

WINDOWS 7 - INSTALL, SET-UP, & CUSTOMIZE



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Windows7_Install.lwp

revised 3-19-2019

Owner Name _____ PC & Model: _____

Users/Passwords: _____ Date: _____

1. **UPGRADE?** If this is an upgrade from XP (or VISTA), run the **Easy Transfer Tool** now on the old PC, before installing Windows 7. See my "UPGRATE/MIGRATE FROM VISTA OR XP" sheet. Also run **Belarc Advisor** and save the results to a flash-drive (for Product Keys). If the old system will not boot, get the Product Keys using PRODUKEY & get the data/settings with FAB's AUTOBACKUP.
2. **PC HEALTH & HARD-DRIVE HEALTH:** If you are installing Win 7 on a used PC, be sure to do the following before shutting down the PC:
 - a. Check PC temps with SPEEDFAN.
 - b. Hard-drive health: Check with SPINRITE HDTUNE and CRYSTAL DISK INFO
 - c. Clean dust from PC;
 - d. Check Battery voltage > 3.01 vdc.
3. **IF WINDOWS 7 IS INSTALLED ALREADY OR THIS IS A NEW Win 7 PC, SKIP TO STEP 7c.**
4. **HYPERTHREAD, AHCI, VT HARDWARE:** If your PC's BIOS supports Hyperthreading, "AHCI" SATA Control, or Virtualization Technology, now is the time to turn it on in the BIOS: Before you boot the Install DVD. WARNING: If you have any SSD Drives, AHCI must be on for the TRIM command to work in Windows7.
5. **MAKE SURE PC IS NOT ON THE INTERNET UNTIL STEP 21.**
6. **DISCONNECT DEVICES:** Unplug all USB Printer and Device cables from the PC. NOTE: If this is a Vista to Windows 7 upgrade, be sure to disable any Anti-malware programs.
7. **INSTALL WINDOWS 7:** Use your Recovery DVD's or your Win 7 Install DVD.
(NOTE: To use a Window 7 Upgrade Disk to do a clean install, see this tutorial:
<http://www.winsupersite.com/article/windows-7/clean-install-windows-7-with-upgrade-media.aspx>)
 - a. If asked, select the language = English.
 - b. At the "Where do you want to install Windows" screen:
 - 1) If you want to format the drive, click "Drive Options (Advanced)". *If not, Windows 7 will save your old installation in a folder called "Windows.old". This folder wastes space, but can be deleted later.*
 - 2) If you have a Chipset Drivers CD, click "Load driver" and specify the drive where it is located.
 - c. User Account Name: Although the Account you create during the install will be an "Administrator" authority account, be sure to name this first User Account with the user name you want for daily use. (NOTE: Later you will change this account to a "Standard User" Account, after you have created an "Admin-User" User Account). WARNING: Never name a User Account "Administrator", since there is already a hidden user account with that name as part of Windows 7.
 - d. Computer Name: Choose something useful like the make and model number: DELL-XPS8100.
 - e. If asked, un-check the box that says: " Automatically activate Windows when I'm online", then enter the Product Key, (You should wait until all hardware is recognized and running under Windows 7 before activating it).
 - f. At the Windows Update Options Window, click "Ask me later".
 - g. If asked for your Location; For a Laptop, select "Public Location". For a Desktop PC, select "Home".
8. **TIME/DATE VERIFY:** Double verify these ALL are correct: Time, AM/PM, Date, Year, & Time Zone.
9. **KEYBOARD FUNCTION KEYS:** On laptops, make sure the "Fn" Function keys operate correctly.
10. **CONTROL PANEL VIEW:** Set the "View by" to "Large Icons".
11. **USER ACCOUNT CONTROL:** Make sure UAC is turned on and set to "Always Notify". (Control Panel > Action Center), (for Vista: Control Panel > Security Center > Other Security settings)

12. **SYSTEM PROPERTIES** optimizations:
 - a. **COMPUTER NAME:** (*Control Panel > System*).
 - Verify the Computer Name and Computer Description are exactly what you want.
 - *NOTE: Do not join a "Homegroup" . It makes things more complicated.*
 - b. **STARTUP & RECOVERY:** (*Control Panel > System > Advanced system settings > Advanced Tab > under Startup and Recovery, click the "Settings" button*). Under "System Failure", un-check the box for " Automatically Restart".
13. **VIRTUAL MEMORY:** (*Control Panel > System > Advanced system settings > Advanced tab > Performance "Settings" button > Advanced tab*). Under "Virtual Memory", click <Change>. Make sure the box is checked for: " Automatically manage paging file size for all drives". (*This is the default*).
14. **WINDOWS FIREWALL:** Make sure the Windows Firewall is turned on. (*Control Panel > System and Security > Windows Firewall*).
15. **AUTOMATIC UPDATES, TURN OFF:** (*Control Panel > Windows Update > Change Settings*). For now, select "Never check for updates".
16. **REMOVE ANY UNNECESSARY PROGRAMS, TRIALS, & FEATURES:**
 - a. (*Control Panel > Programs and Features*): 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*)
 - a. **CHOOSE A PRELIMINARY POWER PLAN FOR THE INSTALL:** Set the "Power Plan" to "Ⓞ High Performance". Customize the detailed settings by clicking "Change Plan settings" so that the PC never Sleeps or Hibernates during the install.
18. **CREATE A RESTORE POINT:** Now is the time to create a Restore Point: (*Control Panel > System > Advanced system settings > System Protection tab > Create*).
19. **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, fix all these issues before continuing.
20. **NETWORK:** **Connect to the Network now (*You must be on the internet to continue.*)**
21. **ACTIVATE WINDOWS 7:** (*Control Panel > System*). Scroll to the bottom of the window. It will tell you if Windows has been Activated or not. Activate now if the install looks good.
22. **UEFI / BIOS UPDATE:** Check at the Manufacture's website for any important updates. **WARNING:** *Be aware there always is a risk of permanently damaging the motherboard while doing a BIOS flash.*
23. **INITIALIZE INTERNET EXPLORER:** Open IE11 and go through the first use questions.
24. **UPDATES TO WINDOWS UPDATE:** Follow this procedure. *See here for details and hot-links to the updates (also for Vista): <http://wu.krelay.de/en/>*
 - a. Is SERVICE PACK 1 installed? (*Right-click Computer > Properties > "Windows Edition" area*). If it is not installed, then go to my "WINDOWS 7 SP1 INSTALL GUIDE". If it is already on, continue...
 - b. Make sure Automatic Updates is OFF,
 - c. Restart the PC, *If you know how, also stop the Windows Update Service (wuauserv).*
 - d. Manually download and install Update Packages KB3207752, and KB3177467. Reboot and install KB3172605. Reboot again, then try "Check for Updates".
 - e. If it hangs, repeat steps a and b, then try installing KB3083324, KB3138612, and KB3102810 one at a time. (*Just google each KBnnnnnnn number one at a time*) (*Choose x86 or x64 to match your system*). *You can also look in "Installed Updates". (Windows 7 Search box = View Installed updates)*
 - f. Restart the PC. Put your update settings back as desired and try Check for Updates again.
 - g. If you still have problems, try also manually downloading and installing these Update Packages: KB3145739, KB3153199, KB3161664, and KB3161608 the same way as above.

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- h. (NOTES: You may not need to restart the PC after each individual update unless the next update will not install. If any are already installed it will tell you. If an individual Update seems to hang or not install, try installing them in a different order).
25. **WINDOWS UPDATE:**
- Run Windows Update manually: (Control Panel > Windows Update).
 - Configure the Windows Update Settings to add updates for "Other Microsoft Products":
 - Under "Get updates for Microsoft Products", click "Find out more". Then check "I agree" & click "Install". NOTE: If this does not work, go to IE11 and add microsoft.com to the (Tools > Compatibility View Settings). You may also have to click "Allow" in IE11 to get the add-on activated.
 - Click "Change Settings" (on the left). Make sure all boxes are checked, click <OK> to save & exit.
 - Run "Check for updates" and keep re-running until no more "Important" Updates are found.
 - Install "Optional" updates by clicking "View available updates". Click to check the box for each one you want to install, then click the <Install> button.
26. **RESTORE USER DATA AND SETTINGS WITH EASY TRANSFER TOOL OR FABS:** Now is the time to run this tool after you first create all your "Standard User" User Accounts, including all Data, and settings.
- WARNINGS:
 - Be sure to do an image backup of the new install before running this tool in case things go awry.
 - See the Tips on running this Tool in my Windows 7 document called "MIGRATE OR UPGRADE FROM VISTA OR XP". *Note: I prefer Fabs Autobackup to the Easy Transfer Tool.*
27. **UTILITY & MISC PROGRAMS INSTALL:**
- NINITE Installer:
 - From an Administrator Account, go to www.ninite.com and select the following programs, then download and run the custom installer. *Note: You can close the browser while Ninite is running*

<input type="checkbox"/> -Firefox	<input type="checkbox"/> -Thunderbird	<input type="checkbox"/> -JAVA	<input type="checkbox"/> -Adobe Reader DC
<input type="checkbox"/> -MSE	<input type="checkbox"/> -MalwareBytes AntiMalware	<input type="checkbox"/> -	
<input type="checkbox"/> -SuperAntiSpyware	<input type="checkbox"/> -CDBurnerXP	<input type="checkbox"/> -Revo Uninstaller	<input type="checkbox"/> -LIBRE OFFICE (optional)
<input type="checkbox"/> -SKYPE (optional)	<input type="checkbox"/> -iTunes (optional)		
<input type="checkbox"/> -Flash FF	<input type="checkbox"/> -Flash IE		
 - Manually install these utilities:

<input type="checkbox"/> -BELARC ADVISOR	<input type="checkbox"/> -CCLEANER	<input type="checkbox"/> -CRYSTAL DISK INFO
<input type="checkbox"/> -DEFRAGGLER DEFRAG	<input type="checkbox"/> -HD TUNE	<input type="checkbox"/> -SANDBOXIE
<input type="checkbox"/> -SUMo		
<input type="checkbox"/> -SPEEDFAN	<input type="checkbox"/> -TFC	<input type="checkbox"/> -ULTRA FILE SEARCH LITE
<input type="checkbox"/> -TEAMVIEWER QS FOR USER	<input type="checkbox"/> -TEAMVIEWER QS FOR THE ADMIN USER DESKTOP	
 - CCLEANER: Go to (Options > Smart Cleaning), and DISABLE all check boxes FOR EACH USER.
28. **OFFICE SUITE - INSTALLATION:** (Do this from an Administrator Account)
- MICROSOFT OFFICE 2007/2010/2013 from CD/DVD.
 - ACTIVATE Microsoft Office. (Office should automatically Activate when you enter in the Product Key or when you first open the program)..
 - Run WINDOWS UPDATE several times to get all the Office Updates.
 - If Powerpoint is not included, you need to either download and install the POWERPOINT VIEWER 2007 from support.microsoft.com.
 - LIBRE OFFICE is a good free alternative to the Microsoft Office suite.
29. **LCD BRIGHTNESS (Laptops only):** (Control Panel > Power Options). Click "Show additional Plans", then "Power Plan". At the bottom of this screen where you set the default LCD brightness if you are on a laptop. This should only need to be done once.
30. ***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 for EACH User Account.
31. **DISPLAY and DESKTOP SET-UP:** (Control Panel > Personalization)
- MISC SETTINGS:**
 - OPTIMIZE DISPLAY SETTINGS** (Control Panel > Personalization > Display > Adjust resolution > Advanced Settings > Monitor tab).
 - MONITOR TYPE: Make sure the Monitor Type matches your Display.

- b) **COLORS:** Set "Colors:" to True Color (32 bit), then click <OK>.
- c) **RESOLUTION:** Back on the Screen Resolution Window, select the best resolution for your Monitor. *Higher is better.* For LCD's always pick the "Native" Resolution (*usually the highest available*).

