

Hardware Transfer Instructions 2021

U A N
U N I F O R M
ACCOUNTING
N E T W O R K

OHIO AUDITOR OF STATE
KEITH FABER



Uniform Accounting Network Hardware Transfer

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OVERVIEW

These instructions will guide you through setting up your new hardware and transferring your data to your new hardware. The following data will be transferred:

- UAN software data
- UAN Cemetery software (*if installed*)
- Documents folder contents
- Microsoft Outlook data (*emails, contacts, tasks, calendar, and settings*)
- Edge internet browser favorites (*bookmarks*)

The Hardware Transfer Process will be run from a flash drive that will be referred to as the UAN Hardware Transfer USB Drive in these instructions. This flash drive will be donated to your entity once the transfer process is complete.

This booklet has four parts:

Part 1: Before Hardware Transfer - Tasks to accomplish before starting the hardware transfer. These tasks can be started, paused and resumed, and completed at your leisure. Many of the tasks are optional or may not relate to your particular situation.

Part 2: Hardware Transfer - The process of transferring your data (see above) from the Dell hardware to the HP hardware. On average the transfer process will take approximately 20-60 minutes to complete. Once the hardware transfer process has started, it **cannot** be paused or cancelled.

Part 3: After Hardware Transfer - Tasks that must be performed after the hardware transfer is completed. These tasks need not be completed immediately after the hardware transfer, but should be done in a timely manner. Many of the tasks are optional or may not relate to your particular situation.

Part 4: Appendices

Important: Performing the hardware transfer process is **not** optional.

Important: You will not be able to upgrade the UAN application to version 2021.2 on your current Dell computer. Version 2021.2 will contain the updated 941 Federal Tax Form and other enhancements.

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BEFORE HARDWARE TRANSFER

DELL HARDWARE WARRANTY

UAN strongly recommends that you complete the hardware transfer before the warranty on the Dell hardware expires. April 12, 2021 the majority of Dell computers will no longer be covered by the warranty. To verify the warranty expiration/end date, visit their website at: <https://www.dell.com/support/home/en-us?app=warranty> and enter the Dell computer's service tag (found on the Dell computer) into the 'Search support' search box. Any required hardware service must be initiated before this date to be covered at no cost under the UAN warranty.

The new HP hardware is warranted for four years.

DELL HARDWARE DONATION

The Auditor of State is donating the Dell hardware to your governmental entity. Your entity is authorized to accept the donation of the system once the setup and data transfer to the new UAN hardware has been completed.

Note: All UAN printers were replaced in 2019 and you will not receive another printer this year. The current HP or Lexmark printers are not included in the hardware donation.

The following software will remain on the system and will also be donated to your entity:

- Windows 10 Operating System
- Microsoft Office 2016 (*Word, Excel, PowerPoint and Outlook*)

The hardware is donated 'as is' with no implied warranty. If your entity decides to sell the hardware, Sections 505.10 and 721.15 of the Ohio Revised Code (ORC) identifies the process to be followed for Townships and Villages respectively. There is no section of the ORC that applies to Libraries and Special Districts. However, all entities are subject to Ohio ethics laws, and we advise you to consult with your statutory legal counsel should you have any questions regarding the disposal or sale of your Dell hardware.

Please remove the AOS inventory number sticker from your donated Dell system. The AOS tag number sticker is located on the top of the desktop tower, and on the top of the laptop in the closed position. It is a very small silver sticker that will indicate *Auditor of State*, then a bar code and a six-digit number.

INSURANCE COVERAGE

The new hardware is property of the Auditor of State of Ohio. Your entity will need to continue to insure the new UAN hardware, including the printer issued in 2019, for a value of \$2,000.

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UAN VERSION 2021.1 MUST BE INSTALLED

The transfer process requires UAN version 2021.1 on the Dell computer. UAN Version 2021.1 was released on December 2, 2020. If you need a copy of that version, please contact UAN Support at UAN_Support@ohioauditor.gov or 1-800-833-8261.

CEMETERY

If your entity is using the UAN Cemetery software, it must be upgraded to Cemetery version 4.0 to be eligible to transfer to the new HP computer. If using Cemetery version 3.0 or below, you must upgrade to Cemetery version 4.0 to proceed. To verify the cemetery version you are using, the version number will be located on the cemetery log in screen.

Note: Networked Cemetery users will be provided additional steps to ensure all systems are updated.

Note: This only applies to the Cemetery software that is installed on your current Dell computer. If you are using Cemetery on a non-UAN issued computer, there will be no transfer of data.

DOCUMENTS

UAN will transfer the contents of your Documents folder during the hardware transfer process. The folder will appear on the desktop of UANUser and will be labeled “Documents”.

Some clients may have a large number of audio or video files in the Documents folder. If the data will not fit onto the provided USB Drive, you will be required to back up the contents of the Documents folder on your own, and then reduce the size of this folder by deleting files before attempting the transfer process again.

Reminder: Review your records retention schedule before discarding any documents and files.

Reminder: Backups for the Documents folder should be done on a regular basis. Detailed steps on how to perform a Documents folder backup are located in Appendix C of this document.

MICROSOFT OUTLOOK

If you use an internet service for your email, contacts, or calendar (*Hotmail, Gmail, Yahoo, etc.*) and are not using Microsoft Outlook, then the following does not apply to you.

The UAN hardware transfer process will include your Microsoft Outlook data (*emails, contacts, tasks, calendar, and settings*). After the hardware transfer has completed, some additional Outlook setup steps may be required. Those steps will be detailed in this booklet in the “After Hardware Transfer” section.

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MICROSOFT OFFICE 2019

The new HP computer will be upgraded to Microsoft Office 2019.

MICROSOFT EDGE FAVORITES/BOOKMARKS

Microsoft Edge favorites (*bookmarks*) will be transferred to the new hardware.

PRINTER INSTALL

The transfer process will determine which printer you are using, and will install the proper scanning software if you have a multi-function printer. Make sure you have your printer plugged in to your new HP computer when you begin Step 6.

C:_UAN_EFILES DIRECTORY

The files within the _UAN_Efiles directory will not be transferred to your new HP computer during the transfer process.

GOOGLE CHROME

Google Chrome is preinstalled on the new HP computer. However, if you had added Google Chrome to your Dell computer, favorites or any other Google Chrome settings such as contacts will not be included in the hardware transfer.

Important: If you wish to retain your Google Chrome favorites and contacts, sign in using the same Google account, and your content should appear on the new system.

