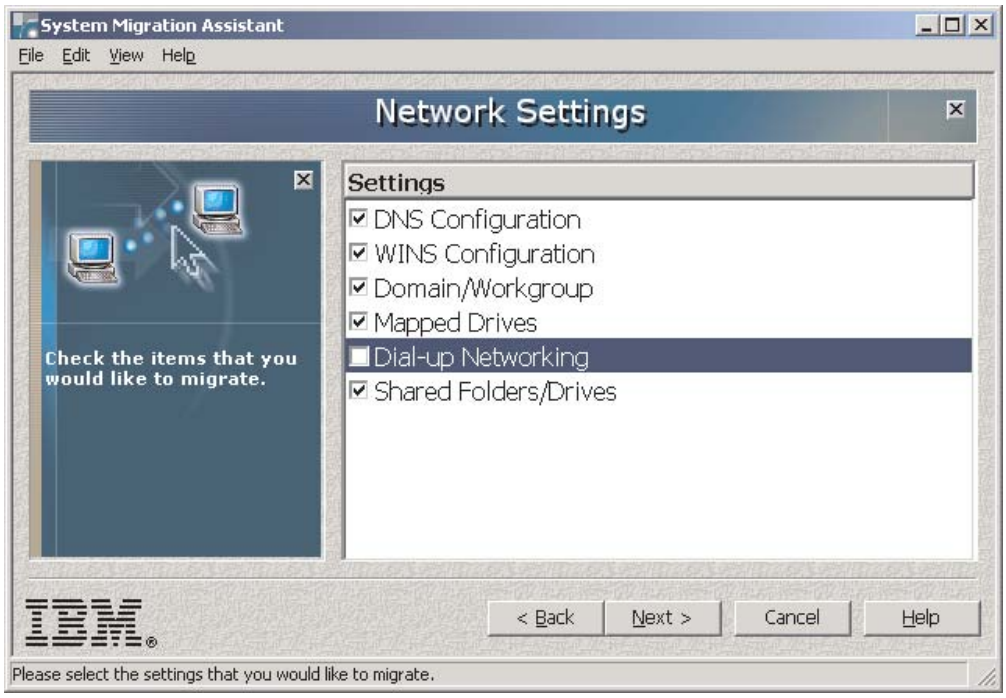

Figure 30. Editing and applying a profile: “Network Settings” window

The network settings selected during the capture phase are displayed. You can clear one or more of the check boxes.

14. Click **Next**.
15. If you selected an editable network option when you captured the profile, the “Editable Network Settings” window opens.

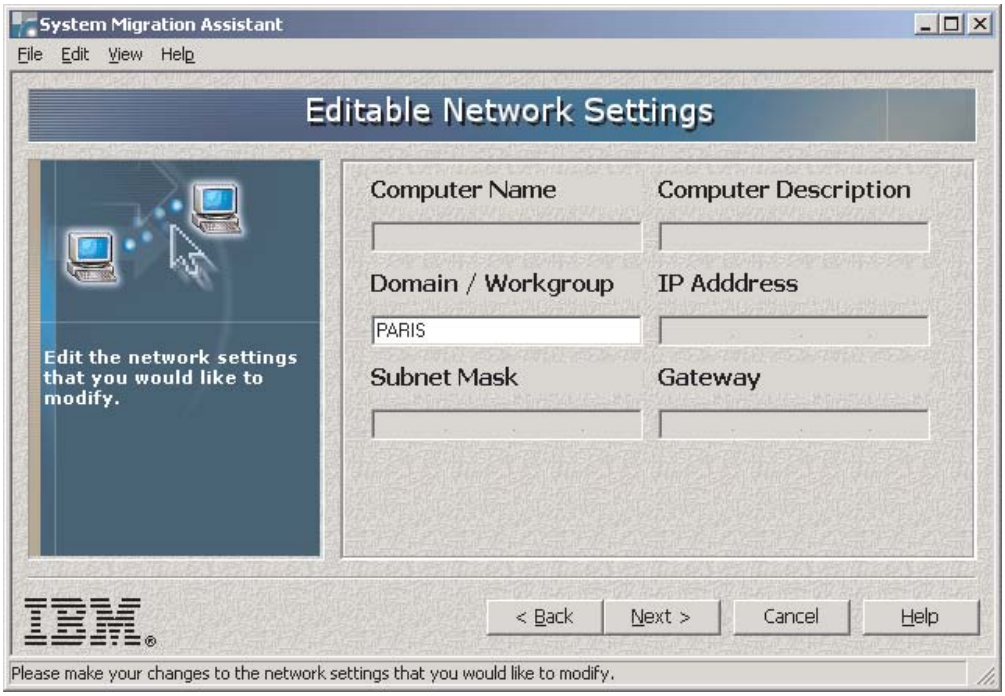

Figure 31. Editing and applying a profile: "Editable Network Settings"

The editable network settings that you selected during the capture phase are displayed.

Notes:

a. If the target system is in the same domain as the source system and you are keeping the source system operational, you must change the IP address and computer name.

b. You cannot apply both the computer name and the domain name. If you want to migrate both settings, you must first apply one setting, and then reapply the profile and select the second setting.

16. Click **Next**.
17. If you selected the Files and Folders option when you captured the profile, the "Files and Folders" window opens. Otherwise, go to step 19 on page 33.

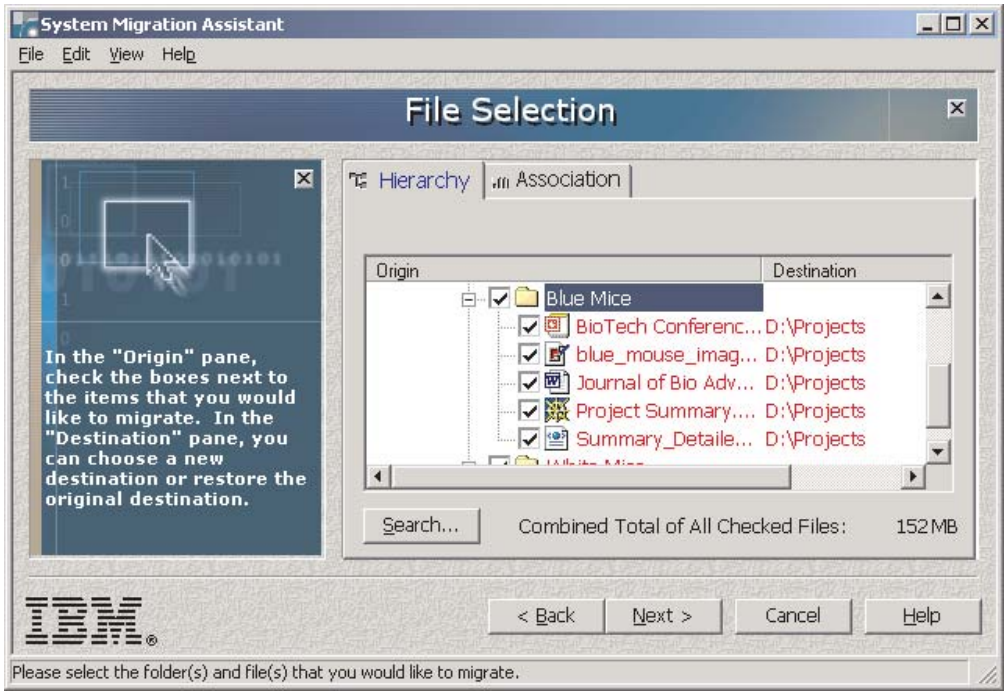

Figure 32. Editing and applying a profile: "File Selection-Hierarchy" page

The files and directories selected during the capture phase are displayed. You can clear one or more check boxes.

18. Click **Next**.
19. If you selected the User Profiles Settings option when you captured the profile, the "User Profiles" window opens. Otherwise, go to step 20 on page 34.

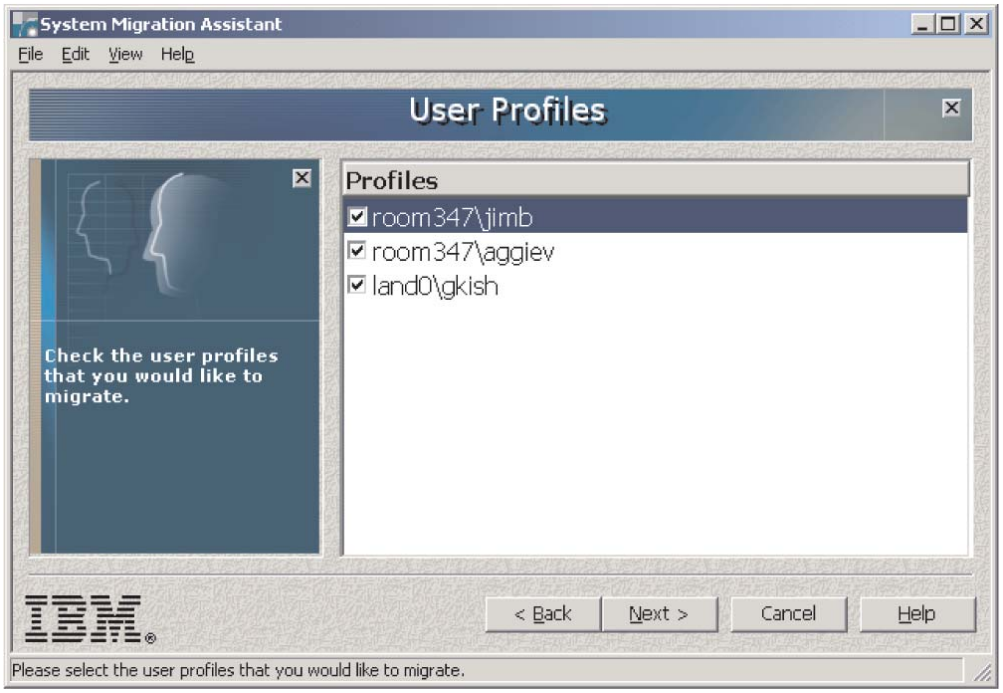

Figure 33. Editing and applying a profile: "User Profiles" window

The user profiles selected during the capture phase are displayed. You can clear one or more check boxes.

20. Click **Next**.
21. When prompted to start processing, click **Yes**. If you are migrating a domain setting, the “Domain Authority Dialog” window opens. Otherwise, go to step 24.

Figure 34. Editing and applying a profile: “Domain Authority Dialog” window

22. Provide a user name and password of an existing operating-system account with the authority to create an account in the domain.
23. Click **OK**.
24. The “Copy Progress” window opens.

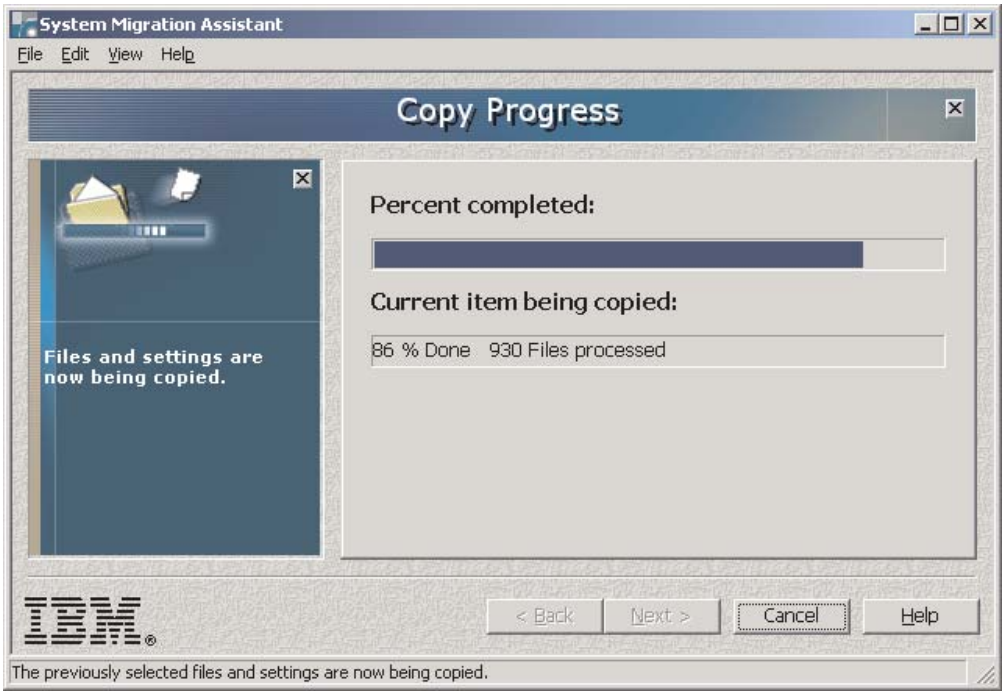

Figure 35. Editing and applying a profile: “Copy Progress” window

SMA copies the profile to the target system. This might take several minutes, depending on how many settings and files are copied.

