TECH4 ME2

TECH ISN'T A 4-LETTER WORD

Tech4Me2 Action Guide

Move to a New PC

Without Losing Your Stuff

A Step-by-Step Guide to a Safe and Stress-Free PC Migration

JOHN CLITES

Moving to a New PC Without Losing Your Stuff

Step-by-step guide to preparing, transferring, and setting up your new PC safely

John Clites

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Introduction

Buying a new computer is exciting.

Migrating to it is usually not.

For many people, the stress of moving files, reinstalling programs, and making sure nothing important is lost can overshadow the excitement of the upgrade. In reality, most migration problems occur not because the process is technically difficult - it isn't - but because something important was overlooked during the preparation phase.

This guide is designed to prevent that.

You won't find complicated technical language here. What you *will* find is a clear, calm, step-by-step system. If you identify what you use, protect what matters, and move deliberately, the process becomes manageable.

> *"If you don't know where you're going, you'll end up somewhere else."*
>
> -Yogi Berra, famed Yankee catcher and philosopher

This guide ensures you know exactly where you're going.

A consolidated Migration Day Checklist and High-Level Overview of the entire process are provided at the end of this guide. You may wish to print those pages before you begin, so you can monitor your progress, and always know the next step.

Before starting, set aside uninterrupted time for the preparation phase. The time required will vary depending on how much data you have and how prepared you are. As a practical rule of thumb, plan to set aside an uninterrupted morning or afternoon so you're not rushed.

Your mantra should be "Preparation determines success".

Migration Overview: What's Migrated and How

(A view from 30,000 feet)

Although the migration process might seem a little intimidating, the concepts behind it are quite simple. Essentially, information residing on your current computer needs to be moved to or duplicated on your new one.

You may wish to refer to the High-Level Overview at the end of this guide.

To demystify the migration process, let's begin at a high-level and look at the different types of information that have to find their way over to your new PC, and how each is generally handled. Broadly speaking, this information falls into three categories:

1. Your personal data: This is what you automatically think of. It's your personal and perhaps work files, photos and videos, downloads – all the stuff pertinent to you and your life that has accumulated on your PC throughout its lifetime.
2. Browser settings and stored information: You might not have realized it, but your web browser, whether Chrome, Edge, or another one, likely houses a great deal of information. This might include bookmarks, passwords, extensions, and browsing history.
3. Installed programs (aka applications): Here we aren't referring to the Windows operating system applications, since Windows has very likely already been pre-loaded onto your new PC, waiting for you. Rather, we are talking about programs like Microsoft Office, Quicken, Kindle, Grammarly, etc., which you installed post-purchase.

Now let's look briefly at how each is usually migrated over to your new PC. We'll discuss the steps involved in more detail shortly.

Your personal data will need to be manually transferred. There are three main ways that this can be accomplished: direct PC-to-PC connection via cable, using an external drive, or uploading to the cloud for download to the new PC.

Transferring browser information is typically easier, because it actually resides in the cloud rather than on your computer. When you log in to your browser on your new computer, you can access the information – provided you do one step beforehand, which we'll cover below.

Applications that you installed on your current PC post-purchase will likely need to be reinstalled on your new PC. However, the only ones that you'll actually need to handle are those that physically

reside on your PC's drive. These days, many – perhaps most – applications are actually accessed online, so no migration is necessary.

That's the process. There is nothing mysterious about it, and while migrations years ago were generally best handled by IT techs, these days – especially with data and applications living in the cloud – you should be able to handle the task yourself. You just need a step-by-step roadmap to follow.

Which is what you are reading right now.

Phase 1 - Preparation

(The Most Important Phase)

If something goes wrong during a migration, it almost always traces back to preparation, so take your time during this step.

The scope of this initial step might be substantial, depending on what you use your PC for and how long you've had it. Just like in your garage, junk tends to accumulate on your PC's drive, and it needs to be reviewed, sorted, and either kept or discarded.

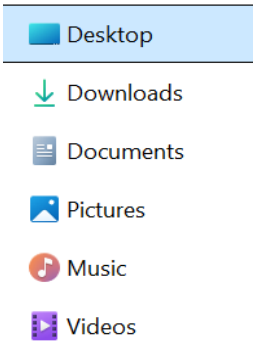
1.1 Identify What You Actually Use

Think of this phase as organizing before moving to a new home. It's much easier to relocate what is already sorted. And when moving, you wouldn't pack up and take everything that you own, including those boxes in the back of the garage. You'd use the opportunity to purge.

The same applies to migrating from your current PC to a new one. Without a doubt, detritus has collected on your current PC. Old work files, tax returns from 10 years ago, duplicate photographs, programs that are no longer used, cute cat videos sent to you via WhatsApp, the unfinished novel – all of these take up space.

So, how do you proceed? Take it step by step, looking at successive "chunks" of data. Open File Explorer and review the following folders carefully:

- Documents
- Desktop
- Downloads
- Pictures
- Videos

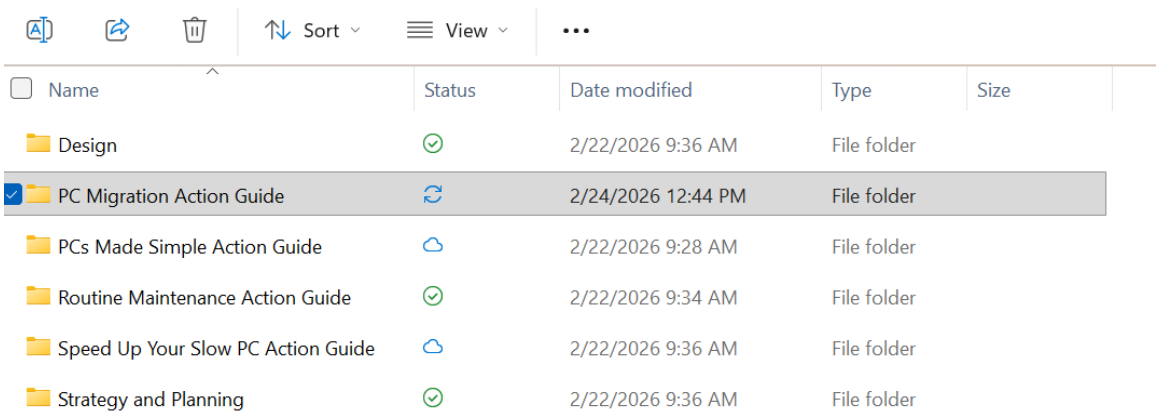


First decide where deletions - or perhaps offloading to an external drive - can be done at a high level. Are there entire folders that can be removed to an external drive? There are generally some surgical excisions that can be made without too much thought. Handling them first may significantly reduce what will need to be migrated to the new PC – and give you a bit of momentum.

