

# WINDOWS 7 - INSTALL, SET-UP, & CUSTOMIZE



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Windows7\_Install.lwp

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

Users/Passwords: \_\_\_\_\_ Date/s: \_\_\_\_\_

1. **UPGRADE?** If this is an upgrade from XP (or VISTA), run the  **Easy Transfer Tool NOW**, 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 the  PRODUKEY utility and 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 first:  
1)  Clean dust from PC; 2)  Check Battery voltage > 3.0vdc; 3)  Check PC temps with the SPEEDFAN utility. Then check out the hard-drive health with;  SPINRITE;  HDTUNE; and  CRYSTAL DISK INFO before installing Windows 7 or immediately after.
3. **IF WINDOWS 7 IS INSTALLED ALREADY OR THIS IS A NEW Win 7 PC, SKIP TO STEP 6c.**
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. **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.
6. **INSTALL WINDOWS 7:** Use your Recovery DVD's or your Win 7 Install DVD. *To use a Win7 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: The Account you create during the install will be an "Administrator" authority account. Name it with a user name like "Admin-PC" (and a password, please). *A user account should never actually be named "Administrator", since there is already a hidden user account with that name. (NOTE: You will add your Main "Standard User" Account later).* Also, enter a meaningful Computer Name (something like DELL-XPS8100).
  - d. 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*).
  - e. At the Windows Update Options Window, click "Ask me later".
  - f. If asked for your Location; For a Laptop, select "Public Location". For a Desktop PC, select "Home".
7. **TIME/DATE VERIFY:** Double verify these all are correct: Time, AM/PM, Date, Year, & Time Zone.
8. **KEYBOARD FUNCTION KEYS:** On laptops, make sure the "Fn" Function keys operate correctly.
9. **SYSTEM PROPERTIES** optimizations:
  - a. **COMPUTER NAME:** (*Control Panel < System and Security > System*).
    - Verify the Computer Name and Computer Description are exactly what you want.
    - Verify the Workgroup is correct: To change the Workgroup, click the "Advanced system settings" button. *Note1: All Workgroup Names on a home network should be exactly the same for a mixed group of PC's (XP & Win7). NOTE2: Do not join a "Homegroup" if you have any "XP" PC's connected to your network. It works, but makes things more complicated.*

- b. **STARTUP & RECOVERY:** (*Control Panel > System and Security > System > Advanced system settings > Advanced Tab > under Startup and Recovery, click the "Settings" button*). Under "System Failure", un-check the box for " Automatically Restart".
10. **VIRTUAL MEMORY:** (*Control Panel > System and Security > System > Advanced system settings > Advanced tab > Performance "Settings" button > Advanced tab*). Under "Virtual Memory", click <Change>.
- a. If you only have one hard drive, make sure the box is checked for: " Automatically manage paging file size for all drives". (This is the default).
- b. If you have a second physical hard-drive, see my "Speed Up Windows 7 checklist" for tips.
11. **WINDOWS FIREWALL:** Make sure the Windows Firewall is turned on. (*Control Panel > System and Security > Windows Firewall*).
12. **AUTOMATIC UPDATES, TURN OFF:** (*Control Panel > System and Security > under "Windows Update", click "Turn Automatic updating on or off"*). For now, select "Never check for updates".
13. **REMOVE ANY UNNECESSARY PROGRAMS, TRIALS, & FEATURES:**
- a. (*Control Panel > Programs > 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.*
14. **POWER PLAN:** (*Control Panel > System and Maintenance > 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.
15. **CREATE A RESTORE POINT:** Now is the time to create a Restore Point: (*Control Panel > System and Security > System > Advanced system settings > System Protection tab > Create*).
16. **NETWORK: If not already connected, connect to the Network now (You must be on the internet to continue.)**
17. **ACTIVATE WINDOWS 7:** (*Control Panel > System and Security > 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.
18. **INITIALIZE IE8/9:** Open IE and go through the first use questions. Answer the questions as desired.
19. **WINDOWS UPDATE:**
- 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. Run Windows Update (*Control Panel > System and Security > Windows Update*).
- c. Windows Update Settings:
- 1) Under "Get updates for Microsoft Products", click "Find out more". Then check "I agree" & click "Install".
- 2) Click "Change Settings" (on the left). Make sure all boxes are checked, click <OK> to save & exit.
- d. Run "Check for updates" and keep re-running until no more "Important" Updates are found. *Warning: Be sure to do a "Restart" after each batch of updates to make sure the downloaded ones have installed correctly and completely before downloading more.*
- e. Look at the "Recommended" and "Optional" updates by clicking "View available updates". Double-click each update to see more information about it. Click to check the box for each one you want to install, then click the <Install> button. "Recommended" updates are usually suggested software updates to fix bugs and improve reliability of Windows 7.
20. **DEVICE MANAGER & HARDWARE DRIVERS:** (*Control Panel > System and Security > System > Device Manager*). Look to make sure there are no devices with exclamation marks, question marks, or X's. If so,

