

# WINDOWS 11 - INSTALL, SET-UP, & CUSTOMIZE



Jim McKnight www.jimopi.net Windows11\_Install.lwp (Re: Win11 build 24H2 or later) revised 2-15-2025

Owner Name \_\_\_\_\_ PC & Model: \_\_\_\_\_

1. **If Windows 11 IS ALREADY INSTALLED OR THIS IS A NEW PC, THEN SKIP TO STEP 7c.?**
2. **UPGRADING FROM WIN 7 or 8.1?** Use my "Windows 10/11 UPGRADE" checklist.
3. **PRODUCT KEY:** If this is a fresh Install, you will need a Product Key (*unless this is a new PC or you are re-installing Win 11*). Normally the Key will be with original Install DVD.
4. **UEFI / BIOS:** If you are upgrading this PC to Windows 11 or installing Windows 11 on an older PC, first make sure the BIOS will support Windows 11. Also make sure the Manufacturer says the PC's hardware and drivers support Windows 11.
5. **PC HEALTH & HARD-DRIVE HEALTH:** If you are installing Windows 11 on an older PC, be sure to do the following before shutting down the PC:
  - a.  Check PC temps with the SPEEDFAN Utility. Inspect the MOBO Capacitors for swelling.
  - b. Check out the hard-drive health with  CRYSTAL DISK INFO.
  - c. Then:  Clean dust from PC and  Check Battery voltage > 3.05 vdc.
6. **DISCONNECT DEVICES:** Unplug all USB Printer and Device cables from the PC.
7. **INSTALL WINDOWS 11:**
  - a. If asked "Where do you want to install Windows" screen: If you want to format the drive, click "Drive Options (Advanced)". *If not, Windows 11 will save your old installation in a folder called "Windows.old". This folder wastes space, but can be deleted later.*
  - b. At the "Lets name your PC" screen. After naming the PC,.
  - c. Privacy Settings are all **No**. If offered, un-check "Accept McAfee terms".
  - d. **INSTALL USING A "LOCAL" ACCOUNT:** Microsoft REQUIRES installing a new PC with a Microsoft "Live" online Account. To create a LOCAL Account instead, follow the Windows 11 install process until you get to the "choose a country" screen. Press <Shift-F10>, key in: OOBE\BYPASSNRO , the PC will reboot. Then key in: IPCONFIG /RELEASE to disable the Internet. When the install says you must Sign In to a Microsoft Account, Click on: I have no internet, click on "Continue with limited setup". This will allow you to create a LOCAL Account. **DO NOT CREATE A NEW MICROSOFT ACCOUNT UNLESS YOU ARE SURE YOU WANT IT.**
8. **TIME/DATE VERIFY:** Double verify these ALL are correct: Time, AM/PM, Date, Year, & Time Zone.
9. **START ICON.** To move it to the Left: Right-click on Taskbar, Find "Taskbar behaviors". Change Taskbar alignment from Center to Left.
10. **PRIVACY SETTINGS:** If you have not already done so, go to (*Right-click Start > Settings > Privacy & security*) and carefully review all the Privacy options. Then I recommend going to Activity History & disabling it.
11. **SYSTEM ICONS TO THE DESKTOP:** (*Right-click on the Desktop > Personalize > Themes > Desktop Icon settings*). Click to check to add all desired System Icons including the Control Panel to the Desktop.
12. **START ICON.** To move it to the left (Like Windows 10: Right-click on Taskbar, Find Taskbar behaviors. Change Taskbar alignment from Center to Left.
13. **CONTROL PANEL VIEW:** . Verify that it is set to "View by: Large Icons or Small Icons.
14. **USER ACCOUNT CONTROL:** Make sure UAC is turned on and set to "Always Notify". (*Control Panel > User Accounts > Change User Account Control settings*)
15. **SYSTEM PROPERTIES OPTIMIZATIONS:**
  - a. **COMPUTER NAME:** (*Control Panel < System*).
    - Verify the Computer Name and Computer Description are exactly what you want.
  - b. **STARTUP & RECOVERY:** (*Control Panel > System > Advanced system settings (Advanced Tab) > under Startup & Recovery, click "Settings" button*). Under "System Failure", un-check the box for " Automatically Restart"
  - c. **VISUAL EFFECTS:** (*Control Panel > System Icon > Advanced Tab, Performance, click <Settings>*).
    - If desired, un-check " Use Drop Shadows for icon labels on the desktop"