- 2) **THEME:** (*Control Panel > Personalization > Theme*). If your video card is "AERO" capable, you will see several Aero Theme options listed. Change the Theme setting as desired. *NOTE: Themes affect visuals, sounds, buttons, mouse pointer, screen saver, and other system elements.* When done, click "Save changes". (*See my "SPEED UP WINDOWS 7" for a guide on how the Themes, and visual effects affect Windows 7 speed on older PC's.*)
- 3) **WINDOW COLOR:** (*Control Panel > Personalization > Window Color*). If Aero is on, you will be at the "Window color and appearance" palette window. Customize the Color Scheme and Transparency level here, as desired. Next, click "Advanced appearance settings...". *Note: If Aero is off, you will already be at the "Advanced appearance settings" window. (See the "WINDOWS 7 IMPROVE YOUR DISPLAY READABILITY for details on Schemes & Advanced appearance settings.")*
- 4) **TRANSPARENCY** (Windows 7 Aero only): (*Control Panel > Personalization > Window color*). If running Windows 7 Aero, you can turn off Transparency at this time if desired: (uncheck " Enable transparency". Click <OK> to exit). Note: If you are not running an "Aero" theme, the Transparency option will not be presented.
- 5) **CLEARTYPE:** If you are using an LCD monitor, you should turn on ClearType. (*Control Panel > Personalization > Display > Adjust ClearType text*). Check the box: " Turn on ClearType". click "Next", then follow the instructions for "ClearType Tuning".
- 6) **IMPROVE DISPLAY READABILITY:** (*Right-click on Desktop > Personalize > Window Color*): If you want to customize various visual items to improve the readability of the display, this is the time to do it. For details, see my "IMPROVE YOUR DISPLAY READABILITY" sheet for Windows 7.
- 7) **DESKTOP BACKGROUND IMAGE:** (*Control Panel > Personalization > Desktop Background*). Browse and choose a background. Click <OK> to exit.
- 8) **SCREEN SAVER:** (*Control Panel > Personalization > Screen Saver*). Set up your Screen Saver settings. I suggest that you set the Screen Saver to "None". Then go to Power Plan (*Control Panel > System and Security > Power Options*), select "Choose when to turn off the display" and choose the desired minutes.
- 9) **SAVE YOUR CUSTOM THEME:** (*Control Panel > Personalization*). Click "Save Theme": Name your custom theme and click "Save".

b. ADD/REMOVE ICONS ON THE DESKTOP:

- 1) **System Icons:** To show System Icons on the desktop (*Right-click Desktop > Personalize > Change Desktop Icons*). Check boxes for all desired System Icons.
- 2) **Regular Icons:** Right-click and drag any desired Shortcuts or folders to the Desktop.
- 3) **Special Icons:** Such as the "Devices and Printers" Icon, can be found in the Control Panel's "Classic View" (*ie: Control Panel > click Large Icons > Devices and Printers*). Right-click and drag all desired Icons to the Desktop.. When done, you may want to restore the Control Panel to its default "Category" view (*Control Panel > View by: Category*).
- 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.

c. REBOOT: Be sure to Reboot at this point and then make sure all the new settings took correctly.

32. **SOUNDS:** If you do not like the sounds connected with your chosen visual theme, go to: (*Control Panel > Personalization > Sounds*). Select a Sound Scheme or you can customize each sound individually. Click <OK> to save and exit.
33. **AUTOPLAY:** Turn off AutoPlay for all devices. (*Control Panel > AutoPlay*). Un-check the box: " Use AutoPlay for all media & devices", then click "Save".

