New Device Setup Instructions for A&S Faculty & Staff

macOS DEVICES

UA OFFICE OF INFORMATION TECHNOLOGY
DESKTOP SUPPORT

Getting Ready for Your New Device

Before you take delivery of your new computer, you will need to set aside some time to prepare your current device for retirement. Follow this guide to ensure your files are backed up to reliable and secure cloud storage so you can get up and running quickly when you receive your new device. We'll also take a brief inventory of any specialty applications or software that you use in your day to day work, any network printers you use, and take care of saving your Internet bookmarks.

Good to Know

Gather Device Information

You'll need to know which version of macOS you are running on your current Mac, just in case you have trouble completing any of these steps and need assistance. To find out which version of macOS your device is running, click the **Apple menu** in the top left of your screen. Choose **About This Mac**, and a window will appear with your device information. Write the version number in the box below, and make note of the Serial Number.

macOS Version: _____

Serial Number: _____

Responsibilities

It is your responsibility to ensure your data is backed up properly prior to turning in your current device. OIT and eTech are not responsible for data loss, and cannot assist with data recovery once a hard drive has been securely erased. *Your new Mac will not be set up until you have confirmed all files have been transferred to the cloud or an external storage device, since no files will be moved while a technician is present.*

Moving files to Cloud Storage

UA's Office of Information Technology offers two great options for cloud storage — *UA Box* and *Microsoft OneDrive*. For the smoothest experience and deep integration with *Microsoft 365* cloud features, OIT recommends using *Microsoft OneDrive*. If you'd like to back up to *UA Box* instead, skip to **Page 5**. *You can also choose to save your files to an external storage device, like a USB drive or external hard drive.* Whichever cloud storage solution you choose, you can be assured that your files will be safe and securely protected by your *myBama* Username and Password, along with *DUO Two-Factor Authentication* to ensure no one else can access your data.

Microsoft OneDrive

ABOUT ONEDRIVE

OneDrive is the intelligent files app for Microsoft 365 connecting you to all your work and school files so you can share and collaborate from anywhere, on any device, while protecting your work.
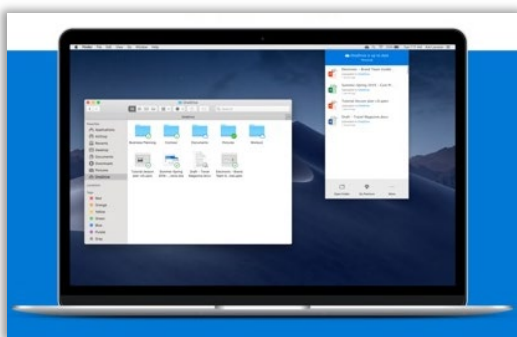
- With OneDrive you can store, access, and discover your individual and shared work files in Microsoft 365, including Microsoft Teams and other Office apps, from all your devices. Your offline edits will automatically sync next time you connect.
- Work faster and smarter with anyone inside or outside your organization. Securely share files and work together in real time using Word, Excel, and PowerPoint across web, mobile, and desktop.
- Create, view, edit, and share files on the go with the OneDrive mobile app. Easily capture whiteboards and scan work receipts, business cards, and other paper documents for safekeeping.

- Back up and protect your files with OneDrive. You can easily recover files from accidental deletes or malicious attacks, and policies set by OIT Security help keep your information safe.
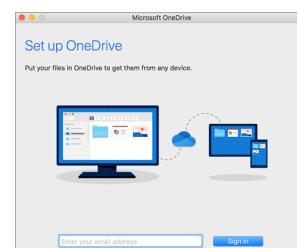
BACKING UP FILES TO ONEDRIVE

Getting your files backed up to the cloud with OneDrive on your Mac is a simple drag-and-drop process, but we'll need to make sure OneDrive is set up on your Mac first.