16. **REMOVE ANY UNNECESSARY PROGRAMS, TRIALS, & FEATURES:** (Right-click Start > Settings > Apps > Apps & features) or with Revo Uninstaller. Remove all unwanted programs including all Trial versions of MICROSOFT OFFICE, McAfee, Norton, AOL, etc. *NOTE: If you are going to migrate to Thunderbird Mail from Outlook from an old PC, do not remove the Microsoft Office Trial until Thunderbird has been set up.*
17. **POWER PLAN:** (Control Panel > Power Options) CHOOSE A PRELIMINARY POWER PLAN FOR THE INSTALL: Set the "Power Plan" to "⊕ High Performance". Customize the settings (by clicking "Change Plan settings") so that the PC never Sleeps or Hibernates during the install. Make sure the Power Button is set to **Shutdown** the PC. (Control Panel > Power Options > Choose what the power buttons do).
18. **SYSTEM PROTECTION - CREATE A RESTORE POINT: (NOTE: In Windows 11, System Protection may NOT be on by default.) Turn on System Protection now!** Then create a Restore Point: (Control Panel > System > Advanced system settings > System Protection tab > Create).
19. **ACTIVATE Windows 11:** (Right-click Start > Settings > System > Activation). It will tell you if Windows has been Activated or not. Activate now if the install looks good.
20. **UEFI / BIOS UPDATE:** Go to the Manufacturers website and see if any important/recommended UEFI/BIOS updates are available. **WARNING:** *Be aware there always is a risk of permanently damaging the motherboard while doing a BIOS flash.*
21. **TURN OFF S-MODE:** (Requires a Microsoft account login). Go to the Microsoft Store and search for "Switch out of S-Mode". Download the App and run it.
22. **SSD:**
  - a. If the PC main drive is an SSD, especially an M.2 (NVME) SSD, make sure that both "Crystal Disk Info" and an "Acronis Bootable CD" can recognize it. If not, see the ADDENDUM at the end of this document to change the SATA mode from RAID to AHCI.
  - b. Run AS-SSD BENCHMARK and verify that SECTOR SIZE ALIGNMENT is good. If not Fix it.
  - c. If the main drive is an **SSD**, turn off Indexing. (Right-click C-drive > Properties). Uncheck allow drive to be indexed. Choose: Ignore all errors.
23. **DEVICE ENCRYPTION ( TURN OFF BITLOCKER ! )**
  - a. Win 11 Pro & possibly Home: If desired, disable Bitlocker. (Control Panel > Bitlocker Drive Encryption). It should say "BitLocker is off" and NOT say "Bitlocker waiting for activation". *Waiting for activation messes up Acronis backups because Bitlocker is not On or Off, it is in limbo. Admin cmd prompt: manage-bde c: -off*
  - b. Win 11 Home: Disable Device Encryption if it is on:(Start > Settings > Privacy & Security > Device Encryption)
24. **FIREFOX/CHROME:**
  - a. Download and install Firefox or Chrome and make it the Default browser.
  - b. Go to (Right-click start > Settings > Apps > Default Apps) & make Firefox or Chrome the Default Browser.
25. **WINDOWS UPDATE:**
  - a. Go to Windows Update: (Right-click start > Settings > Windows Update > Advanced options). Make sure the switch is ON for:"Receive updates for other Microsoft products when you update Windows"
  - b. Stop WU's from loading to/from other PC's: Go to Windows Update (Click Start > Settings > Windows Update > Advanced options > Delivery Optimization). Make sure "Allow downloads from other devices" is OFF
  - c. Run "Check for updates" and keep re-running until no more updates are found.
  - d. Run: WINVER and make sure the Windows 11 is at the latest version..
26. **DELL Command / LENOVO / HP SUPPORT ASSISTANT:** If any apply, run and install all updates.
27. **DEVICE MANAGER & HARDWARE DRIVERS:** (Control Panel > System > Device Manager). Look to make sure there are no devices with exclamation marks, question marks, or X's. If so, delete the bad entries and reboot to see if Windows 11 can re-detect & re-install the devices OK.  
**Fix all these issues before continuing.**

**28. 27. OFFICE SUITE - INSTALLATION:**

- a. MICROSOFT OFFICE from DVD or online download. (**Do this from an Administrator Account!**)
  - 1) Verify that Office is ACTIVATED. (*Open WORD > File > Help*).
  - 2) Put the Office Start Folder on the Desktop. ("*Program Data*" folder is hidden) It can be found at :  
C:\ProgramData\Microsoft\Windows\Start Menu\Programs\Startup
- b. LIBRE OFFICE is the best free alternative to Microsoft Office.

**29. CREATE YOUR "ADMINISTRATOR" USER ACCOUNT.** *This is the account you will use only for Program installs and other administrator tasks. This account should be an "Administrator" authority LOCAL user Account, not a "Standard" User Account and you should give it a password.*

- a. FROM AN **ADMINISTRATOR** AUTHORITY ACCOUNT (*Right-click Start > Settings > Accounts > Other users > Add Account.*). Under "How will this person sign in?": click on "I don't have this person's sign in information". Click on "Add a user without a Microsoft account". Name it something like "Admin-User". Select the new user and click on "Change Account type". Choose Account type = "Administrator".
- b. Now sign in to the new Admin user account and let it initialize.

**30. WINDOWS UPDATE AGAIN:** Manually run to ensure all Office Updates get installed.

**31. UTILITY & MISC PROGRAMS INSTALL:**

- a. **NINITE Installer:** From an Administrator Account, go to [www.ninite.com](http://www.ninite.com) and select the following programs, then download and run the custom installer.
  - ACROBAT READER DC      -FIREFOX      -CDBurnerXP      -CHROME
  - iTunes (*optional*)      -JAVA ALT      -LIBRE OFFICE (*optional*)      -SKYPE
  - MalwareBytes AntiMalware      -SuperAntiSpyware      -Thunderbird      -ZOOM
- b. **Manually install these utilities:**
  - CrystalDiskINFO      -CrystalDiskMARK      -BELARC ADVISOR      -CCLEANER
  - HDTUNE      -SPEEDFAN
  - ULTRA FILE SEARCH LITE      -WINAERO TWEAKER      -REBUILD ICON CACHE
- c. **CCLEANER SETUP:**
  - 1) Go to (*Options > Smart Cleaning*), and DISABLE all check boxes.
  - 2) Go to (*Options > Updates*), Uncheck all boxes until further notice. (annoying Avast Ads)

**32. IMAGE BACKUP:** Do a full image back-up of your new install to an external Hard-drive. A third party program like ACRONIS or EASEUS is required

**33. RESTORE USER DATA AND SETTINGS WITH FAB'S AUTOBACKUP:** Hopefully you have already saved the data and settings from the old PC with FAB'S AUTOBACKUP.

