

By Greg Shultz

If you skipped Windows Vista and stuck with Windows XP, chances are good that you are now seriously considering moving to Windows 7 after it's released on October 22. If so, there is much for you to do. Not only should you begin planning for your operating system migration, but you should begin learning as much as you can about Windows 7. Here are 10 things you can do to get ready for the switch.

1 Check your hardware

Windows 7 was designed to be lean in terms of hardware, so that it will be able to function satisfactorily on sub-powered netbooks. If you're running Windows XP on a computer manufactured within the last three or four years, chances are good that Windows 7 will run fine on your system. However, you can make sure that your hardware is compatible by running Microsoft's [Windows 7 Upgrade Advisor](#).

The Windows 7 Upgrade Advisor will perform a detailed scan of your entire system, checking hardware, programs, and peripheral devices. Once the scan is complete, the Upgrade Advisor will display a report telling you whether your system meets the hardware requirements and identifying any known compatibility issues with your programs and devices. If it finds problems, the Upgrade Advisor will provide suggestions you can use to better analyze your upgrade options to Windows 7.

You can [download the Windows 7 Upgrade Advisor from the Microsoft Download Center](#). At the time of this writing, this tool is listed as being a Beta version. However, running it now will give you a good idea of what you will be facing as you prepare for your upgrade.

If you're planning a much bigger Windows XP to Windows 7 migration, you'll want to investigate the [Microsoft Assessment and Planning Toolkit](#). This free toolkit, which runs across the network without having to install software on client systems, will allow you to investigate systems and compile reports on hardware and device compatibility.

2 Understand the Custom Install

If you're running Windows XP on your computer and you want to use Windows 7 on that same computer, you'll purchase an Upgrade license package of Windows 7. However, you won't be able to perform an in-place upgrade. In other words, you won't be able to upgrade to Windows 7 on top of XP and keep all your applications and settings "in place." Instead, you'll have to perform a Custom Install, which Microsoft describes as follows:

A custom (clean) installation gives you the option to either completely replace your current operating system or install Windows on a specific drive or partition that you select. You can also perform a custom installation if your computer does not have an operating system, or if you want to set up a multiboot system on your computer.

When you completely replace Windows XP, the installation procedure will not totally obliterate it. In fact, the installation procedure will create a folder on the hard disk called *Windows.old* and will place the Windows, Documents And Settings, and Program Files folders from your Windows XP installation in it. Your data files will be safe and accessible, but your applications will not be viable. (Even though the Custom Install saves your data in the *Windows.old* folder, you will want to have a separate backup on hand just in case!)

Regardless of whether you choose to completely replace Windows XP or set up a multiboot system, you are going to have to back up and transfer all of your data, reinstall all of your applications, and reconfigure all of your settings.

3 Consider a setting up a multiboot configuration

When pondering a Custom Install, you should consider setting up a multiboot configuration. That will place both Windows XP and Windows 7 at your disposal, which will be a big advantage as you begin migrating your settings, documents, and applications. More specifically, you can boot into Windows XP to check out how something is set up and then boot into Windows 7 to re-create the same configuration. Once you have everything in Windows 7 exactly the way you had it in Windows XP, you can remove the multiboot configuration set Windows 7 as the primary OS and then remove Windows XP.

To be able to perform this type of switch, both XP and 7 must be installed on the same hard disk but on separate partitions. (If you install Windows 7 on a second hard disk, the boot partition will exist on the first hard disk, so you won't be able to remove that drive once you're ready to get rid of XP.) As a result, you'll need to repartition your hard disk to make room for Windows 7. To repartition your hard disk without destroying data, you can take advantage of partition management software, such as [Norton PartitionMagic 8.0](#), which retails for about \$70, or [Easeus Partition Manager Home Edition 4.0.1](#), which is available for free and earned a 4.5 star rating in a recent CNET editors' review.

4 Plan your backup and restore strategy

Before you move from one operating system to another, you'll want to back up all your data -- at least once and maybe twice, just in case. While it may sound like overkill, having an extra backup will give you peace of mind.

If you're using a third-party backup program, you will need to check the manufacturer's Web site to see whether the program will be upgraded to work in Windows 7. If you aren't using a third-party backup program, you're probably using Windows XP's native Backup Utility. As you may have heard, the file format used for this tool isn't compatible with Windows Vista's Backup And Restore Center. To provide for that, Microsoft released a *special version* of the XP Backup Utility, called the Windows NT Backup - Restore Utility. It's designed specifically for restoring backups made on Windows XP to computers running Windows Vista. While I was unable to get official confirmation, it is a safe bet that this special version will work in Windows 7 or will be adapted to do so. If you aren't willing to take that bet or you are not sure whether your third-party backup program will be upgraded to work in Windows 7, you can simply make copies of all your data files on CD/DVD or on an external hard disk.

