Checklist for Migration to Windows 7

The purpose of this document is to provide you with steps to take to prepare your PC for migration to Windows 7. It also includes the steps to take once Windows 7 has been installed.

<u>WARNING</u>: *The migration to Windows 7 will reimage your PC. This means that all information on your PC will be erased. You must therefore migrate any user content that you want to maintain. "Migrate" means that you save files and settings in a safe location, such as on a USB drive or a network share, prior to installing Windows 7 on your computer. When the installation is complete, you can move the files and settings from the safe location to your computer now running Windows 7.*

<u>NOTE</u>: *The migration to Windows 7 will also include the upgrade from Microsoft Office 2007 to Microsoft Office 2010. No additional steps are needed to prepare for this Office upgrade.*

Part 1 – Prior to Migrating to Windows 7 – Backup All Important Files

1. **Create a backup folder on the server.** *Go to your home drive <u>on the server</u> (H: drive) and create a folder called* W7BACKUP. **DONE ☐**

2. **Locate any folders and files on your PC** (usually on your C: drive) **that you want to save.** *Search your PC for files you want to keep. Possible locations to search include:*

   a. **My Documents**. *You may have a shortcut to* **My Documents** *on your desktop. If not, go to* C:\Documents and Settings*YourUserName*\My Documents. (*You may also click on* **Start** *then* **Run***. Enter* **C:\Documents and Settings*YourUserName*** *in the space then click* **OK**.*) Copy the entire* **My Documents** *folder to your* W7BACKUP *folder*. <u>Note</u>: *If your* **My Documents** *is your H: drive, you do <u>not</u> have to back up* **My Documents**. **DONE ☐**

   b. Your **Desktop**. *All folders, files and shortcuts located on your desktop are also easily viewed / accessed at* C:\Documents and Settings*YourUserName***Desktop**. *Copy the entire* **Desktop** *folder to your* W7BACKUP *folder. You might also want to copy* **Start Menu** *and* **Application Data**. *Both are located In the same location as* **Desktop**. **DONE ☐**

   <u>Note</u>: *Several shortcuts are put on your* **Desktop** *by default: My Computer, My Network Places, My Documents, and Recycle Bin. If these are the only items on your* **Desktop***, you do not have to worry about copying your* **Desktop** *items. However, Microsoft has renamed some of these shortcuts in Windows 7. You may have to re-establish these shortcuts after you have migrated to Windows 7. Make a note of the <u>full paths</u> of each of your shortcuts.* **DONE ☐**

   <u>Note also</u>: *You may have files in another profile's* **Desktop** *folder such as the "Default User"* **Desktop** *and/or the "All Users"* **Desktop***. It is recommended that you check and backup all profiles'* **Desktops**. **DONE ☐**

   *Go to C:\Documents and Settings\All Users**Desktop***. If files exist in this* **Desktop** *folder, copy this folder to your* W7BACKUP *folder. Name it "All Users Desktop." Go to C:\Documents and Settings\Default User**Desktop***. If files exist in this* **Desktop** *folder, copy this folder to your* W7BACKUP *folder. Name it "Default User Desktop."* **DONE ☐**

   c. Your **Favorites**. *This is the list of "Favorites" you might have created in Internet Explorer (IE). Your* **Favorites** *folder is located at* C:\Documents and Settings*YourUserName*. *Copy the entire* **Favorites** *folder to your* W7BACKUP *folder*. **DONE ☐**

3. **Locate any other important files on your PC that you want to save.** *Search for any other important files that may not be located in the above folders. Make a note of the location of each of these important files so you can copy the files back to the appropriate folders after migration.*

a. **Check for any PST files** (email personal files). *The location(s) of your **PST** files may be identified from within Outlook by clicking on **File** then **Data File Management**. Click on the **Data Files** tab. Make a copy of this Outlook window (screen shot) by clicking on the window then clicking **Alt / Print Screen** and pasting (**ctrl-v**) the screen shot into Word. If some location paths are too long to be completely visible in a screen shot, write the full paths in your Word document. Save this Word document in your* W7BACKUP *folder on the H: drive.* **DONE ☐**