34. **34. MOUSE Optimizations:** (*Control Panel > Mouse*)
- Buttons Tab: Set the double-click speed as slow as possible (*to the left*).
 - Pointers Tab.
 - Choose the "Magnified (system scheme) Pointer Scheme or find a "Normal Select" custom pointer with the <Browse> button.
 - Disable the Pointer Shadow by un-checking the box for " Enable Pointer Shadow"
 - Disable Pointer changes by un-checking the box for " Allow Themes to change pointers".
 - Pointer Options Tab: 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".
 - Device Settings: If on a Laptop, I suggest you find and DISABLE "Tap to Click" for the touchpad. (*The name varies with the hardware. It could also be called "Tap" or "Tapping"*).
 - Click <Apply> & <OK> to exit.
35. **FOLDER OPTIONS SET-UP**
- Default Folder View: This sets the preferred Default view for ALL folders. First go to any Standard Folder and choose your preferred view, then click; (*Organize > "Folder and Search Options"> View tab. Click "Apply to Folders"*).
 - Folder View Options: (*Control Panel > Folder 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 the following boxes:
 - Always show menus.
 - Display the full path In the title bar (Classic Theme only).
 - Hidden files and folders
 - Show Hidden files, folders, and drives.
 - Hide extensions for known file types, then click <Apply> **Un-check this one!**
 - Hide protected operating system files.
 - Show Drive Letters.
 - Show encrypted or compressed NTFS Folders & files in color.
 - Click the "Apply" button at the bottom.
36. **START MENU:**
- WINDOWS UPDATE ICON: Find the "Windows Update" Icon (*Start > All Programs*). Hold down the Shift key while you right-click on the Icon. Click on "Pin to Start Menu".
 - COMMAND PROMPT ICON:
 - Find the "Command Prompt" Icon in (*Start > All Programs > Accessories*). Right-click on the Icon & select "Pin to Start Menu".
 - Right-click on the new "Command Prompt" Icon in the Main Start Menu, then click (*Properties > Shortcut tab > "Advanced" button*) and check the box for " Run as Administrator", <OK>, <OK>.
 - CUSTOMIZE START MENU: (*Right-click the Start button > Properties > Start Menu tab > Customize button*).
 - DISABLE "HIGHLIGHT NEWLY INSTALLED PROGRAMS": Scroll down the list and uncheck the box for " Highlight newly installed programs".
 - ADD "RUN..." BOX: Add the "Run" command box to the Start Menu: Scroll down the list and check the box for " Run command".
 - Remove any unwanted Icons from the Start Menu. (Use right-click).
37. **TASKBAR:**
- TOOLBARS: Right-click any blank area of the Taskbar. Click Toolbars, then click (to uncheck) any undesired Toolbars like "Yahoo or Google Search".
 - LOCK THE TASKBAR: If not already checked, click: " Lock the Taskbar".
 - "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: (*Right-click Taskbar > Properties*). Under Notification area, click "Customize", then click to check "Always show all icons.....". Click OK OK to exit).