Attention: You can click **Cancel** to stop the copy process; however, all changes that were completed before you clicked **Cancel** are applied, including any incomplete settings that SMA was in the process of migrating. Depending on the settings that were applied, the operating system might be unstable or might fail.

25. After the profile is applied, a “Migration Summary” window opens. The summary lists any errors that occurred and the location of the log file.

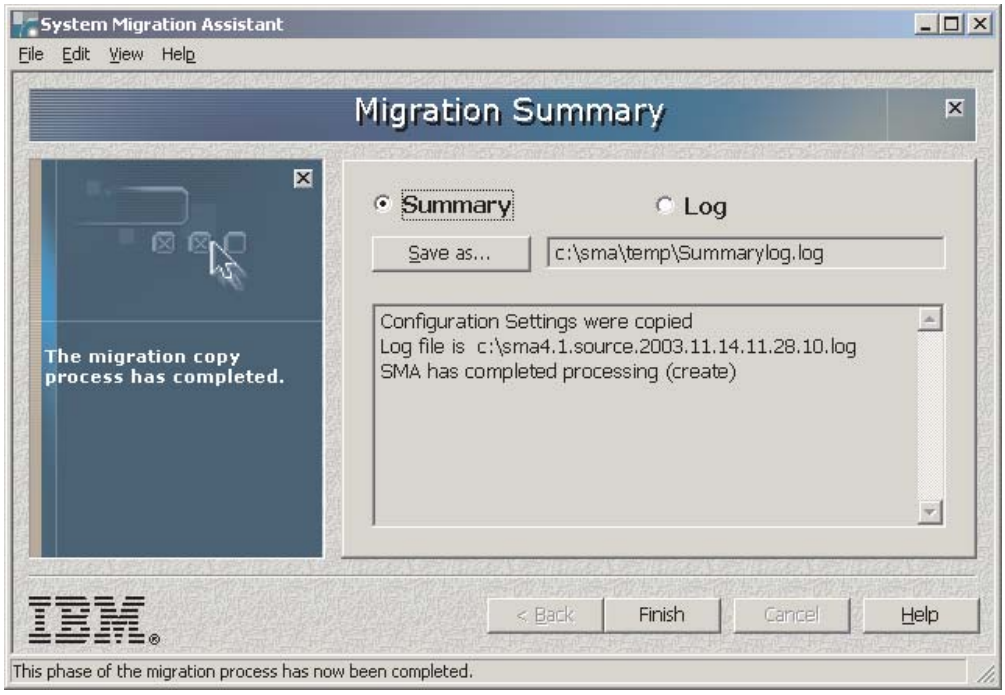

Figure 36. Editing and applying a profile: “Migration Summary” window on source

26. To view the log file, click **Log**. The log file is displayed in the pane at the bottom of the window.
27. Complete the following steps to save the summary or log file to a different location:
    a. Click **Summary** or **Log**.
    b. Click **Save As...**. The “Save As” window opens.
    c. In the **Save in** field, navigate to the directory where you want to save the file.
    d. In the **Save As** field, type a descriptive name for the file.
    e. Click **Save**.
28. Click **Finish**. Depending on the contents of the profile, you might be prompted to restart the system.

Chapter 4. Performing a migration in batch mode

This chapter contains information about performing a migration in batch mode.

You can use standard or batch mode migration interchangeably. When you capture files and settings or apply a profile using the GUI, smabat.exe is started in the background. File migration functions the same in both modes; however, in batch mode, you select files and folders using inclusion and exclusion of characteristics.

The profiles produced in standard and batch mode are the same. If you create a profile in batch mode, you can open the profile and examine its contents by using the user interface. Similarly, you can use the GUI to create a command-file template, although you must add file migration criteria manually.

smabat syntax

The SMA executable file is smabat.exe. If you installed SMA in the default location, it is located in the *d*:\Program Files\IBM\SMA directory, where *d* is the drive letter of the hard disk drive.

The smabat command uses the following syntax:

```
smabat /c :cmdfile [/n smafile] | /a [cmdfile] /n smafile | /e smafile [options]
```

Note: If a fully qualified file name includes any spaces, such as c:\Program Files\IBM\SMA\Commandfile.text, you must enclose the file name in quotation marks.

The following table describes the primary parameters of the SMABAT command.

Table 1. Primary SMABAT parameters

Function	Syntax	What it does
Capture	/c *cmdfile* /n *smafile* where • *cmdfile* is the fully qualified file name of the command file. • /n *smafile* is an optional parameter that specifies an alternative profile, and *smafile* is the fully qualified name of the profile.	Captures the files and settings specified in the command file and creates a profile. By default, the profile is written to the directory that is specified in the command file. You also can write the profile to an alternative directory.
Apply	/a *cmdfile* /n *smafile* where • *cmdfile* is an optional parameter that specifies a command file. • *smafile* is the fully qualified name of the profile.	Applies the files and settings specified in the profile. You also can select to run a command file against the profile before it is applied to the target system.
Extract	/e *smafile* where *smafile* is the fully qualified name of the profile.	Extracts the command file used to create a profile.

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There are additional optional parameters that you can use with the **smabat** command. The following table contains information about the optional SMA parameters.

Table 2. Optional SMABAT parameters

Function	Syntax	What it does
Log file	/o *logfile* where *logfile* is the fully qualified file name of the log file.	Specifies the location of the log file.
Temporary directory	/t *tmpdir* where *tmpdir* is the fully qualified name of the temporary SMA directory.	Specifies the location of the temporary SMA directory.
Password	/p *smapwd* where *smapwd* is one of the following values: • The password used to password protect a profile during the capture phase • The password used to access a password-protected profile during the apply phase Passwords must meet the following criteria: • Be at least six characters and no more than 16 characters • Contain a non-numeric character in the first and last positions • Have no two identical consecutive characters	Specifies the password for an SMA profile.
Domain account information	/jdu *userid* /jdp *pwd* where • *userid* is an existing user name. • *pwd* is the corresponding password. The operating-system account must have either account owner or administrator privileges in the domain.	/jdu specifies a domain user name. /jdp specifies a password for the user name. This parameter is required only if you are migrating domain settings. **Note:** This parameter can be used only in an apply command.
Verbose logging	/v	Enables verbose logging.
Preview	/r	Generates a log file only. **Note:** This parameter can be used only in a capture command.

Creating a command file

During the capture phase, smabat.exe reads the contents of the command file and creates a profile. This section contains information about command files and the statements that they can contain.

SMA provides a default command file (commandfile.txt) that you can use as a template to create a customized command file. If you installed SMA in the default location, this file is located in the *d*:\Program Files\IBM\SMA directory, where *d* is the drive letter of the hard disk drive.

Consider the following points concerning SMA command files:

- Use semicolons to indicate comments.
- The **smabat** command is not case-sensitive.
- The **smabat** command processes statements in the order in which they appear in the command file.
- Each section must be clearly marked with a beginning and end; each parameter and its value must be typed on a separate line.
- Syntax errors might cause an error when you run SMA. If SMA encounters an error, it writes the error to the log file and continues the operation. Depending on the severity of the error, the end results might be flawed.

Command file commands

The following table contains information about the commands, with the exception of those concerning file migration or the registry, that can be used in a command file.

Table 3. Command file commands

Command	Parameters	Parameter values and examples
password	plain_password	To specify a password, set plain_password to an alphanumeric string. The string must be between four and 16 characters in length. If you issue the /p parameter from the command line prompt, the password you specify overwrites any password set in the command file. **Note:** You cannot use a password with an executable SMA profile.

profile_path_and_name	output_profile	To specify the path and file name of the profile file, set output_profile to the path and file name of the profile file.
		
		For example:
		`[profile_path_and_name_start]`
		`output_profile = c:\temp\myprofile.sma`
		`[profile_path_and_name_end]`
		
		You also can specify the location of the profile file using the following notation:
		`\\mycomputer\temp\myprofile.sma`

Table 3. Command file commands (continued)

Command	Parameters	Parameter values and examples
desktop	• accessibility • active_desktop • colors • desktop_icons • display • icon_font • keyboard • mouse • pattern • screen_saver • sendto_menu • shell • sound • start_menu • taskbar • wallpaper • window_metrics	To select a desktop setting, set the parameter to 1. Otherwise, set the parameter to 0 or leave it unspecified.
network	• ip_subnet_gateway_configuation • dns_configuration • wins_configuration • computer_name • computer_description • domain_workgroup • mapped_drives • shared_folders_drives • dialup_networking • microsoft_networking • odbc_datasources	To select a network setting, set the parameter to 1. Otherwise, set the parameter to zero or leave it unspecified.

applications	See Appendix A, “Application settings available for migration”, on page 71 for a list of supported applications.	To capture or apply the supported application settings, specify the application name as a parameter in the command file.
		
		For example:
		`[applications_start]`
		`Lotus Notes`
		`Lotus SmartSuite`
		`Microsoft Office`
		`Microsoft Outlook`
		`[applications_end]`

userprofiles	GetAllUserProfiles	To capture all user profiles, set GetAllUserProfiles to 1. Otherwise, specify users individually.
		
		For example:
		`[userprofiles_start]`
		`JANESCOMPUTER\administrator`
		`MYDOMAIN\janed`
		`[userprofiles_end]`

Table 3. Command file commands (continued)

Command	Parameters	Parameter values and examples
migrationnote		To include information that pertains to the profile, type a note. The note cannot be more than 1024 characters in length.
misc_settings	bypass_registry	To deselect all registry settings, set bypass_registry to 1. Otherwise, set bypass_registry to zero or leave it unspecified.
	quota	To restrict the amount of uncompressed data that can be captured, specify a limit in MB.
	stop_if_quota_exceeded	To stop SMA when the quota is exceeded, set stop_if_quota_exceeded to 1. Otherwise, set the parameter to zero or leave it unspecified.
	printers	To capture or apply printer settings, set printers to 1. Otherwise, set printers to zero. **Note:** This parameter is not optional.
	defaultprinteronly	To migrate only the default printer settings, set defaultprinteronly to 1. Otherwise, set the parameter to zero or leave it unspecified.
	capture_ntfs_attribute	To select the parameter, set capture_nfts_attribute equal to 1. Otherwise, set the parameter to zero or leave it unspecified.
	user_exit	To launch an application after migration is completed, set user_exit to the fully qualified name of an executable file.
	overwrite_existing_files	To overwrite existing files, set overwrite_existing_ files to 1. Otherwise, set overwrite_existing_ files to 0 or leave it unspecified.

Table 3. Command file commands (continued)

Command	Parameters	Parameter values and examples
Misc settings cont.	temp_file_location	To specify the directory to which SMA writes temporary files, set temp_file_location to a fully qualified directory name. The directory you specify can be a shared directory on another system. If you do not set this parameter, SMA writes temporary files to *d*:\sma\temp, where *d* is the drive letter of the hard disk drive.
	log_file_location	To specify the directory to which SMA writes log files, set log_file_location to the fully qualified directory name. The directory you specify can be a shared directory on another system. If you do not set this parameter, SMA writes temporary files to *d*:\, where *d* is the drive letter of the hard disk drive.
	alternate_print_driver_location	To specify an alternate location of printer driver files, set alternate_print_driver_location to the appropriate path.
	removable_media	To enable the use of removable media, set the removable_media to 1. Otherwise, set the parameter to 0 or leave it unspecified.
	AutoReboot	To restart (reboot) SMA after a target-side migration is completed, set AutoReboot to 1. Otherwise, set AutoReboot to 0 or leave it unspecified.
	resolve_icon_links	To copy only icons with active links, set resolve_icon_links to 1. Otherwise, set the parameter to 0 or leave it unspecified.
	file_span_size	Specify a size in KB. When a profile reaches this size, it is spanned.
	createselfextractingexe	To create an executable SMA profile, set createselfextractingexe to 1. Otherwise, set the parameter to 0. **Note:** You cannot use a password with an executable SMA profile.
	using_peer_to_peer_migration	To perform a peer-to-peer migration, set using_peer_to_peer_migration to 1. Otherwise, set the parameter to 0. **Note:** The createselfextractingexe parameter and the using_peer_to_peer_migration parameter cannot both be set to 1. You cannot perform a peer-to-peer migration and create an executable SMA profile at the same time.
editable_connectivity	computer_name	Specify a computer name for the target system.
	computer_description	Specify a description for the target system.
	ip_address	Specify an IP address for the target system.
	subnet	Specify a subnet for the target system.
	gateway	Specify a gateway for the target system.
	domain_workgroup	Specify a domain workgroup for the target system.

File-migration commands

SMA processes file-migration commands in strict serial order. For example, if a file inclusion command is followed by a file exclusion command that is in turn followed by a file inclusion command, SMA will include files on the basis of the first command, then it will exclude files from the resulting set on the basis of the exclude command, and then it will include files from the original set of scanned files on the basis of the third command.

SMA will select and deselect files on the basis of the original location of files and folders on the source computer. File redirection statements are stored in the profile and are interpreted during the apply phase after the file deselection commands have been processed.

The processing of file and directory names is not case sensitive. If a file-migration command contains more than one statement, only the last statement is used.

The following table contains information about the file-migration commands. All file migration commands are optional.

Table 4. File-migration commands

Command	Parameter	What it does
exclude_drives	The drive letter of the hard disk drive.	Excludes drives from being scanned. **Note:** To use this command, you must place it at the beginning of the file-migration section of the command file.

Table 4. File-migration commands (continued)

Command	Parameter	What it does

IncludeFile	*Filename*, [*TargetDirectory*] [*Operand* , *DateOrSize*]
	
	where
	• *Filename* is the fully-qualified filename. You can use wildcard characters in the filename only. Logical locations such as “My Documents” cannot be used.
	• *TargetDirectory* is an optional parameter that specifies the location on the target system where the files are written. Wildcard characters cannot be used in the directory name, but logical names can be used.
	• [*Operand* , *DateOrSize*] is an optional command that you use to select files based on their age or size, and where:
	– *Operand* is either NEWER or OLDER, and *DateOrSize* is the baseline date in mm/dd/yyyy format.
	– *Operand* is either LARGER or SMALLER, and *DateOrSize* is the file size in MB.
	
	For example, the following command copies all files with a .cpp extension from the “MyCode” directory and writes them to a subdirectory of “My Documents” on the target system:
	`[includefile_start]`
	`D:\MyCode\*.cpp, My Documents\MyCode`
	`[includefile_end]`
	
	The following command further refines the file inclusion function to ensure that only files created after 10/08/2002 migrate:
	`[includefile_start]`
	`D:\MyCode\*.cpp, My Documents\MyCode, NEWER,10/08/2002`
	`[includefile_end]`
		Searches for all matching files in a specified directory (but not its subdirectories).
		Note: The logical name “My Documents” is translated to the correct physical location on the hard disk drive. “My Documents” is not used on Windows 95, Windows NT 4.0 Workstation, and Windows NT 4.0 Server.

IncludePath	*Path* , [*TargetDirectory*]
	
	where
	• *Path* is the directory location. Wildcard characters cannot be used.
	• *TargetDirectory* is an optional parameter that specifies the location on the target system where the files are written. Wildcard characters cannot be used in the directory name, but logical names can be used.
	
	For example, the following command copies the contents of the WhiteMice directory and writes them to a subdirectory of My Documents on the target system:
	`[includepath_start]`
	`C:\Project_1\Lab23\1998\WhiteMice, My Documents\WhiteMice`
	`[includepath_end]`
		Specifies a directory and copies it and its contents to the profile. You also can specify the directory location on the target system to save the profile where you want.

Table 4. File-migration commands (continued)

Command	Parameter	What it does
IncludeFileDescription	*filename*, [*start*], [*newlocation*] [p | r],[*Operand* , *DateOrSize*] where • *filename* is the filename. It can include wildcard characters. • *start* is an optional command that specifies where the search begins. This can be a hard disk drive letter, a directory, or a logical location such as “My Computer” or “My Documents.” It cannot contain wildcard characters. If you do not specify the start location, SMA searches “My Computer,” with the exclusion of CD-ROM and network drives. • *newlocation* is an optional command that specifies where the files are written on the target system. It can be a root of a drive or a logical location such as “My Computer” or “My Documents.” It cannot contain wildcard characters. If the specified directory does not exist on the target system, it is created. • [p | r] is an optional command that specifies how the file path is handled: – p preserves the path of the file and recreates the file on the target system starting at the location specified by the newlocation parameter. – r removes the path of the file and places the file directly in the location specified by the newlocation parameter. • [*Operand* , *DateOrSize*] is an optional command that you use to select files based on their age or size, and where: – *Operand* is either NEWER or OLDER, and *DateOrSize* is the baseline date in mm/dd/yyyy format. – *Operand* is either LARGER or SMALLER, and *DateOrSize* is the file size in MB.	Searches for all files that match a pattern. You can retain or change the directory structure.

ExcludeFile	*filename*, [*Operand* , *DateOrSize*]
	
	where
	• *filename* is a fully qualified file name. It can contain wild card characters but cannot contain logical locations.
	• [*Operand* , *DateOrSize*] is an optional command that you use to select files based on their age or size, and where:
	– *Operand* is either NEWER or OLDER, and *DateOrSize* is the baseline date in mm/dd/yyyy format.
	– *Operand* is either LARGER or SMALLER, and *DateOrSize* is the file size in MB.
	
	For example, the following command removes all files with a .tmp extension from the c:\Docs directory:
	`[ExcludeFile_start]`
	`c:\Docs\*.tmp`
	`[ExcludeFile_end]`
		Deselects all matching files in a specified directory.

ExcludePath	Directory location. Wildcard characters are not permitted.
	
	For example, the following command removes all files and subdirectories located in the c:\Windows directory:
	`[ExcludePath_start]`
	`c:\Windows`
	`[ExcludePath_end]`
		Deselect all files and subdirectories located in a specified directory.

Table 4. File-migration commands (continued)

Command	Parameter	What it does

ExcludeFileDescription	*filename* , [*StartLocation*], [*Operand* , *DateOrSize*]
	
	where
	• *filename* is the filename. Wildcard characters can be used.
	• *StartLocation* is an optional parameter that specifies the location that will be searched. Logical locations can be used. By default, if *StartLocation* is not specified, all selected files are searched.
	• [*Operand* , *DateOrSize*] is an optional command that you use to select files based on their age or size, and where:
	– *Operand* is either NEWER or OLDER, and *DateOrSize* is the baseline date in mm/dd/yyyy format.
	– *Operand* is either LARGER or SMALLER, and *DateOrSize* is the file size in MB.
	
	For example, the following command excludes all files that have _old.doc in their names from “My Documents”:
	`[ExcludeFileDescription_start]`
	`*_old.doc, My Documents`
	`[ExcludeFileDescription_end]`
		Deselects all files with the specified name.

Examples of file-migration commands

This section contains examples of file-migration commands. These examples demonstrate how to combine file-inclusion and file-exclusion commands to refine your file selection. Only the file-handling sections of the command file are shown.

Selecting files during the capture phase

This section contains three examples of code used to select files during the capture phase.

Example 1: The following code example selects all files with a .doc extension (Microsoft Word documents) and relocates them in the “My Documents” directory. It then excludes all files that are in the d:\No_Longer_Used directory.

```
[includefiledescription_start]
*.doc , My Documents , r
[includefiledescription_end]
[excludepath_start]
d:\No_Longer_Used
[excludepath_end]
```

Example 2: The following code example selects the contents of the drive, excluding all files located in the root of the drive and all files with a .tmp extension.

```
[includepath_start]
d:\
[includepath_end]
[excludefile_start]
d:\*
[excludefile_stop]
[excludefiledescription_start]
*.tmp
[excludefiledescription_end]
```

Example 3: The following code example selects the entire contents of the d drive, excluding all files located at the root of the drive. Finally, it includes all files with .doc and .jpg extensions that are located at the root of the drive.

```
[includepath_start]
d:\
[includepath_end]
[excludefile_start]
d:\*
[excludefile_stop]
[includefile_start]
d:\*.doc
d:\*.jpg
[includefile_end]
```

Deselecting files during the apply phase

During the capture phase, a profile was created that contained all files ending with a .doc extension; these files were targeted to be relocated in “My Documents.” In addition, all files located in the d:\No_Longer_Used directory were excluded. (See “Example 1” on page 46.)

During the apply phase, an additional command is added to the command file to exclude all files with file names that include _old.doc.

```
[excludefiledescription_start]
*_old.doc
[excludefiledescription_end]
```

Creating a command file template

You can use the GUI to create a command file template. Instead of creating an actual profile, SMA captures the types of settings that you want to capture. This information is written to a command file, which you can use to capture a profile in batch mode.

Note: You cannot use the GUI to add file-migration commands to the command file template, since file migration is handled differently in the two modes.

Complete the following steps to create a command file template:

1. Open the config.ini file in an ASCII text editor. If you installed SMA in the default location, this file is located in the *d*:\Program Files\IBM\SMA directory, where *d* is the drive letter of the hard disk drive.

2. To ensure that SMA does not create a profile, change the Just_Create_Command file option to the following string:

   ```
   Just_Create_Command_File = Yes
   ```

3. Change the command_file option to specify the name and path of the template file. By default, the command_file is set to c:\CommandFile\Commands.txt.
4. Start SMA and run the capture phase. Neither the **Files and Folders** check box on the “Migration Options” window nor the “File Selection” window appear. The “Profile Location” window is used to capture the location and name of the profile in the template file, although no actual profile will be created.
5. (Optional) If you want to add file migration commands, edit the template file and make the appropriate changes. See “File-migration commands” on page 43 for more information.
6. Reopen the config.ini file in an ASCII text editor and change the Command_File and the Just_Create_Command_File options back to the default settings.

Applying a profile in batch mode

During the apply phase, smabat.exe copies the contents of the profile to the target computer. You can modify the profile before it is applied. The following two examples demonstrate using the **smabat** command to apply a profile.

In this example, the selected profile (receptionist.sma) is applied to the target system:

```
smabat /a /n c:\sma_profiles\receptionist.sma
```

In this example, the selected profile is modified before it is applied to the target system. The modifications are specified in the EntryLevel.txt command file:

```
smabat /a c:\EntryLevel.txt /n c:\sma_profiles\receptionist.sma
```

Consider the following points about using command files when you apply a profile in batch mode:

- You cannot add settings or files to a specified profile.
- When SMA processes file exclusion commands during the apply phase, it uses the original location of the files and folders on the source system, not the redirected location specified during the capture phase.
- The exclude_drives command is ignored.
- You cannot use a password with an executable SMA profile.

