

Windows 10 → Windows 11: Union Office Checklist

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Goal: Move off Windows 10 safely, protect member data, and keep dispatch/dues running without disruption.

Who's involved: Office Manager, Treasurer, Dispatch Lead, Steward Coordinator, IT (internal or vendor).

Week 1 — Make the List (No Surprises)

- [] Write down every computer: user, location (front desk/dispatch/treasurer/field), and Windows version.
- [] Mark any machine that touches dues, grievance files, member records, or dispatch.
- [] Check if the computer can run Windows 11 (IT can confirm).
- [] Note printers, card readers, label printers, and specialty software tied to each machine.

Week 2 — Decide Per Machine (Common-sense Plan)

- [] Upgrade now: Any computer that's ready for Windows 11.
- [] Short-term security updates program: Use only for machines that must stay on Windows 10 a bit longer.
- [] Replace or Cloud PC: For computers that can't upgrade and handle sensitive work (treasurer/dispatch).
- [] Put dates on the calendar for each machine (15–30 minute windows where possible).

Weeks 3–4 — Rollout in Batches (Keep the Counters Moving)

- [] Back up files (desktop/Documents) and confirm you can restore.
- [] Pilot first with low-risk users. Make sure printers, card readers, grievance & dues software still work.
- [] Upgrade the front desk, then treasurer, then dispatch—one group at a time, after the pilot is clean.
- [] Keep a short issues log (what broke, who fixed it, how).

Weeks 5–6 — Lock It Down (Protect Members & Staff)

- [] Turn on device encryption (BitLocker) and modern antivirus/EDR.
- [] Remove everyday admin rights; use admin only when needed.
- [] Update the office rule: "Only supported systems handle member data."
- [] Update cyber-insurance answers and any audit checklists to show your new setup.

Communications (Copy/Paste)

- Staff heads-up: "Windows 10 support has ended. We're upgrading office computers to protect member data. Your upgrade window will be scheduled; most take 15–30 minutes. Printers and card readers will be tested. If you store files on your desktop, please flag it so we can back them up."
- Treasurer/Dispatch note (day before): "Your station upgrades tomorrow after close. We'll back up files, test the receipt printer, label printer, and dispatch software before you log off. If anything looks off, call IT immediately."
- After upgrade: "Please test printing, card readers, and shared drives. Report issues to IT with screenshots if possible."

Sign-Off (So We're Done for Real)

- [] Asset list shows Windows 11 (or short-term updates if truly needed).
- [] Issues log is cleared; lingering Windows 10 machines have a retirement date.
- [] Disaster-recovery notes updated (how to restore, who to call).
- [] Leadership brief sent: what changed, what's left, and any budget notes.

Quick Role Guide

- Office Manager: Owns the schedule; keeps the issues log.
- Treasurer/Dispatch Leads: Approve timing; confirm printers/scanners/apps.
- Steward Coordinator: Flags any jobsite laptops or stewards' machines still on Windows 10.
- IT: Checks Windows 11 readiness, runs upgrades, tests devices, and enables security.

What If We Can't Upgrade Right Away?

- [] Put the machine in the short-term security updates program.
- [] Keep Chrome/Edge fully updated; remove old plug-ins.
- [] Require MFA for Union Impact and email logins.
- [] Do not use that machine for dues, member records, grievances, or dispatch beyond the temporary window.
- [] Set a replacement date.

10-Point Quick Check (Pin to the Wall)

- [] Full device list with roles
- [] Windows 11 readiness checked
- [] Sensitive stations prioritized (treasurer/dispatch/front desk)
- [] Backups verified
- [] Pilot upgrade passed
- [] Printers/card readers/apps tested
- [] Encryption on, antivirus modern
- [] Admin rights tightened
- [] Policy updated (supported systems only)
- [] Leadership sign-off + replacement dates for any stragglers

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