ADDITIONAL SOFTWARE

If you have installed hardware or software files onto your system that are not part of the UAN package or are not located in the Documents folder, you are responsible for backing up those items before beginning the transfer process and reinstalling them after the transfer is complete.

If additional software (EFT software provided by your bank, hyper-terminal EFT setup, utility billing applications, mayor's court applications, non-Outlook email, check signers, etc.) is critical to your operations, UAN recommends that you gather all necessary installation discs and product keys, and (if necessary) speak with the software vendor before starting the hardware transfer.

If you plan to network the Dell hardware with the HP hardware after the transfer process (in order to use the UAN software on both computers), you will need the UAN version 2021.1 update disc to reinstall UAN on the Dell computer. Call or e-mail UAN Support if you need another 2021.1 update disc.

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IF UAN DATA HAS BEEN MOVED TO ANOTHER COMPUTER OR SERVER

If you use UAN only on a UAN-provided Dell, or you have networked multiple computers but the UAN database still resides on the Dell (i.e. you have never moved the UAN data to another computer or server), then the following does not apply to you.

Even if you have moved the current UAN software database to another computer or server, you are still required to complete the hardware transfer from the UAN-provided Dell Computer. Future UAN software updates, including UAN version 2021.2 which will contain the first quarter 941, will not install if this transfer process is not completed. The process is still required to transfer the following items:

- UAN software data
- UAN Cemetery software data (*if installed*)
- Documents folder contents
- Microsoft Outlook data (*emails, contacts, tasks, calendar, and settings*)
- Favorites (*bookmarks*)

HARDWARE SETUP

Important: Be sure to inspect the HP hardware for any damage before starting the hardware transfer. If damaged, please contact UAN Support.

If you chose the laptop, please skip to page 10.

DESKTOP - HP ELITEDESK 805 G6

If you requested a desktop, you should receive one box that contain the following equipment:

- Flat Panel Monitor (*including 3 monitor cables and black power cord*)
- Central Processing Unit (CPU) (*including black power cord*)
- Mouse and Keyboard

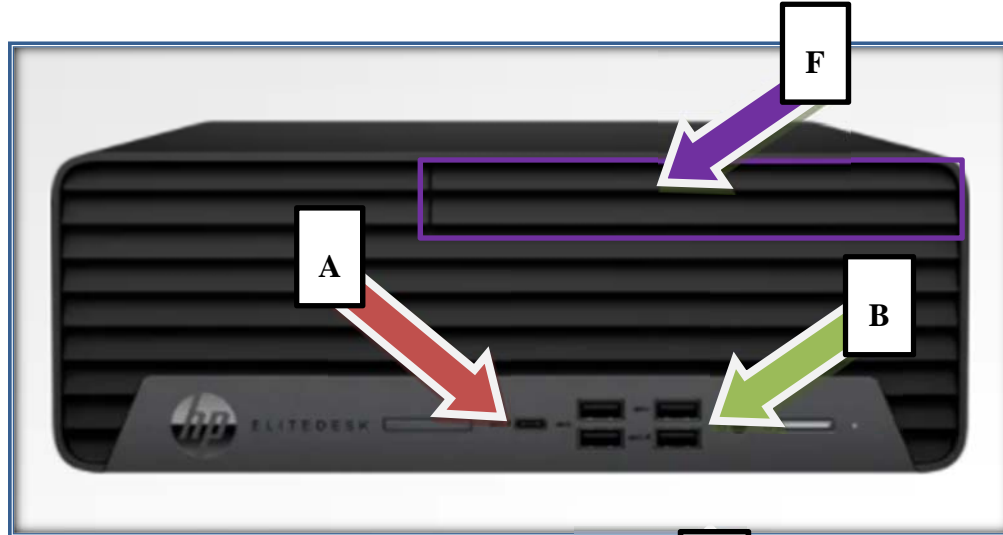
* If you do not receive all of the equipment listed, contact UAN Support at 1-800-833-8261.

Note: All UAN printers were replaced in 2019 and you will not receive another printer this year.

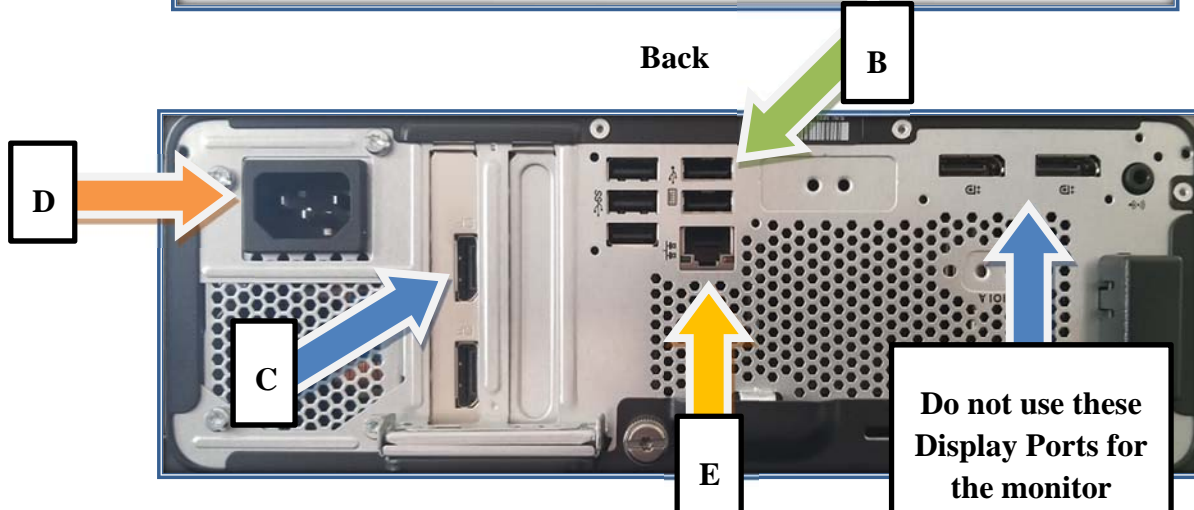
Unpack the equipment from the boxes and keep the boxes for future use. If desired, you may break down the boxes for easy storage. The CPU will function vertically on its side as pictured below, or you may choose to sit your CPU horizontally.

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Front



Back



Listed below is a description of each of the connection types:

A – USB Type C Port

B – USB Ports

The HP EliteDesk 805 G6 has 10 USB ports. 4 SuperSpeed & 1 USB C on the front, and 5 SuperSpeed ports on the back. You may use any of these ports to plug in your keyboard and mouse, as well as any other peripherals.