38. **INTERNET EXPLORER (should be at IE11) - Secure and customize IE:**
- MENU BAR: Right-click in any empty space just below the top of the IE window until a context menu box opens up offering the option; "Menu Bar". Click it and the Menu bar will *appear*.
 - TAB BAR ON ITS OWN ROW: (*Right-click in the toolbar area, then select "Show tabs on a separate row"*)
 - SECURE IE: (*Tools > Internet Options > General Tab*).
 - Under browsing History; Click the "Delete" button and make sure all desired items are checked.
 - Now click the "Delete" button on that windows to exit the "Delete browsing History" Window.
 - Wait a little, then click to check the box for "Delete browsing history on exit", then click Apply.
 - HOME PAGE: Set the preferred home page/s. (*The default Home Page is www.msn.com.. Yuchh*). To change it to "www.google.com" or some other desired page: First go to the desired website/s. Then (*click Tools > Internet Options > General tab*). Click the "Use current" button, then OK to exit.
 - CACHE SIZE: (*Tools > Internet Options > General Tab*). Under Browsing History, click Settings & select 50
 - DEFAULT SEARCH ENGINE: (*Tools > Manage Add-ons > Search Providers > Find more search providers > select Google Search > Add*). Close and reopen the Manage Add-ons window, then click Search providers. Select Google and click "Set as Default". Delete BING.
 - TOOLBARS: Unlock the toolbars, customize and clean up visually, then re-lock the toolbars.
39. **FIREFOX (66+) (and CHROME (for each user))**
- SET UP 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".
 - HOME PAGE: Set Default Homepage/s as desire: (*Tools > Options > Home tab*) .
 - BOOKMARKS BAR: Drag any desired Icons to the Bookmarks Toolbar.
 - SECURE FIREFOX: (*Tools > Options > Privacy & Security tab*).
 - "History": Choose: Firefox will "Use custom settings for history". Check the box for: " Clear history when Firefox closes". Click <Settings> and choose the desired items.
 - "Cookies & Site Data", Accept third-party cookies. Choose "Never".
 - "Tracking Protection", choose "Always" and "Always" again
 - WOT: Install the WOT Firefox add-on and test it.
 - SEARCH ENGINE SETTINGS: (*Tools > Options > Search tab*).
 - Search Bar: Select "Add Search bar in toolbar"
 - Default Search Engine. Select GOOGLE as default.
 - One-Click Search Engines: Uncheck and then remove BING and YAHOO
 - Be sure to do a system restart after installing Firefox to make sure any Anti-Malware programs recognize that it is installed..
40. **ADOBE READER**
- Install Reader or Acrobat, not both, and check for updates until no more show up. (*If downloading the free Adobe 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.
41. **OFFICE SUITE - INITIALIZATION (It must be customized for each User Account)**
- For MICROSOFT OFFICE:** Make sure you have run Windows Update several times to get all Office Updates. (*Office 2003: Be sure to "ACTIVATE" Microsoft Office on-line*).
 - For OPEN OFFICE or LIBRE OFFICE**
 - DEFAULTS: Set up Open Office to be the default program for all kinds of Office files. (*Control Panel > Default Programs > Set your default Programs*). Click "Open Office". Click "Set this Program as default".
 - DEFAULT SAVE FORMAT: (After installing, be sure to set the default "Save" format to Microsoft Word 97/2000/XP. (*Open any Open Office Program. Go to Tools > Options > Load/Save*). Select a save format of "Microsoft Word 97/2000/XP".

42. **42, E-MAIL SET-UP:**
- ADMINISTRATOR ACCOUNT NOTE:** NEVER set up e-mail in an "Administrator" Authority User Account. E-mail should be set up only in a "Standard User" Account for security.
 - WINDOWS LIVE MAIL or OUTLOOK 2007/2010** (*Windows Live Mail replaces Outlook Express*). *I think Thunderbird is better, but if you must use Windows Live Mail or Outlook use these tips from Microsoft :*
 - For tips on moving your Outlook Express Account into Windows Live Mail, look in my "WINDOWS 7 TIPS" sheet under the WINDOWS LIVE MAIL.
 - THUNDERBIRD** If desired by the user, set it up for e-mail. *NOTE: NEVER set up e-mail on the Admin User account. E-mail should be run only in a Standard User Acct.*
43. **SECURITY & ANTI-MALWARE PROTECTION:**
- BROWSER SECURITY**
 - Verify that the WOT Add-on is installed on all Browsers and for all Users.
 - SANDBOXIE: Set up and test SANDBOXIE for all Users. + **SET UP PRINT PERMISSIONS**
 - ANTI-MALWARE PROGRAM ICONS: "Run as Administrator"**. (*Click Properties > Shortcut tab > "Advanced" button*). Check the box for " Run as Administrator" for all the Anti-Malware Start Icons.
 - MISC**
 - 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:**
 - ✓ Install the ESET online scanner into Internet Explorer = www.eset.com/online-scanner
 - ✓ Create a shortcut icon for the "ESET On-Line Scan" that opens Internet Explorer & goes directly to the "www.eset.com/online-scanner" website.
 - ACTION CENTER:** Go to the Windows 7 ACTION CENTER and make sure all is OK. (*Control Panel > System and Security > Action Center*). Nothing should be **RED**.
 - DISABLE PASSWORD EXPIRATION: For Windows 7 Pro/Enterprise/Ultimate only:** Log-in passwords expire every 42 days by default. To disable Password timeout, first log in to an Administrator User Account. (*Control Panel > Administrative Tools > Local Security Policy > Account Policy > Password Policy*). Change the maximum setting from 42 to 0. .
44. **SCANS:**
- HARD-DRIVE TESTS:**
 - Run the HD-TUNE "slow" error scan and make sure all hard-drives look OK.
 - Run the HD-TUNE drive benchmark speed test on all hard-drives. _____ MB/sec
 - Run CRYSTAL DISK INFO and make sure all hard-drive status show as "Good".
 - SUMo SCAN:** Run a scan and update all programs
Issues found: _____
 - Resolve all insecure and end-of-life issues before continuing.
 - ANTIMALWARE SCANS: FIRST: UNPLUG ANY FLASH OR EXTERNAL DRIVES !**
 - MSE or PREFERRED ANTI-VIRUS: Verify Real time protection is on and a scheduled scan is set up. Do updates, then run a Full Scan.
 - MBAM SCAN: MalwareBytes AntiMalware: Do updates, then run a full scan on all drives.
 - SAS SCAN: SuperAntiSpyware: Do updates, then run a full scan on all drives.
 - ESET Online Scan. Run a full-scan including archives.
 - SPEEDFAN:** Benchmark PC Temperatures; _____
With Prime 95 or some other program running to push CPU near 100%.
 - Resolve all issues before continuing!**