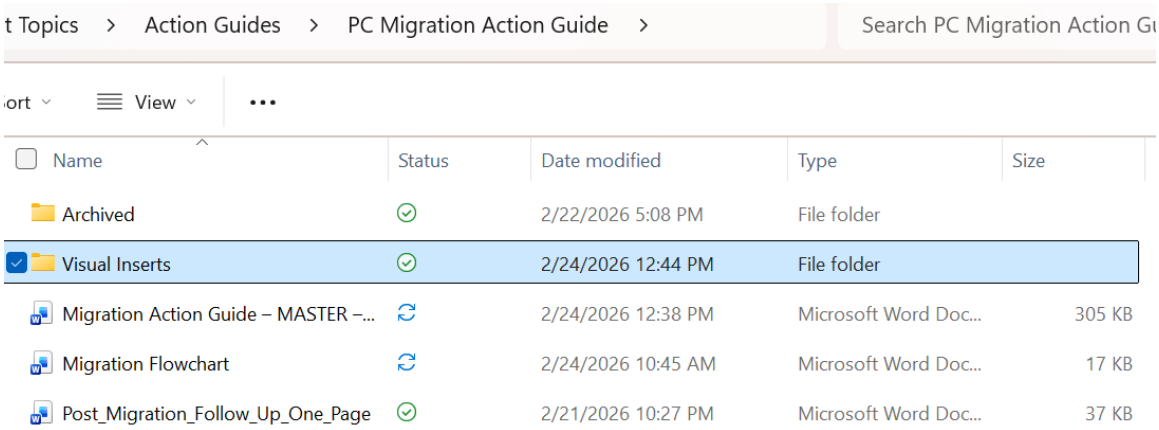
After making the more obvious cuts, you can drive down a level in Documents to search for items consuming the most space. To do this:

In File Explorer, look across the top of the screen. Switch to **View** → **Details** and click the **Size** column so that files are sorted from largest to smallest, making it easier to identify and remove space hogs. Large files are often old videos, forgotten downloads, or duplicate media.

Note: File Explorer will not display sizes for folders, only for individual files. To display large files, simply drill down into the folder.

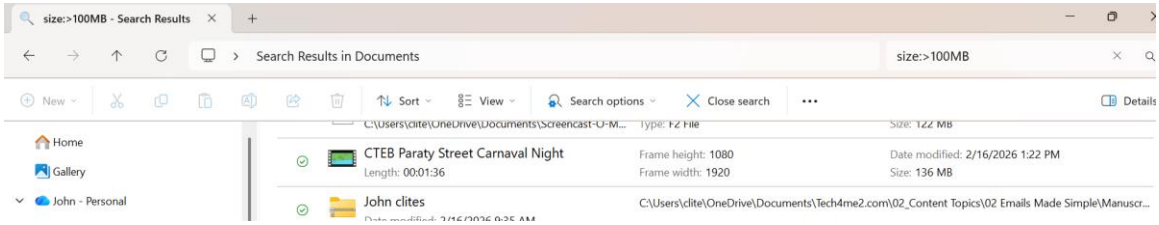


Sizes for Folders do not display



Sizes for Individual Files Do Display

You can also use the search box in the upper-right corner of File Explorer to locate large files. Simple place your cursor in the search and type: size:>100MB.



This easy step will quickly reveal large files that may deserve review.

Deciding what you truly want to migrate might go quickly or take some time. You might want to take a quick look in File Explorer, not to make those decisions, but to determine the time you might want to devote to this task.

A Note About Email

If you use Gmail in a web browser, your email does not need to be migrated. It lives online and will be available via your browser on your new PC.

If you use Outlook as a desktop program, your email may be stored locally on your PC. In that case, it must be backed up. Confirm this before proceeding.

1.2 Confirm Browser Synchronization

When we talk about browser sync(hronization), it simply means ensuring that your browsers on different devices (such as your current PC and the new one) store the same bookmarks, passwords, and extensions, and browsing history. If your browser settings in your current computer are correctly enabled before opening your browser in the new computer, all bookmarks should “port over”.

Here’s how to enable those settings:

If you use Chrome (or Edge, which is built using the same tools, and works in a very similar way):

Click your profile icon in the upper-right corner and confirm that Sync is turned ON. If it is, when you access Chrome on your new PC, your browser data should display. Simple.

If you’d like to verify what currently does and does not sync:

Go to **Settings > You and Google > Sync and Google services > Manage what you sync** to ensure "All data" or specific items (bookmarks, passwords, extensions) are enabled.

You can also manually download your bookmarks and passwords so that you'll have a copy should for any reason that this data does not port (which is unlikely unless you didn't enable sync).

To export bookmarks: In the upper right of your browser window, click the **three-dots menu** → **Bookmarks and lists** → **Bookmarks manager**. Then click the **three-dots menu** within bookmarks manager (which is below the Chrome three-dots manager) → **Export bookmarks**.

