

Checklist for PC Setups

Draft

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(copy available online at www.lehman.cuny.edu/cs/docs/setups)

(Adapt form as necessary to setup of new PCs, reinstallations, setup of cloned PCs etc.)

Date

ITR Staff

Owner Information

Name of User:

Name of Supervisor/Director:

Department

Location

User Email Address

Discussion of setup with user/supervisor (dates, times, file backups etc.)

Purchase orders for software (or on file for reinstallation/transfer)

New CPU information

Model

SN/Service Tag:

Type of Setup:

New PC – not cloned

New PC – cloned

Setup of Source/Reference PC for cloning

Reinstallation

Installed OS

Installed Service Packs

OS Product Key

Other Peripherals to be setup (new or transferred from old PC)

Printer

Scanner

Other

Special Considerations for Upgrades on existing PCs

Determine if you will be upgrading the existing installation or repartitioning/reformatting the drive first.

Discuss setup and planning of the upgrade with staff thoroughly familiar with the uses of the PC in the office. This is not necessarily the current primary user. Upgrades and reformatting hard drives should be cleared with supervisor or director in most cases. All parties must understand that reformatting of hard drive will destroy all data and applications and an upgrade on top of an existing installation may lead to some data loss.

Determine if PC meets recommended system requirements.

Inform user if PC is entirely unsuitable for upgrade or if a memory and/or hard disk upgrade is required. Be sure to check the system settings for hard drive size, RAM etc. Many if not most Windows NT installations do not use all the hard drive capacity. Determine if application software will work with new OS. This is especially important if specialized software is being used (GIS software, statistical software, communications software used to access other systems). Determine if this software will require special configuration under the new OS and who will do it.

Determine if peripherals will work with new OS. Again special attention should be given to specialized devices such as data acquisition equipment used in experiments, scanners, external storage devices, CD-RWs, SCSI adapters etc. Are drivers available from device vendor for new OS? Is the interface compatible? Determine any special networking setup - Determine if media for software reinstallation are available. (Software licensed through the ITR does not require media from the user.)

File transfer and backup of files if new PC replaces old

Plan for Transfer of Files

- Over network
- Crossover cable
- External media (zip)

Backup of user documents to external media

Backup of Favorites, Bookmarks to external media

Email Client used

Backup of email (including contacts, address books) to external media

Details of current configuration

Network printing

Departmental or other local network

Status of current network connection

- DHCP
- Fixed IP address
- Required Fixed address
- Computer Name
- MAC Address

Local Printer model

Special devices (modems, scanners, external zip drives, palm pilots etc)

Special networking needs (e.g. fixed address, grade changes, and remote system access)

Review of software on current PC and what packages will be reinstalled on new PC

Use/disposal of old PC

Other relevant details of current setup

New OS Installation

Check system requirements for OS

If fresh install will be done:

- Obtain approval for reformatting drive and resulting data loss

- Determination of file system and partitioning scheme

Installation of OS from installation CD/restore CD/ZZTOP

Plan for backing up files

New and Pre-Installed OS

Service packs

Windows critical updates

Copy i386 folder to c:\i386 (should be there on pre-installed systems)

Copy service packs to c:\sp

XP Activation (may be set by manufacturer)

(Note: \windows\system32\wpa.dbl can be copied to diskette to avoid reactivating – not really necessary)

Configuration of Automatic Update

OS Setup

Discuss account setup with user/director

Setup accounts for user (generally in admin group for office PCs)
itr in Administrator group

Hide ITR (XP only)

In Regedit:

HKLM\Software\Microsoft\Windows NT \Current Version\WinLogon\Special
Accounts\Userlist

Create New Dword entry for the itr account with value set to 0 (default)

(Administrator XP account should be hidden if additional accounts are created.)

Set password on Administrator account

Application/Utility Software Installation

Purchase orders/requests for the following licensed software packages (SPSS, Adobe, WordPerfect etc.):

Software	Applied updates if available (e.g. Corel)
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- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

AntiVirus Software

Symantec Anti Virus

Update Virus definitions

Configuration of Symantec – scheduling of LiveUpdate

Office Suite

Office

- 2000
- 2002 - XP
- 2003

Office service packs

Office updates

Network Applications

Hummingbird

Hummingbird updates (use System Administration in Hummingbird group)

Hummingbird profiles (on updated installation CD)

- UAPC
- CUNYVtam
- Alpha

Copy profiles to default user under Program Files/Hummingbird/.....

WS-FTP (deselect Passive Transfer Mode)

Netscape

Eudora

Other Software

Adobe Acrobat Reader

Optional items

- Decompression utility
- Quicktime
- Browser extensions for Flash

Completion of software license agreements (see www.lehman.cuny.edu/cs/forms)

Network Setup

Configuration of Email client

Email Restores

Restore campus backbone connection

DHCP

IP

MAC

Computer Name (note bldg-wall outlet label convention)

Restore/setup network/shared printing

Restore/setup department/local area network connection

Restore other network access

Installation of new or transferred peripherals

Printer

Scanner

Other

Additional local setup

Drivers (check device manager)
Iomega software

Video settings

IE/Netscape settings

Local printer

Restore changed options (folder views)

Clean up desktop

Standardize desktops

Time/date

Clean up (remove temp. IPs, empty recycle bin etc.)

CHECK DRIVES FOR CDs AND ZIP CARTRIDGES

Notes: