**Keywords:** *offboarding, offboard, off, boarding, psi, site*

Offboarding a PSI Owned & Operated site is sometimes necessary when our locations are sold to 3rd party vendors. This process should take approximately 9 hours - 3 hours per day, over 3 days. While the hours spent on any given day are flexible, the 3 day timeframe needs to be followed as closely as possible to avoid any interruptions in testing at the site.

Currently, either Todd Laffoon or Chris Taggart will create a ticket for the offboarding procedure, CC-ing Cormac, Cavin Heaton, and the assigned technician. Cavin will call the site to discuss the details.

1. **Day One**
2. **Server**

**1.** Create the following file structure (with subfolders) on the server:

FinalPull[YY.MM.DD] (i.e FinalPull21.09.30)

\.ser

\seat 01

\seat 02

\seat 03

…etc

\.upload

\captures

\photos

\fingerprints

\signature pad

**2.** All testing workstations must have their files and backup files purged.

**a.** Dump the psi-data and backup folders from each seat into the respective seat folder you just created and delete the originals from the testing workstations.

**b.** Make certain that all server .upload files and all captures for photos, fingerprints, and signature pads make it to their respective folders (in the structure you just created at step 1) and delete the originals.

**3.** Zip the Entire file/folder structure you created in step 1 and move it to \\10.20.68.211\ServerPull\OnO\_Servers\state, site name (code)\

**4.** Remove all content from “My” type folders (My Downloads, My Documents, etc.) from C:\ and remove the \OPS and \MISC folders.

**5.** OPS may be installed on D:\ instead. Remove it, and remove any \Happiness folder, if it exists. (OPS is to be installed on C:\ only going forward)

**\*Steps 6 through 14 are performed on all stations.**\*

**6.** Pull Ivanti using the executable located at <https://psienterprises.sharepoint.com/:u:/s/TCN/ESyucv4LUBBBr-y3dWkphqABSzCS69m3emxtUxAMKIofQA?e=btHGr8>

**7.** Run the Disk Cleanup utility and remove everything.

**8.** Clean up desktop icons on all profiles.

**9.** Open the Task Scheduler and right-click > delete the PSI folder in the Task Scheduler Library.

**10.** Empty the Recycle Bin.

**11.** Set a new screensaver with the following options:

**a.** Blank

**b.** 20 minutes

**c.** Does not require re-login.

**12.** Set a generic desktop background.

**13.** Run the executables from the Sharepoint link above for password changes AND to delete the Estech and OPSHD accounts. (Only *seat*, *proctor*, and *admin* user accounts should remain.)

**14.** Log out.

1. **Proctor / Check-in Stations**

**1.** Under the proctor user account, delete all content from “MY” type folders (My Downloads, My Documents, etc.) and remove the \MISC folder.

**2**. Delete all anomalous installations from the list of installed programs.

**3**. Perform steps 6-14 as outlined above in section A.

1. **Testing Workstations**

**1.** Remove all ADA software.

**2.** Delete the \MISC folder.

**3.** Perform steps 6-14 as outlined above in section A.

1. **Day Two**
2. Ideally, this is when Cormac will arrive and label all stations and KVM switches, which monitors are attached to which proctor stations, and the testing workstation cubicles.
3. Complete any tasks that were carried over from Day One (i.e., any stations that were previously inaccessible).
4. For all stations, you or the Cormac technician should: confirm admin, seat, and proctor login profiles and logout after each. If ordered to change the IP configuration to DHCP, you may do so for admin profiles before logging out.
5. Uninstall DameWare from the server.
6. Cormac/Greg will reconfigure or replace the Cisco router.
7. The hardware team will update the TCN Master Info table.
8. **Day Three**
9. Confirm ISP changes have been made and remote access is possible.
10. Complete a standard vanilla install, complete with demos.
11. When configuring the hosts file during installation, clean up any erroneous or PSI specific entries that are not necessary to the successful operation of a 3rd party site.
12. Confirm printers are functioning correctly.
13. **Days Four through Ten**
14. Give the site the contact information for Tier 1 tech support.
15. Reach out to the site on the morning of day 4 to check up on them.
16. Reach out to the site on the afternoon of day 5 for a final check in.