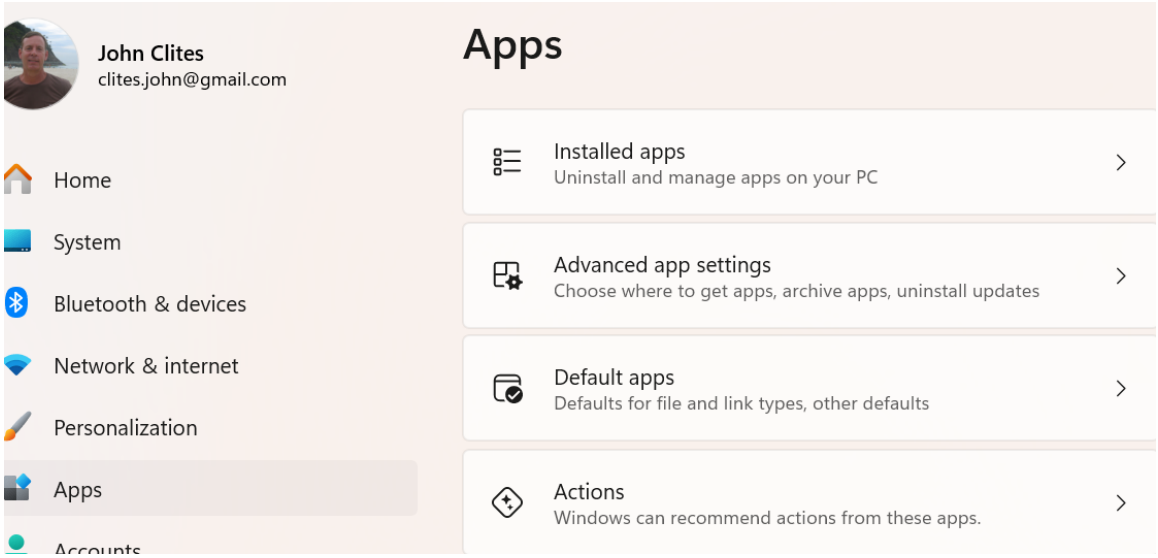
To export passwords: Click Chrome's **three-dot menu** → **Passwords and autofill** → **Google password manager**. From there, click the **three-line menu** in the upper left → **Settings** → **Export passwords**.

Note: Navigation does change periodically. If the steps given here don't match what you see on your screen, search online for alternative routes.

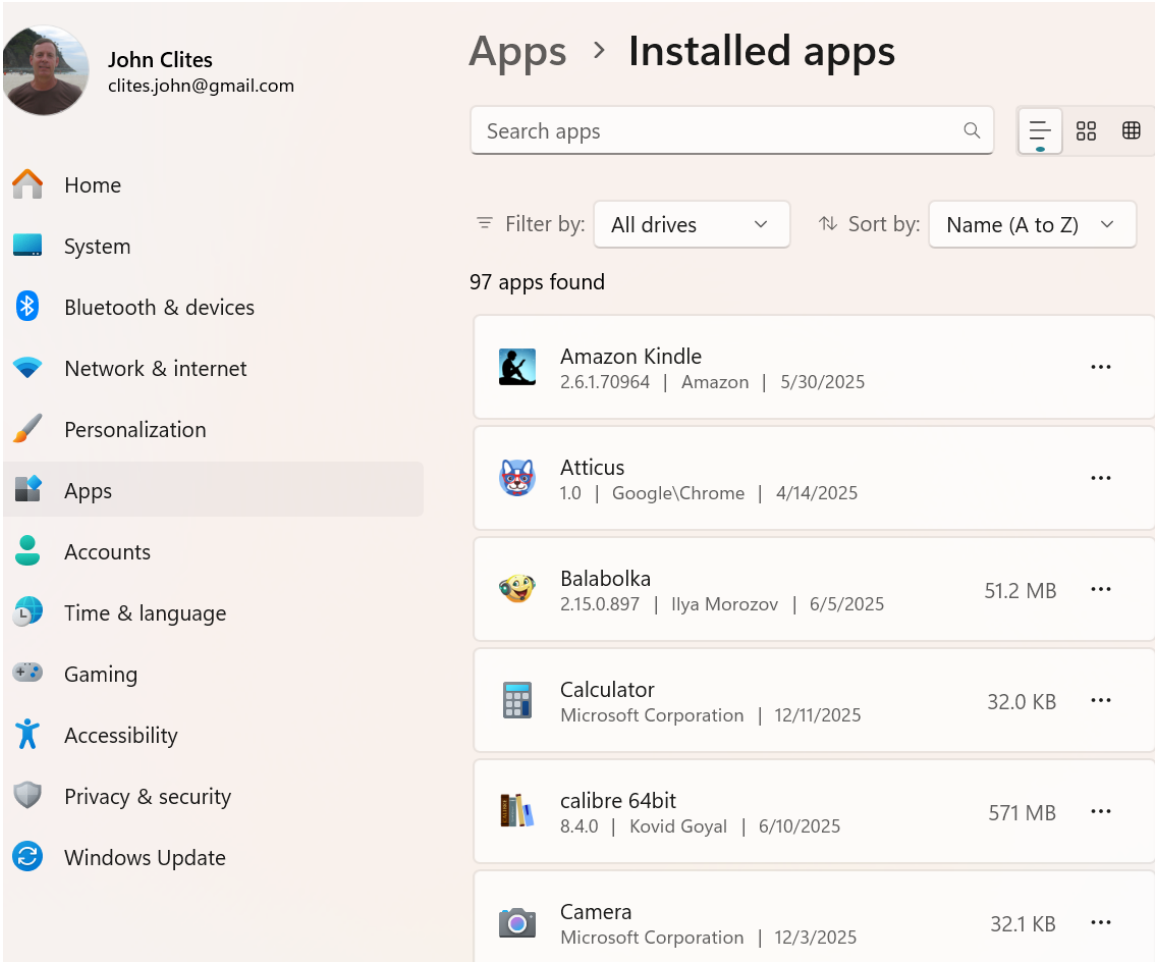
1.3 Identify Installed Programs

Because programs (applications) you've loaded onto your current PC won't be migrated over, they'll need to be reloaded after the data migration (which is covered in Section 3). Therefore, you should review programs you've installed prior to the migration.