   Note: *You do not have to worry about your **OST** file(s) (mailbox file). It will be migrated automatically.*

b. **Copy all local PST files**. *If any **PST** file is stored on your PC (C: drive), you will need to copy this local **PST** file to your* W7BACKUP *folder. (You do not have to copy your **OST** file(s).)*

   Note: *You cannot be in Outlook when you copy your **PST** files.*

   *Close Outlook. Copy all your local **PST** files to your* W7BACKUP *folder.* **DONE ☐**

c. **Other important files?** *If you think you may have other important files or folders on your PC (C: drive), locate these files/folders, make a note of the location of each and copy them to your* W7BACKUP *folder.* **DONE ☐**

Note: *All **logins and passwords** stored locally will be lost during migration.*

4. **Verify that you copied the files to your W7BACKUP folder.** Review the W7BACKUP folder contents to ensure you have everything you need. **DONE ☐**

Part 2 – Prior to Migrating to Windows 7 – Make Note of All Customizations

Although, the Windows 7 Migration Tool will automatically reinstall all "standard" CIO/OFT software, it will not reinstall any non-standard software and it will not restore your personal customizations of standard software. Therefore, you'll need to identify any non-standard program you use/need. You'll also need to identify any customizations and personalizations you've made on your PC. Follow steps 5 – 7 to find to make notes of non-standard software and customizations:

5. **Identify all special applications and software** *installed on your PC. All special applications and software will have to be reinstalled post-migration. Note each program's name and version number.*

   Note: *You do not need to note the following "standard" CIO/OFT-supplied software:*

✓ Adobe Reader	✓ MS Infopath	✓ MS SharePoint
✓ McAfee	✓ MS Internet Explorer (IE)	✓ MS Visio
✓ MS Access	✓ MS Outlook	✓ MS Word
✓ MS Communicator	✓ MS PowerPoint	
✓ MS Excel	✓ MS Publisher	MS Project is NOT standard.

   *To find a list of all software installed on your PC, from your **Desktop** click on **Start** then **Settings** then **Control Panel**. In Control Panel, click **Add or Remove Programs**. Make a copy of this window (screen shot) by clicking once on the window then clicking **Alt / Print Screen** and pasting (**ctrl-v**) the screen shot into Word. If your list of software is long, to ensure that you capture all listed software, you may have to scroll down and do one or more additional **Alt / Print Screen** and paste. Save your Word document in your* W7BACKUP *folder on the H: drive.* **DONE ☐**

   *To ensure all software has been identified, you might also want to check the **Start** menus. From your **Desktop**, click on **Start** then **Programs**. Make a copy of this menu of programs by clicking **Ctrl / Print***

Screen *and pasting (***ctrl-v** *or right click and* **Paste***) the screen shot into a Word document. Create another screen shot for each sub-menu as well. Save your Word document in your* W7BACKUP *folder on the H: drive.* **DONE** ☐

6. **Identify all printers installed on your PC.** *Printers will have to be reinstalled post-migration. To find all the printers currently installed on your PC, click* **Start** *then* **Settings** *then* **Printers and Faxes***. Make a copy of the window (screen shot) by clicking on the window then clicking* **Alt / Print Screen** *and pasting (***ctrl-v***) the screen shot into Word. The printer's IP address may be needed for reinstall, so also copy the* **Properties** *of each Printer. Save this Word document in your* W7BACKUP *folder on the H: drive.* **DONE** ☐

7. **Make a note of all customizations/personalizations on your PC.** *If you personalized (customized) any of the software on your PC, this customization will be lost when Windows 7 is installed. An example of customization is making changes to the "ribbons" in the various Microsoft Office software programs.*

   a. **Outlook** *provides a number of* **customizable options** *(e.g., Signature blocks). These customizations will not be migrated. To find any customizations, open Outlook, click on* **Tools** *then* **Options***. Check each tab and each button on the tab. Make a screen shot copy of each option that includes customization. Click the* **Print Screen** *key or click* **Alt / Print Screen***. Paste (***ctrl-v***) the copy of the screen shots into a Word document. Save this Word document in your* W7BACKUP *folder on the H: drive.* **DONE** ☐