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

a. SOUNDS

- 1) Check that the system "Sounds" are working OK. (Control Panel > Sounds)
- 2) Test the Front Panel Headphone Jack that you hear sound and that is cuts off the speaker sound.

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. If "Show Menu bar" is not already checked, click to check it.
- 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. The default Viewer is: _____

f. WINDOWS MEDIA PLAYER TESTS: Play the following file types: Default Player is _____

AU AVI FLV MID MP3 MPG WAV WMA WMV MP4 =

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. QUICKTIME 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 or QUICKTIME) is: _____

k. PDF: Test Default PDF Reader Default Reader: _____

l. DEFAULT BROWSER AND HTML READER:

Default Reader: _____

m. BROWSER TESTS: (IE11, FIREFOX, CHROME) (FF 32-bit only, IE11 64-bit only)

CH FF IE

FLASH/HTML5 TEST. Play a youtube video FULL SCREEN: www.youtube.com/trailers

-- -- JAVA TEST. www.java.com/en/download/installed.jsp

PDF: Open a PDF in Browser TEST. www.samplepdf.com/sample.pdf

QUICKTIME VIDEO TEST: Play a QUICKTIME video: www.apple.com/trailers

WMP PLUGIN TEST. Play a video from: 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. WEBCAM: If the PC has a built-in webcam, open the program for it and test it.

