**FSI Computer Transition Guide**

*Compiled by: Dave Alexander*

**⚙️ General Pre-Swap Checklist (All Users)**

**System Prep**

* Power on new PCs and connect to Ethernet
* Ensure remote management agent (e.g. Ninja) is active

**Required Software Installations (IT Task)**

* Contpaq
* Adobe Acrobat
* Zed Axis *(Install only; activation on swap day)*
* QuickBooks
* Citrix Workspace
* Remove unused software (e.g. Endicia, Dymo apps if no longer needed)

**Configuration & Setup**

* Add user to Outlook shared mailboxes (e.g. Accounting@, Operations@)
* Validate printer mappings
* Map all shared network drives
* Transfer desktop files (via USB or network share)

**🧳 User-Specific Pre-Swap Tasks**

**Bookmark Backup**

**Browsers: Chrome / Edge / Firefox**

1. Press Ctrl + Shift + O
2. Open bookmarks manager
3. Use **Export** to save as HTML
4. Store on OneDrive or USB

**Email Signature Backup**

**For Outlook Desktop:**

1. Go to File → Options → Mail → Signatures
2. Copy content into Notepad or Word
3. Save file to OneDrive or USB

**Optional Full Backup (Advanced):**

1. Press Windows + R, enter:
2. %APPDATA%\Microsoft\Signatures
3. Copy all relevant .htm, .rtf, .txt files and matching folder
4. Store to external location for import later

**🔐 Zed Axis Activation Process**

**Issue Identified:** License activation cannot occur until old PC is deactivated

**Resolution:**

* Release existing license via Zed Axis web portal
* Reactivate during live swap
* Schedule 15-minute support window for activation

**🌐 Remote Access Setup (Michelle's Case Study)**

**Standard Workflow:**

1. User connects to VPN via GlobalProtect
2. User launches RDP session to office workstation

**Troubleshooting Lessons:**

* VPN won’t connect internally or over some hotspots
* RDP access may fail if user is not explicitly granted permission

**Required Config:**

* Add user to **Remote Desktop Users** group
* Confirm PC name format (e.g. MZ01QH1A-FS)
* Ensure port 3389 is accessible (if applicable)
* Test GlobalProtect from user’s home network

**💼 Post-Swap Configuration (Handled by Dave/User)**

* Microsoft 365 sign-in
* Outlook email profile setup
* Teams configuration
* Taskbar and desktop personalization
* Chrome as default browser
* Audio/speaker setup
* Email signature import (see below)

**📂 Importing Email Signatures**

**Full File-Based Import**

1. On the **new PC**, open:
2. %APPDATA%\Microsoft\Signatures
3. Paste previously saved .htm, .rtf, .txt files and folders
4. Open Outlook: File → Options → Mail → Signatures
5. Signatures should appear automatically

**Manual Re-Entry (if no files available)**

1. Open saved Notepad/Word copy
2. Paste into new signature in Outlook's signature editor

**⏱️ Recommended Timeline**

| **Task** | **Timing** |
| --- | --- |
| Power-on + networking | 2 days pre-swap |
| IT software + prep config | 1 day pre-swap |
| Bookmark/signature backup | 1 day pre-swap |
| Zed Axis reactivation | Day of swap |
| Final system validation | End of swap day |

**📞 Key Support Contacts**

* **IT Support (Stellar):** [support@stellar.tech](mailto:support@stellar.tech) | 888-434-1043 opt. 2
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