Installing OneDrive for Mac

1. Check to see if you have the OneDrive app installed by opening the **Finder** and looking for it in your **Applications** folder. If you don't have it, you can download Microsoft OneDrive from the Mac App Store, or directly from Microsoft here.
2. Open the OneDrive app. If you're already signed in with your UA Microsoft Account, skip to **Step 4** — If not, sign in using your UA email address (formatted myBamaUsername@ua.edu) and myBama password. *Note: Never use a personal Microsoft account to back up University data.*
3. Follow the steps that appear on the screen until OneDrive Setup is finished. You can skip downloading the mobile app, if you'd like.
4. You should now see a OneDrive icon on your **Menu Bar** at the top of your screen. Click it to open the OneDrive menu, where you can choose to open your OneDrive folder directly.

Moving Files to OneDrive

1. Open the OneDrive menu by clicking the OneDrive cloud icon in the **Menu bar**, then choose **Open my OneDrive folder**.
1. In your **OneDrive – The University of Alabama** folder, create a new folder named "Backup - Fall 2020"
2. Open your new **Backup - Fall 2020** folder and drag any files or folders you would like to transfer to your new Mac into it.
    a. Be sure to include any files that you want to keep. Your old device will be completely erased when it is turned in, so be thorough! Think of this as a time to get more organized and move files to a more secure and accessible storage method.
    b. If you want, you can further organize your synced files and folders by opening up your **OneDrive** folder. Create new folders, move things around, remove duplicates — whatever you need.
    c. You do not need to move files that are stored in a UA Departmental or Personal Network Share Drive. These files are already backed up in the OIT Data Center.
3. Click the OneDrive cloud icon in the Menu bar to check the status of the files uploading to OneDrive. Please be patient — the syncing process can take quite a while, depending on the speed of your internet connection. If at any point your internet connection is interrupted, don't worry! OneDrive will pick up where it left off when you get connected again. When you see the message "OneDrive is up to date" and you are certain that you have moved all files you want to back up into OneDrive, you're done! You can continue with this guide while OneDrive works in the background.

We'll go over how to set up OneDrive and access your files on your new computer later in this guide. For now, let's move on to the rest of the preparation steps on Page 6.

UA Box

ABOUT UA BOX

Box is a service that provides cloud storage to students, faculty, and staff of The University of Alabama via box.ua.edu. Box is accessible on desktop and mobile devices around the world, and it is encrypted both in transit and storage.

Box is also useful for sharing and collaboration – folders and documents may be shared among users for distributed editing and viewing. Box has robust permissions settings, allowing collaborators to be viewers or editors, and it keeps revisions of documents so that your work is never lost.

BACKING UP FILES TO UA BOX

Upgrading to Box Drive

1. Download the latest version of the Box Drive app for Mac here and install the application.
2. When prompted, sign in to Box Drive with your UA Email Address and myBama Password.
3. Click through the tour, paying attention to how Box Drive stores your files in the cloud and streams them on-demand to your Mac.
4. If you currently have the older *Box Sync* installed, you will be prompted to migrate to *Box Drive.* This will not affect your files in any way.
5. When the setup process is complete, you will have a new ***Box*** folder in the sidebar of the **Finder**.
6. In this UA Box Folder, create a new folder named "Backup - Fall 2020"
7. Open your new **Backup - Fall 2020** folder and drag any files or folders you would like to transfer to your new Mac into it.
    a. Be sure to include any files that you want to keep. Your old device will be completely erased when it is turned in, so be thorough! Think of this as a time to get more organized and move files to a more secure and accessible storage method.
    b. If you want, you can further organize your synced files and folders by opening up your **Box** folder. Create new folders, move things around, remove duplicates — whatever you need.
    c. You do not need to move files that are stored in a UA Departmental or Personal Network Share Drive. These files are already backed up in the OIT Data Center.
8. Allow Box Drive time to sync the files to the cloud. When your **Backup - Fall 2020** folder has a white cloud icon visible, the process is complete.
    a. Please be patient — the syncing process can take quite a while, depending on the speed of your internet connection.
    b. If at any point your internet connection is interrupted, don't worry! Box Drive will pick up where it left off when you get connected again.
    c. You can continue with this guide while Box Drive works in the background.

We'll go over how to set up Box Drive and access your files on your new computer later in this guide. For now, let's move on to the rest of the preparation steps on the next page.

Device Inventory

You and your Mac have probably known each other for quite a while now, so it's understandable if you're a bit apprehensive about moving on to something new. These next steps will help you take a brief inventory of your current device configuration, which will make it easier to get started with your new device once you receive it. Think of it as a packing list of the printers, software, and other details that you'll want to make sure you have with you when you move.

Network Printers

FINDING INSTALLED PRINTERS

1. Open System Preferences by clicking the **Apple menu** in the top left of your screen and choosing **System Preferences**.
2. Click **Printers & Scanners**.
3. A Preference Pane with a list of your installed printers will appear.
4. You'll now need to determine which printers are *Local* and which are ***Network Connected***. Look at the printer's name:
   a. If a printer has a name that starts with a building code and room number, like *OO-C103-COPIER*, it is a network printer.
   b. If a printer has a name that starts with its manufacturer and model, like *HP LaserJet 1100 Series,* it is a local printer.
5. Fill in the list below with the names of any Network Printers you find. We'll use the list again later in this guide to find and add these printers to your new Mac during setup.
6. Close any open windows from this section.

Network Printers

Specialty Software

Your new Mac will come with most of the software you need pre-installed, like Microsoft Office 365, Adobe Acrobat Pro DC, and the Adobe Creative Cloud app. Your new Mac will also have the latest versions of the top three web browsers for Mac — Safari, Google Chrome, and Mozilla Firefox — along with virus protection and threat prevention software from OIT Security. However, we know that you may need more than what we provide in our base setup for new devices. Take some time now to go through the **Applications** folder on your current Mac and look for programs and apps that you use in your day to day work, whether that be for teaching, research, or service.

Use the space below to make notes about what you find for later. Keep in mind that you do not need to list every piece of software on your device — only the stuff that is not too common, or things that you may forget you needed! It's also important to note that not all software that you currently use on your device may be compatible with your new one, and some software may no longer be offered by The University or your Department.

To find out what software is currently offered by
OIT and The University, along with how to install it,
head to www.oit.ua.edu/software.

Internet Bookmarks

Many browsers now allow you to create an account so you can sync your bookmarks across different devices, which makes it easy to back up your bookmarks before moving to your new PC. *You can also choose to save your bookmarks to a file without syncing, if you wish.*

How to Save Your Internet Bookmarks or Favorites

Safari

Safari bookmarks can only be synced automatically via iCloud. If you do not wish to use iCloud, follow the instructions for *Exporting Bookmarks to a file without iCloud*.

1. Open System Preferences by clicking the **Apple menu** in the top left of your screen and choosing **System Preferences**.
2. If you're using macOS Catalina, click **Apple ID** then **iCloud**. If not, click **iCloud** here.
3. Sign in with your Apple ID if needed.
4. Check the box beside Safari.

Export Safari Bookmarks to a file without iCloud

1. In the Safari app on your Mac, choose **File** > **Export Bookmarks**.
2. The exported file is called "Safari Bookmarks.html."
3. Copy this file to a safe place – we suggest saving it in the same location as the files you backed up earlier in this guide, like OneDrive or Box

Firefox

1. Open Firefox on your current Mac. In the top right of the window, click on the User Profile icon and choose **Sign in to Firefox**.
2. If you do not have an account, it will ask you to create one.
3. During the creation of this account, it allows you to select what you want to sync. You can choose to sync only Bookmarks or have Firefox store and sync other data.
4. Finish creating your account and leave Firefox open for a few minutes to complete the syncing process.

To export Firefox Bookmarks to a file without syncing:

1. Open Firefox on your current Mac and press ***Command + Shift + B*** to open the Bookmarks Library.
2. Click **Import and Backup** on the menu bar.
3. Select **Backup.**
4. Save the file as "*My Bookmarks – Fall 2020"*.
5. Make sure to save this file in a safe place – we suggest saving it in the same location as the files you backed up earlier in this guide, like OneDrive or Box.

Chrome

1. Open Chrome on your current Mac. In the top right of the window, click on the User Profile icon and choose **Turn on sync...**
2. If you do not have a Google account, you can create one here and use your UA Email Address for the username. Otherwise, you can log in with any existing Gmail or Google account belonging to you.
3. During Sync setup, you will ask you want you want to sync. If you only want to sync Bookmarks, select **Customize Sync** and make sure that only *Bookmarks* is checked.
5. Click **Confirm** and leave Chrome open for a few minutes to complete the syncing process.

To export Chrome Bookmarks to a file without syncing:

1. Click the Chrome menu button (three dots) on the top right.
2. Select **Bookmarks**, then **Bookmark Manager**.
3. At the top, click the menu button (three dots) and then **Export Bookmarks**.
4. Save the file as "*My Bookmarks – Fall 2020"*.
5. Make sure to save this file in a safe place – we suggest saving it in the same location as the files you backed up earlier in this guide, like OneDrive or Box

Equipment Label Template

When you have completed the previous steps in this guide and you are ready for an OIT Technician to deliver your new Mac, please print out copies of this label and affix to each item being returned to eTech. There is no need to label your mouse, keyboard, or cables. *You will also need to notify your technician that you are ready by responding to the email thread with your device install Ticket Number in the subject line.*

Faculty/Staff Member's Name (First & Last):	
Department:	
UA Email address:	
Phone Number:	
Equipment Serial # (or Service Tag):	
Additional Comments:	

Faculty/Staff Member's Name (First & Last):	
Department:	
UA Email address:	
Phone Number:	
Equipment Serial # (or Service Tag):	
Additional Comments:	

Setting Up Your New Device

Now that your new device has been delivered, it's time to get it ready for you to use. We'll start by setting a password for your user account, then move on to getting the files you backed up in the first section of this guide where you can work with them. We'll also look back at the notes you made about your network printers and software to further personalize your Mac, so you'll be back to work in no time.

Getting Started

Log in and Set Your Password

Your OIT technician has already created a user account for you and set a temporary password, which was provided in their communication to you about your new Mac delivery. The first time you log in with this temporary password, you will be required to change it to something only you know. We recommend changing it to match your current myBama password. This makes it easy to remember, and because myBama passwords must meet specific security requirements, hard for others to guess.

Set Up Microsoft Office 365 Apps & Email

To set up your Microsoft 365 account for access to your email and other Microsoft Office 365 apps, open the **Launchpad** (rocket ship icon on your dock) and open the **Outlook** app. You can then sign in with your UA email address (formatted myBamaUsername@ua.edu) and your myBama password.

> *To access Office 365 email with Outlook on the Web (the new version of Webmail), open a web browser and go to outlook.office.com, then sign in with your UA email address (formatted myBamaUsername@ua.edu) and your myBama password.*

Activate Adobe Applications

For detailed information and FAQs about Adobe apps at UA, visit the OIT website.

If you have never activated your Adobe account in myBama, visit the myBama Tech Tab and click the account creation link under Software Spotlight to activate your Adobe Creative Cloud account, then follow the instructions below:

1. Wait just a bit for a message letting you know that your account creation was successful.
2. Next, open an Adobe application, like Acrobat DC or Creative Cloud Desktop. When prompted to sign in, enter your UA email address (including @ua.edu) and press the [ENTER] key.
3. You will then be redirected to a familiar myBama Single Sign On screen, where you may sign in with your myBama credentials to activate your license.