When a file is relocated to a directory that already contains a file of the same name, a numeric string is appended to the name of the relocated file, if the overwrite_existing_files parameter in the command file is set to zero or left unspecified. For example, if the target directory already contains a readme.txt file, the relocated file is renamed readme_01.txt. If additional files named readme.txt are relocated to the directory, the numeric string that is appended is incremented, yielding renamed files such as readme_02.txt and readme_03.txt.

Chapter 5. Performing a peer-to-peer migration

This chapter contains information about performing a peer-to-peer migration.

You can use peer-to-peer migration to migrate an SMA profile directly from the source system to the target system. Peer-to-peer migration is useful when the source system does not have enough disk drive space to save the SMA profile. It also requires fewer steps to complete than a standard migration and so saves time.

You can perform a peer-to-peer migration on systems running the following operating systems:

- Windows 95
- Windows 98
- Windows NT 4.0 Workstation
- Windows Server
- Windows 2000 Professional
- Windows 2000 Server
- Windows XP Professional

Note: (Windows 95 only) The target system must have Windows Sockets, version 2.0 installed. You can download Windows Sockets, version 2.0 from http://www.microsoft.com/.

Setting up a peer-to-peer connection

To perform a peer-to-peer migration, both the source system and the target system must have a network interface card (NIC). The TCP/IP protocol must be enabled, and both systems must be nodes within the same local area network (LAN).

You must connect the source system and the target system. You can use one of the following connection options:

Over a LAN

You can use either Ethernet or Token Ring. When you use Token Ring, only Windows 2000 and Windows XP are supported.

Ethernet crossover cable

You can use an Ethernet crossover cable to create a direct connection between the source system and the target system. You must make sure that the IP addresses of both the source and target system specify the same network. On Windows 2000 and Windows XP, the IP addresses are automatically issued. On Windows 98 and Windows NT, you must enter the IP address manually.

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Performing a standard peer-to-peer migration

A standard peer-to-peer migration uses the SMA GUI to capture and apply an SMA profile. After you select the settings and files that you want to migrate, SMA connects to the target system, saves the profile to a temporary location on the target system, and then applies the profile to the target system.

Complete the following steps to perform a peer-to-peer migration:

1. Log on to the source system using the operating-system account that you want to migrate.
2. Click **Start** → **Programs** → **IBM System Migration Assistant** → **System Migration Assistant**. The “System Migration Assistant window” opens.

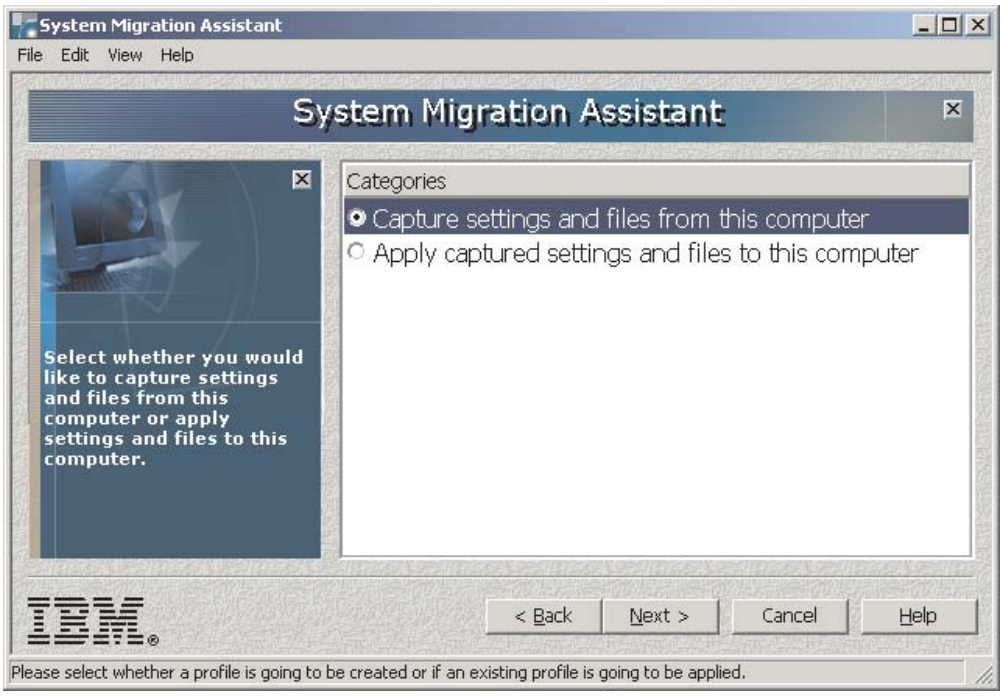

Figure 37. Peer-to-peer migration: “System Migration Assistant” window

3. Click **Capture settings and files from this computer**; then, click **Next**. The “Migration” window opens.
4. Select the settings and files that you want to migrate. For more information about the standard migration options, see “Creating an SMA profile” on page 11.
5. After you make your selections, the “Profile Location” window opens.

Figure 38. Peer-to-peer migration: "Profile Location" window

6. Configure the profile:
   a. Select the **Peer to Peer file transfer** check box.
   b. To assign a password to the SMA profile, select the **Password protect** check box.
   c. In the **Notes about this migration** field, type a brief description (maximum of 1024 characters) of the SMA profile.
   d. Click **Next**.
7. If you selected the **Password protect** check box in step 27 on page 22, the "Password" window opens.

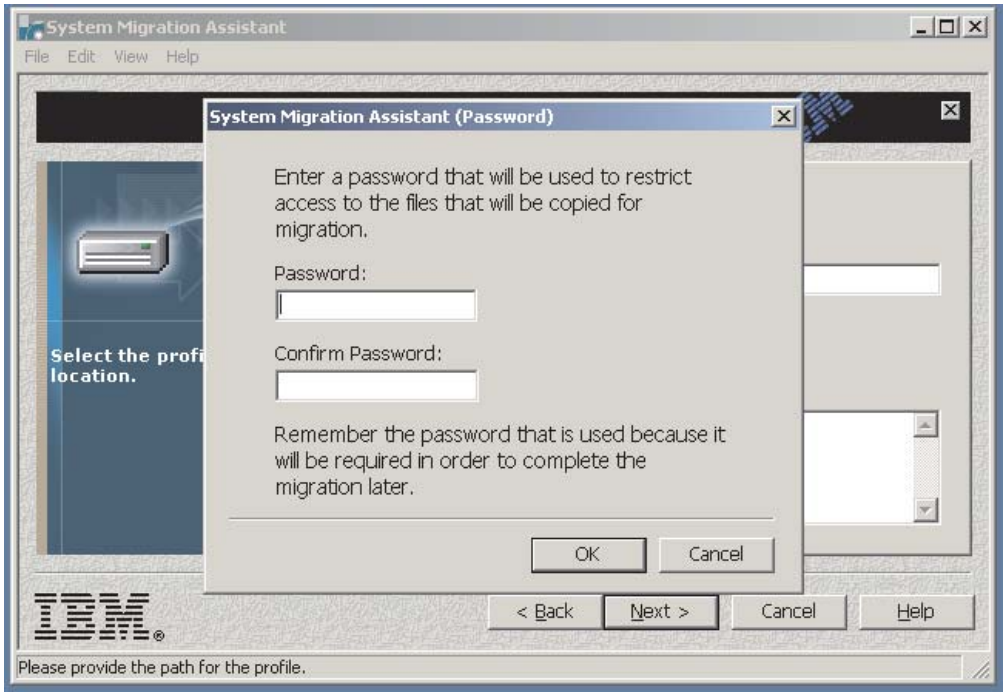

Figure 39. Peer-to-peer migration: "Password Protect" window

8. Set up a password for the profile:
   a. In the **Password** field, type a password. (The password must be between 6 and 16 characters long, must contain a non-numeric character in the first and last positions, and cannot contain identical consecutive characters.)
   b. In the **Confirm Password** field, type the password again.
   c. Click **OK**.
9. The "Peer to Peer Migration" window opens. In the **Profile name** field, type a profile name no more than 40 characters in length. Do not include the path or any special characters. This profile name, when entered on the target system, completes the peer-to-peer connection.

   Note: The profile name that you enter must be unique.
10. Click **OK**. SMA prompts you to start SMA on the target machine and begin the apply phase.
11. On the source system, click **OK**. You have three minutes to establish the connection on the target system, otherwise SMA stops trying to connect.
12. Log on to the target system using the same account that you used to log on to the source system.
13. On the target system, click **Start** → **Programs** → **IBM System Migration Assistant** → **System Migration Assistant**. The "System Migration Assistant window" opens.

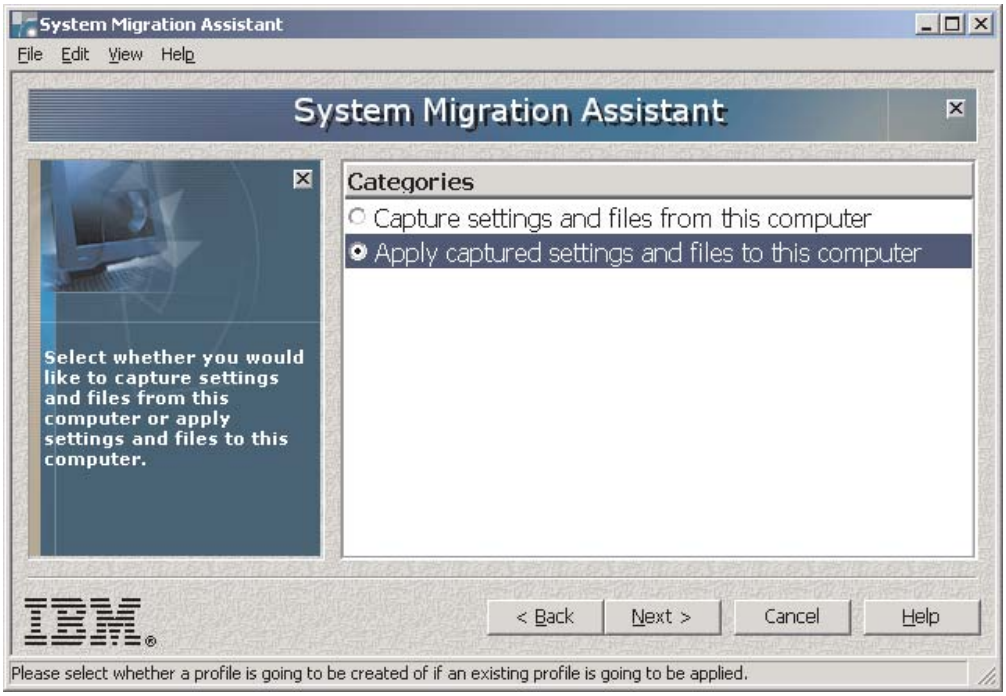

Figure 40. Peer-to-peer migration: "System Migration Assistant" window

14. Click **Apply captured settings and files to this computer**; then, click **Next**. The "Profile Location window" opens.
15. Select the **Peer to Peer file transfer** check box, and then click **Next**. The "Peer to Peer Migration" window opens.
16. In the **Profile name** field, type the name of the profile that you created on the source system, and then click **OK**.
17. On the source system, a notification window opens to indicate that a connection has been established. Click **OK**. On the target system, a notification window opens to indicate that a connection has been established.
18. When prompted to start the peer-to-peer migration, click **Yes**. On the target system, the **Copy Progress** window opens.

