

From: Bret (bret_blackford@yahoo.com)
To: bret_blackford@yahoo.com
Date: Tuesday, September 1, 2026 at 07:02 PM CDT

From: M Bret Blackford <bret_blackford@yahoo.com>

Date: September 1, 2026 at 6:53:48 PM CDT
To: Eric McPherson <emcpherson@cfserve.org>, Kevin Romain <kromain@cfserve.org>
Cc: Bret Blackford <bblackford@cfserve.org>, Mary Ennis <mennis@cfserve.org>, Jodi Mitchell <jmitchell@cfserve.org>
Subject: CFS UNAS-2 / Active Directory Migration – Next Steps

Kevin,

I have continued working on the CFS server-decommissioning project we discussed in August and wanted to update you and get your assistance with the Active Directory portion.

We now have a UniFi **UNAS-2** installed and operational at CFS. I have created a new shared drive named **CFSFS2**, which I intend to use as the replacement for the file-storage function currently provided by the legacy CFSFS server.

My proposed approach is to move any files or folders that staff still actively need to CFSFS2 and also use the UNAS-2 for the **scanner/copier file directory**. The copier currently appears to scan to 192.168.44.6\publicdata, so we would eventually redirect that function to an appropriate Scans folder on CFSFS2.

Regarding the legacy CFSFS data, I do not think we need to undertake a file-by-file migration or preserve the old server as an ongoing archive. I have already made at least **two independent backups** of the existing file-server data. My thought is that staff can identify anything still actively needed, we can move those files to CFSFS2, and then—after confirming there are no applicable retention or legal-hold requirements requiring the production copy to remain—we can securely remove the remaining legacy data from CFSFS. Mary Ennis is working on an email to staff to help identify anything that is still actively needed. The backup copies can be retained and protected in accordance with CFS's retention requirements.

This seems consistent with the direction we previously discussed. You noted that the existing Dell server currently provides Active Directory/domain authentication, file-server storage, print-server services, and scan-drive/storage services. The UNAS-2 should allow us to eliminate the file-storage and scan-storage functions from that server. We will still need to address the **print-server function** and, of course, the Active Directory/domain services before the physical server can actually be retired.

You also previously indicated that moving CFS users/computers toward Microsoft Entra ID is a realistic goal and recommended **Entra Domain Services** to maintain compatibility and security baselines. You indicated that CFS's current Microsoft grant should provide the needed access, subject to final business requirements.

As an interim step, **UniFi Drive supports integration with our existing Active Directory**. This should allow users to access CFSFS2 using their existing directory credentials while we work through the longer-term Entra migration. I do not intend to make any changes to or decommission the existing AD environment until we have tested this successfully and you are comfortable with the migration plan.

The UNAS is asking for the following AD information:

- AD server hostname or IP address
- Confirmation of the appropriate port (UniFi defaults to 389)
- Whether SSL should be enabled
- Base DN
- Username/password for an appropriate account to perform the directory integration

I believe the current domain controller/DNS server may be **192.168.44.100**, but I would prefer that you confirm the correct settings. Would you also recommend creating a **dedicated service account** for the UNAS integration rather than using a personal or highly privileged administrator account? Please also confirm whether the UNAS should use the domain controller directly for DNS resolution.

My thought is to integrate the UNAS with the existing AD now, test CFSFS2 with a few workstations while leaving the current server fully operational, migrate the scanner and any actively needed files, address printing, and then work with you on the Entra/Entra Domain Services transition. Only after those dependencies are resolved would we decommission the physical Dell server and securely sanitize or dispose of its storage media.

Please let me know if this approach makes sense and what information you need from me to proceed.

--- Bret

On Tuesday, August 25, 2026 at 09:14:02 PM CDT, Kevin Romain <kromain@cfserve.org> wrote:

Hello Team,
Thanks for laying out the next-phase considerations for the CFS environment.
I fully support Bret's take on moving away from the legacy file server, pending further review.
Before we begin any technical changes related to shared-drive migration, authentication modernization, or decommissioning the on-premise server, we need to complete an administrative file review of all data currently stored on the file server.

Because the shared drive contains a mix of legacy material and potentially sensitive documents, this review is required to ensure we remain fully compliant with HIPAA and other data-handling obligations. Specifically, we need to:

- Identify which folders contain PHI or other regulated information.
- Determine what must be retained, archived, or securely disposed of.
- Confirm which items are still actively used by staff.
- Validate that any data slated for migration is appropriate for cloud storage under Microsoft 365's compliance framework.

After this administrative review is completed and documented, we can safely begin data migration or restructuring of authentication services. While the review is underway, we can map out the technical dependencies, evaluate the feasibility of moving fully to Entra ID, outline licensing considerations, and provide more details around migration work.