The next steps in this guide will cover how to access and restore your backed-up files and other data, like Internet Bookmarks. This process can take a while, depending on your Internet connection speed. If you have trouble following this guide, contact the IT Service Desk at 205-348-5555 or itservicedesk@ua.edu.
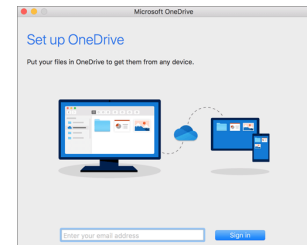

Accessing Your Backed-Up Files

If you backed up your files to a cloud service like Microsoft OneDrive or UA Box, follow the steps in this section to access them on your new Mac. *Note: If you used UA Box to back up your data, skip to **Page 13** to set up Box Drive.*

Microsoft OneDrive

ACCESING FILES IN ONEDRIVE

Installing OneDrive for Mac

1. Check to see if you have the OneDrive app installed by opening the **Finder** and looking for it in your **Applications** folder. If you don't have it, you can download Microsoft OneDrive from the Mac App Store, or directly from Microsoft here.
2. Open the OneDrive app. If you're already signed in with your UA Microsoft Account, skip to **Step 4** — If not, sign in using your UA email address (formatted myBamaUsername@ua.edu) and myBama password. *Note: Never use a personal Microsoft account to back up University data.*
3. Follow the steps that appear on the screen until OneDrive Setup is finished. You can skip downloading the mobile app, if you'd like.
4. You should now see a OneDrive icon on your **Menu Bar** at the top of your screen. Click it to open the OneDrive menu, where you can choose to open your OneDrive folder directly.

Opening the OneDrive Folder

1. Open the OneDrive menu by clicking the OneDrive cloud icon in the **Menu bar**, then choose **Open my OneDrive folder**.
2. Open your new **Backup - Fall 2020** folder and drag any files or folders you would like to transfer to your new Mac out of it.
   a. You can also choose to keep the files securely backed up to the cloud and work with them out of the OneDrive folder. We recommend doing this to get all the benefits of OneDrive cloud storage. You might want to organize the files from your Backup – Fall 2020 Folder a bit more, though.
3. Click the OneDrive cloud icon in the Menu bar to check the status of the files syncing from OneDrive. Please be patient — the syncing process can take quite a while, depending on the speed of your internet connection. If at any point your internet connection is interrupted, don't worry! OneDrive will pick up where it left off when you get connected again. When you see the message "OneDrive is up to date" and you are certain that you have moved all files you want to back up into OneDrive, you're done! You can continue with this guide while OneDrive works in the background.

UA Box

1. Download the latest version of the Box Drive app for Mac <u>here</u> and install the application.
2. When prompted, sign in to Box Drive with your UA Email Address and myBama Password.
3. Click through the tour, paying attention to how Box Drive stores your files in the cloud and streams them on-demand to your Mac.
4. When the setup process is complete, you will have a new *Box* folder in the sidebar of the **Finder**.
5. Allow Box Drive time to sync the files from the cloud. When all of the folders within the **Box** folder have a white cloud icon visible, the process is complete.
6. Open your **Box** Folder, and locate the folder you created earlier in this guide called "Backup - Fall 2020"
7. Open your **Backup - Fall 2020** folder and drag any files or folders you would like to transfer to your new PC out of it to their appropriate locations on your new computer.
    a. You can also choose to keep the files securely backed up to the cloud and work with them out of the Box folder. We recommend doing this to get all the benefits of Box cloud storage. You might want to organize the files from your Backup – Fall 2020 Folder a bit more, though.
    b. Please be patient — the download process can take quite a while, depending on the speed of your internet connection.
    c. You can continue with this guide while Box Drive works in the background.

Check for Updates

Since it may have been a few days since your new Mac was initially provisioned by OIT, it is important to check for and run Software Updates after getting settled in. Choose **Apple menu > System Preferences**, click **Software Update**, then install any software updates listed.

Restoring Other Saved Information

Internet Bookmarks

If you backed up your Internet Bookmarks or Favorites earlier in this guide, follow the steps for your web browser of choice below to restore them.

How to Restore Your Internet Bookmarks or Favorites

Safari

Safari bookmarks can only be synced automatically via iCloud. If you did not use iCloud to back up your Bookmarks, follow the instructions for *Importing Bookmarks from a file without iCloud*.

1. Open System Preferences by clicking the **Apple menu** in the top left of your screen and choosing **System Preferences**.
2. If you're using macOS Catalina, click **Apple ID** then **iCloud**. If not, click **iCloud** here.
3. Sign in with your Apple ID if needed.
4. Check the box beside Safari.