46. **CLEAN TEMP FILES, COOKIES, ETC:** *(Run CCleaner first so TFC does not hang)*
- CCLEANER SCAN: Verify the latest version of CCleaner is installed..
Run "File Clean"for each User Account. FILES cleaned: _____ MB
 - TFC: Close all programs and run the Temp File Cleaner utility. _____ MB. Always reboot after.
47. **CREATE YOUR "ADMINISTRATOR" USER ACCOUNT.**
- This is the account you will use only for Program installs and other administrator tasks and should be named something like "Admin-yourname". This user account should be a "Administrator" user Account, not a "Standard" User Account and you should give it a password. *(From the Administrator Account, go to Control Panel > User Accounts > Manage another account, > Create a new account).* **WARNING: Never change any Account Name. If you do, the C:\Users\ Plan ahead.**
 - Repeat steps 27 through 43 for all items that apply to multiple Users. Make sure to set up the AutoPlay, Visual properties, & Mouse properties. Also initialize IE, Firefox, and your Office Suite.
48. **MAIN USER ACCOUNT - CHANGE TO "STANDARD USER":**
- From the Admin account, go to: *(Control Panel > User Accounts > Manage another Account)*. Select your main user account and click "Change your account type". Select "Standard user" and click "Change account type".
 - Test all UTILITY Programs, User Programs, and Antimalware Programs and make sure they all open OK as a Standard user. *If necessary, customize any start Icons to "Run as Administrator.*
 - Rerun Spybot S&D immunization to catch all new users.
49. **ADDITIONAL "STANDARD" USERS as needed.**
- From the Administrator Account, manually create any additional desired "Standard" user accounts.
 - Repeat steps 30 through 45 for all items that apply to multiple Users. Make sure to set the AutoPlay, Visual properties, & Mouse properties. Also initialize IE, Firefox, and your Office Suite for each user. Also repeat the complete "Testing" section for each user.
 - Be sure to set up Windows Mail or Thunderbird e-mail for each User.
50. **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.
51. **DEFRAG:**
- SSD: ***Solid State Drives should never be defragged.*** If your system properly recognizes an SSD, it will not even show up in the Scheduled Defrag window. If it does, uncheck it.
 - Defrag Schedule: *Note: By default, Windows 7 defrags the C Drive on a weekly schedule. Wednesdays at 0100 AM).* You can set the Automatic Defrag schedule as desired: Both the day & time and which drives. *(Open Computer > right-click Drive C > Properties > Tools > Defragment now).*
 - Use DEFRAGGLER DEFRAG: Do a DEFRAG.
52. **POWER SETTINGS:**
- CHOOSE A FINAL POWER PLAN:** *(Control Panel > Power Options)*
 - For Desktops, set the "Power Plan" to "⊙ High Performance". *(I recommend choosing High Performance for Laptops as well, unless you run a lot on batteries).*
 - Customize the detailed settings by clicking "Change Plan settings". Set the "When to turn off the display" actions, and "When the computer sleeps" actions as desired.
 - 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*). Then go to: (*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.
53. **SCREENSAVER SETTINGS:** (*Control Panel > Personalization*)
- a. Choose a Screensaver style and timeout.
54. **SAVE ALL THEME & DISPLAY PREFERENCES:** (*Control Panel > Personalization*). Click "Save Settings" then name it and save it.
55. **HIBERNATE & SLEEP (Standby):** (*Note: These functions may not work on laptops if any USB devices are plugged in and active; especially an external Keyboard and Mouse. Verify that "Hibernate" and "Sleep" function OK. If the Hibernate option is not visible in the Start menu, the PC may be using "Hybrid Sleep". If you need to activate Hibernate, turn off Hybrid Sleep in the Advanced Power settings. You may also have to open a Command Prompt window (must be run in Administrator mode), type: powercfg -h on <enter>, then: exit.*)
56. **BACKGROUND PROGRAMS:** If desired, turn off any unnecessary background programs or services using the "STARTER" Utility Program. Be careful.
57. **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.
58. **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.
59. **IMAGE BACKUP:** Do a Windows 7 full image back-up of your new install to an external Hard-drive. (*Control Panel > Backup and restore*). Click Create a system image.
60. **AUTOMATIC UPDATES:** (*Control Panel > Windows Update > Change settings*). Configure to "Install Updates automatically". Also be sure to check the boxes for : " Give me recommended updates.....", and " Allow all users to install updates. If the owner wants any of this different, they can change it.
61. **SYSTEM PROTECTION (SYSTEM RESTORE):** (*Control Panel > System > System Protection*)
- a. **CLEAR THE SYSTEM RESTORE HISTORY:** Highlight Drive C, then click "Configure", then "Delete"
 - b. **MONITOR DRIVE C ONLY:** Make sure System Restore is only monitoring Drive C.
 - c. **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*).
 - d. **SET A RESTORE POINT:** This a good time to create a Windows Restore Point. Click "Create".
62. **USER ACCOUNT CONTROL**
- a. Make sure UAC is turned on and set to "Always Notify". (*Control Panel > Action Center*), (*for Vista: Control Panel > Security Center > Other Security settings*)
63. **USER ACCOUNT TYPES**
- a. Make sure that all user accounts are "Standard" except for the one "Admin" User Account which should be "Administrator".
64. **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!!
- a. Be sure to download and install all the latest Software and drivers from your Printer manufacturer's website. **Do not use the software CD shipped with the printer!**
65. **Make sure the CD/DVD Drive is empty before powering down the PC !**