C – Display Port Connection

These are the monitor ports. There are a total of 4. If you are using just one monitor, the preferred port to use is the one closest to the power connection pointed to on the left side of the above picture. You may connect additional display devices to the other three ports once the first connection is made.

D – Power Connection

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E – Ethernet Port / RJ-45 connection

This is the internet connection if you choose to use an ethernet cable connected to your router or modem. The wireless card is built into the computer and does not require an extra antenna to be installed like the Dell computer.

F- DVD-ROM

The drive may be accessed by pushing anywhere on the front of the drive slot. Once pushed in, the tray will eject. Closing the drive operates in the same manner by pushing the tray back in.

Important: If you are using a battery backup device, plug the CPU and monitor power cables into the outlets. Do not plug the printer into a battery backup.

MONITOR - HP P24H G4

The HP 24" inch monitor is shipped with the following equipment:

- Flat Panel Monitor
- A 2 piece monitor stand
- 3 video cables
- 1 power cord
- Quick Setup Guide



Important: In order for the computer to properly recognize the display, the monitor will need to be plugged in and powered on **before** the computer has been turned on. If the items are powered on outside of this sequence, the computer may not detect the display. The power button location is pointed to by the red arrow in the above picture. It is the button furthest to the right on the underside of the monitor.

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The 2 piece monitor stand will need connected and attached to the flat panel screen. Included in the box is a 'Quick Setup' fold out instruction set that will step your through this process. Below is a picture of the front page of the instructions.



Important: Although the monitor includes 3 different video connection cables, the desktop computer only has a Display Port connection. The following is a picture of the Display Port connection:



The additional cables can be used to connect this monitor to another device.

To being the hardware transfer, please skip to page 12.

LAPTOP - HP ELITEBOOK 855 G7

If you requested a laptop, you will receive one box that contains the following equipment:

- HP Elitebook 855 G7 Laptop
- Power cord and adapter
- External USB DVD Drive
- USB hub with Ethernet (RJ-45 connection) port

* If you do not receive all of the equipment listed, contact UAN Support at 1-800-833-8261.

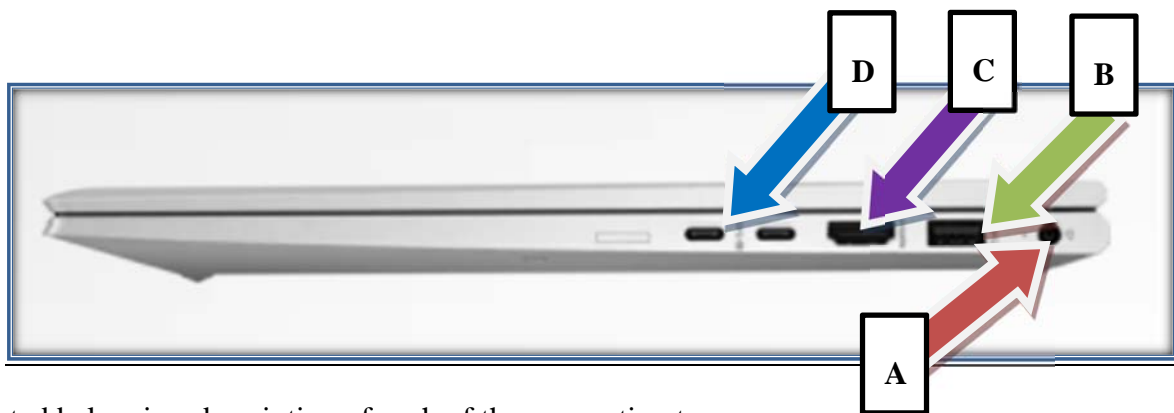
Note: All UAN printers were replaced in 2019 and you will not receive another printer this year.

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Unpack the equipment from the box and keep the box for future use. If desired, you may break down the box for easy storage.



Important: The power button has been moved from the side of the laptop to the keyboard. It is located to the right of the PRTSCR button on the top row of the keyboard. The arrow in the picture above points to the power button.



Listed below is a description of each of the connection types:

A – Power Connection

B – USB Ports

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The HP Elitebook 855 G7 has 2 standard super speed USB ports (1 on the left side of the laptop and 1 on the right side of the laptop).

C – HDMI Connection

This is the monitor port. You may plug the laptop into your own monitor to extend or duplicate the screen.

D – USB Type C Port

These are USB Type C Ports. You may plug the USB hub into this to expand the number of USB ports available.

Ethernet Connection:

The HP Elitebook 855 G7 does not come with an Ethernet connection. If you wish to connect your laptop to Ethernet, use the port on the provided USB Hub.

External DVD Drive:

The HP Elitebook 855 G7 does not come with an internal DVD drive. The DVD drive that you will use is an external optical drive that will plug into a USB port on your laptop. It is recommended that you only have this drive plugged in when it is in use. It is very easy to knock the drive off the desk, and it will damage easy as there are many moving parts. This DVD drive is not covered under the manufacturer's warranty, and has a \$30 replacement cost. The external DVD drive may be plugged in to the external USB hub that is provided.

HARDWARE TRANSFER

This process will be more efficient if you have both the Dell and the HP system set up near each other. If there is no way for both systems to be running at the same time during the transfer process, you will need to do the following: inspect the new HP hardware for damage, perform Steps 1 through 4 (below) on the Dell computer, remove the Dell hardware and set up the HP hardware, perform Steps 5 through 7, remove the HP hardware and set up the Dell hardware again, and perform Step 8. Otherwise, complete the following steps as indicated.

Important: Once the Hardware Transfer process has begun it **cannot** be paused or resumed at a later time. Depending on the volume of data you have to backup and restore, the entire Hardware Transfer process should take approximately 20-60 minutes to complete.

STEP 1: PRINT FUND STATUS REPORT (BEFORE HARDWARE TRANSFER)

This step is necessary if you use UAN only on the UAN computer (like most clients), or you have networked multiple computers but the UAN database resides on the Dell.

Print a copy of your Fund Status Report and write *Before Hardware Transfer* on the report. The report is located at Accounting > Reports & Statements > Fund Reports > Fund Status. Please

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make sure that all your funds are checked, and no other transactions are posted prior to the start of the hardware transfer. The Fund Status Report will be referenced again later in this process.

STEP 2: CLOSE ALL SOFTWARE APPLICATIONS

No applications (*UAN, Microsoft Word, Google Chrome, etc.*) can be open during the transfer.

