

# "Solutions, Inc." – Windows XP Pro OS Installation Checklist Updated 10.2005 ME

## □ Client Information

Client Name and Office:
Date installation completed:
Installation Technician:

## □ Data Transfer Preparation

(Copy data to a network share if bringing old PC offline.)

<input type="checkbox"/>	Email Messages
<input type="checkbox"/>	Email Account Username: Password: Server:
<input type="checkbox"/>	Address Book
<input type="checkbox"/>	My Documents
<input type="checkbox"/>	Lotus Work Folder
<input type="checkbox"/>	Export IE Favorites
<input type="checkbox"/>	Other Data (Review hard drive contents with client)

## □ Note Network Settings from Old PC

<input type="checkbox"/>	Computer Name:
<input type="checkbox"/>	IP Address :
<input type="checkbox"/>	Default Gateway:
<input type="checkbox"/>	DNS Server:
<input type="checkbox"/>	Domain Name (if applicable):
<input type="checkbox"/>	Workgroup Name (if applicable):
<input type="checkbox"/>	Mapped Drives:
<input type="checkbox"/>	Printer:
<input type="checkbox"/>	Printer:
<input type="checkbox"/>	Printer:
<input type="checkbox"/>	Is a Client Access printer session(s) used? If so note the specifications here (printer ID and emulation driver):

## □ Unpack and Setup New PC

<input type="checkbox"/>	Unpack
<input type="checkbox"/>	Install additional memory (if applicable): _____
<input type="checkbox"/>	Install modem (if applicable)
<input type="checkbox"/>	Install LPT2: card (if applicable)
<input type="checkbox"/>	Install SCSI card (if applicable)
<input type="checkbox"/>	Install 3270 Emulation card (if applicable)
<input type="checkbox"/>	Install Other Hardware (if applicable) Note Here:

## □ Start Windows for the First Time

(Note: Order of the following steps will vary.)

<input type="checkbox"/>	Connect computer to network and boot up.
<input type="checkbox"/>	Personalize Your Software: Name & Organization.
<input type="checkbox"/>	Enter Computer Name and Description.
<input type="checkbox"/>	Enter Time Zone, Date and Time.
<input type="checkbox"/>	Networking Components: Choose Typical
<input type="checkbox"/>	Select Workgroup or Domain NOTE: If computer will be in a workgroup enter that name now. If computer will be in a domain, place it temporarily in a workgroup, use network wizard later to add to correct domain.
<input type="checkbox"/>	Internet Connection: specify LAN
<input type="checkbox"/>	Set Static IP:
<input type="checkbox"/>	Set Subnet Mask:
<input type="checkbox"/>	Set Default Gateway: (NOTE: In most circumstances this is the IP address of the Instagate)
<input type="checkbox"/>	Set Preferred DNS: (NOTE: In some circumstances this is the IP address of the Instagate or other firewall).
<input type="checkbox"/>	Register with Microsoft? Choose Yes (enter data).
<input type="checkbox"/>	Register with IBM? Choose Yes (enter data).
<input type="checkbox"/>	From the Start menu, choose to show the "My Computer" icon on the desktop (XP Only).
<input type="checkbox"/>	From My Computer, change Power Options to Always On (Never to all options).
<input type="checkbox"/>	Right click on Taskbar, go into Properties, enable Show Quick Launch, then click Start Menu, Customize, Advanced, check My Network Places, then Apply it, click on Start, right click on My Network Places and click Show on Desktop (XP Only).

## □ Use Network Wizard

(Note: Domain users only.)