   Make a note of any **Outlook Mailboxes** *(other than your own) that you have access to. These will have to be re-added post migration. From the* **Mail** *tab in Outlook, click the* **Print Screen** *key or click* **Alt / Print Screen***. Paste (***ctrl-v***) the copy of the screen shots into a Word document. Save this Word document in your* W7BACKUP *folder on the H: drive.* **DONE** ☐

   Make a note of any **Outlook Calendars** *(other than your own) that you have access to. These will have to be re-added post migration. From the* **Calendars** *tab in Outlook, click the* **Print Screen** *key or click* **Alt / Print Screen***. Paste (***ctrl-v***) the copy of the screen shots into a Word document. Save this Word document in your* W7BACKUP *folder on the H: drive.* **DONE** ☐

   If you have an extensive number of **email addresses or domain names** *that you have identified as either "***blocked***" or "***safe***," you may want to export those names to a file and import them after you migrate. To do this, from within Outlook, click on* **Tools** *then* **Options***. On the* **Preferences** *tab, click the* **Junk E-mail…** *button. Click on the* **Safe Senders** *tab and then click the* **Export to File…** *button. In the* **Save in:** *field, browse to your* **W7BACKUP** *folder on your* **H: drive***. In the* **File name:** *field, enter the file name* **Safe Senders** *to save your list of safe senders to a text file. Do the same at the* **Safe Recipients** *and* **Blocked Senders** *tabs.* **DONE** ☐

   b. *Open any other* **Microsoft Office software** *that you customized or personalized. Make a copy of the home screen (or any other customized screen) by clicking the* **Print Screen** *key or clicking* **Alt / Print Screen***. Paste (***ctrl-v***) the copy of the screen shots into a Word document. Save this Word document in your W7BACKUP folder on the H: drive.* **DONE** ☐

   c. *Note any* **other important PC customizations** *such as* **Desktop Task Bar** *settings. Make a screen shot copy of your* **Desktop** *and any other option that includes customization* **DONE** ☐

Part 3 – After Migrating to Windows 7 and Microsoft Office 2010 – Restoring Your PC

After the Windows 7 migration has been completed, you will need to restore your files. "Restore" means the files have been put back into their original location. You may also want to re-customize / re-personalize your PC.

Perform the following steps once your PC is up and running. Do <u>NOT</u> delete your W7BACKUP *folder until you are <u>certain</u> all your folders, files and data have been relocated appropriately.*

1. **Copy your data from your W7BACKUP folder** *to the appropriate locations on your PC (***My Documents***, your various* **Desktop** *folders, your* **Favorites** *folder, etc.).*

   a. *In Windows 7, the* **My Documents** *folder is now located in the* **Documents** *folder in the* **Libraries** *folder. One way t*o *get to your new* **My Documents** *folder is to click on the new "folders" icon located in the Task Bar at the bottom of your screen.*
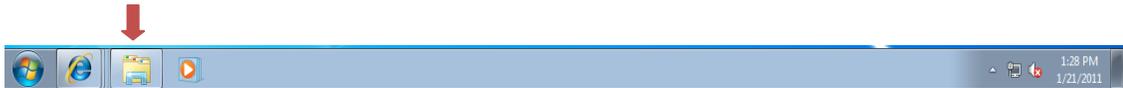