STEP 3: BEGIN THE HARDWARE TRANSFER PROCESS

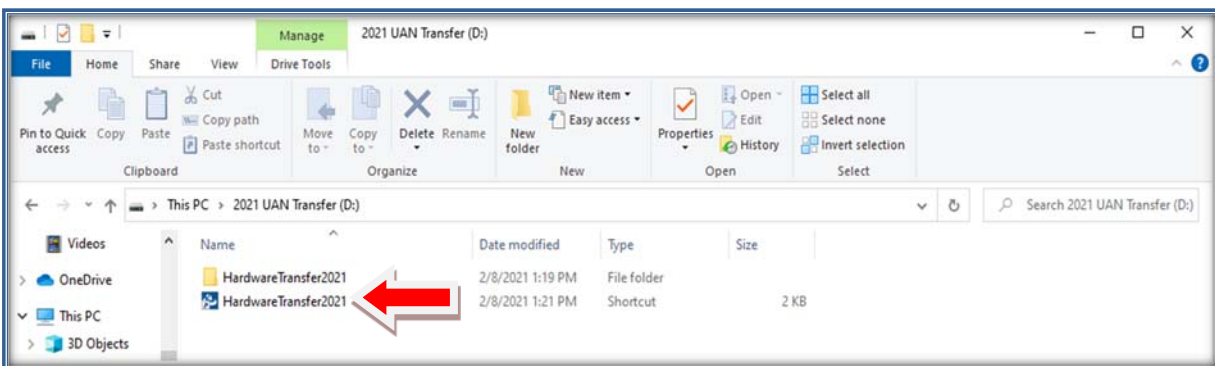
Insert the UAN Hardware Transfer USB Drive into a SuperSpeed USB port of your Dell computer. SuperSpeed USB port will have the “SS” decal next to the port, as in the picture below:



Important: Do not have any other USB drives plugged into the computer other than the UAN Hardware Transfer USB Drive. Also, make sure your computer is securely plugged in (if you have a laptop, do not have it running off the battery).

Note: Some of the messages you encounter during the Hardware Transfer Process may be different depending on the version of Windows 10 that you have installed.

The Windows File Explorer window will display as shown below:



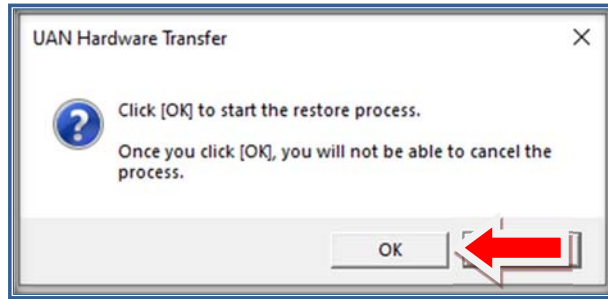
Note: If the File Explorer window does not automatically open and manually open File Explorer, browse to the USB drive.

Double click on the **Hardware Transfer 2021 Shortcut** (listed second in directory) as shown in picture above (black arrow pointing to the shortcut).

Since we are running an application, a User Account Control window will display. Click **Yes**. If you have a computer with a UANInstaller Account, you will need to enter the password of “**FiscalOfficer**” (no quotes, capital F and O, and no space), then click **Yes**.

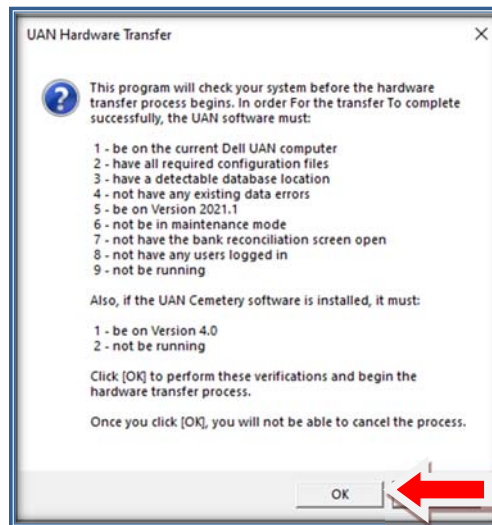
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The following message box will display. Click **OK** to start the restore process.



STEP 4: VERIFICATION OF DATA TRANSFER CONDITIONS AND DATA BACKUP

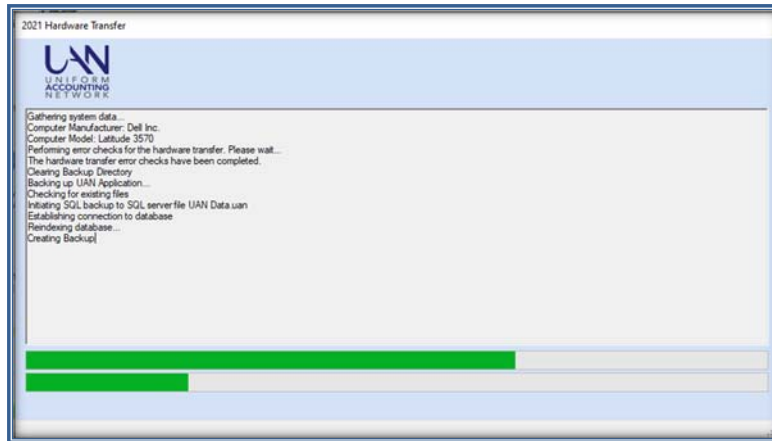
The software will run a series of checks to ensure that your system is ready for the transfer. The message box below will appear, detailing all of the conditions.



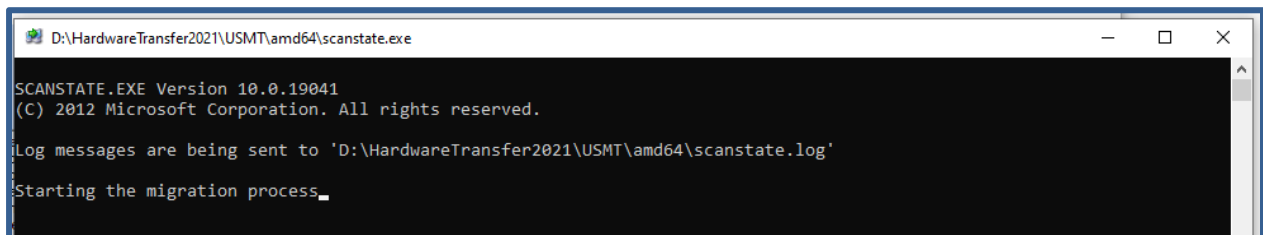
Click **OK** to continue.