To view installed programs, go to: **Settings** → **Apps** → **Installed Apps**



Navigation to Installed Apps



Example Installed Apps

Scroll through your list to identify the programs you actually use.

Do not assume you need to reinstall everything listed. Many systems accumulate programs over the years that are rarely used and can be safely omitted.

For programs you *do* intend to reinstall:

- Locate purchase confirmations or activation codes (search your email inbox for the vendor's name).
- Confirm that the program is still supported on your new version of Windows, if different.

Not being able to reinstall an important application can stall the migration. A few minutes spent verifying now prevents frustration later.

You may wish to list programs you plan to reinstall here:

Note: Programs that you access online (versus those residing on your computer), should still be accessible to you after migrating. If you store your login credentials in a password manager, this information should autofill when you log into the online application from your new computer. If it does not, just go through the standard procedure to request a new password.

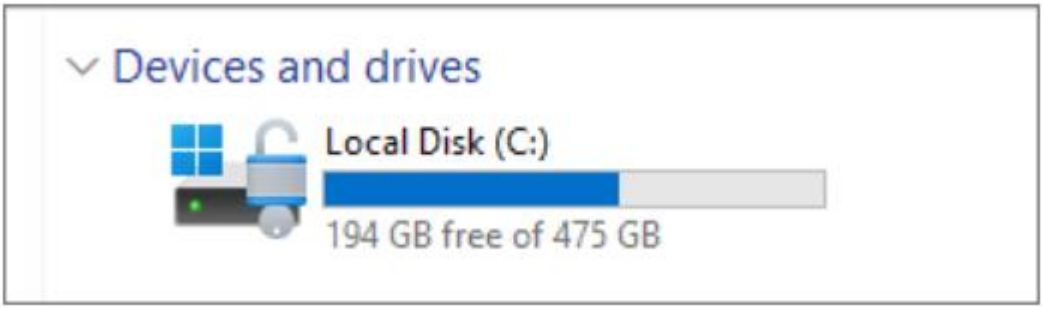
1.4 Confirm Storage Capacity

You'll want to verify that your new computer has sufficient space on the main system drive (usually C:) to accommodate everything migrated.

This is generally not an issue, as most new computers have more storage than older ones — but not always. If you are moving from a large traditional hard drive to a smaller SSD, space may be tighter than expected.

Knowing this in advance prevents having to make last-minute what-to-leave-out decisions under pressure. Here's how to verify available space:

On your old PC, open **File Explorer** → **This PC**



Used and Available Drive Space

Note the Used space and Available space:

Old PC Used Space: _____

Old PC Available Space: _____

Then, on your new PC, open **File Explorer → This PC**
Note the Total space and Available space.

New PC Total Space: _____

New PC Available Space: _____

As a rule of thumb, try to keep at least 15% of your system drive free. Windows needs working space for updates, temporary files, and virtual memory. If your drive is nearly full, performance can suffer. Keeping closer to 20–25% free space provides even more breathing room.

1.5 Remove What You Don't Need

As noted earlier, a move is the perfect time to leave behind what you no longer need. How do you determine what to migrate and what not to?

- Photos and videos are often the largest consumers of disk space. If you have years of media files, this may be a good time to offload older items to cloud storage or an external drive.
- Applications can also consume considerable space, so deleting those no longer needed can free up a considerable amount of room.

- The Downloads folder is often crammed full of trash, such as once-watched videos, old photos, installation (.exe) programs and email attachments no longer needed, which can be safely deleted.
- Folders filled with years-old files are another likely candidate. IRS audits only go back seven years, so those 10-year-old returns can be safely deleted – or offloaded to an external drive if you want to be extra careful.

Move deliberately. Do not rush deletions but do take advantage of the opportunity to do some spring cleaning. If you have no current need for data but have concerns that you might need it in the future, export it to an external drive and move on.

1.6 Compatibility Check

If you run any very old applications on your current PC, or if you use specialized software, it's a good idea to confirm that they will be compatible with the new PC's operating system, if it is a different version.

Visit the vendor's website and confirm that the program will operate on the version of Windows running on your new PC.

If you are uncertain, or if your situation is complex, this may be an appropriate time to consult a qualified technician.

Not every migration is a one-step process. It is better to identify complications early.

Phase 2 – Back Up Properly

(Verification Prevents Regret)

Do not proceed without performing a backup. If something should go wrong during transfer, your backup is your insurance that your important data will not be lost.

Therefore, resist the temptation to tell yourself that you can skip this step to save some time because "everything will be fine". Yes, it probably will be, but things do happen.

By now you've reviewed your PC's contents and purged what you won't need going forward. Determining what to back up should not be difficult. Just make yourself notes or a checklist before beginning. This simple step will help to keep you organized throughout the process and ensure that no step is skipped. Having notes to refer to is especially important if the backup process is interrupted for any reason. You can verify where you are in the process.

While certainly important, the backup process is not complicated. Just proceed deliberately and understand that the transfer speed will probably fluctuate. This is normal and probably doesn't indicate a problem unless the transfer actually stalls.

So where will you back up your data to? Your options are:

- An external drive
- Cloud storage
- Or both (recommended for critical files)

2.1 External Drive Backup

You'll want to verify before proceeding that the available space on the drive will be sufficient.

Connect your external drive to your PC using a USB 3.0 (or higher) external drive connected with a compatible high-speed cable (USB 3.0 or USB-C).

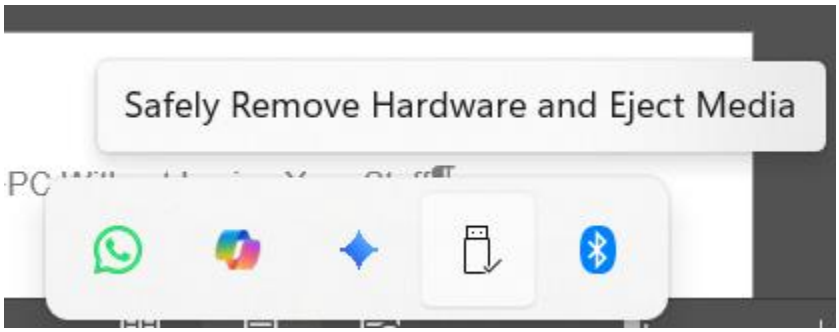
Now begin copying your important folders to the external drive. Be careful to *copy* and not to *move* folders unless that is your deliberate intention.

