Migrating a CPFUMC Computer

This procedure addresses the task of migrating and cascading CPFUMC computers. Two situations are addressed:

- 1. An old computer that has been in use for several years is being replaced by a brand-new computer which has never been used before
- 2. An existing computer is being cascaded and repurposed

The goal of the migration is for users to find everything they typically use in a familiar location on their desktop and all applications functioning normally with all of the user's existing data and customizations in place.

On the Old Computer

- 1. Make a list of all the login accounts and credentials (userids, passwords) on the old computer.
- 2. Make a list of all the software installed. (Control Panel → Programs and Features). You can use the Windows Snipping Tool or your smartphone to make a picture of the software list.
- 3. Use the Snipping Tool or your smartphone to take a picture of the arrangement of the desktop for each account.
- 4. Export web browser bookmarks for each browser in each user account and copy them to a flash drive.
- 5. If Outlook is used for email, export Outlook email data files (*.pst), contacts and calendar files to a flash drive. (Reference) Skip this step if the account uses a form of webmail and no email client software is installed.
- 6. Export contacts and calendars (to *.pst format files with appropriate names, e.g., calendar.pst, contacts.pst) for each Microsoft Outlook email client installed locally in each account. Skip this step if the account uses a form of webmail and no separate email client is installed.
- 7. Follow the publisher's uninstall procedure for any software being migrated if its license does not allow for multiple installations on different machines. Make sure that you have any product/license codes and installation files required so the software can be reinstalled on the newer machine. (example: Servant Keeper).
- 8. For each login account, copy all personal files to a flash drive. This includes every file that you want to save and transfer to the new computer. Usually these are in the C:\Users\<username> path, but they could also be in other file folders on the boot drive or on other drives if the old machine has multiple storage drives.
- 9. Copy any backup batch files and their log files installed on the old machine and note which account they use.

On the Brand-New Computer

Preparation Tasks

- 1. Make sure that it is connected to the Internet, then boot up the brand-new computer.
- 2. When asked to sign on with a Microsoft account, use the cpfumctrustees@gmail.com MS account and password. This account will be deleted later after local accounts are made and any MS Office software is installed.
- 3. Using Control Panel \rightarrow Power Settings, configure the computer, disk and monitor so that they never sleep, hibernate or turn off, especially during lengthy driver and OS updates. Set the time zone/time.
- 4. Install Windows OS updates and keep installing them until there are no more updates left to install.
- 5. Install Dell hardware drivers, applications and BIOS updates until there are no more left to install.
- 6. Using Control Panel→ System→ Advanced system settings→ Computer Name tab/Change..., the computer should be named (if it has not already been named) and the computer's Workgroup should be set to CPFUMC. (Note that NETBIOS limits the computer name to 15 characters.) Name the new computer **before** installing any Microsoft Office software.
- 7. Configure the new computer BIOS AC Power setting so that if AC power is lost, the computer reboots and comes back ON when power is restored.
- 8. Using the list you made above, reinstall all the user software. This may involve purchasing a new license for some software, such as Microsoft Office, which is licensed per machine. You may have to uninstall any trial MS Office or Office 365 software, which came pre-installed, if you are installing a purchased version of MS Office Pro Plus. See here if you want to transfer a Microsoft Office installation from the old machine to the new machine. This may also involve migrating a software license, such as Servant Keeper, to a new machine. See Moving Servant Keeper to a New Computer for Servant Keeper migration and setup steps.
- 9. Create any new user accounts required, then you can delete the MS setup account and files.
- 10. Install Brave, Ookla Speedtest, RemotePC, Dell Command | Update and Support Assist in each account.
- 11. Using the bookmark files you saved above, import web browser bookmarks for each browser in each corresponding user account.
- 12. Create a desktop arrangement (icons, background) to match the corresponding account on the old machine that the new computer is replacing.
- 13. If the new computer has a *username*@cpfumc.org email account, follow the <u>GoDaddy instructions</u> to migrate the email installation to the new computer.
- 14. If the new computer has a GMail or other email account **not** of the form *username@cpfumc.org*, use the data files you saved above, import email client data, contacts and calendars (.pst files) into each email client in each corresponding user account. (<u>Reference</u>)
- 15. Using the personal files you copied above, copy all personal files saved to the appropriate locations on the new machine, typically C:\Users\<username>.
- 16. If the new machine is to be used on the CPFUMC peer LAN, make sure that all <u>peer networking</u> configuration parameters are set.

Installation Tasks

- 17. With the new computer connected to the CPFUMC LAN, used CMD and the **ipconfig/all** command to determine the new computer's IP address(es). The computer may have TWO IP addresses if Wi-Fi capability is present and turned ON (recommended).
- 18. For ease of propagation to other computers, the current *hosts* file is stored in the root directory of the CPFUMC Electronic Library.
- 19. Update the CPFUMC LAN *hosts* file with the new computer's name and IP address(es). (If the new computer has Ethernet and Wi-Fi, it will have two different IP addresses.)
- 20. Copy the newly edited *hosts* file to **all other computers on the CPFUMC LAN** in the *C:\Windows\system32\drivers\etc* folder of each computer.
- 21. Peer LAN configuration also involves a router configuration step to reserve the IP address(es) of the new computer. This allows the new computer to be assigned the same IP address(es) each time it is restarted while connected to the CPFUMC peer LAN. It also allows it to be "seen" better by other computers on the CPFUMC peer LAN.
- 22. Install a printer driver so the new computer can print to a nearby printer. Make sure to set color OK for the Sharp MX-3071 to make color printing available later for authorized users.
- 23. Reinstall and check operation of any backup batch files and create a Windows Scheduler script to run the batch file(s).
- 24. Test software on each user account to make sure that it functions and is configured as expected.

On a Repurposed Computer

- 1. Boot up the computer, making sure that it is connected to the Internet.
- 2. Install any OS updates and keep installing them until there are no more updates left to install.
- 3. Create any new user accounts required.
- 4. Delete any old user accounts and files which will not be used. Retain any installations of licensed software, such as Microsoft Office, which is licensed per-machine.
- 5. Configure a new computer name and check the workgroup for the repurposed computer.
- 6. If the new machine is to be used on the same peer CPFUMC LAN, make sure that all <u>peer networking configurations</u> are set and the hosts file is copied and includes the IP address of the repurposed computer. This will also involve a main router configuration step to reserve the IP address of the repurposed computer. This allows the repurposed computer to be "seen" by other computers on the same peer CPFUMC LAN.
- 7. Check the Power Settings so that the computer never sleeps, hibernates or turns off.
- 8. Install a printer driver, as required, so the new computer can print to a nearby printer.
- 9. Install and check operation of any backup batch files.
- 10. Using the list you made above, reinstall all the user software. This may involve migrating a software license, such as Servant Keeper, to a new machine. See Servant Keeper References $\underline{1}$ and $\underline{2}$ for Servant Keeper migration and setup.
- 11. Uninstall any software not needed for the repurposed computer.
- 12. Using the bookmark files you saved above, import web browser bookmarks for each browser in each user account.
- 13. Using the data files you saved above, import email client data, contacts and calendars into each email client in each user email account. (Reference)
- 14. Using the personal files you copied above, copy all personal files saved to the appropriate locations on the new machine, typically C:\Users\<username>.
- 15. Create a desktop arrangement (icons, background) to match the corresponding account on the old computer that the repurposed computer is replacing.
- 16. Test software on each user account to make sure that it functions and is configured as expected.