The UAN Hardware Transfer Application will verify that specific conditions are met. If a condition is incomplete, you will receive a message detailing the issue to be addressed before the data transfer can proceed. When all data transfer conditions have been met, the transfer program will begin running as in the picture below. When the transfer backup is working, you will see various screens open and close.

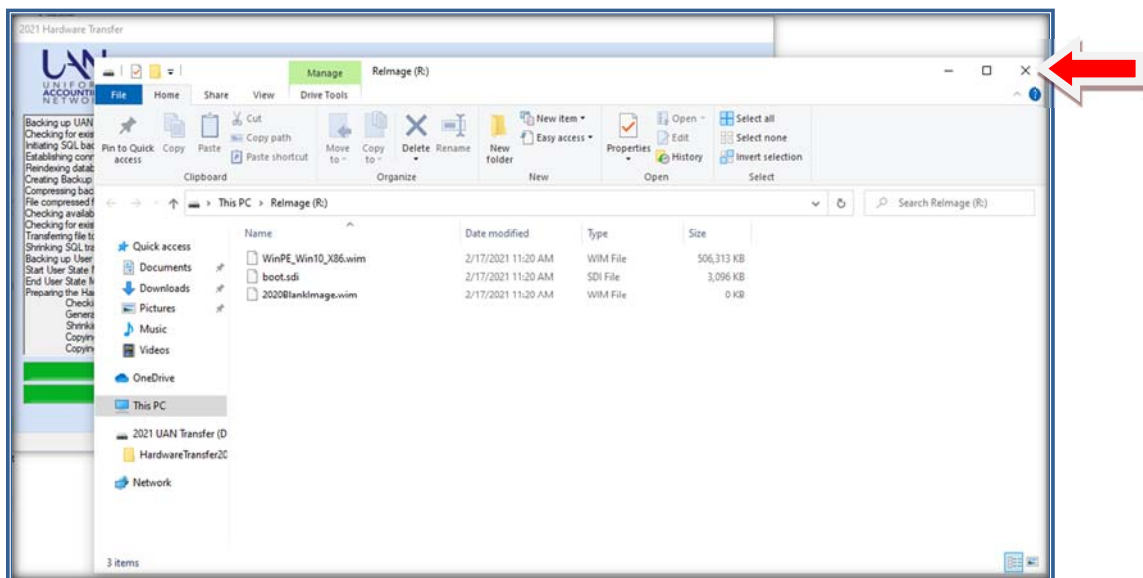
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A black command window will also appear as shown below:



You may see a *ReImage R:* window display as depicted below. It is a temporary partition created to use with the transfer process. Click on the **X** in top right corner of the window to close it. The transfer process will not continue until this window is closed.

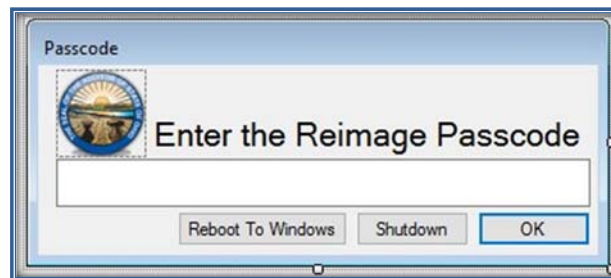


When the Transfer Backup is complete, the following message will be displayed:

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Click **OK** and the computer will restart. You may now remove the UAN Hardware Transfer USB Drive. When the Dell computer restarts, the following Passcode entry box window will be displayed (following example does not show the code assigned to your entity):



The Dell computer will now be disabled for future use in its current state. If you restart the Dell computer, it will not boot into Windows. Additional instructions for the Dell computer are contained in Step 8 of this documentation. **Please proceed with Step 5 before addressing any issues with the Dell computer.**

STEP 5: TURN ON THE HP COMPUTER

As stated previously, the HP computer come preinstalled with Windows 10. At this time, you may connect your Internet Ethernet Cable if you have one available. If you use Wi-Fi or do not have Internet at this time, you can connect to the Internet at a later time.

After booting up, you will automatically be logged in to the UANUser account and will arrive at the desktop. Proceed to step 6 to continue the hardware transfer process.

Note: If you receive a message in the upper right corner of your new HP computer screen stating “Can’t update Microsoft Edge. Couldn’t update to latest version, so you are missing out on new features and security fixes”, click the ‘x’ in right corner to close the message box. Then connect your new HP to the internet and open Microsoft Edge to allow it to automatically update prior to proceeding to Step 6.

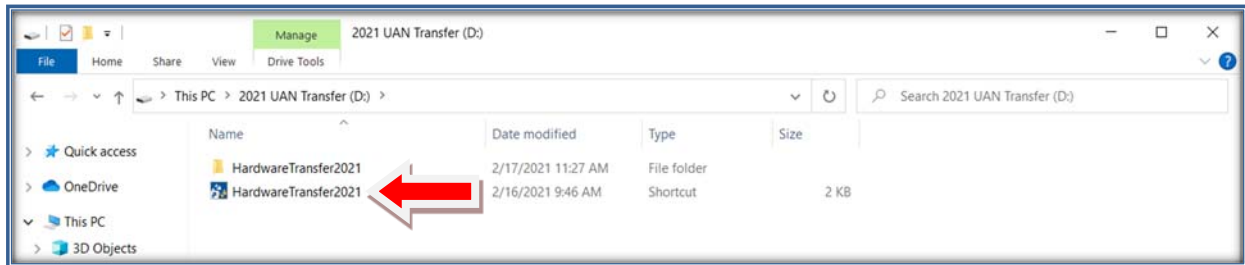
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STEP 6: RESTORE TRANSFER DATA

Insert the UAN Hardware Transfer USB Drive into a USB port on the new UAN HP computer.

Important: Do not have any other USB drives plugged into the computer other than the UAN Hardware Transfer USB Drive. Also, make sure your computer is securely plugged in (if you have a laptop, do not have it running off the battery).

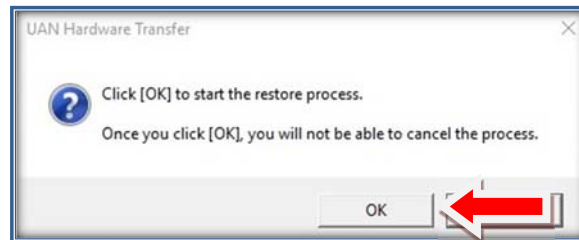
The Windows File Explorer window will display as shown below:



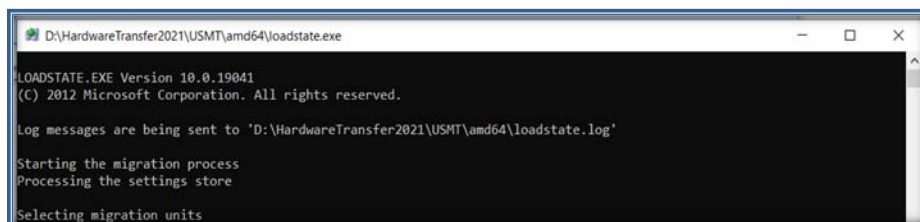
Note: If the File Explorer window does not automatically open and manually open File Explorer, browse to the USB drive.