   The following window will be displayed:
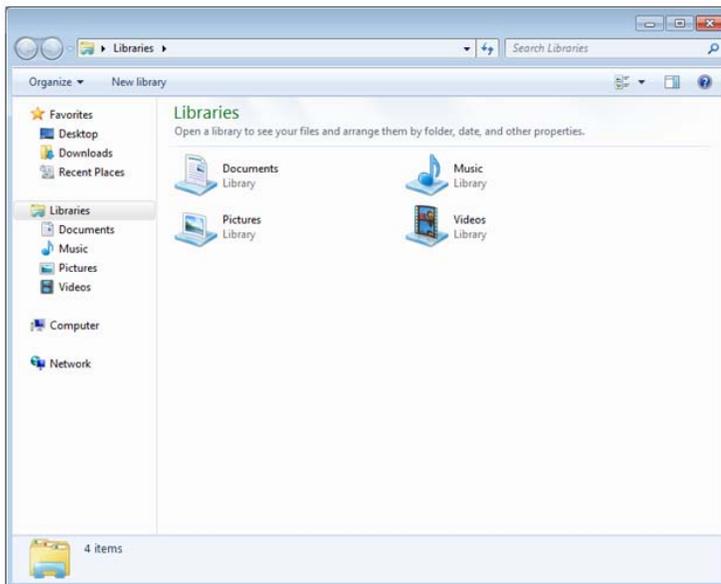
   Click on **Libraries** *in the navigation bar on the left. Then click on the little triangle/arrow to the left of* **Documents** *(not shown above). You can then click on* **My Documents** *to open that folder. Drag and drop the items from your* **W7BACKUP My Documents** *folder into your new Windows 7* **My Documents** *folder.*   **DONE** ☐

   Optionally, to ensure that your new **My Documents** *folder points to your home drive on the server (your* **H:** *drive), right click on* **My Documents** *in the left navigation bar. The* **Documents Properties** *window will appear.* **My Documents** *should be followed by* **(H:)***. (See below.) If it does not point to H:, you may need to get help from IT Support to re-point* **My Documents***.*
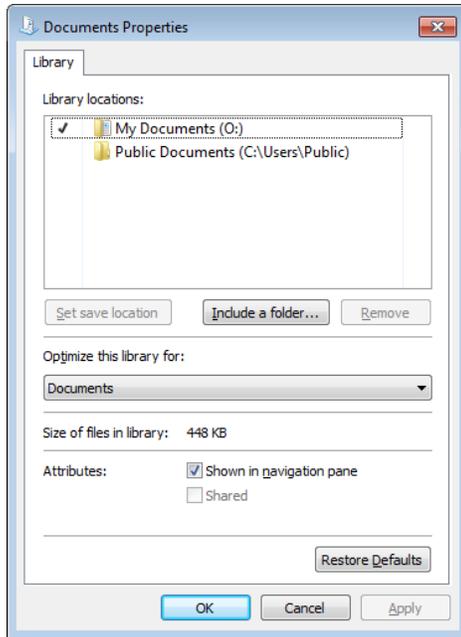
*Your new **Favorites** folder can be found by clicking on **Computer** in the left navigation bar in the same **Libraries** window. Alternatively, you can use the **Start** menu to navigate to your **Favorites** folder (or other folders). To get to your **Favorites** folder, click on the **Windows Start** button* ⊕ *(lower left corner of the screen) to get to the new **Start** menu. Then click on **Computer**.*
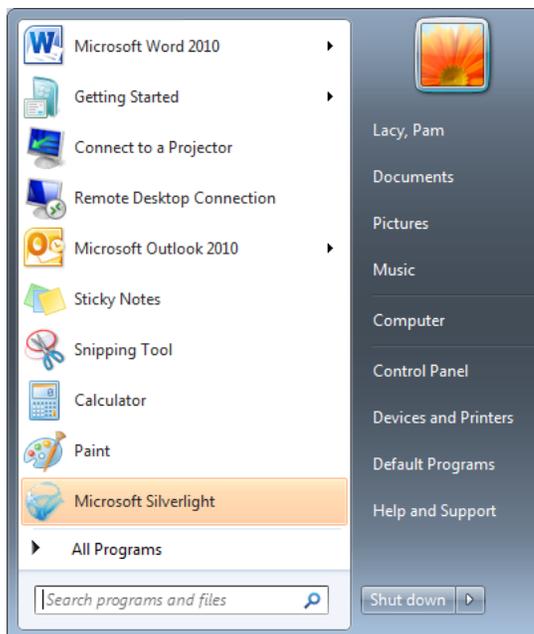