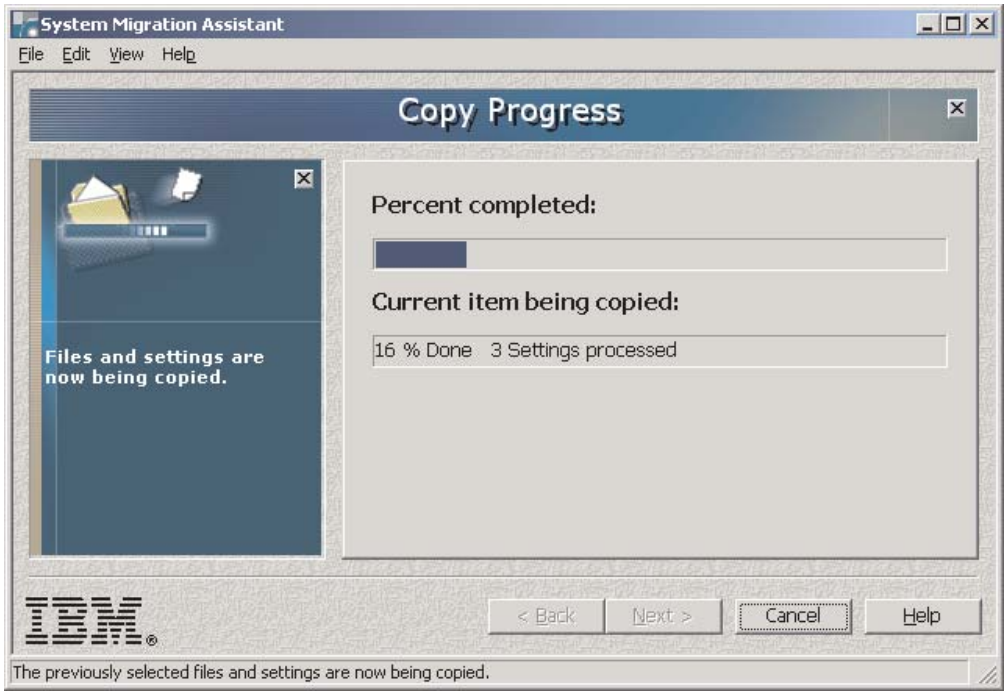

Figure 41. Peer-to-peer migration: "Copy Progress" window on target

SMA copies the profile created on the source system to the target system and then applies the saved profile. This might take several minutes, depending on how many settings and files are being migrated.

19. After the profile is applied, a "Migration Summary" window opens on the source system. The summary lists any errors that occurred and the location of the log file.

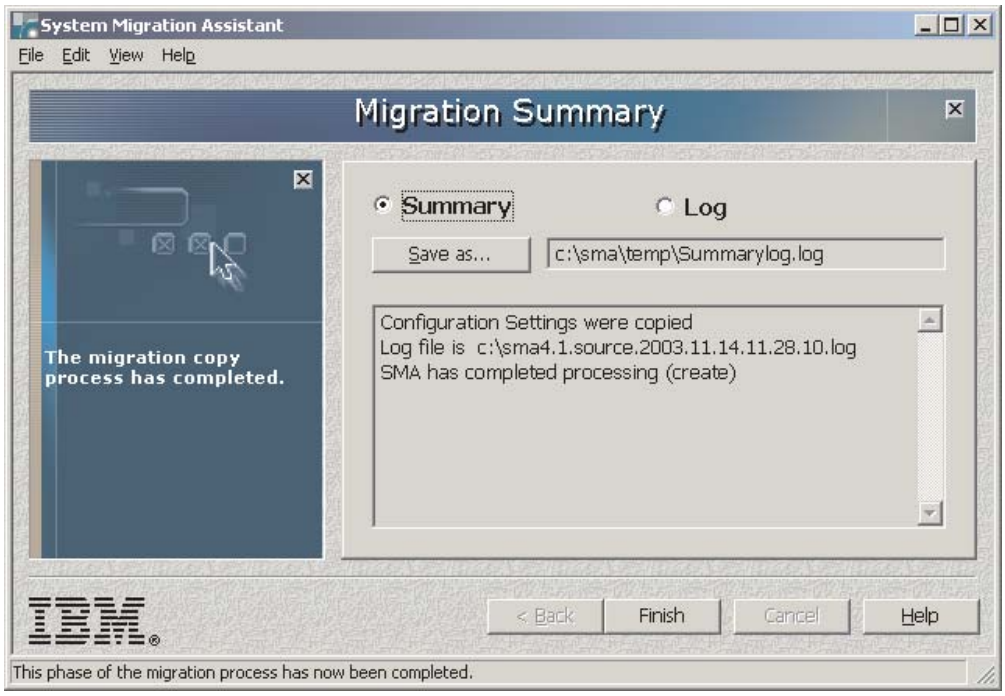

Figure 42. Peer-to-peer migration: "Migration Summary" window on source

20. To view the log file, click **Log**. The log file is displayed in the pane at the bottom of the window.
21. To save the summary or log file to a different location, complete the following steps:
    a. Click **Summary** or **Log**; then, click **Save As...**. The "Save As" window opens.
    b. In the **Save in** field, navigate to the directory where you want to save the file.
    c. In the **Save As** field, type a descriptive name for the file.
    d. Click **Save**.
22. On the source system, click **Finish**.
23. On the target system, click **Finish**.

Performing a peer-to-peer migration in batch mode

To perform a peer-to-peer migration in batch mode, you edit the command file to specify the settings and files that you want to migrate. Then, from a command prompt, you run the **smabat** command on both the source and target systems.

Complete the following steps to perform a peer-to-peer migration:

1. If necessary, create a command file. For information about creating a command file, see "Creating a command file" on page 38.
2. Open the command file in an ASCII text editor. Make sure that the "Miscellaneous" section contains the following string:

   ```
   using_peer_to_peer_migration = 1
   ```

3. Make sure that the "profile_path_and_name" section specifies a fully qualified name of an SMA profile. For more information about the command file variables, see "Creating a command file" on page 38.

4. Save the command file to both the source and target system.
5. Start the migration on the target system. Change to the directory that contains SMA, and from a command-line prompt, type the following command and press Enter:

   ```
   smabat /a /p2p "profile file"
   ```

   where *profile file* is the fully qualified path, file name, and extension of the profile.

   SMA starts in the background and waits for the profile to be transmitted.
6. Start the migration on the source system. Change to the directory that contains SMA, and from a command-line prompt, type the following command and press Enter:

   ```
   smabat /c "commandfile"
   ```

   where *commandfile* is the fully qualified name of the command file.

   SMA starts on the source system and the peer-to-peer migration begins.

For more information about performing a migration in batch mode, see Chapter 4, “Performing a migration in batch mode”, on page 37.

Chapter 6. Advanced administrative topics

This chapter contains information about customizing the SMA GUI and migrating additional application settings.

Customizing the standard migration

You can customize the standard migration process, including the look and feel of the SMA GUI, by editing the config.ini file. You can use the advanced administrative functions to modify the following features and settings:

- SMA windows that are displayed
- Settings that are selected by default during the capture phase
- Settings that are always or never selected during a migration

If you installed SMA 4.1 in the default location, the config.ini file is located in the *d*:\Program Files\IBM\SMA\ directory, where *d* is the drive letter of the hard disk drive.

Consider the following points concerning the config.ini file:

- Use semicolons to indicate comments.
- The **smabat** command is not case-sensitive.

Global options

The following table contains information about the Global options settings.

Table 5. Config.ini file: Global option settings

Variable	Values	What it does
Configuration_File_Show_ Configuration_Messages	Yes or No	Specifies whether error messages are displayed while SMA interprets the config.ini file. By default, it is set to No.
Window_Background_Image_Name	The fully qualified name of a BMP file	Specifies the bitmap image that is used as the window background. By default, a sand pattern is used. The image is tiled if it is smaller than the SMA window.
Temp_File_Location	The fully qualified name of a directory. It can be a shared directory on another system.	Specifies the SMA temporary directory. This is where SMA will place files for compression and decompression during processing. By default, this is set to c:\sma\temp. For example, `Temp_File_Location = %systemdrive%\%username%` writes the temporary files to a directory with the same name as the user name.
Log_File_Location	The fully qualified name of a directory. It can be a shared directory on another system.	Specifies the directory where the log file is saved. By default, this is set to c:.
Command_File	Fully qualified file name	Specifies the name and path of the command file. By default, this is set to C:\CommandFile\Commands.txt.

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Table 5. Config.ini file: Global option settings (continued)

Variable	Values	What it does
Just_Create_Command_File	Yes or No	Specifies whether a profile is created. Set Just_Create_Command_File to Yes to create a command file template without creating a profile.
Exclude_Drives	Drive letter	Specifies the disk drives that will not be scanned by SMA during the capture phase. SMA ignores this variable during the apply phase.
Overwrite_Existing_Files	Yes or No	Specifies whether existing files are overwritten when a profile is applied. Set Overwrite_Existing_Files to Yes or leave it unspecified to overwrite existing files. By default, Overwrite_Existing_Files is unspecified.
Default_Profile_Path	Fully qualified directory	Specifies the default location for SMA profiles.
Verbose_Logging	Yes or No	Specifies whether SMA writes extended logging information to the log files.
Enable_4GFat32_warning	Yes or No	Set Enable_4GFat32_warning to yes to warn users that a profile cannot be written to a FAT32 partition if the profile is larger than 4 GB.

Splash page

The following table contains information about the Splash page settings. These settings control the splash screen that is displayed when you start SMA.

Variable	Values	What it does
Splash_Page_Display_Time	Number	Specifies the length of time (in seconds) that the splash screen is displayed. By default, Splash_Page_Display_Time is set to 2.
Splash_Page_Text_Line1 Splash_Page_Text_Line2 Splash_Page_Text_Line3 Splash_Page_Text_Line4	A text string	Specifies text that is displayed on the splash screen.

Generic page options

The following table contains information about the generic page options. These options apply to all SMA windows. *SpecificPage* is one of the following variables:

- Desktop
- Applications
- Network
- Edit_Network
- Selection

Table 6. Config.ini: Generic page options

Variable	Value	What it does
SpecificPage_Page_Title	Text string	Specifies an alternate title for a window.
SpecificPage_Page_Banner_Text	Text string	Specifies a banner for the page.
SpecificPage_Page_Banner_Font	Font type	Specifies an alternate font for the page banner
SpecificPage_Page_Banner_Text_Foreground_Color	RBG value	Specifies an alternate color for the page banner.
SpecificPage_Page_Banner_Text_Shadow_Color	RBG value	Specifies an alternate color for the text shadow in the banner.
SpecificPage_Page_Guidance_Text	A text string	Specifies alternate text for the left panel.
SpecificPage_Page_Guidance_Font	Font type	Specifies an alternate font for the text in the left panel.
SpecificPage_Page_Guidance_Text_Font_Size	Font size	Specifies an alternate font size for the text in the left panel.
SpecificPage_Page_Guidance_Text_Color	RBG value	Specifies an alternate color for the text in the left panel.
SpecificPage_Page_Status_Bar_Text	A text string	Specifies alternate text for the status bar.

Choice options

This section provides information about variables that contain the following string:

```
_Choice
```

These variables are located in the “Start Page,” “Options Page,” “Desktop Page,” and “Network Page” sections of the config.ini file. These variables control whether radio buttons and check boxes are displayed or hidden, active or grayed out, or selected by default.

Values

Each such variable takes the following value:

OptionDisplay, *OptionActive*, *OptionSelected*

where

- *Option* is one of the following values:
  - HIDE hides the radio button or check box
  - DISPLAY displays the radio button or check box
- *OptionActive* is one of the following values:
  - ENABLED specifies that the radio button or check box is active.
  - DISABLED specifies that the radio button or check box is grayed-out.