Double click on the **Hardware Transfer 2021 Shortcut** (listed second in directory) as shown in picture above (red arrow pointing to the shortcut). A User Account Control window will display. Enter the password “**FiscalOfficer**” (no quotes, capital F and O, and no space) and click **Yes**.

The following message box will appear. Click **OK**.



Your transferred data will now begin to copy to the new computer. You will see a 2021 Hardware Transfer Window displayed that will update during each step of the transfer. Shortly after starting, a command prompt window will also show additional processes that are running. The picture on the following page shows what the process should look like.



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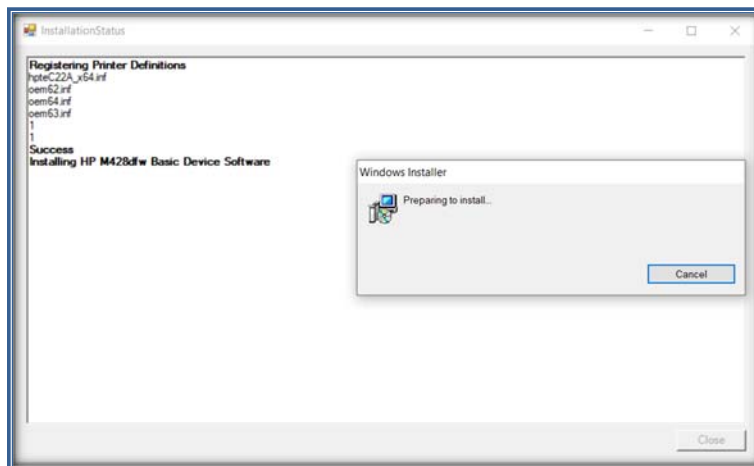
A Select Printer window will display. **Important:** Before proceeding have the printer powered on and connected to the computer.



Note: If you previously used a wireless connection for your printer, the printer should still be connected to your network.

Important: Please make every effort to setup and install the printer at this time. The option to 'Do Not Install Printer Drivers' should only be used in case of an emergency where the printer is not present.

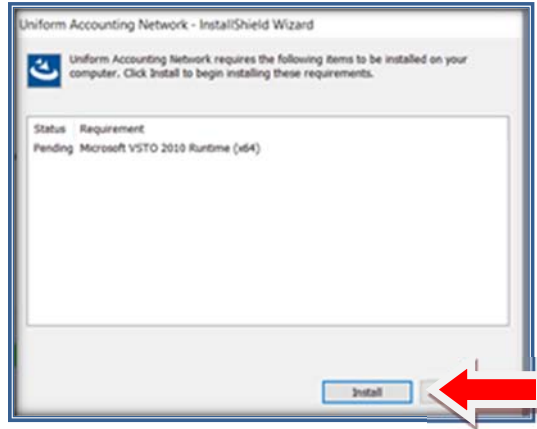
Each printer install is unique to its printer. Upon clicking **OK**, the manufacturer's install will start and display the following window:



The manufacturer's printer install will now begin. There will be some interaction with the manufacturer's install that you will need to take. When the printer install is complete, this window will disappear and the transfer program will move on to the next step.

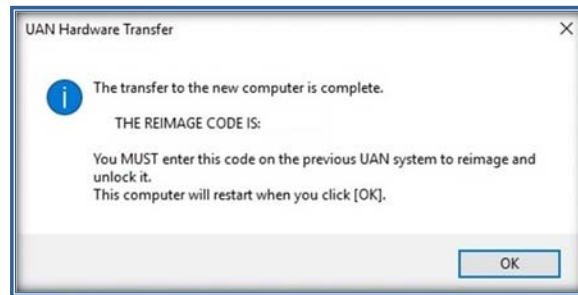
The following window will be the prompt. This is the UAN software install portion of the transfer process.

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Click ***Install*** to continue.

Various other windows may pop up as this process is working. This process could take anywhere from 10 to 60 minutes depending on how much data is being transferred. When the hardware process is complete, you will receive the following message:



The reimage password code is unique to each UAN entity. Please write down your code in the following field. You will need this code later in the process to reimage the Dell computer back to factory state (Step 8 on page 20).

--	--	--	--	--	--	--	--

The code will not appear again. If it is misplaced, you will need to contact UAN Support. The UAN Hardware Transfer code will be used in Step 8. **Once reimaged, the Dell computer will have no UAN data remaining on it.**

Click ***OK*** to finish the transfer. You may now remove the UAN Hardware Transfer USB Drive.

For users who did not have UAN installed on their Dell computer, you will still have to go through the reimage process. This is to ensure that all licensing issues have been addressed, and that no sensitive entity specific data still resides on the system.

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STEP 7: PRINT FUND STATUS REPORT (AFTER HARDWARE TRANSFER)

This step is necessary if you use UAN only on the UAN-provided HP (like most clients), or you have networked multiple computers but the UAN database resides on the HP.

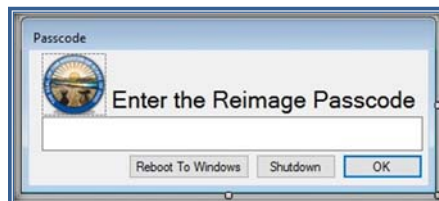
Print a copy of your Fund Status Report and write *After Hardware Transfer* on the report. The report is located at Accounting > Reports & Statements > Fund Reports > Fund Status. Please make sure that all your funds are checked, and no other transactions were posted prior to the start of the hardware transfer. Compare the balances from the *Before Hardware Transfer* Fund Status report (Step 1) to the *After Hardware Transfer* Fund Status report. This report is verification that your UAN data has transferred to the new hardware. If the balances do not agree, please contact UAN Support.

Reminder: It is very important not to post any transactions between the printing of the *Before Hardware Transfer* and *After Hardware Transfer* Fund Status reports. If transactions are posted before the *After Hardware Transfer* Fund Status report is printed, it will complicate the comparison of the Fund Status reports.