- a. **WARNING 1:** Make sure you have first created all necessary new User Accounts before running "Fab's Autobackup" Restore, and initialize the User Accounts by signing in.
- b. **WARNING 2:** *Be sure to do an image backup of the new install before running this tool*
- c. **WARNING 3:** *Be sure to choose "Copy newest" when restoring.*

**34. LID OPEN:** On laptops, make sure the PC does NOT power on when the LID is raised.  
NOTE: Lenovo Vantage app: Power, Flip to Start. Dell uses BIOS access to this setting: Power on Lid open.

**35. LCD BRIGHTNESS (Laptops only):** (*Click on Windows-A Keys.* At the bottom of this screen where you set the default LCD brightness. This should only need to be done once.

**36. \*LOG-IN TO THE DESIRED USER ACCOUNT:** \* If this is the first time through this sheet, skip this step and continue setting up the main User Account. NOTE: *Do all the following steps EACH User Account.* .

**37. ACCESSABILITY SETTINGS. MAKE ALL TEXT, APPS, AND OTHER ITEMS LARGER:**

- a. **MAKE TEXT BIGGER:** (*Right-click start > Settings > Accessibility > Text size*) Move Slider to the right to make text larger. ( I recommend set scaling to: 110-125%). **CLICK APPLY.**
- b. **MAKE EVERYTHING BIGGER: IF NECESSARY:** (*Right-click Start > Settings > Display > Scale* ) Enter a custom setting to make text larger. ( I recommend set scaling to no more than 110-125%)
- c. **ALWAYS SHOW SCROLLBARS:** (*Right-clickStart > Settings > Accessibility > Visual effects*). Turn ON "Always show scroll bars"
- d. **MOUSE POINTER SIZE:** Select "Mouse pointer" and set slider to 3 or 4.
- e. **TEXT CURSOR THICKNESS:** Select "Text cursor" and set slider to 3 or 4.
- f. **SIGN-OUT and Back in to save the settings.**

### 38. DISPLAY and DESKTOP SET-UP:

#### a. ADD/REMOVE & CUSTOMIZE ICONS.

- 1) **System Icons:** (*Right-click start > Settings > Personalization > Themes > Desktop Icon settings*). If not already done, add the System Icons on the desktop: "This PC" (Computer), User's Files, Recycle Bin, Control Panel.
- 2) **Start Menu Icons:** LEFT-CLICK and drag any desired Shortcuts to the Desktop *NOTE: Windows 11 no longer allows you to drag start icon **Folders** to the desktop, just Icons.*
- 3) **Special Icons:** Such as the "Devices and Printers" Icon, can be found in the Control Panel's "Classic View". Right-click and drag all desired Icons to the Desktop.
- 4) **Custom Folders:** For a cleaner Desktop, you can create your own custom folders for storing similar Program Shortcuts (*Right-click Desktop > New > Folder*).
- 5) **Unwanted Icons:** Delete any unwanted Icons from the Desktop

#### b. WINAERO TWEAKER UTILITY: Use this to finish tuning up the readability of the text:

- 1) CUSTOMIZE ICON SPACING, ICON text size, "MENU" text size, "MESSAGE" text size, "TITLE BAR: text size, INCLUDING BOLDNESS.
- 2) Increase the SCROLLBAR WIDTH (Make it thicker):
- 3) DISABLE **BLUR** DURING LOG IN.
- 4) INSTALL "WINDOWS PHOTO VIEWER" AS THE DEFAULT PHOTO VIEWER.
- 5) **NOTE: After making a font change, make sure you click the "Apply Changes" button after each change or nothing will happen. Also, you must log out and back in to see any changes.** [Http://winaero.com/download.php?view.1796](http://winaero.com/download.php?view.1796)

#### c. DESKTOP ICONS: Drag any desired "Program Start" Icons to the Desktop. Note: To drag Program Start Icons from the Start Menu to the Desktop, use a LEFT-CLICK and drag (*Not a right-click and drag as in Windows 7*).

#### d. THEME SETTINGS: (*Right-click Start > > Personalization > Themes*). Change the Theme settings as desired. *NOTE: Themes affect visuals, sounds, buttons, mouse pointer, screen saver, and other elements.*

#### e. BACKGROUND IMAGE (WALLPAPER): (*Right-click Start > Settings > Personalization > Background*). Choose "Picture", then Browse and choose a background image. *Note: You can also download images to the Pictures folder or create a folder for a slide show and select Slideshow.*

#### f. ACCENT COLORS: Window Accent Colors: (*Right-click Start > Settings > Personalization > Colors*) By default, the Taskbar and other backgrounds are BLACK. I suggest you make the following changes:

- 1) Turn OFF: "Transparency effects".
- 2) Choose a desired accent color.
- 3) Turn ON: "Show accent color on Start and taskbar".
- 4) Turn ON: "Show accent color on title bars and windows borders".

#### g. LOCK SCREEN (and Sign-in Screen): (*Right-click Start > Settings > Personalization > Lock Screen*).

- 1) Choose an image for the Lock Screen. If you prefer "Windows spotlight" you will need to change the Background setting to "Picture" and then back to "Windows spotlight to trigger the event.
- 2) Lock Screen Status: Set it to NONE.
- 3) Leave the "Show Lock Screen background picture on the sign-in screen" turned on.