Let me know when you begin the administrative review, and if you need support during the process.

Bret, also see a few quick answers to some of your questions, inline below.

Best regards,
Kevin

From: Eric McPherson <emcpherson@cfserve.org>

Sent: Thursday, August 20, 2026 1:29 PM

To: M Bret Blackford <bret_blackford@yahoo.com>

Cc: Kevin Romain <kromain@cfserve.org>; Bret Blackford <bblackford@cfserve.org>; Mary Ennis <mennis@cfserve.org>

Subject: Re: CFS Server Decommissioning as Next Phase of IT Modernization

Thanks, Bret!

I agree that there is no rush, but we need to prudently move ahead with this idea of removing a physical structure when it could all be on the cloud.

Your turn, Kevin!

Serving for Life,

Eric McPherson, MA, LPC

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From: M Bret Blackford <bret_blackford@yahoo.com>

Sent: Tuesday, August 18, 2026 9:06 PM

To: Eric McPherson <emcpherson@cfserve.org>

Cc: Kevin Romain <kromain@cfserve.org>; Bret Blackford <bblackford@cfserve.org>; Mary Ennis <mennis@cfserve.org>

Subject: CFS Server Decommissioning as Next Phase of IT Modernization

Eric,

I stopped by CFS today to look at the first-floor server/UPS (picture attached), which was beeping following a recent power outage. With Kevin Romain now out of state, I may occasionally need to provide some on-site assistance, which is fine, but it also reinforces something we identified during the IT review earlier this year: **I think it is time to start looking at the remaining on-premise server as the next phase of the CFS IT modernization.**

The Dell server currently provides several functions, including:

- Active Directory/domain authentication
- File-server/shared-drive storage
- Print-server services
- Scan-drive/storage services

Before doing anything with it, we obviously need Kevin's assistance to confirm exactly what still depends on the server. However, my preliminary recommendation would be to work toward eliminating the need for the physical server altogether.

The shared drive appears to contain a considerable amount of older/legacy material, although there are also some folders—such as Scans—that are still actively being used. I think we should first determine what needs to be retained and what staff still actively use (it all looks old to me). We could then archive older material and migrate files that need ongoing shared access to an appropriate Microsoft 365 solution such as SharePoint/OneDrive.

Similarly, I would like Kevin to help us evaluate moving CFS away from the local Active Directory environment toward Microsoft Entra ID/Microsoft 365 authentication, assuming there are no remaining applications or workstation dependencies that require traditional on-premise Active Directory.

We would also need to determine the best replacement for the current print-server function and where scanners should save documents.

If those pieces can be addressed, **the goal would ultimately be to decommission and remove the Dell server and its UPS.** That would eliminate another aging piece of on-site infrastructure and reduce the amount of equipment CFS has to maintain and support locally.

One other item I think we should address as part of this project is administrative backup coverage. In addition to Kevin, I would suggest that I—and perhaps Mary—have appropriate backup administrative access to Microsoft 365/Entra ID so CFS is not dependent upon a single individual for routine administration or emergencies.

Kevin, please weigh in on this. In particular, I'd appreciate your thoughts on:

- What currently depends on the local Active Directory server? **Local user authentication/device authentication/print server functionality/permissions and access.**
- Whether moving the CFS users/computers to Microsoft Entra ID is practical. **Yes, this is a realistic goal, but will require some planning and testing.**
- Whether our existing Microsoft 365 licensing already includes what we would need for Entra ID. **Yes, CFS' current grant from Microsoft provides access.**
- What additional Microsoft/Azure licensing costs we should expect, if any. **None, but will depend on business requirements or add-ons.**
- Whether we would need Microsoft Entra Domain Services or whether a simpler cloud-native Entra ID setup would be sufficient. **To keep compatibility and security baselines, Entra Domain Services is recommended. It is also provided with Azure cloud services.**
- A rough estimate of any one-time consulting/migration costs to make the change. **Will depend on final scope of work and the plan which works best after evaluation.**
- What portions of the shared drive are still actively used (I think none). **Staff and administrators will need to answer this question, but I get support requests when the shared drive is unavailable.**
- Whether SharePoint/OneDrive would be an appropriate replacement for the shared drive and what, if any, additional cost that would involve. **Will depend on the data allocation needed. However, Microsoft provides a healthy amount of storage for new and existing teams libraries, with the current plan.**
- Options for replacing the print-server and scan-drive functions. **Requires more investigation.**
- Any other dependencies we need to address before the physical server can be retired. **None that I know of at the moment.**

There isn't any immediate rush, but I think this would be a logical next phase now that the network, phones, and related infrastructure have been substantially modernized.

Thanks,

--- Bret

<image001.jpg>