After copying, don't assume that because files "appear" in the drive folder structure that the transfer completed properly. To verify that they have:

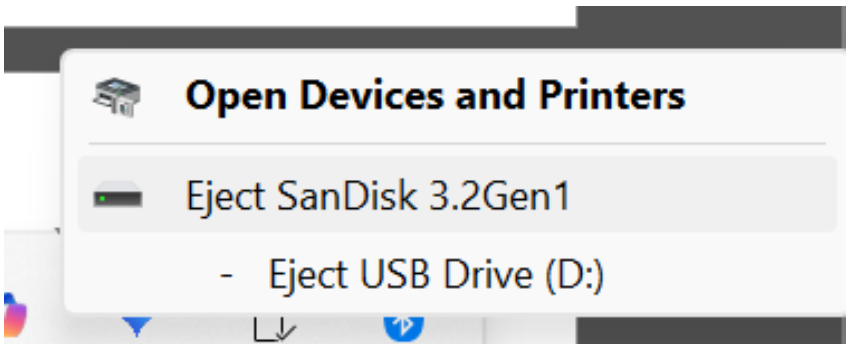
1. Open several random files directly from the external drive.
2. Confirm they open properly.
3. Spot-check different file types (documents, photos, videos).
4. Compare file counts where possible.

Important: When finished, be sure to safely eject the drive before disconnecting it. Do this by clicking on the caret icon in the notification area at the bottom-right of your screen and then clicking the icon of the external drive. Wait a second or two to receive a confirmation message that it is safe to eject before physically disconnecting the external drive.

Eject Safely 1 Click Caret



Eject Safety 2 Click Thumb Drive Icon



Eject Safely 3 Click Message to Confirm

Failing to follow this procedure can cause data corruption or loss. Give it the few seconds it takes.

2.2 Cloud Backup

Conceptually, backing up to the cloud is quite similar to backing up to an external drive. The preparation is the same. Review your data. Purge what you won't need, and list what you will back up – which should closely mirror your migration list.

While backing up to the cloud parallels using an external drive, internet speeds can vary greatly, and backing up to the cloud may well take longer. Allow ample time.

Tip: Wi-Fi can be slower and less stable than a wired Ethernet connection, especially during large uploads.

Once you've uploaded your data, do ***not*** rely solely on any message indicating that the upload was successful. Spot check several files to verify. I once lost hundreds of photos from a vacation because I failed to verify my uploads.

As noted earlier, you may wish to back up critical files using both an external drive and the cloud.

Common Hiccups in Phase 2

While a well-planned migration will usually be uneventful, things do happen. A few of the most common surprises include:

Insufficient backup space: This issue can easily be avoided by comparing the required space you recorded on page 13 to the available space on the external drive. Data storage today is cheap. If you need more, buy it.

External drive not recognized: This could be due to any of several causes, most of which are easy to check and resolve.

- First try rebooting your PC; it is simply amazing how often this simple action fixes issues.
- If the drive is still not recognized, check the physical connections. Are both ends of the cable securely connected? Is there perhaps dust in the USB cable plug or the PC's USB port?
- If the PC has a second USB port, try switching to it.
- Try using a different USB cable, verifying that it is a USB 3.0 or higher (SuperSpeed) cable.
- Most external drives today are powered by the PC, but larger ones may have their own power cord. Make sure that it is securely plugged again. Look for a signal light to confirm this.
- If none of these steps address the issue, the drive may need to be formatted (although most come pre-formatted these days).

Incomplete file transfer: These can happen for any number of reasons, from a power surge to a file issue to being physically jostled. Whatever the reason, if a transfer is interrupted, it is usually safer to restart the transfer rather than attempt to resume. To help avoid this problem:

- Use a stable internet connection.
- Use a surge protector (not just for the backup, but always)

Phase 3 – Set Up the New PC

(Build Carefully Before You Celebrate)

To pick up the metaphor from earlier, now it's time to move your furniture into your new home.

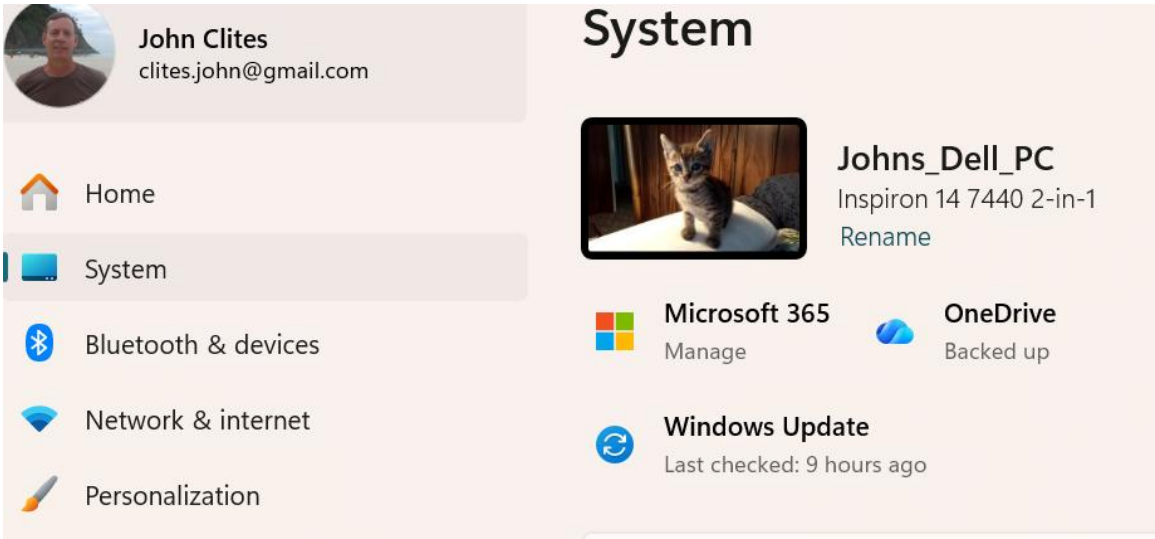
But before you do, you'll need to have the operating system installed and updated on the new PC.