#### h. SCREEN SAVER: (*Right-click start > Settings > Personalization > Lock Screen > Screen saver settings*).

#### i. START MENU: (*Right-click on Desktop > Personalization > Start*). Turn off "Show recently added apps".

#### j. CLARITY TUNE: (LAPTOPS ONLY) Turn on ClearType. (*Search Clarity or Run: CTTUNE*). Check the box: " Turn on ClearType". click "Next". Follow the instructions for "ClearType Tuning".

#### k. DISPLAY BRIGHTNESS (LAPTOPS ONLY): (*Right-click start > > System > Display*). Adjust Brightness.

#### l. SAVE YOUR CUSTOM THEME. (*Right-click Start > Settings > Personalization > Themes*). Click "Save Theme": Name your custom theme and click "Save" .

- 39. 38. SOUNDS:** Go to: *(Right-click start > Settings > Personalization > Themes > Sounds)*.
- Click to check the box for " Play Windows Startup sound".
  - Make sure the Sound Scheme is set to: "**Windows Default**" and check that you can hear the system "Sounds" OK. *(Control Panel > Sound > Sounds tab)*.
  - Make sure any "AUDIO ENHANCEMENTS" are DISABLED. *(ie: MAXX AUDIO, DTS AUDIO, etc.)*
  - Make sure "Spatial Sounds" is set to **OFF**. *(Right-click start > > System > Sound > Device properties.)*
- 40. MOUSE SETTINGS:**
- BUTTONS Tab:** *(Right-click start > Settings > Bluetooth & Devices > Mouse > Additional Mouse Options)* . Set the double-click speed as slow as possible *(Slider to the left)*.
  - POINTER - Basic Options:** *(Right-click start > Settings > Bluetooth & Devices > Mouse > Additional Mouse Options)*. Disable the Pointer Shadow by un-checking the box for " Enable Pointer Shadow".
  - POINTER OPTIONS Tab:** *(Right-click start > Settings > Bluetooth & Devices > Mouse > Additional Mouse Options)*. Check the box for " Automatically move the pointer to the default button" and check the box for " Show location of Pointer when I press the <Ctrl> key".
- 41. TOUCHPAD SETTINGS - (LAPTOPS ONLY):** *(Right-click start > Settings > Bluetooth & Devices > Touchpad)*. I suggest you DISABLE all "TAP" and other "Gestures". This includes all Scroll & Zoom gestures. Set all "three-finger" gestures to do "Nothing".
- 42. TOUCHSCREEN:** If it has a Touchscreen, TEST it to make sure it works.
- 43. SAVE THE THEME:** *(Right-click start > > Personalization > Themes)*. Click "Save Theme". Name the new Theme, then click "Save".
- 44. SNAP:** Disable SNAP. Unless you do multitasking, be sure to disable Snap. *(Right-click Start > Settings > System > Multitasking)* and turn off "Snap Windows" *(I find SNAP very annoying)*.
- 45. FILE EXPLORER OPTIONS SET-UP (Folder Options)**
- Folder View Options: *(Control Panel > File Explorer Options > View Tab > Advanced settings: )*. The default settings are mostly OK. In the "Advanced settings" box, make sure these boxes are set as follows:
    - Check or uncheck the following boxes as shown *(the Default is OK for the other items)* :
      - Always show menus.
      - Decrease space between items (compact mode).** **CHECK THIS!**
      - Display full path in the title bar
      - Hidden files and folders
        - Show Hidden files, folders, and drives.
        - Hide empty drives.
        - Hide extensions for known file types **UN-CHECK THIS!**
        - Hide protected operating system files.
        - Show Drive Letters.
        - Show encrypted or compressed NTFS Folders & files in color.
        - Show sync provider notifications **UN-CHECK THIS!**
    - Click <Apply>".
- 46. TASKBAR:** Right-click any blank area of the Taskbar and click "Taskbar settings".
- TASKBAR COLOR: This was set in Step 39f "Windows Accent Color".
  - TASKBAR ALIGNMENT: Choose "Left" if desired. (Center is the default)
  - "QUICK LAUNCH" area: Add any desired Icons to the Taskbar by right-clicking the desired Icon on the Start Menu or the Desktop, then click "Pin to taskbar" *(Note: It is no longer called Quick Launch)*.
  - NOTIFICATION AREA ICONS: *(Right-click Taskbar > Taskbar settings)* Now called Corner overflow. Select which Icons always appear on the Taskbar..
  - NOTE: The WIN 10 CLASSIC TOOLBAR can be restored using the "Winaero Tweaker" Utility.

#### 47. FIREFOX Browser SETUP (for each user)

- a. SET UP TO VIEW MENUS & TOOLBARS: Right-click in the area to the right of any Tab and click (to check) MENU BAR. Then click VIEW and check each toolbar desired so it shows up.
- b. IF THE BOOKMARKS ARE MISSING: Go to Run: firefox.exe -p and change to the correct profile.
- c. TITLE BAR: Activate the Title Bar (Click on the Hamburger > More Tools > Customize toolbar) Click to check the box for "Title Bar" > Done.
- d. HOMEPAGE: (Tools > Settings > Home tab) Set the Default Homepage/s as desired.
- e. BOOKMARKS TOOLBAR: Drag any desired Icons to the Bookmarks Toolbar.
- f. SEARCH ENGINE SETTINGS: (Tools > Settings > Search tab).
  - 1) Default Search Engine. Select GOOGLE as default.
  - 2) One-Click Search Engines: Uncheck and then delete BING.
- g. WOT ADD-ON (Web Of Trust): Install the add-on and **test it**.
- h. NEW TAB OVERRIDE: Install Add-On and set it up to open the "Current Home Page". Be sure to check the box called:  Set Focus to the Web Page instead of the address bar.