  SMA ignores this variable if *Option* is set to HIDE.
- *OptionSelected* is one of the following values:
  - CHECKED specifies that radio button or check box is selected by default
  - UNCHECKED specifies that radio button or check box is cleared by default.

Examples

Consider the following examples:

- In this example, the **Colors** check box on the “Desktop Settings” page is displayed and automatically selected; users cannot clear the check box. SMA always captures the colors setting.

  ```
  Desktop_Page_Choice_Colors = Display, Disabled, Checked
  ```

- In this example, the **Files and Folders** check box on the ″Migration Options” page is displayed and the check box is cleared. However, users cannot select the check box.

  ```
  Options_Page_Choice_Files = Display, Disabled, Unchecked
  ```

- In this example, the **Task Bar** check box is not displayed on the “Desktop settings” page. However, the task bar settings are automatically selected and captured.

  ```
  Desktop_Page_Choice_ Task_Bar = Hide, Checked.
  ```

- In this example, the **Printers** check box is not displayed on the “Options” page. However, it is automatically selected and captured.

  ```
  Options_Page_Choice_Printers = Hide, Checked.
  ```

Show window options

The “Desktop page”, “Applications pages”, and “Network page” sections each contain the following variable:

*SpecificPage*Page_Show_Page

where *SpecificPage* is one of the following: Desktop, Applications, or Network. Set this variable to No to ensure that the window does not open when you run SMA. Otherwise, set the variable to Yes or leave it unspecified. When a window is not displayed, SMA captures or applies all settings specified in the config.ini file.

Other options

The following table contains information about additional variables in the config.ini file.

Table 7. Config.ini file: Other options

Variable	Value	What it does
Applications_Page_Show_Registry_Button	Yes or No	Specifies whether the registry button is displayed on the “Application Settings” window. By default, this is set to No.
Selection_Page_File_Quota	Number (MB)	Specifies the maximum amount of uncompressed data (in MB) that can be captured.
Selection_Page_File_Warning_Message	A text string	Specifies an alternate warning message that is displayed when users select to capture files with certain extensions.

Selection_Page_Warning_Extensions	File extensions	Specifies the file extensions that will generate a warning message when a user selects to migrate files that have those extensions.
		
		You must specify each extension on a separate line, for example:
		`[Selection_Page_Warning_Extensions_Start]`
		`exe`
		`com`
		`dll`
		`[Selection_Page_Warning_Extensions_End]`

Migrating registry settings

Attention: Use extreme caution when migrating registry settings. Migrating incorrect registry settings might disable the operating system. Before migrating registry settings, you should have a thorough understanding of the registry database.

You can use either the SMA GUI or batch mode to capture and apply registry settings.

Migrating registry settings using the GUI

Complete the following steps to migrate registry settings:

1. Open the config.ini file in an ASCII text editor.
2. Modify the “Applications Page” section so that it contains the following string:
   `Applications_Page_Show_Registry_Button = Yes`
3. Start SMA. Follow the instructions on the screen until the “Settings for Application” window opens.
4. Click **Registry**. The “System Migration Assistant (Registry Selection Window)” opens.

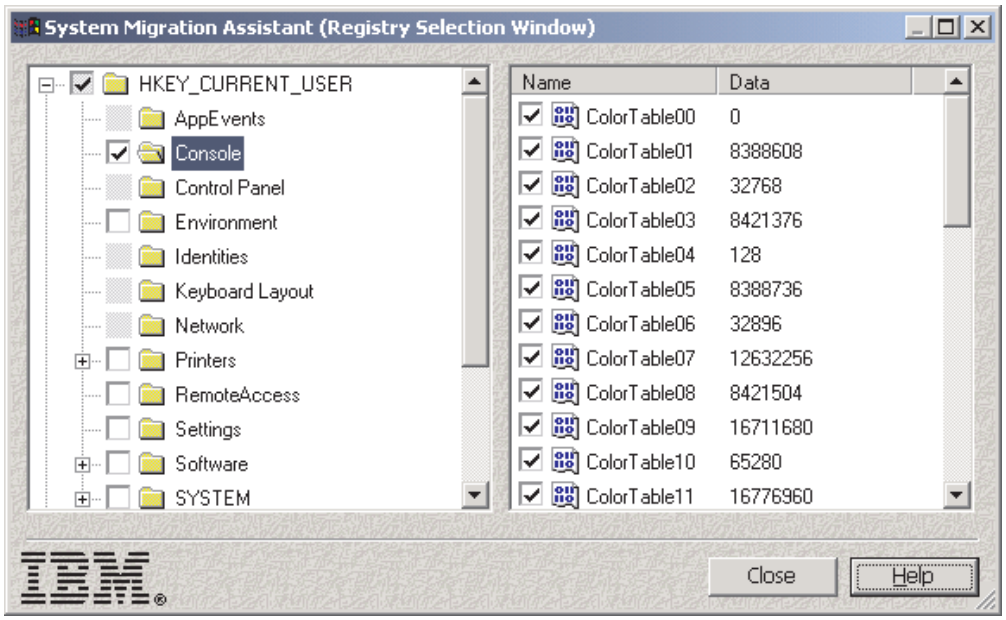

Figure 43. "System Migration Assistant (Registry Selection Window)" window

5. Select the registry keys that you want to migrate. You can select subkeys from either HKEY_CURRENT_USER or HKEY_LOCALMACHINE\COFTWARE. You cannot migrate the registry settings for hardware.
6. Complete the remaining SMA windows and save the profile.
7. Start the apply phase on the target machine. When the "Settings for Application" window is displayed, the **Migrate Registry Selections** check box is selected.
8. Continue through the wizard and apply the profile.

Migrating registry settings using batch mode

Complete the following steps to migrate registry settings:

1. Open the command file in an ASCII text editor.
2. Modify the "Registry" section so that it contains the following command:

   ```
   [registry_start]
   hive,"keyname","value"
   [registry_end]
   ```

   where

   - *hive* is either HKLM or HKCU.
   - *keyname* is the key name.
   - *value* is an optional command that specfies the registry value that is migrated.

   If *keyname* or *value* contain spaces, they are not ignored.
3. Run the capture.

Migrating additional application settings

Note: To create custom application files, you must have a thorough knowledge of the application, including the storage locations of customized settings.

By default, SMA is preconfigured to migrate settings for several applications. For a list of applications supported by SMA, see Appendix A, “Application settings available for migration”, on page 71. You can also create a custom application file to migrate settings for additional applications.

This file must be named *application*.smaapp and located in the *d*:\Program Files\IBM\SMA\Apps directory, where *application* specifies the application and *d* is the drive letter of the hard disk drive.

To support a new application, you can copy an existing application file and make the necessary changes. For example, Microsoft_Access.smaapp is an existing application file.

Consider the following points about application files:

- Use semicolons to indicate comments.
- Each command must be described in a separate section.
- Each section begins with a command enclosed by brackets, for example, [General] or [App_Info.IE]. You can enter one or more fields in a section; each field must be on a separate line.
- If the application file contains syntax errors, SMA continues the operation and writes the errors to the log file

The following tables contains information about application files.

Section	Command	Value	What it does
General			
	Family	A text string. Leading spaces are ignored; do not enclose the text string in quotation marks.	Specifies the non-version-specific name of the application. When you run SMA in batch mode, you use this string in the applications section of the command file. For example, Microsoft Access.
	SMA_Version	A numeric value.	Specifies the SMA version number.
	App*X*, where *X* is an integer	*ShortName* where *ShortName* is a version-specific short name for an application.	Specifies a version-specific short name for one or more applications. For example, Access_2000 and Access_XP.
App_Info.*ShortName* where *ShortName* is the short name for an application that you specified in the “General” section.			
	Name	A text string.	Specifies the name of the application.
	Version	A numeric value.	Specifies the version of the application.

	Detect_*X*, where *X* is an integer	*Root*,*PathAndKey*	Specifies a registry key. SMA detects an application by searching for the specified registry key.
			
			For example:
			`Detect_1 = HKLM,"Software\Microsoft\Windows \CurrentVersion \Uninstall\Office8.0"`
			`Detect_2 = HKLM,"Software\Microsoft\Windows \CurrentVersion \Uninstall\Office9.0"`

Install_Directories.*ShortName* where *ShortName* is the short name for an application that you specified in the ″General″ section.			
	OS = *hive*,*keyname*,*value* where • *OS* specifies the operating system and is one of the following: – WinXP – Win2000 – WinNT – Win98 – Win95 • *hive* is either HKLM or HKCU. • *keyname* is the keyname. • *value* is an optional command that specifies the registry value that is migrated.		Specifies the installation directory as it appears in the registry.
Files_From_Folders.*ShortName* where *ShortName* is the short name for an application that you specified in the General section. Optional			

<table>
<tr><th>Section</th><th>Command</th><th>Value</th><th>What it does</th></tr>
<tr><td></td><td colspan="2">SMAvariable,Location,[File]

where
• SMAvariable is one of the following variables that specify the location of the customization files:
– %Windows Directory% (location of operating-system files)
– %Systemroot Directory% (location of the system root directory)
– %Install Directory% (location of the application as defined in the Install_Directories section)
– %UserProfiles Directory% (location of the user profile directory)
– %Appdata Directory% (the Application Data directory, which is a subdirectory of the user profile directory)
– %LocalAppdata Directory% (the Application Data directory in the Local Settings folder, which is a subdirectory of the user profile directory.
– %Cookies Directory% (the Cookies directory, which is a subdirectory of the user profile directory)
– %History Directory% (the History directory, which is a subdirectory of the user profile directory.
– %Favorites Directory% (the Favorites directory, which is a subdirectory of the user profile directory.
• Location specifies a fully qualified file or directory. You can use wildcard characters in the file name but not the path. If you specify a directory, all files are copied.
• [File] is an optional parameter that can be used only if Location specifies a directory, and File is the file to be copied. You can use wildcard characters in the file name but not the path.</td><td>Specifies the customization files that you want to migrate.

For example:
<tt>%Windows Directory%, notes.ini</tt>
<tt>%Install Directory%, data, *.id</tt></td></tr>
<tr><td colspan="4">Registry.ShortName

where ShortName is the short name for an application that you specified in the General section.

Optional</td></tr>
<tr><td></td><td colspan="2">hive,keyname,value

where
• hive is either HKLM or HKCU.
• keyname is the keyname.
• value is an optional command that specifies the registry value that is migrated.</td><td>Specifies the registry entries that you want to migrate.

For example,
<tt>Registry.Lotus 123 = HKCU,"Software\Lotus \123\99.0"</tt></td></tr>
<tr><td colspan="4">Registry_Exclude.ShortName

where ShortName is the short name for an application that you specified in the General section.

Optional</td></tr>
</table>

<table>
<tr><th>Section</th><th>Command</th><th>Value</th><th>What it does</th></tr>
<tr><td></td><td colspan="2">hive,"keyname",value

where
• hive is either HKLM or HKCU.
• keyname is the keyname.
• value is an optional command that specifies the registry value that is migrated.</td><td>Specifies registry keys and values that you want to exclude from the selected registry entries.

For example,
<code>Registry.Lotus 123 = HKCU,"Software\Lotus \123\99.0\Paths"</code></td></tr>
<tr><td colspan="4">Files_Through_Registry.ShortName

where ShortName is the short name for an application that you specified in the ″General″ section.

Optional</td></tr>
<tr><td></td><td colspan="2">OS = Registry,File

where
• OS specifies the operating system and is one of the following values:
– WinXP
– Win2000
– WinNT
– Win98
– Win95
• Registry specifies the registry entry and is in the format hive,keyname,value, where:
– hive is either HKLM or HKCU.
– keyname is the keyname.
– value is an optional command that specifies the registry value the is migrated.
• File is the file name. You can use wildcard characters.</td><td>Specifies customization files to be migrated

For example:
<code>WinXP=HKCU,"Software\Lotus\Components\ Spell\4.1","Multi User Path",*.udc</code></td></tr>
</table>

Creating an application file

To determine which application settings must be migrated for custom application files, you must carefully test the applications.