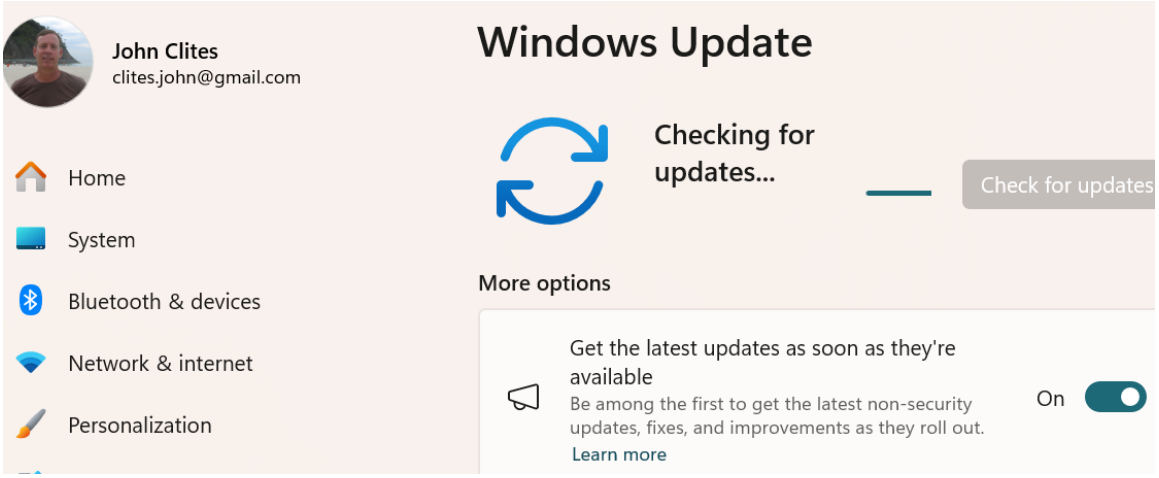
These days, your new PC will probably have Windows (Windows 11 as of early 2026) pre-loaded, but if it doesn't, that will be your first step.

3.1 Connect to the Internet Immediately

Once Windows is installed, connect the new PC to the internet so that Windows can check for and install updates.

To initiate the process, go to: **Settings** → **Windows Update**. Then click **Check for Updates** and allow updates to install fully before moving forward. As always, be sure to restart the computer after the installation to activate the updates.





Note: You do not need to complete the file transfer before going online. Once your new PC is connected to Wi-Fi or Ethernet, you should be able to access the internet normally.

3.2 Install Security Software First

Confirm that Windows Security is active:

Open the **Start menu**, type "**Windows Security**," and select the app. Look for green checkmarks next to **Virus & threat protection** and **Firewall & network protection**. A green checkmark indicates that real-time protection is enabled.

You may also choose to install your preferred antivirus program at this time.

Protection first.

3.3 Restore Files Carefully

Restoring files is essentially backing up data, but in reverse. You've been through the backup, so restoring files should feel familiar. And if you think of this step as moving into your new home, it can be pleasurable.

You'll do the actual data transfer in one of three ways, two of which we discussed in the Phase 2 section:

1. External drive to new PC's drive,
2. Cloud download to new PC's drive, or

3. Direct old PC to new PC via cable

As we've already discussed methods 1 and 2, let's skip ahead to 3.

Method 3 is actually my preferred way to perform data transfer, as it is the most direct and also typically the fastest. But to use this method, you may need to buy a specialized cable called a "bridge cable," shown here:

USB Bridge Cable for Data Transfer

For the best performance, ensure that you use the most recent standard USB 3.0 or USB-C.

Once you've connected the PCs, transferring files and folders is essentially like transferring between two File Explorer windows on a single screen.

There are other transfer methods, such as Wi-Fi/network transfer, but the three methods described above are sufficient and likely already at least somewhat familiar to you.

Whichever transfer method you use, just go slowly and methodically.

And – you guessed it – after copying, open several files to confirm they function properly.

3.4 Reinstall Essential Programs

Next you'll install the non-Windows applications you use.

While some applications may need to be loaded from a thumb drive, the vast majority of applications are installed from the web these days.

Note: Many applications that you use probably reside on the web rather than your hard drive. You won't need to download these, just log into them.

Install the programs that you identified in Phase 1. Be sure to download only from official vendor websites.

You may need login credentials or activation codes.

Record the programs you've successfully reinstalled below:

3.5 Confirm Browser Sync

Sign into your browser and confirm that bookmarks, extensions, and history appear correctly. If you enabled "Bookmarks" in your Chrome browser sync settings, they will appear in your browser on your new PC.

Also verify your browser settings, as these may sometimes shift during the sync process.

Likewise, if you enabled "Passwords" in sync settings, then login credentials should autofill when you log into websites.