Important: If the Fund Status reports are in agreement, proceed with Step 8. If the Fund Status reports are not in agreement and you are unsure why, then contact UAN Support immediately and **do not** proceed to Step 8.

STEP 8: REIMAGE DELL COMPUTER

The Dell computer is now temporarily disabled for future use. This computer must be reimaged due to licensing issues. Below is the message that will be displayed when you turn the Dell computer back on.



If you need to temporarily access the data on the Dell computer, you may select the *Reboot to Windows* option. If this button is selected, you will need a code from UAN to allow you back into the system until the next time the system is shut down. Please contact UAN Support at 1-800-833-8261 if you need emergency access to this data.

Warning: Once you complete the following step no data will remain on the Dell computer.

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To image the computer for future use, type in the code that you received on the HP computer (Step 6 page 19) that was displayed when the transfer was complete, then click **OK**. There is no way to regenerate this code. If you misplaced it, please contact UAN Support at 1-800-833-8261.

To ensure that all previous and potentially sensitive data is unrecoverable, the re-image process will go through a 3 pass full level format before installing the new image. This process will take around 3-6 hours. Make sure your PC is securely plugged in (if you have a laptop, do not have it running off the battery). When it is complete, you should see the line item 'Image Capture Completed Successfully' with a message box, 'Click **OK** to shut down'. Once reimaged, the system will be in a condition that is suitable for sale or donation. If you have additional hardware attached to the Dell computer, such as printers or scanners, you may see various installation messages after the computer restarts. These messages may or may not require action to continue. The following licensed software will remain on the system:

- **Windows 10 Professional Operating System** - The operating system will be "Out of the box", which means that you will be prompted to go through the setup steps and create a username and password the first time into Windows 10.
- **Microsoft Office 2016** (*Word, Excel, PowerPoint and Outlook*) - When accessing one of the Office applications for the first time, you will be prompted to activate Microsoft Office 2016.
- **Microsoft Windows Defender** (*Antivirus*) - This is free antivirus protection provided by Microsoft, and you may be prompted to go through a few setup steps.

AFTER HARDWARE TRANSFER

MICROSOFT OFFICE UPGRADE

Microsoft Office (*Word, Excel, PowerPoint, etc.*) has been updated to the Office 2019 Edition. Office 2019 uses the same file format as Office 2016 (.docx, .xlsx, .pptx, etc), which was installed on the UAN Dell computer.

MICROSOFT OFFICE ACTIVATION

Microsoft Office 2019 will automatically activate. No user interaction is required.

MICROSOFT OUTLOOK

The Hardware Transfer migrated all Outlook 2016 contacts, emails, and settings to Outlook 2019 on the new hardware. The migration occurred if you were using the UANUser Windows account (the default on the UAN Dell computers).

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Important: If you or your IT staff created another account that uses Outlook, you will need to input the Outlook settings on your own.

If you used the UANUser account on the Dell computers, the only setup needed on the new hardware for Outlook is to enter the password. The first time you enter Outlook, you may receive a prompt for a password. If you do, enter your email password in at that time, and it will save for future use. Also, make sure you are connected to the Internet.

REINSTALL ANY ADDITIONAL SOFTWARE

As mentioned in the *Before Hardware Transfer* section, any additional software required by your entity will need to be manually reinstalled.

WEB BROWSERS

Microsoft Edge is the default browser in Windows 10 and can be accessed directly from your taskbar. All Microsoft Edge bookmarks were transferred over. Also, Google Chrome is an available browser on the HP computer.

BATTERY BACKUP

When you receive your new hardware, it is a good time to review the age of your current battery backup. Battery backups generally have a lifespan of no more than 3-5 years. If your battery backup is older than this, it may not be able to handle the power requirements of the new system. It is essential that you have a battery backup system connected to your UAN Hardware. Battery backups protect your computer from unwanted power surges and shutdowns.

It is recommended that you purchase a backup with at least a 660 VA (Volt Amp rating) and 4-5 amps. The battery backup should not be relied upon to continue processing transactions during a power failure. It is used to provide enough time to exit the program and turn the system off safely. These units cost approximately \$100 and can be purchased from an office supply or computer supply vendor of your choice.

Important: Do not plug your printer into a battery backup. The printer draws too much power and can shorten the life of the battery, and may cause your computer to shut down randomly.

HARDWARE SERVICE

If your hardware ever requires service, please contact the HP Technical Support Team. Please have your service tag number ready when you call for service. Your service tag number identifies you as an UAN client, and will ensure that you receive the premium level of support and next-day repair or replacement service. The service tag number is located on the bottom of the laptop labeled "S/N". This number can be difficult to read. (It may be necessary to take a picture of the serial

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number and use the zoom feature to make it readable.) It is also located on the original box that the printer was shipped in. HP can be contacted by phone at 1-800-334-5144 or by online chat at <https://support.hp.com/us-en/contact/laptops>

Important: If asked about the ownership of the laptop, state that it is a “State of Ohio owned computer”.

APPENDIX A – WINDOWS USER ACCOUNTS

The UAN HP computer will have user accounts displayed on the Windows Login Screen. The Accounts are **UANInstaller**, **UANUser**, and **UANXAdmin**. This Appendix will explain when to use each account.

UANUser:

This is the account that you should use on an everyday basis. By default, there is no password. This account is setup as a Standard User in Windows. This means that you can perform all functions, except installing applications.

Note: You may establish a password on the account, but you will be responsible for remembering it. UAN can reset the password, but it will require a Tech appointment.

UANInstaller:

This account has full administrative rights to Windows. It is password protected with a password of “**FiscalOfficer**” (no quotes, capital F and O, and no space). This account should only be used to install programs or to perform high level administrative tasks.

Important: If you login to this account from the Windows login screen, we highly recommend that you log off and log in to **UANUser** for your Accounting and Payroll work.

UANXAdmin:

This is an account for **UAN use only**. Please **do not** remove or change the password to this account.

Installing software and performing administrative tasks:

When you are logged in as UANUser, you can still perform all functions associated with being an administrator. An example of this would be installing the latest UAN Update. This means that you are doing something that requires administrative access and that you temporarily need to use the UANInstaller Account. To do this, type in the password “**FiscalOfficer**” (no quotes, capital F and O, and no space) and click **Yes**, then the Update will be installed. You may see this window prompt at other times as well, like when changes are made in the anti-virus program.