Complete the following steps to create an application file:

1. Use an ASCII text editor to open an existing SMAAPP file. If you installed SMA in the default location, the SMAAPP files are located in the *d*:\Program Files\IBM\SMA\Apps directory, where *d* is the drive letter of the hard disk drive.
2. Modify this SMAAPP file for the application and applications settings that you want to migrate.
3. Modify the information in the General Section.
4. Modify the Name and Version commands in the App_Info.*ShortName* section.
5. Determine the registry keys that must be migrated:
   a. Click **Start → Run**. The “Run” window opens. In the **Open** field, type `regedit` and click **OK**. The “Registry Editor” window opens.

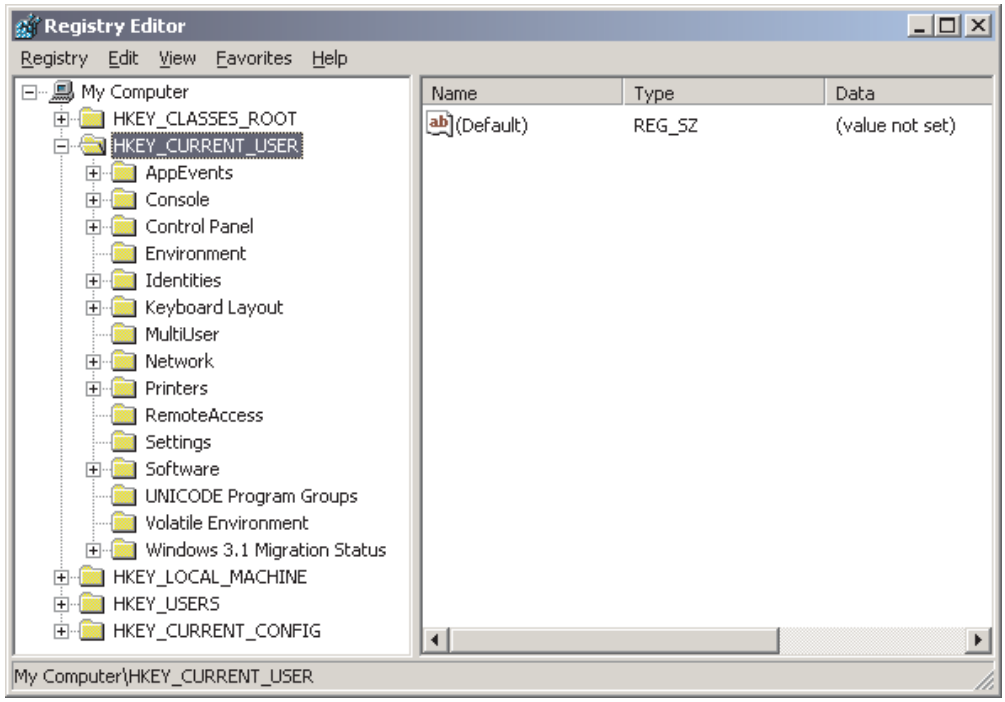

Figure 44. "Registry Editor" window

b. In the left pane, expand the **HKEY_LOCAL_MACHINE** node.

c. Expand the **Software** node.

d. Expand the vendor-specific node, for example, **Adobe.**

e. Continue navigating until you have located the registry key for the application. In this example, the registry key is SOFTWARE\Adobe\Acrobat Distiller\5.0.

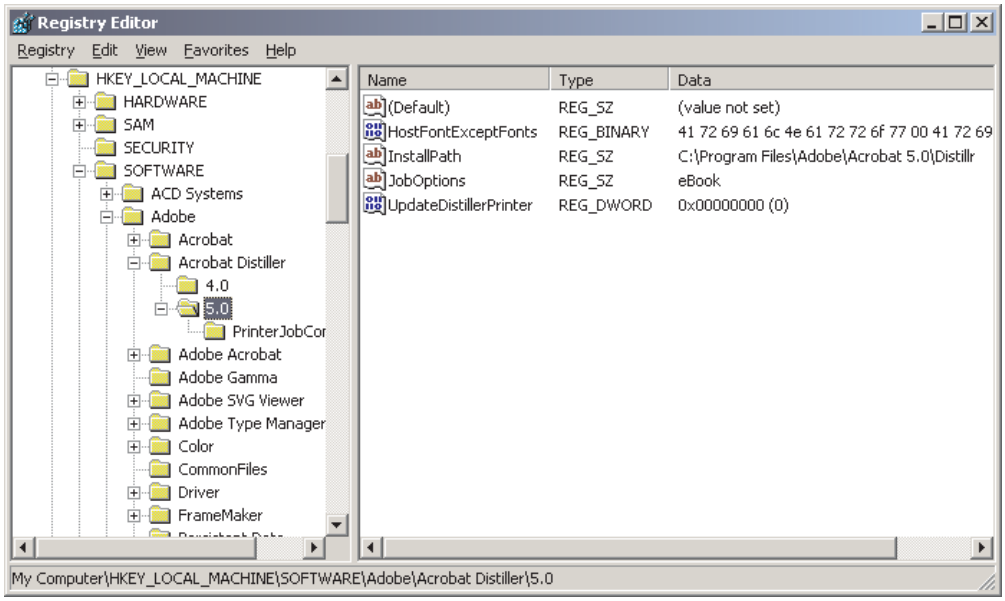

Figure 45. "Registry Editor" window: Locating a registry key

f. Set the value of the **Detect_*X*** field. In this example, type the following command:

```
Detect_1=HKLM, "SOFTWARE\Adobe\Acrobat Distiller\5.0"
```

6. Modify the Name and Version commands in the Install_Directories.*ShortName* section.
7. Determine the path of the installation directories for the application.
   a. From the “Registry Editor” window, navigate to the HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion node.
   b. Expand the node, and locate the directory that corresponds to the application that you are writing this application file for. In this example, it is AcroDist.exe.

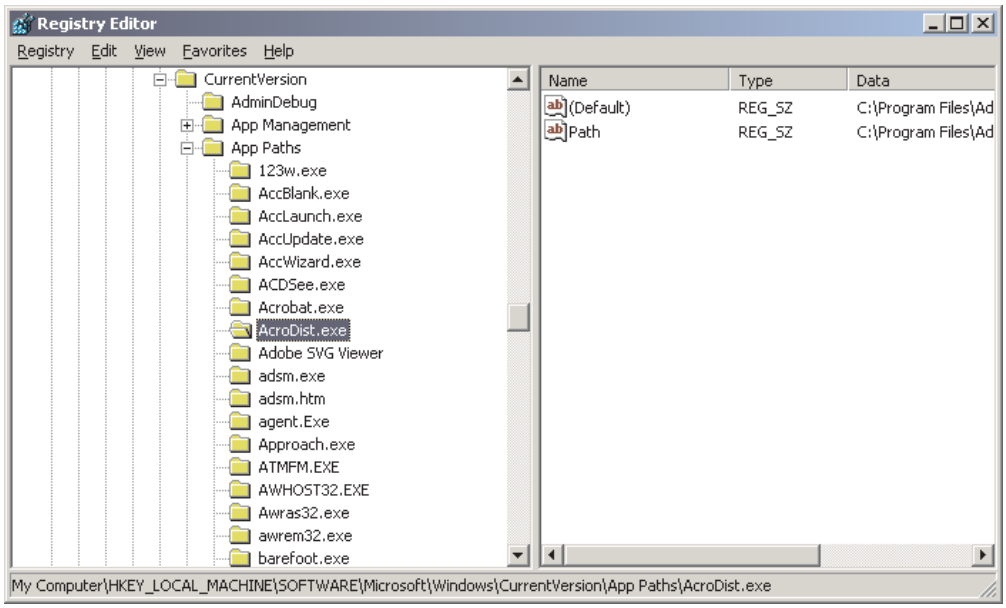

Figure 46. “Registry Editor” window: Locating the installation path

c. Add the appropriate command to the Install_Directories.ShortName section of the application file. In this example, type the following command:

```
Win2000=HKLM,"Software\Microsoft\Windows\CurrentVersion\
App Paths\AcroDist.exe
```

Note: If you do not find an application-specific directory in the HKLM\Software\Microsoft\Windows\CurrentVersion\AppPaths directory, you must locate a directory that contains the installation path elsewhere in the HKLM\Software tree. Then, use that key in the Install_Directories.ShortName section.

8. In the Files_From Folders section, specify the customization files you want to migrate.
   a. Since many applications by default save files in the Documents and settings subdirectory, check the Application data directory for directories that pertain to the application. If one exists, you can use the following command to migrate the directory and files:

      ```
      [Install_Directories.ShortName]
      %,Location,File
      ```

      where *Location* is a fully qualified file or directory, and *File* is an optional parameter that can be used only if *Location* specifies a directory.

      In the Adobe Distiller example, the customization files are in the Preferences directory.

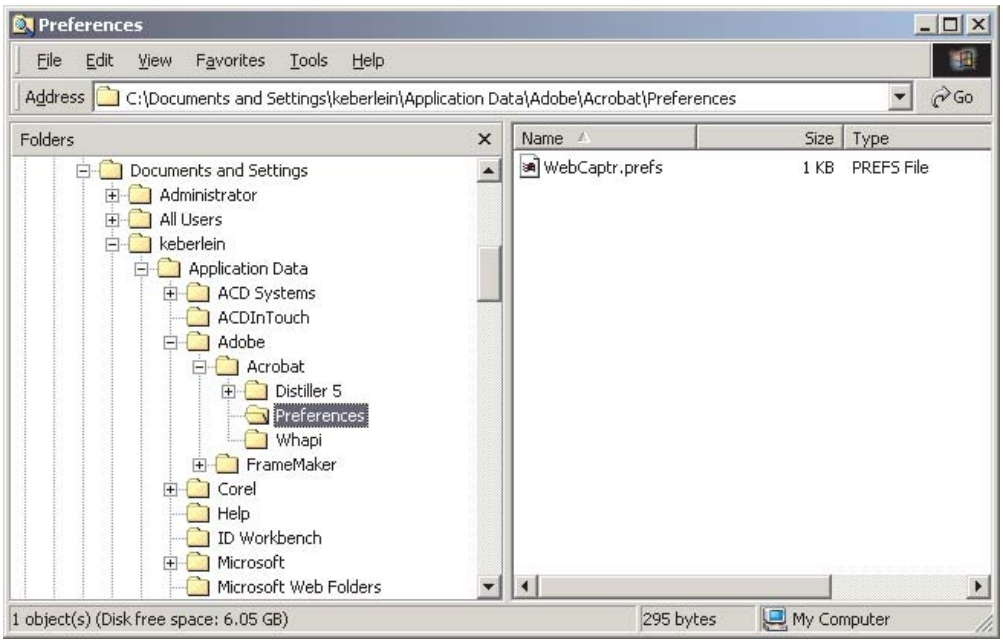

Figure 47. Customization files located below "Documents and settings"

   b. Check all related directories for personal settings that might be stored there.
   c. Check the Local Settings directory.
9. Determine registry entries that you want to migrate. They will be in HKCU (HKEY_CURRENT_USER). In the Registry.*ShortName* section of the application file, add the appropriate commands.
10. Save the SMAAPP file in the *d*:\Program Files\IBM\SMA\Apps directory, where *d* is the drive letter of the hard disk drive.
11. Test the new application file.