3.6 Install and Test Peripherals

After verifying that data and browser information transferred successfully, you should next test that peripherals are working. Typical peripherals include:

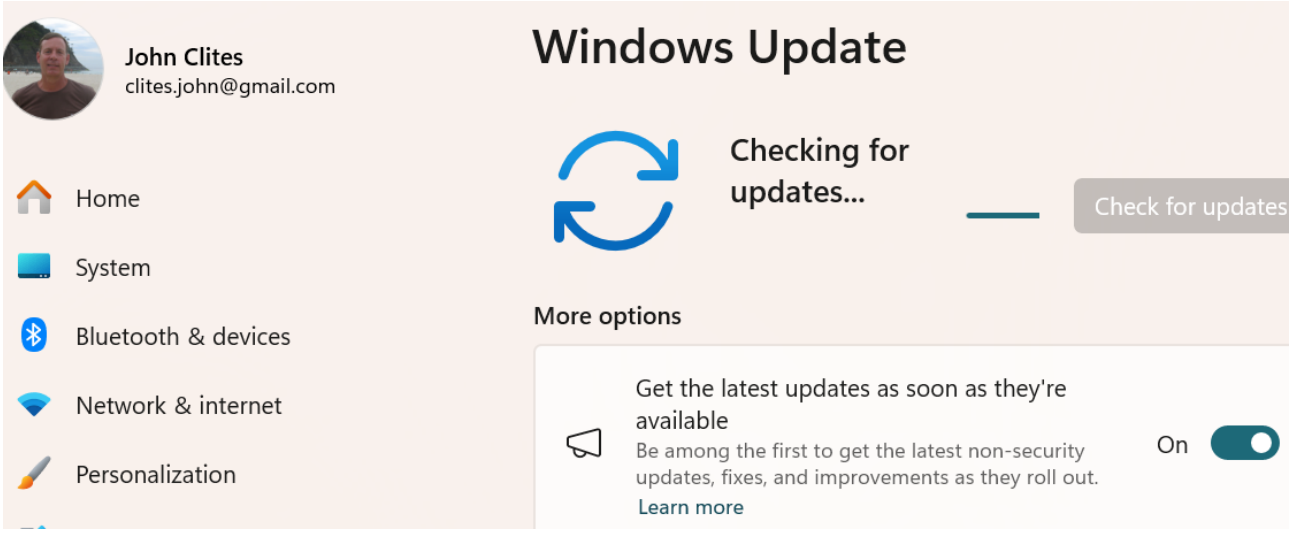
- Printer: Print a test page
- External drives: Verify that you can access them, if you have not already.
- Webcam: Initiate an online call.
- Other devices: These might include headsets, a mouse, or Bluetooth devices like earbuds.

If a peripheral is not working, you may need to update its driver (the small piece of software that allows your PC and the device to communicate).

A safe and simple place to start is Windows Update. Optional Updates often include driver updates for printers, sound, Wi-Fi, and other hardware. To check for updates, go to:

Settings → Windows Update → Advanced Options → Optional Updates

Windows Update is the bottom setting



Click "Check for updates". Also, turn "Get latest updates..." ON

If you are familiar with Windows Device Manager, you can also locate the affected device there, right-click it, and choose "Update driver."

If you are not familiar with Device Manager, do not experiment. Start with Windows Update instead.

3.7 Adjust Key Settings

If prompted to sign in with a Microsoft account during setup, you may do so now. Signing in can help sync certain settings and preferences automatically.

Even if some settings transfer, you should still review your key preferences manually — especially security-related options.

To access security settings, go to:

Settings → Privacy & Security

Make essential adjustments now. You can review and refine other preferences (display, notifications, personalization, etc.) after you've used the PC for a few days.

Phase 4 – Retire the Old PC Safely

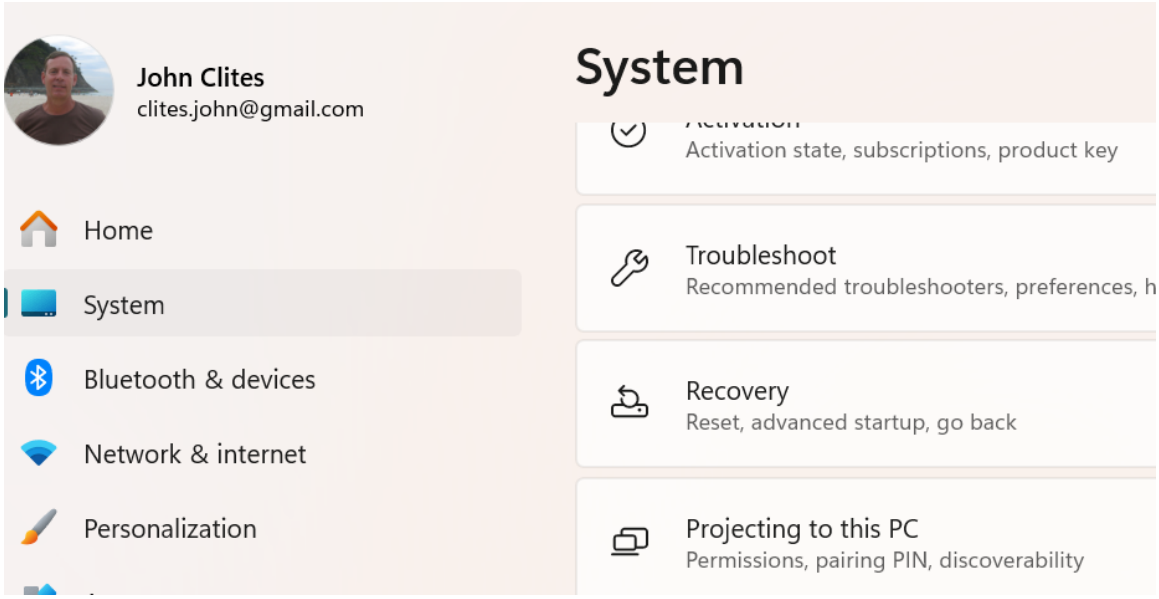
(Final check and responsible disposal)