*Next click on **Local Disk (C:)**, then **Favorites**. Drag and drop the items from your **W7BACKUP Favorites** folder into your new Windows 7 **Favorites** folder.*   **DONE** ☐
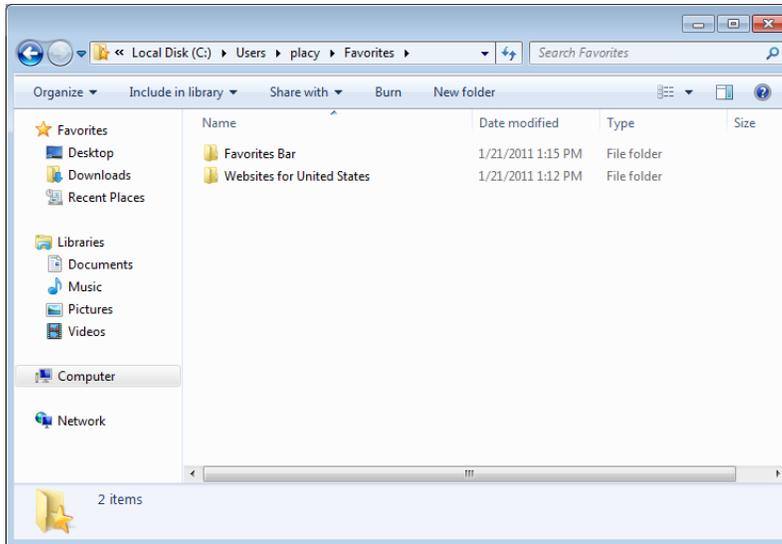
b. *Don't forget to copy contents of your original* **Desktop** *folder to new Windows7* **Desktop** *folder.*
 DONE ☐

2. **Re-create your special links and shortcuts.** **Note***: Because the destinations of your special links or shortcuts may be different on the Windows 7 platform, it is recommended that your recreate your shortcuts from scratch.* **Note also:** *When you migrated to Window 7, you also migrated to* **Office 2010***. Delete (do not use) any shortcuts that point to* **Office 2007** *products.* **DONE** ☐

3. **Verify that all special applications and software have been re-installed on your PC.** *Do* <u>*either a or b*</u> *below:*

a. *Click on the* **Windows Start** *button then click on* **Control Panel***.*
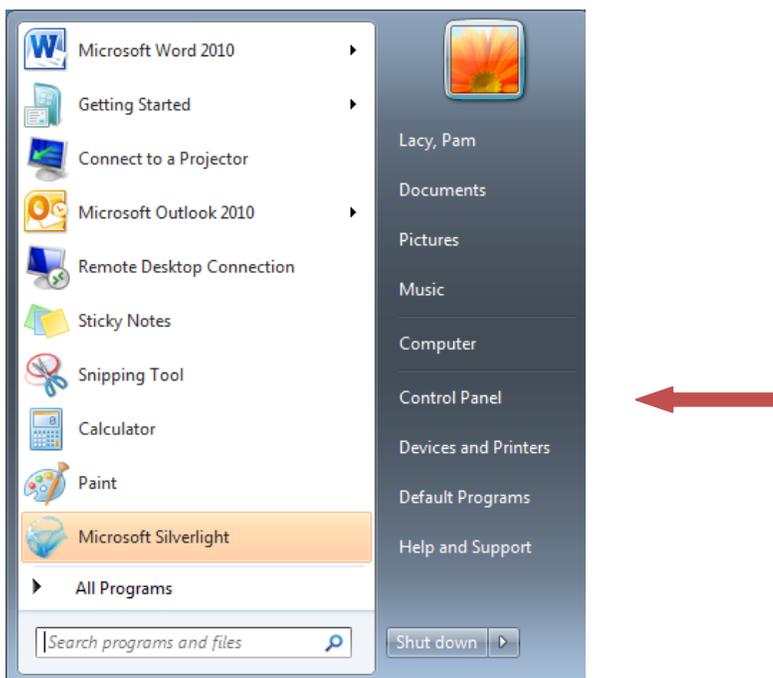
From within **Control Panel***, click* **Programs and Features***. You'll see a list of your software.*

b. Click on the **Windows Start** button then click **All Programs**. *You may have to scroll down the programs list to view all your software.*

Compare the software on your new Windows 7 platform to your original list of software that you created in **Step 5** above. If you believe any software is missing, contact IT Support.   **DONE** ☐