5 Plan your data transfer strategy

To move from one operating system to another, you'll probably want to use a transfer program that will scan your XP system, pull out all your data and settings, and then transfer them to Windows 7. Fortunately, the Windows 7 Easy Transfer utility can provide this service for you. However, before you perform this transfer operation, it will be in your best interest to have a separate back up copy of your data (see #4).

The new operating system will come with two copies of the Windows 7 Easy Transfer. One copy will be on the DVD and the other will be installed with the operating system. Before you install Windows 7, you will run Windows 7 Easy Transfer from the DVD and back up all your files and settings. Then, once you have Windows 7 installed, you'll use it to move all your files and settings to the new operating system. You can learn more about the Windows 7 Easy Transfer by reading the article [Step-by-Step: Windows 7 Upgrade and Migration](#) on the Microsoft TechNet site.

6 Inventory your applications and gather your CDs

Since you won't be able to perform an in-place upgrade when you move from Windows XP to Windows 7, you'll have to reinstall all your applications that passed the Windows 7 Upgrade Advisor compatibility tests (see #1). It will be helpful to have an inventory of all the installed applications so that you can track down all your CDs or compile a list of Web sites for those applications you downloaded.

While the report generated by the Upgrade Advisor will be helpful as you create an inventory, it won't be comprehensive. To create a detailed inventory, you can use something like the Belarc Advisor. For more details, see the article [Gather detailed system information with Belarc Advisor](#).

7 Become familiar with the new UI

The UI in Windows 7 is quite different from the UI in Windows XP, and it offers a lot of new features. As a result, you may encounter what I call "UI Shock." You'll know what you want to do, but you'll experience a momentary lapse of composure as you strive to adapt what you know about XP's UI to what you're seeing and experiencing in Windows 7.

To ease the level of UI shock, you'll want to become as familiar as possible with the features of the new Windows 7 UI. One starting point is Microsoft's [Windows 7 page](#). While a lot of the content here is essentially marketing related, it will give you a good idea of what to look for when you actually move into the Windows 7 operating system.

To help you get right to the good stuff, check out:

- The [Windows 7 features section](#), where you'll find a host of short videos and descriptions.
- The [Windows 7 Help & How-to section](#), where you'll find a whole slew of step-by-step articles that show you how get around in Windows 7. Be sure to check out the section on installing Windows.

You'll also find useful information on the [Windows Training Portal](#) on the Microsoft Learning site. Be sure to check out:

- The [Windows 7 Learning Snacks](#), which are short, interactive presentations. Each Snack is delivered via animations and recorded demos using Microsoft Silverlight.
- The [Microsoft Press sample chapters from upcoming Windows 7 books](#). Viewing the free chapters requires registration, but it is a short procedure. Once you're registered, you can access sample chapters from *Windows 7 Inside Out*, *Windows 7 Resource Kit*, *Windows 7 Step by Step*, and *Windows 7 for Developers*.

8 Check for XP Mode support

If you discover that some of the applications you're currently running in Windows XP are not compatible with Windows 7 (see #1) or you just want to keep Windows XP accessible, don't forget about Windows XP Mode. This virtual environment includes a free, fully licensed, ready-to-run copy of Windows XP with SP3 that runs under Windows Virtual PC in Windows 7. As you consider the Windows XP Mode, keep these things in mind:

- Windows XP Mode is available only in Windows 7 Professional, Enterprise, and Ultimate editions.
- Your computer must support processor-based virtualization.

You can learn more about Windows XP Mode from the following TechRepublic resources:

- [Determine if your hardware can support Windows XP Mode in Windows 7](#)
- [Hands on: Windows 7 XP Mode](#)
- [10 reasons why Windows 7's XP Mode is a big deal](#)

9 Ask questions

You aren't the only one making the move from Windows XP to Windows 7, so ask questions and share information you pick up along the way. Of course, you can use the TechRepublic discussion forums. But you should cast a wider net.

One good place to connect with Microsoft experts is the [Getting Ready for Windows 7](#) section of the Microsoft Answers site. Another good place is in the [Windows 7 forums in the Windows Client TechCenter](#) on the Microsoft TechNet site.

10 Subscribe to the Windows Vista and Windows 7 Report

TechRepublic's free Windows Vista and Windows 7 Report newsletter, which is delivered every Friday, offers tips, news, and scuttlebutt on Windows 7. As we count down to October 22, the day that Windows 7 is to be released to the general public, we will be covering topics of interest to Windows XP users in more detail. You can sign up on the [TechRepublic newsletters page](#).

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Version history

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