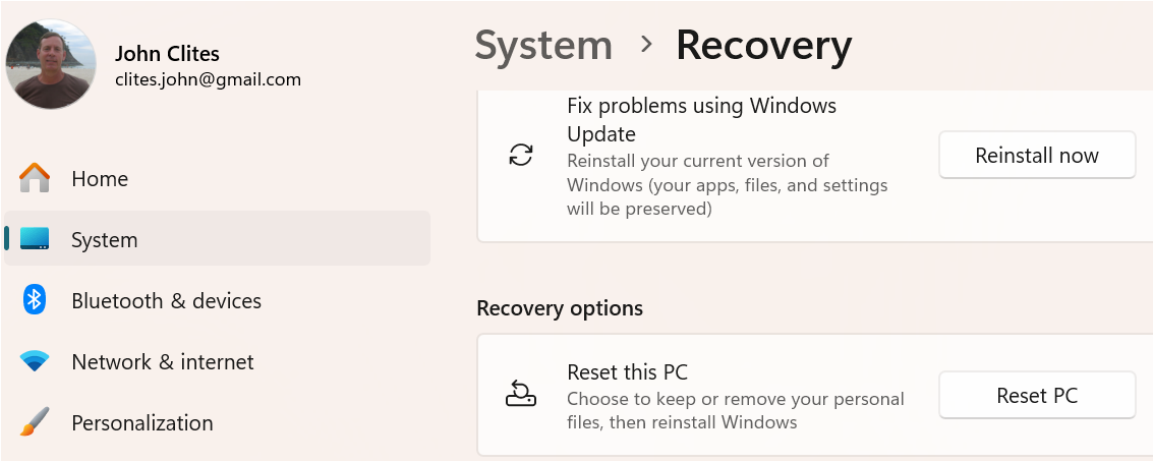
You will likely dispose of your old PC after your new one is up and running smoothly. However, you shouldn't be in a rush. Ideally, you should keep the old PC for 30 days before disposal. If there are any issues such as missing data or programs, they will probably surface within this period.

Before disposing of your old computer – whether you choose to sell, donate, or trash it – be sure to reset it to erase your personal data from the SSD or hard drive to prevent the possibility of your personal data falling into the wrong hands.

When you are ready to reset the system, select:

Settings → System → Recovery → Reset this PC





Take a breath and choose: **Remove everything**

For most home users, this process is sufficient.

If highly sensitive data was stored and you remain concerned, consult a qualified technician regarding "wiping" your drive.

Note: The time required to reset can vary widely, depending on the volume of data, type of drive (hard drive or SSD), and other factors. But expect a minimum of 30 minutes, and possibly hours. So be sure the PC is plugged in and go explore your new PC.

Migration Day Checklist

Use this checklist to keep you on track and to track your progress.

Phase 1 – Preparation

☐ Files reviewed and organized

– Important folders identified

– Unneeded files removed

– Large files reviewed

☐ Programs identified

– List of programs to reinstall created

– Login credentials located or recorded

– Activation codes or purchase emails located

☐ Storage space confirmed

– Old PC available space reviewed

– New PC available space confirmed

– At least 15–20% free space available on new PC

☐ Cloud sync settings verified

– Browser sync confirmed

– Cloud storage (OneDrive/Google Drive/etc.) reviewed

☐ Backup plan decided

– External drive ready

– Cloud backup ready

– Both (if using “belt and suspenders” approach)

Phase 2 – Backup and Transfer

☐ Backup completed

– Files copied to external drive or cloud

– Transfer completed without errors

☐ Backup verified

– Spot-checked key folders

– Opened several important files

– Confirmed photos/videos accessible

☐ External drive safely ejected

– “Safely Remove Hardware” used before disconnecting

☐ Files transferred to new PC

– All primary folders moved

– Folder structure preserved

☐ Transfer verified on new PC

– Key files opened successfully

– File counts appear consistent

Phase 3 – Set Up and Configure

☐ Internet connection confirmed

– Wi-Fi or Ethernet working

– Web browser functioning

☐ Windows updates installed

– “Check for updates” completed

– Restart performed if required

– Optional updates reviewed

☐ Security verified

– Windows Security shows green checkmarks

– Antivirus active

☐ Programs reinstalled

– Priority programs installed first

– Login credentials entered

– Programs launch successfully

☐ Peripherals tested

– Printer

– Webcam

– Speakers

– External drives

Phase 4 – Retire the Old PC

☐ Important files confirmed on new PC

☐ Old PC held for short observation period (recommended: 2–4 weeks)

☐ Old PC properly reset (when ready)

– “Reset this PC” used

– Personal files removed

Final Confirmation

☐ New PC running smoothly

☐ Startup time acceptable

☐ Storage space adequate

☐ No missing critical files

Your migration is now complete. Congratulations! Feel free to celebrate.

Post-Migration Tasks

During the first week of using your new PC, consider completing the following steps. These small actions help ensure your system remains organized, protected, and running smoothly.

☐ Review Windows settings and adjust preferences.

(You should already have verified security settings, but if not, go to **Settings** → **System and Settings** → **Privacy & Security**. After a few days of use, you may also wish to adjust display, notifications, or privacy options. (For more about Windows settings, refer to the PCs Made Simple book or course.)

☐ Confirm backups are running automatically.

(Open your cloud backup or external backup software and confirm that new files created on the new PC are being protected.)

☐ Organize temporary Desktop files.

(Move files out of the Desktop into proper folders once everything is working.)

☐ Delete installer files you no longer need.

(Remove setup files downloaded during installation to free up space.)

☐ Schedule a simple monthly check.

(Add a recurring calendar reminder such as “15-Minute PC Check” once per month. Use it to empty Downloads, review storage space, and confirm backups are still functioning.)

Continue Building Your Confidence

If you've completed this guide, you've already taken an important step in your understanding of the world of PCs and technology. You learned by doing.

And it feels good, doesn't it?

Technology works best when we understand it, apply it, and maintain it, so make the most of the migration process you've just completed. If there were any parts of this process that felt uncertain or rushed, that simply means there may be an opportunity to deepen your understanding a bit further.

You may find these additional Tech4Me2 resources helpful:

• **PCs Made Simple** – A no-jargon guide to buying, setting up, customizing, maintaining, and troubleshooting your personal computer
• **PCs Made Simple Course & Workbook** – Step-by-step video guidance with an implementation workbook and checklists
• **Routine Maintenance Action Guide** – Simple monthly steps to keep your PC running smoothly
• **Email Made Simple** – Practical and easy-to-implement systems for keeping your inbox tidy and under control

All resources are designed to be clear, calm, and practical — without being overwhelming.

If there's a topic you would like to see covered, I welcome your suggestions.

You can write to me directly at:

mailto:john@tech4me2.com

Practical technology guidance — without jargon, and without drama.