4. **Verify that all appropriate printers have been reinstalled.** *Printers may have to be reinstalled post-migration. To ensure your printers have been reinstalled, refer to the screen shot you made in **Step 6** above. Compare this list of printers with the printers listed in the Windows **Devices and Printers** (from the **Windows Start**). If you believe any printers are missing, contact IT Support.*   **DONE** ☐

5. **Re-customize/personalize your software, if necessary.**

a. Although the USMT <u>should</u> re-establish your Outlook account, if may not add shared mailboxes and calendars or reconnect your PST(s). Refer to the notes you made in **Step 7a** above for a list of your email accounts (mailboxes, PSTs, and any shared mailboxes and calendars.)

i. **Begin by setting up your default Outlook account**, *if necessary. Click on* **Windows Start** *then* **All Programs** *then* **Microsoft Office** *then* **Outlook**. *If your account has not yet been set up, you will be prompted with the* **Microsoft Outlook 2010 Startup** *screen. Click* **Next>**.

E-mail Accounts *screen. Would you like to configure an E-mail account?* **Yes**

Auto Account Setup *screen. Select* **E-Mail Account**. *If you name isn't already there, enter your email address (*<u>name@cio.ny.gov</u>*) in the* **E-mail Address:** *field. Click* **Next>**.

Microsoft Outlook *screen.* **Allow this website to configure** <u>name@cio.ny.gov</u> **server settings?** *Check* **Don't ask me about this website again.** *Click* **Allow**.

Add New Account *screen. Outlook will list the steps it takes to configure your account. After seeing* **Your e-mail account is successfully configured**, *click* **Finish**.

If you are not automatically brought into Outlook, re-enter Outlook. If you are prompted with **Outlook is not currently your default program for E-mail***…, click* **Yes.**   **DONE** ☐

ii. **Re-establish the PSTs you identified in Step 3a above.** *From within* **Outlook**, *click* **File**, *then* **Account Settings**. *(You may have to hover over the Account Settings icon to get the appropriate* **Account Settings…** *selection.)*

Account Settings *screen. Select the* **Data Files** *tab. Click on* **Add…** .

Navigate to where you saved your PST file(s), e.g., to your **O:** *drive. When you find the correct PST file, double-click on the PST file. You will be returned to the* **Account Settings** *screen.*

Account Settings *screen. If you have more PST files to add, repeat this step. When you are done adding PST files, click* **Close***.*   **DONE** ☐

iii.   **Add other e-mail accounts.** *If you have access to other e-mail mailboxes, you* <u>may</u> *have to add those other accounts. Unless you are familiar with the process for adding other e-mail accounts, request help from IT Support to perform this step.*   **DONE** ☐

iv.   **Shared Calendars.** *If you have access to other users' calendars, you* <u>may</u> *have to request those users to re-establish your access.*   **DONE** ☐

v.   *The USMT* <u>should</u> *re-establish your* **Safe Senders, Safe Recipients** *and* **Blocked Senders** *lists. In* **Outlook***, click the* **Home** *tab. In the* **Delete** *group, click* **Junk***, then click* **Junk E-mail Options… .** *See screen shot below.*
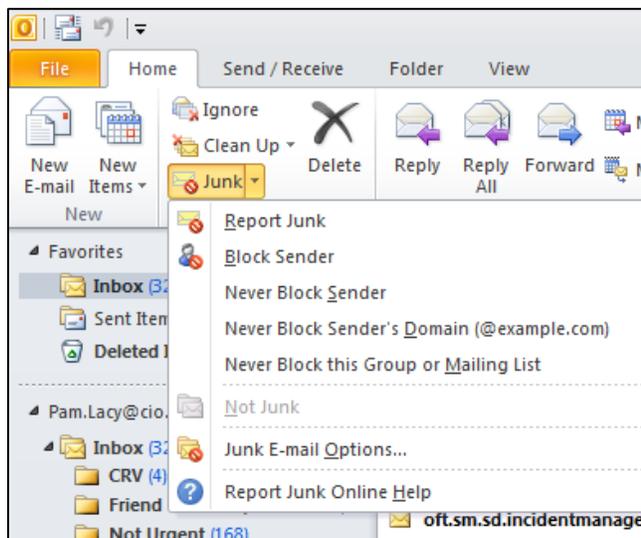
Check the **Safe Senders***,* **Safe Recipients***, and* **Blocked Senders** *tabs. If your lists have been re-established, proceed to step 5b below. If your lists have* <u>not</u> *been re-established – and if you exported them in Step 7a above – click* **Import from File… .**