<input type="checkbox"/>	Right Click on "My Computer"
<input type="checkbox"/>	Switch to the "Computer Name" Tab
<input type="checkbox"/>	Click on "Network ID" to use the Network Identification Wizard
<input type="checkbox"/>	Welcome Screen Click Next.
<input type="checkbox"/>	Select "Business Network".
<input type="checkbox"/>	Select "Network with a Domain".
<input type="checkbox"/>	Information Screen Click Next.
<input type="checkbox"/>	Enter user account, password (recommend same as AS400 login) and domain.
<input type="checkbox"/>	Enter computer name and domain.
<input type="checkbox"/>	Enter administrator account, password and domain.
<input type="checkbox"/>	Add User Account – add domain user account to local computer.
<input type="checkbox"/>	Access Level – Select "Other" and "Administrators".
<input type="checkbox"/>	Completing the Network Identification Wizard.
<input type="checkbox"/>	Restart the Computer and log on as user.

## □ Apply Windows OS Service Pack

<input type="checkbox"/>	Install latest Windows service pack: Version _____
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**Internet Explorer**

- Ensure that the latest version IE is installed.
- Import favorites.

**AntiVirus**

*(Note: Norton AntiVirus Corporate Edition (NAV CE) is recommended for all PCs.*

- Installed NAV CE, install as managed, browse for the server. Or install Norton AV that came with PC. Instruct user that it is only good for 90 days.

**Client Access Installation**

- Client Access Version: \_\_\_\_\_
- Client Access Service Pack: \_\_\_\_\_
- Customize keyboard as desired and save as "keyboard". Set profile to use "keyboard" and save.
- Create new desktop icon and configure display to 27 x 132, save as DSP1. Modify icon properties to use DSP1.
- If needed, create printer session and configure as was noted on old PC. Emulation Driver used \_\_\_\_\_
- Change Service Level under Properties of Client Access to Never

**Microsoft Office – Version: \_\_\_\_\_**

- If needed, install Microsoft Office
- Enter Product Key
- Activate Microsoft Office with customer information

**Lotus Smart Suite – Version: \_\_\_\_\_**

- If needed, install Lotus Smart Suite
- Logon as administrator of local machine.
- Install Smart Suite select the option to allow anyone who uses this machine to use the program.

**Install Utilities**

- Install Adobe Acrobat (latest version on Tech CD)
- Install WinZip (latest version on Tech CD)
- Install VNC – PASSWORD \_\_\_\_\_

**Install Local Printer Driver(s)**

- LPT1:
- LPT2:
- LPT3:
- USB:

**Install Network Printer Driver(s)**

*(Note: Use standard TCP/IP ports.)*

- Model: \_\_\_\_\_ IP: \_\_\_\_\_
- Model: \_\_\_\_\_ IP: \_\_\_\_\_

**Map Network Drives**

- \_\_\_\_\_ Drive Maps to shared Folder \_\_\_\_\_ on \_\_\_\_\_.
- \_\_\_\_\_ Drive Maps to shared Folder \_\_\_\_\_ on \_\_\_\_\_.
- \_\_\_\_\_ Drive Maps to shared Folder \_\_\_\_\_ on \_\_\_\_\_.

**Email**

- Configure email account: username, password, and server.
- Import email messages to new computer.
- Import address book to new computer.

**Data Transfer from Old PC**

- Copy My Documents to new computer.
- Copy Lotus work folder to new computer.
- Copy other saved data to new computer.

**Backup Software**

*(if applicable)*

- Install backup software. Version info \_\_\_\_\_
- Configure backup software.

**Disk Defrag**

- Run Disk Cleanup
- Run Disk Defragmenter

**Cables or other hardware/accessories needed**

- Cat 5 Cables  
Length \_\_\_\_\_ # used \_\_\_\_\_  
Length \_\_\_\_\_ # used \_\_\_\_\_  
Length \_\_\_\_\_ # used \_\_\_\_\_  
Printer cables \_\_\_\_\_
- Other hardware/accessories used (please specify)

**Review with Client**

- Review installation with client.
- Answer any questions client has.
- Leave client with the "GOLDEN" box or bag of software and miscellaneous documents and advise to put it in a safe place for keeping (vault).
- Leave client with complimentary mouse pad.

Client  
Initials: \_\_\_\_\_

Technician  
Initials: \_\_\_\_\_

ADDITIONAL NOTES OR OBSERVATIONS:

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