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The purpose of having these two accounts is to ensure that all administrative tasks performed on your system are ones that you wish to do. If the above window prompts unexpectedly, you can simply click the **No** option and the task will not complete. There are many malicious phishing and malware attacks that require install access, and this step provides an added level of security in preventing these types of attacks from being installed.

APPENDIX B – CYBER SECURITY

MICROSOFT DEFENDER AND MALWAREBYTES UPDATES

Malwarebytes Cloud:

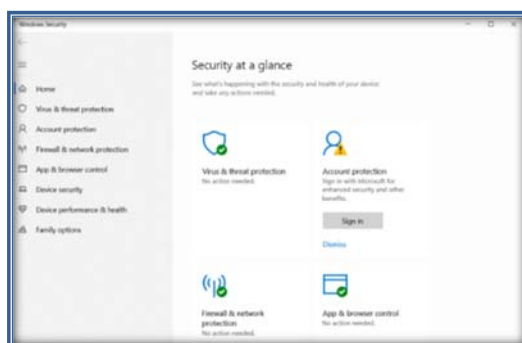
The version of Malwarebytes security software installed on the new computer is cloud based. This is a change from the previous system, which required the end user to manage scans and updates. The cloud managed security will update virus definition files automatically, and will perform weekly scans on your system without any interaction on your part. In times of increased threats, UAN may increase the frequency of these scans. The option to manually run a scan can be performed as well. The on demand scan feature is accessed through the Malwarebytes icon on your desktop. (Pictured below) This icon will only be present after you connect to the internet for the

first time. To perform a scan, double click on the icon  and the scan will begin.

Windows Defender:

In addition to a Malware scan when suspecting a security attack, a Virus scan should also be performed. To do this, right click on the Windows Defender Icon located in the bottom right portion of your screen under ‘Show Hidden Icons’. (You may also run a Search for ‘Windows

Defender’). Click on the icon . Below is the Windows Security window.



If Windows Defender is running, there should be a ‘No action needed.’ Message under ‘Virus & threat protection’. If there is a ‘Turn On’ option, please select it. To access the scanning options, select ‘Virus & threat protection’ on the left side of the screen. Under Current threats, there will be a ‘Quick Scan’ button. To complete a full scan, select ‘Scan Options’, then choose the ‘Full

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Scan' option. Start the scan by selection 'Scan Now' at the bottom of the window. You may then minimize this window and continue with your work as the full scan could take over an hour.

MICROSOFT WINDOWS UPDATES

Proper use of a Windows 10 computer that is connected to the Internet requires that all Windows Updates be applied as soon as possible. Microsoft constantly sends out updates to the operating system, Microsoft programs such as Office, and hardware including printers and DVD drives. These updates not only improve functionality, but provide security from outside attacks. If you are connected to the internet, Microsoft will download and install many of the updates automatically. If you have a metered internet connection, or haven't connected to the internet for a long period of time, you may need to manually download and install the updates to get your system current.

The Windows Update screen is constantly changing, but is designed to be easy to use. Please follow through with anything that is asked of you on this screen. The following scenarios are the most common that you will encounter, but as Windows develops, there may be additional tasks to complete. The 'Windows Update & Security' area is something you should become familiar with, and check on a regular basis. **UAN recommends that you check for updates weekly.**

There are many ways to access the 'Windows Update & Security' Screen. You may search for 'Updates' and select 'Check for updates', or select 'Start' → 'Settings' → 'Update & Security'. Once in the 'Windows Update' screen, a number of different options could be available:

- **Windows is already downloading and installing multiple updates.** In this scenario, you let the updates complete and will eventually get prompted to restart. Restarting the computer is necessary for most updates to complete, and could take more than a few minutes. Once the desktop is back up, go back into the 'Windows Update' screen to make sure that no more intervention is needed.
- **Windows Updates states that 'You're up to date' and a 'Check for updates' button is present.** In this scenario, you want to select 'Check for Updates'. Windows may find additional updates that the initial scan didn't find and begin downloading and installing the updates. There will most likely be another reboot required once everything is complete. Once rebooted, re-renter the 'Windows Updates' area and select 'Check for updates'. You are finished if you receive the 'Your computer is up to date' message.
- **A major update to Windows is available but is not automatically installed.** Twice a year, Microsoft puts out a "Feature Update" for Windows. These updates can take up to an hour to run. Because of this, they are not always automatically installed. The feature updates appear below the 'Check for Updates' button under the title 'Optional updates available'. The Update's title will display with a 'Download and install now' option.

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Choose this option when you have time have your computer down for a significant amount of time. Microsoft will eventually automatically push this update, so it's a good idea to control when you receive it so that you can manage the downtime.

APPENDIX C – DOCUMENTS BACKUP

Keep a current copy of your Documents and the UAN Backup in a secure off-site location. Backups should be done on a regular basis, rotating the backup media in case of damage e.g. Monday's backup is on DVD or USB flash drive #1, Tuesday's backup is on DVD or USB flash drive #2, etc. The following steps are how to backup the Documents folder:

Step 1: Double click on the **Documents** folder. A File Explorer window will open displaying the folder contents.

Step 2: To select all of the files in the Documents folder, hold the **Ctrl** key and then press the letter **A**.

Step 3: Once all files are selected, hold the **Ctrl** key and then press the letter **C**, or right click on the highlighted files and select the **Copy** option.

Step 4: Insert the disc (*CD or DVD*) or the flash drive that will be used for the Documents backup. This will open a *second* File Explorer window displaying the drive contents. (If backing up to a disc, and it is a *new blank* disc, you will also need to select the option, **Like a USB flash drive**, and click the **Next** button.)

Step 5: In the window for drive you are using for the backup, hold the **Ctrl** key and press the letter **V**, or right click anywhere in the drive window, and select **Paste** option.

Step 6: The selected files should then copy to the disc or flash drive window. If the files did not automatically burn to the disc, skip to **Step 8** to finish copying the files to the disc.

Step 7: If the files were all successfully copied to the disc or flash drive, the backup of the Documents folder is **complete**. Close the File Explorer windows, and eject the disc or remove the flash drive. **Please Note:** Only need to follow the additional steps below if copying to disc, and the files did not automatically burn to the disc.

Step 8: Right click in the **blank space** under your list of *Files Ready to be Written to the Disc*.

Step 9: Select the option **Burn to disc**.

Step 10: On the *Burn to Disc* window, click the **Next** button.

Step 11: A **progress bar** should appear in the *Burn to Disc* window that will show the files being copied to the disc.

Step 12: When complete, a message stating, "*You have successfully burned your files to the disc.*" Select the **Finish** button, and the disc will automatically be ejected.