HP Personal Workstations Step-By-Step Instructions for Upgrading Windows Vista or Windows XP Systems to Windows 7

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Introduction

HP is committed to supporting our customer's operating system needs. As new operating systems and service packs are introduced, HP engineering teams perform testing to verify compatibility on HP products. This allows our customers to pick the operating system and service pack which best suits their computing environment.

This white paper discusses installing Windows 7 on selected HP products. The document provides basic instructions for the installation process. The information contained in this white paper is current as of the date of publication. It is recommended that you refer to http://www.hp.com/support for the most current files.

These instructions are provided as a courtesy for customers upgrading to Windows 7.

If you need help using a Microsof®t Windows® 7 DVD that was not obtained through the Windows 7 Upgrade Option Program from HP, contact Microsoft: http://windows.microsoft.com/en-

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us/windows7/help Microsoft supports the Windows 7 *software* under Microsoft warranty terms. However, HP continues to support your PC *hardware* under the terms of your PC's limited warranty.

If you received a Windows 7 Upgrade DVD through the Windows 7 Upgrade Option Program from HP and you need assistance beyond these instructions, please contact HP by visiting www.hp.com/go/contacthp.

> HP recommends that you back up all user data and burn or locate your system recovery disks before beginning any upgrade or re-installation.

List of Tested Systems

The following HP Personal Workstations are supported for upgrade to Windows 7.

Personal Workstations

HP Z400 Workstation
HP Z600 Workstation
HP Z800 Workstation
HP xw4600 Workstation
HP xw6600 Workstation
HP xw8600 Workstation
HP xw9400 Workstation

Install Guide

Minimum Requirements

For details, please go to http://windows.microsoft.com/en-us/windows7/products/system-requirements.

- Systems should be on the Tested Systems list above. Other systems may or may not work with Windows 7 – upgrade them at your own risk.
- 1 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor
- 1 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit)
- 16 GB available hard disk space (32-bit) or 20 GB (64-bit)
- DirectX 9 graphics device with WDDM 1.0 or higher driver

Additional Requirements

For details, please go to http://windows.microsoft.com/en-us/windows7/products/system-requirements.

- Internet access (fees may apply)
- Depending on resolution, video playback may require additional memory and advanced graphics hardware
- For some Windows Media Center functionality a TV tuner and additional hardware may be required
- Windows Touch and Tablet PCs require specific hardware

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- HomeGroup networking requires a network and PCs running Windows 7
- DVD/CD authoring requires a compatible optical drive
- BitLocker requires the Trusted Platform Module (TPM) 1.2 to be enabled in the BIOS
- BitLocker To Go requires a USB flash drive
- Windows XP Mode requires an additional 1 GB of RAM, an additional 15 GB of available hard disk space, and a processor capable of hardware virtualization with Intel VT or AMD-V turned on
- Music and sound require audio output

Operating System requirements for Upgrades

A valid copy of Windows Vista® SP1 or SP2 is required for upgrades, and must be of the same language and similar edition. The following upgrade paths are allowed:

- Windows Vista Home Premium -> Windows 7 Home Premium
- Windows Vista Business -> Windows 7 Professional
- Windows Vista Ultimate -> Windows 7 Ultimate

See: http://www.microsoft.com/windows/buy/offers/upgrade-faq.aspx

You cannot upgrade from Windows XP to Windows 7, you can only do a Custom Install. A Custom Install will replace the current operating system, and will NOT preserve applications, data, or settings. HP recommends that you burn or locate your system recovery disks before beginning an upgrade.

WARNING: BEFORE performing an upgrade or installing Windows 7, you must back up all user data (files, photos, etc.), applications, settings. Failure to do so will result in loss of your data.

For Upgrades from XP, please follow the Custom Install instructions.

Recommended Install Order

1. Check and Upgrade BIOS
2. Update Drivers, Software, and Utilities
3. Backup User Data and collect or Burn Recovery Disks
4. Check for Application and Hardware Compatibility
5. Collect application installation media before performing a Custom Install
6. Install or Upgrade
7. Update Drivers , Software, and Utilities
8. Reinstall applications after performing a Custom Install
9. Restore User Data

Check and Upgrade BIOS

1. Start your system using the current operating system.
2. Press the F10 key during BIOS Post, and check your current System BIOS version.
3. Cross check the revision described in the previous step with the release listed on the HP Web site for your computer model and system BIOS. (http://www.hp.com)
4. Download the newer version and follow the instructions to install the new System ROM BIOS.

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Update Drivers and Utilities

For Upgrades from Vista:

1. Connect to Windows Update, and install all "Important" updates.
2. Download and install Windows Vista SoftPaqs for drivers and utilities from the Hewlett Packard Web site at http://www.hp.com/support. SoftPaqs provide a distribution method for driver and ROM updates and product software enhancements.

For Custom Installs:

1. Download Windows 7 SoftPaqs for drivers and utilities from the Hewlett Packard Web site at http://www.hp.com/support. SoftPaqs provide a distribution method for driver and ROM updates and product software enhancements.
2. Copy the SoftPaqs to a USB drive, or burn them to a CD. You will need these Softpaqs after the Windows 7 Install finishes.

Backup All User Data

Prior to upgrading or installing Windows 7, backup your data, and verify that the backup was successful and is accessible. Collect or burn your system recovery discs, or order them from HP.com. If you are using a 3rd party backup application, including any provided by HP, verify that it is compatible with Windows 7 before choosing it as you backup solution.

WARNING: Failure to back up your data will result in loss of your data.

Microsoft provides the Windows Easy Transfer utility for migrating data.

Using Windows Easy Transfer to gather data for migration:

1. Obtain a large USB or 1394 external hard drive to transfer all of your files and settings to.
2. Plug in the external hard drive.
3. If using Windows XP:
   a. Obtain Windows Easy Transfer from http://www.microsoft.com/downloads/details.aspx?familyid=2B6F1631-973A-45C7-A4EC-4928FA173266&displaylang=en
   b. Install Windows Easy Transfer.
   c. Launch Windows Easy Transfer by clicking the Start button, selecting All Programs, and then selecting Windows Easy Transfer.
4. If using Windows Vista:
   a. Launch Windows Easy Transfer by clicking the Start button, selecting All Programs, selecting Accessories, selecting System Tools, and then selecting Windows Easy Transfer.
   b. For more information, refer to http://support.microsoft.com/kb/928635.
5. At the "Welcome to Windows Easy Transfer" screen, click "Next"
6. You may be prompted to close certain applications before proceeding.

7. If prompted, choose to start a new backup.
8. You may be asked if this is the new or old PC. Choose "old PC".
9. At the "Choose how to transfer files" screens, select "external HD".
10. At the "Choose network location" screen, input the path to the USB drive, using an easy to remember file name with a .MIG extension. For example, "F:/systembackup.MIG"
11. Set a password if desired.
12. Click "Next"
13. At the "What do you want to transfer" screen, select "All user accounts"
14. At the "Review selected files and settings" screen, make changes if necessary, then click "Transfer"
15. After the migration file is created, verify that it has been saved to your USB drive or network share.
16. Disconnect the USB Drive, and proceed with the Windows 7 installation process.

Check for Application and Hardware Compatibility

Run the "Windows Vista Upgrade Advisor" provided by Microsoft:
http://www.microsoft.com/windows/windows-7/upgrade-advisor.aspx

This tool will list all known compatibility issues, and recommend appropriate actions. In some cases, you will be instructed to uninstall an application before upgrading to Windows 7. Contact the appropriate software vendors for Windows 7 compatible versions before upgrading.

Note that in some instances, there will be no driver support for your devices. You will need to decide whether you can do without the device or purchase a Windows 7 compliant device prior to upgrade or install.

These applications have previously shipped on HP computers, and are known to be incompatible with Windows 7. You will need to remove them before proceeding with a Windows 7 Upgrade.

- Altiris Virtual Software Agent (shipped with Firefox)
- Symantec Virtual Software Agent (shipped with Firefox)
- HP Backup and Recovery Manager
- HP ProtectTools Security Manager (can be re-installed after upgrade)

Collect installation media for applications if you are doing a Custom Install

You cannot Upgrade from Windows XP to Windows 7, you can only do a Custom Install. A Custom Install will replace the current operating system, and will NOT preserve applications, data, or settings.

For Upgrades from XP and Custom Installs, locate the installation media for all applications that you intend to use after the installation or upgrade. These will need to be reinstalled.

Install

Determine if you will be doing an Upgrade or a Custom Install.

- If you are upgrading from Windows XP, you will need to do a Custom Install.

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- An Upgrade from Vista will install on top of your existing OS, keeping the existing applications, drivers, and data in place. It will use the existing OS partition.
- A Custom Install from either XP or Vista will erase your existing OS, including all your applications, drivers, and data. After a Custom Installl, previously existing applications, drivers, and data will no longer be available.
  - o Custom Install allows you to either use the existing OS partition, or to create a new partition. If you use the Existing OS Partition, your old OS settings and data may be preserved in a directory called Windows.old. This copy may be useful to speed up your reinstantiation of user settings and data, but should not be relied upon. HP recommends you back up all user data and settings.

Steps to Upgrade from Vista:

1. Obtain the Windows 7 version suitable for your upgrade.
   a. Refer to the Microsoft FAQ at http://www.microsoft.com/windows/buy/offers/upgrade-faq.aspx
      i. What are the "equivalent" Windows 7 products for Windows Vista?

   b. Choose the appropriate language. Only same language Upgrade is supported.
   c. HP offers support for Windows 7 software obtained from HP through the Windows 7 Upgrade Option Program. If your Windows 7 DVD was not obtained through the Windows 7 Upgrade Option Program from HP, contact Microsoft: http://windows.microsoft.com/en-us/windows7/help Microsoft supports the Windows 7 *software* under Microsoft warranty terms. However, HP continues to support your PC *hardware* under the terms of your PC's limited warranty .
2. Insert the Windows 7 DVD into your DVD drive.
3. If the install windows does not start automatically, run "setup.exe" from the DVD.
4. Click "Install Now"
5. Follow the instructions on screen, choosing the following options:
   a. Select "Go online to get the latest updates…"
   b. Select "Upgrade"
   c. Select other options as appropriate.
6. Do not reboot or shut down your computer until the upgrade process has completed.
7. After the installation is complete, run Windows Update to obtain the latest Windows Defender updates, and other updates as needed.