#### 48. CHROME Browser SETUP (for each user)

- a. BOOKMARKS TOOLBAR: If the Bookmarks Toolbar is not visible, click (Ctrl-Shft-B), then drag or import any desired Icons to the Bookmarks Toolbar.
- b. HOMEPAGE: Go to {3 Dots} > Settings > Settings > On Startup). Set Default Homepage/s as desired.
- c. HOME BUTTON: To show Home button: Go to {3 Dots} > Settings > Settings > Appearance) Turn on "Show home button"
- d. STOP POP-UPS: Go to {3 Dots} > Settings > Privacy and security > Site Settings > Scroll down and click on "Pop-ups and redirects". Click the radio button for "Don't allow sites...redirects".
- e. WOT ADD-ON (Web Of Trust): Install the add-on and **test it**. If WOT Icon is not visible, "**PIN**" it.

#### 49. EDGE Browser SETUP (for each user)

- a. YOU MUST FIRST COMPLETE THE "FIRST-RUN" WELCOME TO EDGE SEQUENCE.
- b. UPDATE EDGE: Go to {3 Dots} > Settings > Help & Feedback > About Microsoft Edge.
- c. FAVORITES TOOLBAR:
  - 1) Add the Favorites Toolbar. (Click the {3 Dots} > Favorites > 3 Dots > Show Favorites Bar > Always > Done.) (Ctrl-Shft-B). You can import Bookmarks/Favorites from other browsers if desired: (Click the {3 Dots} > Favorites > 3 Dots > Import favorites).
  - 2) Add custom Links to the Favorites Bar: "www.google.com", "www.jimopi.net", "fast.com", etc
- d. WHEN EDGE STARTS: Click ({3 Dots} > Settings > Settings > "Start, Home, and new tab").
  - 1) HOME PAGE: Choose the pages you want as Home Page/s Choose "Open these pages". Then Click on "Use all open tabs".
  - 2) HOME BUTTON: To show Home button: Turn on "Show home button". Select action desired: Type or paste the website preferred for Home button site.
- e. SECURE EDGE: (Go to {3 Dots} > Settings > Settings > Privacy and services). Set Tracking prevention and other privacy settings as desired.
- f. DEFAULT SEARCH ENGINE: To change from BING to your preferred search enging: Go to {3 Dots} > Settings > Settings > Privacy search and services). Scroll down to "Services" and click on the arrow to the right of "Address bar". Change the search engine to the one desired.
- g. WOT ADD-ON (Web Of Trust): Search for CHROME WOT, and select it. Click on "Allow extensions from other stores". Click on "Add to chrome".After a small wait, click on "Agree and Continue". Close all the WOT windows WITHOUT clicking on "Fix all issues". **TEST WOT**.
- h. NEW TAB REDIRECT: Install this Extension: NOTE: By Default the "New Tab" button opens to the Microsoft BING page. Once this extension is installed, it must be manually turned on (Settings > Extensions), then click "Extension options" and "Set Options". Set the Redirect URL to: <https://www.google.com>, then click SAVE.

- 50. 49. CHOOSE DEFAULT APPS:** (*Right-click Start > Settings > Apps > Default Apps.*). MUSIC = WMP12  
PHOTOS = Windows Photo Viewer, BROWSER = Firefox or Chrome. Choose your preferred Apps, If  
Windows Photo Viewer is missing, activate it using WINAERO TWEAKER. (*Bottom of the list.*)
- 51. ONE DRIVE: STOP MICROSOFT "ONE DRIVE" POPUPS:** (*If you do not use it*)
- Right-click the OneDrive Icon in the Taskbar Notification area, (*Click Settings > Settings tab*). Uncheck the box for "Automatically start OneDrive with Windows. Click OK. Right click OneDrive Icon again and click Exit
  - Turn off OneDrive Notifications: (*Right-click Start > Settings > System > Notifications*) Turn off Notifications for Microsoft OneDrive. **WARNING:** *Any updates to OneDrive usually resets these settings.*
- 52. ADOBE READER DC (or Foxit Reader)**
- Install Reader or Acrobat, not both, and check for updates until no more show up. (*If downloading the free Acrobat Reader, be sure to **UN-CHECK** " Add Google Toolbar" every time it asks*)
  - Open the program to initialize it and click "Yes" to accept the EULA.
  - Set it as the Default Reader. Click on "Select As Default PDF Handler". .
- 53. OFFICE SUITE - INITIALIZATION** (*It must be customized for each User Account*)
- For MICROSOFT OFFICE:** Open Office Word and make sure it opens OK and is ACTIVATED.
  - For LIBRE OFFICE**
    - DEFAULT SAVE FORMAT: (Set the default "Save" format. (*Open any LIBRE Office Program. Go to Tools > Options > Load/Save > General*). Select a save format of "Microsoft Word 2007-2013 XML". Do similar for Spreadsheets and Presentations.
- 54. NOTIFICATIONS:**
- Under (*Right-click Start > Settings > System > Notifications*) You must leave ON: "Get notifications from apps and other senders". If desired, you can then turn off all individual items under "Get notifications from apps and other senders".
    - Turn OFF: Notifications for Microsoft OneDrive if you don't use it.
    - Go to: Additional settings:
      - If desired, UNCHECK: "Show the Windows Welcome experience...."
      - If desired, UNCHECK: "Suggest ways to get the most out of Windows...."
      - If desired, UNCHECK: "Get Tips and suggestions when I use Windows".
- 55. SECURITY & ANTI-MALWARE PROTECTION:**
- BROWSER SECURITY**
    - WOT: Verify the WOT add-on is installed on all browsers and for all Users.
    - SANDBOXIE: (*OPTIONAL*) (*Use Sandboxie version 5.70.4 or higher.*)
      - Set up and test SANDBOXIE for all Users. See my Sandboxie writeup for details.
      - SET UP SANDBOXIE PRINT PERMISSIONS = (*Configure > Edit Configuration*), *Scroll down to the "DefaultBox" settings. At the end of the DefaultBox settings, add the line: AllowSpoolerPrintToFile=Y and be sure it is followed by a blank line.*
  - ANTI-MALWARE PROGRAM ICONS:** On each Program Icon, (*Click Properties > Shortcut tab > "Advanced" button*). Check the box for " Run as Administrator".
    - Drag the Start Icons for all the Anti-Malware programs into the new "Anti-Malware Programs" folder created on the Desktop in an earlier step.
    - ESET ON-LINE SCAN Icon: Download the ESET online scanner app: esetonlinescanner\_enu.exe and drag it to the new Anti Malware Programs folder.
- 56. CAMERA TEST: Start > Camera. Make sure it works.**
- 57. CREATE & CUSTOMIZE AN ADMIN USER and any ADDITIONAL "STANDARD" USERS.**
- From the Administrator Account, manually create any additional desired "Standard" user accounts.
  - Repeat steps 37 through 56 for all items that apply to the ADMIN user and any other Users.
- 58. CLEAN TEMP FILES, COOKIES, ETC:**
- CCLEANER SCAN: Run "Analyze and Clean" scans **for each User**. FILES cleaned: \_\_\_\_\_ MB.