Example of an application file for Microsoft Access

This section contains an application file for Microsoft Access.

```
[General]
Family= Microsoft Access
SMA_Version= 3.1
APP1= Access_2000
APP2= Access_XP
;--------------------------------------------------------------------------

[App_Info.Access_2000]
Name= Microsoft Office 2000
Version = 9.0
Detect_1 = HKLM, "Software\Microsoft\Office\9.0\Access"

[Install_Directories.Access_2000]
Win2000=HKLM, "Software\Microsoft\Office\9.0\Access\InstallRoot", "Path"
WinXP=HKLM, "Software\Microsoft\Office\9.0\Access\InstallRoot", "Path"
WinNT=HKLM, "Software\Microsoft\Office\9.0\Access\InstallRoot", "Path"
Win98=HKLM, "Software\Microsoft\Office\9.0\Access\InstallRoot", "Path"
WinME=HKLM, "Software\Microsoft\Office\9.0\Access\InstallRoot", "Path"
Win95=HKLM, "Software\Microsoft\Office\9.0\Access\InstallRoot", "Path"

[Files_From_Folders.Access_2000]
%AppData Directory%, Microsoft\Office\Recent

[Registry.Access_2000]
HKCU, "Software\Microsoft\Office\9.0\Common\Toolbars"
HKCU, "Software\Microsoft\Office\9.0\Access"

[TargetBatchProcessing.Access_2000]
;--------------------------------------------------------------------------

[App_Info.Access_XP]
Name= Microsoft Office XP
Version = 10.0
Detect_1 = HKLM, "SOFTWARE\Microsoft\Office\10.0\Access"

[Install_Directories.Access_XP]
Win2000=HKLM, "SOFTWARE\Microsoft\Office\10.0\Access\InstallRoot", "Path"
WinXP=HKLM, "SOFTWARE\Microsoft\Office\10.0\Access\InstallRoot", "Path"
WinNT=HKLM, "SOFTWARE\Microsoft\Office\10.0\Access\InstallRoot", "Path"
Win98=HKLM, "SOFTWARE\Microsoft\Office\10.0\Access\InstallRoot", "Path"
WinME=HKLM, "SOFTWARE\Microsoft\Office\10.0\Access\InstallRoot", "Path"
Win95=HKLM, "SOFTWARE\Microsoft\Office\10.0\Access\InstallRoot", "Path"

[Files_From_Folders.Access_XP]
%AppData Directory%, Microsoft\Office\recent

[Registry.Access_XP]
HKCU, "Software\Microsoft\Office\10.0\Common\Toolbars"
HKCU, "Software\Microsoft\Office\10.0\Access\Settings"

[TargetBatchProcessing.Access_XP]
if /i "%SourceApp%" == "Access_2000"   goto Upgrade2k
goto Done
:Upgrade2k
regfix "HKCU\Software\Microsoft\Office\9.0\Common\Toolbars"
"HKCU\Software\Microsoft\Office\10.0\Common\Toolbars"
regfix "HKCU\Software\Microsoft\Office\9.0\Access"
"HKCU\Software\Microsoft\Office\10.0\Access"
regedit /s apps\2000toXP.reg
:Done
```

Appendix A. Application settings available for migration

This appendix lists the applications and settings that SMA can migrate. Results might vary depending on the operating system, migration scenario, and application version changes from the source machine to the target machine.

Application	Settings
Adobe Acrobat Reader 5.0	• Accessibility • Comments • Identity • Full screen • Update • Web buy
AT&T Network Client 5.0	• General • Advanced phone settings
IBM Global Network® Dialer 4.0 Supports target systems running on Windows 2000 Professional or Windows 2000 Server only.	• Access • Appearance • Programs • Browser • Mail • News • Servers
Lotus Notes	• Shortcuts • Basics • International • Mail and news • Location preferences • Servers • Mail • Replication settings • Desktop • ID files • INI files • Address book
Lotus Organizer®, version 6.0	• To do preferences • Contacts • Calls • Planner • Anniversary

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Application	Settings
Lotus SmartSuite® for Windows, version 9.7	• Approach – Show – Grid – Show in design – Maintain default sort for – Database – Show – Navigation – Data • Freelance Graphics® – Grid – View – Preferences • Lotus 1-2-3® – General – New workbook defaults – Recalculation – Classic keys – View – General – Security – Show / Hide • Word Pro – General – Location – Personal – General usage – Performance – View – Preferences • SmartCenter Folder options (color and icon)
Lotus Notes, versions 4.x, 5.x, and 6.x	• Desktop • ID files • INI files • Address book • Databases • Dictionary

Application	Settings
McAfee VirusScan 7.0	• Detection • System scan / Action • System scan / Report • System scan / Exclusion • E-mail scan / Detection • E-mail scan / Action • E-mail scan / Alert • E-mail scan / Report • Script stopper
Microsoft Access, versions 2000 and XP	• Toolbars • Options • View • General • Find • Keyboard • Data sheet • Reporting • Advanced • Queries
Microsoft Internet Explorer, versions 5.0, 5.5, and 6.0	• Favorites • Customize • Options • History • Accessibility
Microsoft NetMeeting, versions 2.x and 3.x	• View • General • Call • Advanced calling options • Security
Microsoft Office, versions 97, 2000, and XP (Excel, PowerPoint, and Word)	• Toolbars • Options • Templates • Save options • User info (under tools options)
Microsoft Outlook	• E-mail accounts • Folders • Address book • E-mail appearance preferences • Calendar appearance preferences • PST files (mail file) • Shortcuts • Toolbars

Application	Settings
Microsoft Outlook Express, versions 4.x and 5.x	• General • Mail sending format • News sending format • Send • Read • Security • Advanced • Address book
Microsoft Outlook, versions 98, 2000, and XP	• View • Toolbars • Customize options • Address book • Accounts • Preferences / E-mail options • Tracking options • Calendar options • Mail delivery • Resource scheduling
Microsoft Project	• Toolbars • Preferences • Save options • File locations • Most recent documents
Microsoft Project, versions 98, 2000, and 2002	Toolbars
Microsoft Visio, versions 2000 and 2002	• View • Toolbars • Customize / Options • General • Drawing • Settings • Advanced
MSN Messenger 5.0	• Tools • Personal • Messages • Privacy • General • Accounts • Connection

Application	Settings
Netscape Navigator, versions 4.x and 6.x	• Appearance • Fonts • Colors • Navigator • History • Languages • Smart browser • Internet search • Composer • New page settings • Mail and news groups • Message display • Message composition • Instant messaging • Addressing • Cookies • Passwords
Norton Antivirus, version 7.x	• Updates • Frequency • When • Advanced • Random options
WinZip, version 8.x	• Options • Columns • General • Section • Buttons • System default folder • Explorer enhancements • Context menu commands • Miscellaneous

Appendix B. File and registry exclusions

This appendix contains information about files and registry entries that cannot be migrated by SMA.

File and directory exclusions

The following files and directories are excluded from the scan process and so cannot be captured:

- pagefile.sys
- hal.dll
- ntuser.dat
- ntuser.dat.log
- ntuser.dat.ini
- system.dat
- user.dat
- bootsect.dos
- io.sys
- msdos.sys
- ntdetect.com
- ntldr
- ldr
- win386.swp
- hiberfil.sys
- boot.ini
- system.ini
- msdos.---
- command.com
- system.ini
- system.1st
- config.sys
- autoexec.bat
- *systemdir*\config, where *systemdir* is the operating-system directory
- SMA temporary directory

Also, the system volume information is not scanned and so cannot be captured.

Registry exclusions

SMA cannot capture the following registry entries:

- HKCU\\Software\\Microsoft\\Windows\\CurrentVersion\\Explorer
- HKLM\\SOFTWARE\\Microsoft\\Windows NT\\CurrentVersion
- HKLM\\Hardware
- HKLM\\sam
- HKLM\\security
- HKLM\\system\\ControlSet00N
- HKLM\\system\\currentcontrolset\\enum

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- HKLM\\system\\currentcontrolset\\services\\Tcpip
- HKLM\\system\\currentcontrolset\\hardware profiles
- HKLM\\SOFTWARE\\Microsoft\\Cryptography
- HKLM\\SOFTWARE\\Policies
- HKLM\\System\\CurrentControlSet\\Control\\Class
- HKLM\\System\\CurrentControlSet\\Control\\Network
- HKLM\\System\\CurrentControlSet\\Control\\DeviceClasses
- HKLM\\Software\\Microsoft\\RPC
- HKLM\\Software\\Microsoft\\Windows\\CurrentVersion\\Group Policy
- HKLM\\Software\\Microsoft\\Windows\\CurrentVersion\\Syncmgr
- HKLM\\Software\\Classes\\CID
- HKLM\\System\\CurrentControlSet\\Services\\Class\\Net
- HKCU\\AppEvents
- HKCU\\Control Panel
- HKCU\\Identities
- HKCU\\InstallLocationsMRU
- HKCU\\Keyboard layout
- HKCU\\Network
- HKLM\\Config
- HKLM\\Driver
- HKLM\\Enum
- HKLM\\Network
- HKLM\\Hardware
- HKLM\\Security

In addition, registry keys are excluded when the final node is one of the following text strings:

- StreamMRU
- Cache
- Enum

Appendix C. Getting help and technical assistance

If you need help, service, or technical assistance or just want more information about IBM® products, you will find a wide variety of sources available from IBM to assist you. This appendix contains information about where to go for additional information about IBM and IBM products, what to do if you experience a problem with your xSeries or IntelliStation® system, and whom to call for service, if it is necessary.

Before you call

Before you call, make sure that you have taken these steps to try to solve the problem yourself:

- Check all cables to make sure that they are connected.
- Check the power switches to make sure that the system is turned on.
- Use the troubleshooting information in your system documentation, and use the diagnostic tools that come with your system. Information about diagnostic tools is in the *Hardware Maintenance Manual and Troubleshooting Guide* on the IBM *xSeries Documentation* CD or in the IntelliStation *Hardware Maintenance Manual* at the IBM Support Web site.
- Go to the IBM Support Web site at http://www.ibm.com/pc/support/ to check for technical information, hints, tips, and new device drivers or to submit a request for information.

You can solve many problems without outside assistance by following the troubleshooting procedures that IBM provides in the online help or in the publications that are provided with your system and software. The information that comes with your system also describes the diagnostic tests that you can perform. Most xSeries and IntelliStation systems, operating systems, and programs come with information that contains troubleshooting procedures and explanations of error messages and error codes. If you suspect a software problem, see the information for the operating system or program.

Using the documentation

Information about your IBM xSeries or IntelliStation system and preinstalled software, if any, is available in the documentation that comes with your system. That documentation includes printed books, online books, readme files, and help files. See the troubleshooting information in your system documentation for instructions for using the diagnostic programs. The troubleshooting information or the diagnostic programs might tell you that you need additional or updated device drivers or other software. IBM maintains pages on the World Wide Web where you can get the latest technical information and download device drivers and updates. To access these pages, go to http://www.ibm.com/pc/support/ and follow the instructions. Also, you can order publications through the IBM Publications Ordering System at
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Getting help and information from the World Wide Web

On the World Wide Web, the IBM Web site has up-to-date information about IBM xSeries and IntelliStation products, services, and support. The address for IBM xSeries information is http://www.ibm.com/eserver/xseries/. The address for IBM IntelliStation information is http://www.ibm.com/pc/intellistation/.

You can find service information for your IBM products, including supported options, at http://www.ibm.com/pc/support/.

Software service and support

Through IBM Support Line, you can get telephone assistance, for a fee, with usage, configuration, and software problems with xSeries servers, IntelliStation workstations, and appliances. For information about which products are supported by Support Line in your country or region, go to http://www.ibm.com/services/sl/products/.

For more information about Support Line and other IBM services, go to http://www.ibm.com/services/, or go to http://www.ibm.com/planetwide/ for support telephone numbers. In the U.S. and Canada, call 1-800-IBM-SERV (1-800-426-7378).

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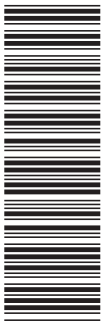

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