Steps for a Custom Install:

WARNING: A Custom Install will erase all data (files and photos, etc) , applications, and settings from your existing OS. You must backup your data and collect or burn system recovery disks before proceeding. Failure to back up your data will result in loss of your data.

1. Collect application installation media
2. Obtain the Windows 7 version suitable for your upgrade.
   a. Refer to the Microsoft FAQ at http://www.microsoft.com/windows/buy/offers/upgrade-faq.aspx
      i. What are the "equivalent" Windows 7 products for Windows Vista?

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      b. Choose the appropriate language. Only same language Upgrade is supported.
      c. HP offers support for Windows 7 software obtained from HP through the Windows 7 Upgrade Option Program. If your Windows 7 DVD was not obtained through the Windows 7 Upgrade Option Program from HP, contact Microsoft: http://windows.microsoft.com/en-us/windows7/help Microsoft supports the Windows 7 *software* under Microsoft warranty terms. However, HP continues to support your PC *hardware* under the terms of your PC's limited warranty .

3. Insert the Windows 7 DVD into your DVD drive.
4. Boot to the Windows 7 DVD.
5. Click "Install Now"
6. Follow the instructions on screen, choosing the following options:
      a. Select "Go online to get the latest updates…"
      b. Select "Custom"
      c. Select other options as appropriate.
          i. HP recommends that you remove the all old partitions and create a new one.
7. Do not reboot or shut down your computer until the upgrade process has completed.
8. After the installation has completed, you will see several option screens.
      a. At the "Help protect Windows automatically" screen, choose "Use recommended settings"
      b. Select other options as appropriate.
9. After the installation is complete, run Windows Update to obtain the latest Windows Defender updates, and other updates as needed.
10. Reinstall your applications, using the application installation media you collected in an earlier step.

Update Drivers, Software, and Utilities

Updated drivers and utilities are available at http://www.hp.com, or on the USB drive or CD drive you downloaded softpaqs to in the Update Your Drivers and Utilities step (2). Install them now

Restore User Data

Using Windows Easy Transfer to restore data after Windows 7 installation completes:

1. Plug in the external hard drive used to store the migration file.
2. Launch Windows Easy Transfer by clicking the Start button, selecting All Programs, selecting Accessories, selecting System Tools, and then selecting Windows Easy Transfer.
3. At the "Welcome to Windows Easy Transfer" screen, click "Next"
4. At the "What do you want to use to transfer" screens, select the "external HD".
5. At the "Which computer are you using now?" screen, select "New Computer"
6. At the "Has Windows Easy Transfer already saved…" screen, select "Yes"
7. Browse to the location of the MIG migration file, and select it.
8. Restart your computer to compete the transfer process.

Additional Information
A Note on Aero Glass

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Aero Glass will not be available on graphics cards that do not have inbox support. Check for updated drivers on Windows Update and hp.com.

A Note on Sharing Folders

Sharing a folder under a User profile (i.e. a folder on the desktop or in the "Documents" folder) will share the folder by making it accessible through \\<computer name>\Users. The User profile will be labeled as a shared folder, but it is secured so that users are only granted access to the specific folder that was shared. Users that open \\<computer name>\Users will only be allowed to see files and folders that they have been given permission to access.

Sharing a folder or file will not change the displayed icon. To check if a file or folder is shared, select it and check its state in the status bar at the bottom of the explorer window.

Known Issues
Issue: Symantec Virtual Software prevents upgrade to Windows 7. The upgrade will fail and return the system to the original OS.
Systems Affected: Any system with Symantec Virtual Software installed.
Resolution: From Control Panel > Programs, uninstall "Symantec Virtual Software". Restart Windows 7 Upgrade.

Issue: Some Digital Copy DVD's direct the user to a webpage in order to upgrade security components, but the "Upgrade" button is grayed out and the upgrade cannot be initiated.
Systems Affected: All systems.
Resolution: Close the browser and the DVD software windows. Re-open the browser and go to http://drmlicense.one.microsoft.ocm/indivsite/enindivit.asp. The upgrade button will now be accessible.

Issue: Remote Desktop will not login with a username that has been changed, but the old username continues to work.
Systems Affected: All systems.
Resolution: Windows Vista and Windows 7 do not allow for changed usernames to be used for Remote Desktop. Please refer to KB article # PENDING.

Issue: The first time Games Explorer is opened, if Narrator is running than the Explorer will crash.
Systems Affected: All systems.
Resolution: Turn off Narrator. Run Games Explorer the first time. You can now turn Narrator on, and running Games Explorer will no longer have an issue. Please refer to KB article # PENDING.

Issue: A system image on DVD or network drive fails to restore.
Systems Affected: All systems, when booting to Windows 7 install on a USB drive
Resolution: After booting to the OS on the USB drive, choose to repair the system, and then choose system recovery. Remove the USB drive at this point, and continue with the restore as indicated.

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