**59. DEFRAG & OPTIMIZE:** (Control Panel > Administrative Tools > Defragment and Optimize Drives).

- a. If the hard-drive is NOT an **SSD**, do a "Defrag and Optimize": Before: \_\_\_\_\_%, After: \_\_\_\_\_%
- b. If Drive is an **SSD**: Solid State Drives should NEVER BE DEFRAGGED. If your system properly recognizes an **SSD**, it will allow you to TRIM it by clicking "**Optimize**".
- c. Optimize Schedule: *Note: By default, Windows 11 Optimizes the C Drive on a weekly schedule.*

**60. SCANS:**

- a. **MEMTEST86+**: Run a full scan while tapping on RAM sticks.
- b. **HARD-DRIVE TESTS:**
  - 1) Run CRYSTAL DISK INFO and make sure all hard-drives show a status of "GOOD".
  - 2) Run the CRYSTAL DISK MARK Click All to run drive benchmark speed tests on all SSD & hard-drives. \_\_\_\_\_ MB/sec
- c. **SCAN FOR OUT OF DATE APPS:** (OPEN **CLEANER** > Tools > Software updater): See my "UTILITY PROGRAMS" sheet. Issues found: \_\_\_\_\_
  - 1) Resolve all insecure and end-of-life issues before continuing.
- d. **ANTIMALWARE SCANS: *FIRST: UNPLUG ANY USB FLASH OR EXTERNAL DRIVES !***
  - 1) ADW CLEANER SCAN
  - 2) WINDOWS SECURITY or PREFERRED ADDITIONAL ANTI-VIRUS: Verify Real time protection is on and a scheduled scan is set up. Do updates, then run a Full Scan.
  - 3) MBAM SCAN: MalwareBytes AntiMalware: Do updates, then run a full scan on all drives.
  - 4) SAS SCAN: SuperAntiSpyware: Do updates, then run a full scan on all drives
  - 5) ESET ONLINE SCAN. Run a full-scan including archives.
- e. ***Resolve all issues before continuing!***

**61. PASSWORD EXPIRATION: For Windows 11 PRO and ENTERPRISE only:** By default, all Log-in passwords expire every 42 days. To disable Password timeout, first log in to an Administrator User Account, then go to: (Start > Windows Tools > Local Security Policy > Account Policies > Password Policy). Change the maximum setting from 42 to 0

**62. SPEEDFAN:** Benchmark PC Temperatures; \_\_\_\_\_  
With Prime 95 or some other program running to push CPU near 100%.

**63. EVENT VIEWER:** Review the Event Viewer logs & resolve any errors found. (Right-click Computer > Manage > Event Viewer > Windows Logs). Check both the "System" logs and "Application" logs for errors & fix them.

**64. E-MAIL SET-UP: (Optional)**

- a. **WARNING:** Only set up a Mail Client in the "Standard" user Account that the user uses every day. Never set up e-mail in an "Administrator" Authority User Account.
- b. **"MAIL" APP or OUTLOOK 2007/2010** (The Windows 11 "MAIL" App replaces all previous Microsoft Mail clients except Microsoft Outlook.). *NOTE: I think Mozilla Thunderbird is the best E-mail Client. You will have to google for tips on moving your Mail and Contacts from previous clients.*
- c. **THUNDERBIRD** If desired by the user, set it up for e-mail.
  - 1) **TOOLBARS:** Right-click on the lower part of the Title Bar and **click to check "✓ Menu Bar"**, then Right-click on the lower part of the Title Bar again and **click to check "✓ Mail Toolbar"**,
  - 2) See my **THUNDERBIRD SETUP STEP-BY-STEP** for full instructions.