In the **Look in** *list, select the text file that you want to import, then click* **Open***.*   **DONE** ☐

b.   *As you have time, open all* **Microsoft Office software** *that you customized or personalized prior to migrating to Windows 7 and* **reapply your customizations to your Microsoft Office software***. (See your notes from* **Step 7a** *and* **Step 7b** *above.) Because you were also migrated from* **Office 2007** *to* **Office 2010** *products, you may have a slight learning curve.*   **DONE** ☐

c.   *As you have time,* **re-establish any other important PC customizations** *such as Desktop Task Bar settings. (See your notes from* **Step 7c** *above.)*   **DONE** ☐

6.   **After verifying that all your folders, files, data, shortcuts, etc., are relocated appropriately***, delete the* **W7BACKUP** *folder that you created on the server.*   **DONE** ☐

7.   **Read the Windows 7 Overview document** to familiarize yourself with some of the differences between Windows XP and Windows 7. You can get a quick overview of Windows 7 by navigating

through the Discover Windows 7 tutorial available from the **Windows Start** menu. *Click on* **Windows Start** *then* **All Programs** *then* **Getting Started**. See screen below.　　　　**DONE** ☐
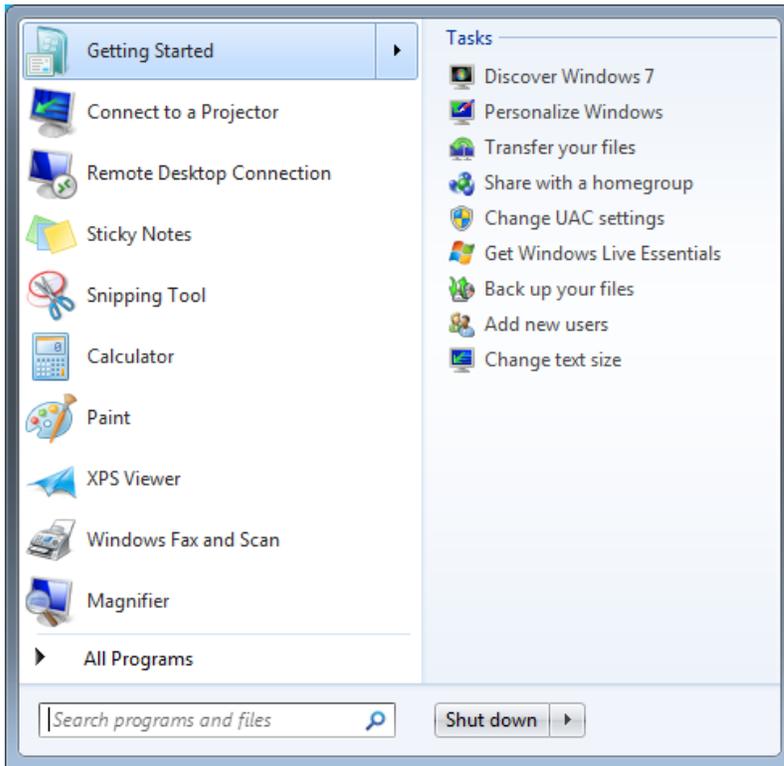
NOTE:

Following the migration to Windows 7, your PC may need updated drivers for your printer(s) or other hardware device(s).

If you experience problems with any hardware device –

or if you are missing any applications, software, or printers –

or if you need help re-establishing Outlook accounts –

or if you experience any other problems post-migration –

Contact the Customer Care Center if you have questions or need assistance

1-800-697-1323

Whenever possible when you report your problem, email to screen shots of the problem, including any error messages. (Make a copy of the screen shot by clicking on the window then clicking **Alt / Print Screen** *and pasting (***ctrl-v***) the screen shot into the email message.)*