Import Safari Bookmarks from a file without iCloud

1. In the Safari app on your Mac, choose **File > Import From > Bookmarks HTML File.**
2. Select the file you want to import.
3. After you import bookmarks, they appear at the bottom of the sidebar in a new folder whose name begins with "Imported" and ends with the date.
4. Click **Import**.

Firefox

1. Open Firefox on your new Mac. In the top right of the window, click on the User Profile icon and choose **Sign in to Firefox**.
2. Sign in using the account you used to sync your browser data previously in this guide. Your data will sync to your new Mac automatically.

If you backed up your Bookmarks to a file instead:

1. Open Firefox on your new Mac and press *Command + Shift + B* to open the Bookmarks Library.
2. Click **Import and Backup** on the menu bar.
3. Select **Restore.**
4. Select the backup file from which you want to restore by clicking **Choose file…**

Chrome

1. Open Chrome on your new Mac. In the top right of the window, click on the User Profile icon and choose **Turn on sync...**
2. Log in to Chrome using the account you used to sync your browser data previously in this guide.
3. During Sync setup, you will ask you want you want to sync. If you only want to sync Bookmarks, select **Customize Sync** and make sure that only *Bookmarks* is checked.
4. Click **Confirm** and leave Chrome open for a few minutes to complete the syncing process.

If you backed up your Bookmarks to a file instead:

1. Click the Chrome menu button (three dots) on the top right.
2. Select **Bookmarks**, then **Import Bookmarks and Settings**.
3. From the drop-down menu, select **Bookmarks HTML file**.
4. Select **Choose File**, then locate the backup file from which you want to restore.
   a. **If you haven't created any bookmarks in Chrome on your new Mac**, the bookmarks show up in the bookmarks bar.
   b. **If you already have bookmarks in Chrome on your new Mac**, the bookmarks are in a new folder labeled "Imported."

Printers

Local (USB-Connected) Printers

For most USB printers, all you must do is update your software and then connect the printer to your Mac. macOS automatically detects the printer and downloads any necessary software. For other printers, you may have to complete a few steps to add the printer.

1. On your Mac, make sure you have completed the **Update Software** step on **Page 12**.
2. Prepare your printer: Use the instructions that came with your printer to unpack the printer, install ink or toner, and add paper. Turn on the printer and make sure it's not displaying any errors.
3. Connect your printer: Connect the USB cable to your Mac. If you see a message prompting you to download new software, make sure to download and install it.

Network Printers

This section will walk you through adding network-connected printers to your new Mac with the *PrinterLogic* website. You will need to refer to the notes you made on **Page 6** of this guide. ***Note: This step must be completed while connected to the UA Campus Network.***

1. On your new Mac, open a web browser (we recommend Google Chrome for installing printers) and navigate to printlogic.ua.edu.
   a. You may need to install the PrinterLogic Extension in Chrome. Follow the prompts and allow the extension to run. Go back to printlogic.ua.edu and refresh the page when finished.
2. If your device is connected to the UA Campus Network with an ethernet cable, the PrinterLogic site should automatically detect your building and navigate to the correct folder of printers. If it does not, or if you're connected via wireless, find the building where the printer you want to add is located in the list to the left and click on it to open the folder.
3. Locate the printer you want to add.
4. Verify that the name of the printer is correct, then click the printer's name to install it.
5. Once the dialog box that appears indicates installation is complete, repeat steps 2-3 for any additional network printers you need.

Software

Instructions for installing most UA-provided software are provided in the OIT Software Catalog at www.oit.ua.edu/software (refer to your notes on **Page 7**, if needed). If you need assistance installing any UA-supported software, contact the IT Service Desk at 205-348-5555 or itservicedesk@ua.edu. OIT Technicians cannot install software not supported by The University. For assistance with non-UA licensed applications, contact the software vendor's support team.

That's it! If you need additional assistance with anything covered in this guide, or if you have further questions, please contact the IT Service Desk at 205-348-5555 or itservicedesk@ua.edu.