**65. 64. TESTING: (Do these for EACH User Account)**

- a. SYSTEM SOUNDS: Make sure that "System Sounds" work: You should hear a plunk when adjusting the volume up and down. If not, right-click on the speaker icon in the notification area and click "Volume Mixer". Make sure the System Sounds are not muted.
- b. WINDOWS MEDIA PLAYER 12:
  - 1) Open & "First time" configure it. Select "Custom Settings". During the set up wizard, be sure to UN-CHECK the box = " Download Usage rights automatically...." and check "Make Windows Media Player the default Music and Video Player". (If it was already configured, (click Tools > Options > "Privacy" tab), and make sure box for " Download usage rights automatically..." Is unchecked).
  - 2) MENUS: Right-click in the menu area and select View. Click "Show Menu bar".
  - 3) FILETYPES: To change any multimedia filetype associations, go to (Control Panel > Default Programs).
- c. MUSIC CD: Load & play a Music CD. Default music player is: \_\_\_\_\_
- d. DVD MOVIE: Load & play a DVD Movie FULL SCREEN. Default Video player is: \_\_\_\_\_
- e. .JPG WINDOWS PHOTO VIEWER TEST: Open a .jpg file. Default Viewer is: \_\_\_\_\_
- f. MULTIMEDIA TESTS: Play the following file types: (The default Player is different for each type.)  
 AU     AVI     MID     MP3     MP4     MPG     WAV     WMA     WMV
- g. .DOC & .DOCX: Set the default application to open these files. Default Office Program is: \_\_\_\_\_
- h. POWERPOINT TEST: Play .pps, .ppsx, .ppt, & .pptx files. Default PowerPoint viewer is: \_\_\_\_\_  
(PC must have one of these installed: Office PowerPoint, ppviewer, OpenOffice or LibreOffice). Make sure the desired default program opens properly.
- i. EXCEL FILE TEST: Load .XLS and .XLSX files. The Default EXCEL file program is: \_\_\_\_\_
- j. MOVIE FILE TEST: Play a video file:  .MOV (Use either a "regular" .mov file or an "h.264" .mov file). The default .MOV file player (usually WMP12) is: \_\_\_\_\_
- k. PDF: Test Default PDF Reader .....Default Reader: \_\_\_\_\_
- l. TEST THE DEFAULT HTM/HTML READER IS THE DEFAULT BROWSER. \_\_\_\_\_
- m. BROWSER TESTS: (CHROME, FIREFOX, IE11) (FF 32 or 64-bit, IE11 64-bit only)  
CH Edge FF
  - HTML5 TEST. Play a youtube video FULL SCREEN:    [www.youtube.com/trailers](http://www.youtube.com/trailers)
  - PDF: Open a PDF in Browser TEST.    [www.samplepdf.com/sample.pdf](http://www.samplepdf.com/sample.pdf)
  - QUICKTIME VIDEO TEST: Play a QUICKTIME video:    [www.apple.com/trailers](http://www.apple.com/trailers)
  - WMP PLUGIN TEST. Play a video from:    [www.windowsmedia.com](http://www.windowsmedia.com)
- n. CD/DVD BURNING: Try burning a data CD & DVD. The Default CD/DVD program is: \_\_\_\_\_
- o. WIRELESS: If wireless is installed, make sure it will connect to a network and access the internet.
- p. ETHERNET: Test the wired connection to the internet.
- q. WEBCAM: If the PC has a built-in webcam, open the program for it and test it.
- r. ZOOM: Test Zoom video and audio.

**66.  HIBERNATE &  SLEEP (Standby):**

- a. **ADD HIBERNATE TO THE POWER MENU:** NOTE: Hibernates is not on in the Power Menu by default. Go to (Control Panel > Power Options > Choose what the power button does > Change settings that are currently unavailable). Scroll down and click to check "Hibernates - Show in Power Menu". Click on "Save"
- b. **Verify that "Hibernates" and "Sleep" function OK.**
- c. NOTE 1: Hibernates and Sleep may not work on some laptops if any USB devices are plugged in and active; especially an external Keyboard and Mouse.
- d. NOTE 2: If the Hibernates option is still not visible in the Power menu, the PC may be using "Hybrid Sleep". Turn OFF Hybrid Sleep in the Advanced Power settings.

- 67. POWER:** (*Control Panel > Power Options*)
- a. **CHOOSE A FINAL POWER PLAN:**
    - 1) For Desktops, set the "Power Plan" to "⊕ High Performance". (*I recommend choosing High Performance for Laptops as well, unless you frequently run long periods on batteries*).
    - 2) Customize detailed settings by clicking "Change Plan settings". Verify that the "When to turn off the display" actions, and "When the computer sleeps" actions are set as desired.
  - b. **CHOOSE BUTTON FUNCTIONS:** Verify the "Power Button" action is set to "Shutdown".
  - c. **LAPTOPS ONLY:**
    - 1) Make sure the Battery/Power Icon set to always display in the Taskbar Notification area (*Control Panel > Power Options*) and (*Right-click Taskbar > Properties > Taskbar Customize*).
    - 2) **BATTERY TEST:** Set the Power Plan to NEVER turn off the "Display" or "Put the PC to sleep" (*Control Panel > Power Options*). Then run it and see how long the battery lasts. Record the time on the Service History header sheet.
    - 3) Verify the "Close Lid" actions and "Adjust the display brightness" actions are set as desired.
- 68. BELARC ADVISOR.** Run a scan. Fix any RED X situations, and save the results. Create a subfolder in My Documents called Belarc\_Files to save the scan results. Save a copy to Flash for archiving. .
- 69. IMAGE BACKUP - FINAL:** Do a full image back-up of your new install to an external Hard-drive. A third party program like ACRONIS or EASEUS is required.
- 70. PC USERS GUIDE:** If you can, download and put a PDF version of the PC's User Guide/Manual into "My Documents", and then put a shortcut to it on the Desktop
- 71. BURN RECOVERY DVD's:** For new PC's, burn a set of Recovery DVD's (or USB Drive). Use the PC's User Manual or (*go to Control Panel > Recovery > Create a Recovery Drive*).
- 72. SYSTEM PROTECTION (SYSTEM RESTORE):** (*Control Panel > System > System Protection*)
- a. **MONITOR DRIVE C ONLY:** Make sure System Restore is only monitoring Drive C.
  - b. **MAX DISK SPACE USAGE:** Make sure the Drive C disk space usage "Max Usage" is set to 30 GB or so (*Larger if desired*). (*Control Panel > System > System Protection > Configure*).
  - c. **SET A NEW RESTORE POINT:** Click "Create". Label it: Install step 71.
  - d. **CLEAR THE SYSTEM RESTORE HISTORY:** Open Ccleaner with Run as Admin. Tools > System Restore. Delete all except the newest one.
- 73. USER ACCOUNT CONTROL:** Make sure UAC is turned on and set to "**Always Notify**". (*Control Panel > User Accounts > Change User Account Control settings*).
- 74. USER ACCOUNT TYPES:**
- a. (*Control Panel > User Accounts < Manage another account*). Make sure that all user accounts are set to "**Standard**" authority except for the one ADMIN User Account which should be set to **Administrator**
- 75. USER PASSWORDS:** As necessary, add user passwords. Test all log-ins.
- 76. UEFI BOOT ORDER:** If necessary, restore the UEFI Boot order.
- 77. PRINTER SOFTWARE & DRIVERS:** (Only if you are on-site and the printers are available).  
**WARNING: Do not connect your printer until instructed by the install wizard!!**
- 78. CLEAR ANY ACTION CENTER NOTIFICATIONS:** Re-enable any real-time Anti-Malware protection that was disabled, then go to the Action Center, Fix and clear all Notifications. (*Taskbar > click right end*).
- 79. *Make sure the CD/DVD Drive is empty before powering down the PC !***

# ADDENDUM

## IF SAVING DATA & SETTINGS FROM AN OLD SYSTEM:

- USER ACCOUNT NAMES:** If possible, write down the exact User Account names for each User.  

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- DESKTOP INFO:** If possible, write down the Theme, Wallpaper, Window Color for each User.  

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- SAVE PRODUCT KEYS AND “INSTALLED PROGRAMS” INFO:**
  - If the System boots OK:
    - BELARC ADVISOR: Install & run Belarc Advisor. This will collect some Product Keys and list the installed programs. Save to a Flash-drive.
    - Try also: PRODUKEY or NEOSMART PRODUCT KEY TOOL.
    - SIW: Run SIW > Licenses: Snip or copy all License and Product Keys. Save to flash drive.
  - If the System will NOT boot:
    - PRODUCT KEYS: (Run PRODUKEY): Boot HIREN’s BOOT CD. Run PRODUKEY and save to a flash-drive. (*Boot > choose Mini Windows XP > HBCD Menu > Passwords/keys > Product Keys > Produkey*). To get the keys: (*File > Select source > choose Load Product Keys from all disks currently plugged into System > OK*). To save the keys, plug in a flash-drive, then: (*Highlight all items > File > Save selected items > name the file as desired.txt > select the flash drive*)
- BACKUP DATA FILES, SYSTEM SETTINGS, EMAILS, FAVORITES, BOOKMARKS ETC.**
  - If system boots OK,
    - First run a full set of malware scans,
    - Then run FAB’s AUTOBACKUP. Save the data & settings for all User Accounts to an external hard-drive.
  - If system will NOT boot, install the hard-drive as a slave-drive in a bench PC.
    - Run malware scans on the drive.
    - Run FAB’s AUTOBACKUP: Select the slave-drive for backup, then save the data and settings for all User Accounts to a flash-drive or external hard-drive ***WARNING: The infected hard-drive can easily infect your bench PC! Scan your bench PC when done.***
- MALWARE SCANS:** Either boot a UBCD4WIN CD or mount drives on another PC and.....
  - Scan all hard-drives to be used on the new system for malware before re-installing Windows.
  - Scan the FAB’s AUTOBACKUP saved files and DOUBLE DRIVER saved files for malware thoroughly before restoring data to a new system.** This includes ANY saved data that is to be transferred to the new system.

## SATA MODE: CHANGE FROM IDE/RAID TO AHCI Without reinstalling Win 11:

- See this tip: <https://www.dell.com/community/XPS-Desktops/XPS-8390-NVMe-SSD-install-issue/td-p/5765334>  
From “Koeven” on the Dell.com Forums. DELL BIOS was set to RAID even though there was only one main drive.
  1. On an Administrator User Account, click the Windows Start Menu >  
(*Windows system > right-click on Command prompt > More > Run as administrator*)
  2. Type this command and press ENTER: **bcdedit /set {current} safeboot minimal**
  3. Restart the computer and enter BIOS Setup by pressing F2 multiple times during the boot.
  4. Change the SATA Operation mode from RAID or IDE to **AHCI**.
  5. Save changes and exit Setup. Windows will automatically boot to Safe Mode.
  6. Click the Windows Start Menu >  
(*Windows system > right-click on Command prompt > More > Run as administrator*)
  7. Type this command and press ENTER: **bcdedit /deletevalue {current} safeboot**
  8. Reboot once more and Windows will automatically start with AHCI drivers enabled.
- **If this does not fix it, I would consider returning the PC to the store.**