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delete the bad entries and reboot to see if Windows 7 can re-detect & re-install the devices OK. Fix these issues before continuing.

21. **WEI ASSESSMENT:** Get the WEI values of the PC, (*Control Panel > System & security > System > Performance Information & tools*). Click "Rate this computer" or Re-run the assessment. Base Score = \_\_\_\_\_.
22. **UTILITY & MISC PROGRAMS INSTALL:**
  - a. NINITE Installer:
    - 1) 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. *Note: You can close the browser while Ninite is running*

<input type="checkbox"/> -Firefox	<input type="checkbox"/> -Thunderbird	<input type="checkbox"/> -Flash FF	<input type="checkbox"/> -Flash IE
<input type="checkbox"/> -JAVA	<input type="checkbox"/> -Adobe Reader	<input type="checkbox"/> -MSE	<input type="checkbox"/> -MalwareBytes AntiMalware
<input type="checkbox"/> -SpyBot S & D	<input type="checkbox"/> -SuperAntiSpyware	<input type="checkbox"/> -CDBurnerXP	<input type="checkbox"/> -Revo Uninstaller
<input type="checkbox"/> -OPEN OFFICE ( <i>optional</i> )	<input type="checkbox"/> -SKYPE ( <i>optional</i> )		
    - 2) When done, Verify the results before closing Ninite. Fix any problems before continuing. **NOTE:** *The Ninite Program Installer window says "Finished" when it is done installing. Do not minimize the window or disturb or shutdown the PC until you are sure Ninite is done.*
  - b. Manually install these utilities, as desired:

<input type="checkbox"/> -BELARC ADVISOR	<input type="checkbox"/> -CCLEANER	<input type="checkbox"/> -CRYSTAL DISK INFO	<input type="checkbox"/> -HD TUNE
<input type="checkbox"/> -SANDBOXIE	<input type="checkbox"/> -SECUNIA PSI	<input type="checkbox"/> -SPEEDFAN	<input type="checkbox"/> -SPYWAREBLASTER
<input type="checkbox"/> "Codestuff" STARTER	<input type="checkbox"/> -TFC	<input type="checkbox"/> -USER PROFILE HIVE CLEANUP SERVICE.	
23. **MULTIMEDIA UTILITIES:** Verify the latest versions are installed:
  - a.  Verify DirectX is version 11 or higher (*Start, run: DXDIAG*). Version found \_\_\_\_\_
  - b.  If desired, install:  WINAMP  LogMeIn Free
24. **OFFICE SUITE - INSTALLATION:** (*Do this from an Administrator Account*)
  - a. MICROSOFT OFFICE from CD/DVD.
    - 1) If you are installing Office 2003, you need to download and install the Office Compatibility Pack.
    - 2) After installing Office, run Windows Update several times to get all Office Updates. Be sure to **ACTIVATE** Microsoft Office. (*Office 2007 & 2010 automatically Activate when you enter in the Product Key*).
    - 3) If Powerpoint is not included, you need to either download and install the POWERPOINT VIEWER 2007 from [support.microsoft.com](http://support.microsoft.com) or install Open Office in order to view PowerPoint files.
  - b. OPEN OFFICE or LIBRE OFFICE are good free alternatives to Microsoft Office.
25. **LCD BRIGHTNESS (Laptops only):** (*Control Panel > System and Security > 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.
26. **\*LOG-IN TO THE DESIRED USER ACCOUNT:** \* If this is the first time through this sheet, skip this step and continue setting up the "Admin" User Account. **NOTE:** *Do all the following steps EACH User Account.*
27. **DISPLAY and DESKTOP SET-UP:** (*Control Panel > Appearance and Personalization > Personalization*)
  - a. **MISC SETTINGS:**
    - 1) **OPTIMIZE DISPLAY SETTINGS** (*Control Panel > Appearance and Personalization > Personalization > Display > Adjust resolution > Advanced Settings > Monitor tab*).
      - a) **MONITOR TYPE:** Make sure the Monitor Type matches your Display. If it is only identified as "Generic", "Default", or "Standard", you will not get the best results. You should try to install the correct monitor driver using the CD that came with your Monitor, from the Manufacturer, or from Windows Update.
      - b) **REFRESH RATE:** Make sure to check the box " Hide modes that this monitor cannot display"*(If possible)*. Select the highest available refresh rate for your Monitor and click <OK>.
      - c) **COLORS:** Set "Colors:" to True Color (32 bit), then click <OK>.
      - d) **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*). Click <OK> to exit.
    - 2) **THEME:** (*Control Panel > Appearance and Personalization > 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) **COLOR SCHEME:** (*Control Panel > Appearance and Personalization > 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 > Appearance and Personalization > 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 > Appearance and Personalization > 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 > Appearance and Personalization > Personalization > Desktop Background*). Browse and choose a background. Click <OK> to exit.
- 8) **SCREEN SAVER:** (*Control Panel > Appearance and Personalization > Personalization > Screen Saver*). Set up your Screen Saver settings. All newer Monitors have a "Power Saver" feature, making a "Screen Saver" unnecessary. I suggest that you set the Screen Saver to "None" and in the 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 > Appearance and Personalization > 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*). *For example, I create a Desktop Folder called "UTILITY Programs" for all my Utility, Anti-virus, and Anti-spy program Icons. I also customize the icon for the "UTILITY Programs" folder by: (Right-clicking Icon > properties > Customize Tab > Change Icon button). Select an Icon graphic and click <OK>, <OK>. The new Icon image should be there.*
- 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.

28. **SOUNDS:** If you do not like the sounds connected with your chosen visual theme, go to: (*Control Panel > Appearance and Personalization > under "Personalization", click Change sound effects > Sounds tab*). Select a Sound Scheme or you can customize each sound individually. Click <OK> to save and exit.
29. **AUTOPLAY:** Turn off AutoPlay for all devices. (*Control Panel > Hardware and sound > AutoPlay*). Un-check the box: " Use AutoPlay for all media & devices", then click "Save".
30. **MOUSE Optimizations:** (*Control Panel > Hardware and Sound > under Devices and Printers, click Mouse*)
  - a. Buttons Tab: Set the double-click speed as slow as possible (*to the left*).
  - b. Pointers Tab.

- 1) Choose the "Magnified (system scheme) Pointer Scheme or find a "Normal Select" custom pointer with the <Browse> button.
  - 2) Disable the Pointer Shadow by un-checking the box for " Enable Pointer Shadow"
  - 3) Disable Pointer changes by un-checking the box for " Allow Themes to change pointers".
  - c. 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".
  - d. Wheel Tab: Set Wheel to "3 lines at a time"
  - e. 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".*).
  - f. Click <Apply> & <OK> to exit.
31. **FOLDER OPTIONS SET-UP**
- a. 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"*). **NOTE: You can change the view on each individual folder and Win 7 will remember.**
  - b. Folder View Options: (*Control Panel > Appearance and Personalization > 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:
    - 1) Check the following boxes:
      - Always show menus.
      - Hidden files and folders
        - Show Hidden files, folders, and drives.
      - Hide empty drives in the Computer Folder???
      - Hide protected operating system files.
      - Show Drive Letters.
      - Show encrypted or compressed NTFS Folders & files in color.
    - 2) Uncheck the following box:
      - Hide extensions for known file types, then click <Apply>
32. **START MENU:**
- a. 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".
  - b. COMMAND PROMPT ICON:
    - 1) Find the "Command Prompt" Icon in (*Start > All Programs > Accessories*). Right-click on the Icon & select "Pin to Start Menu".
    - 2) 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>.
  - c. CUSTOMIZE START MENU: (*Right-click the Start button > Properties > Start Menu tab > Customize button*).
    - 1) DISABLE "HIGHLIGHT NEWLY INSTALLED PROGRAMS": Scroll down the list and uncheck the box for " Highlight newly installed programs".
    - 2) ADD "RUN..." BOX: Add the "Run" command box to the Start Menu: Scroll down the list and check the box for " Run command".
  - d. Remove any unwanted Icons from the Start Menu. (Use right-click).
33. **TASKBAR:**
- a. TOOLBARS: Right-click any blank area of the Taskbar. Click Toolbars, then click (to uncheck) any undesired Toolbars like "Yahoo or Google Search".
  - b. LOCK THE TASKBAR: If not already checked, click: " Lock the Taskbar".
  - c. "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*)
  - d. NOTIFICATION AREA: (*Right-click Taskbar > Properties*). Under Notification area, click "Customize", then click to check "Always show all icons.....". Click OK OK to exit).
34. **INTERNET EXPLORER 9** - Secure and customize IE9:

- a. 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 as: "File - View - Favorites - Tools - Help" .
  - b. TAB BAR ON ITS OWN ROW: (*Right-click in the toolbar area, then select "Show tabs on a separate row"*)
  - c. SECURE IE: (*Tools > Internet Options > General Tab*).
    - 1) Under browsing History; Click the "Delete" button and make sure all desired items are checked.
    - 2) Now click the "Delete" button on that windows to exit the "Delete browsing History" Window.
    - 3) Wait a little, then click to check the box for "Delete browsing history on exit", then click Apply.
  - d. 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.
  - e. CACHE SIZE: (*Tools > Internet Options > General Tab*). Under Browsing History, click Settings & select 50
  - f. DEFAULT SEARCH ENGINE: (*Tools > Internet Options > General Tab*). Under Search, click Settings and select Google as default. If it is not listed, click "Find more search providers".
  - g. WOT: Install the IE add-on called "**WOT**" and test it. (*Find it at: WWW.MYWOT.COM*).
  - h. TOOLBARS: Unlock the toolbars, customize and clean up visually, then re-lock the toolbars.
35. **FIREFOX:**
- a. HOMEPAGE: Import Homepage/s from IE or go to (*Tools > Options > General tab*) & set the Homepage/s.
  - b. OPTIONS:
    - 1) Make sure the "Download Options" setting is: "☉ Always ask me where to save files". (*Firefox: Tools > Options > Main > Downloads*).
    - 2) Set up all desired Firefox Options. See "*Firefox Configuration*" on my **FIREFOX TIPS** Sheet.
  - c. WOT: Install the Firefox add-on called "**WOT**" and test it. (*Find it at: WWW.MYWOT.COM*).
  - d. TOOLBARS: Customize as desired.
36. **PDF READER** (Adobe Reader, Adobe Acrobat, or Fox-it Reader)
- a. Verify a PDF Reader is installed.
  - b. Initialize the program by opening it and accepting the EULA.
  - c. Verify that the latest on-line updates are on.
37. **OFFICE SUITE - INITIALIZATION** (*It must be customized for each User Account*)
- a. **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*).
  - b. **For OPEN OFFICE or LIBRE OFFICE**
    - 1) 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".
    - 2) 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".
38. **E-MAIL SET-UP:**
- a. **ADMIN ACCOUNT NOTE:** Never set up e-mail in an Admin User Account. E-mail should be set up only in a "Standard" User Account for security.
  - b. **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 :*
    - 1) For tips on moving your Outlook Express Account into Windows Live Mail, look in my "WINDOWS 7 TIPS" sheet under the WINDOWS LIVE MAIL.
  - c. **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.*
    - 1) Restore mail Settings, Address books, and Mail Messages if backups are available. *I use MOZBACKUP to save and restore all the mail and settings.*
    - 2) If there are no backups from a previous system, manually configure the e-mail setup for Thunderbird. See my **THUNDERBIRD SETUP STEP-BY-STEP** for full instructions..

- 3) If you are trying to import an Outlook.pst file to Thunderbird, you will need to import it into the Outlook 2007 program first so the Thunderbird Import Wizard can find it. *If Outlook 2007 is not installed, you may be able to get the Trial version from [www.ninite.com](http://www.ninite.com) to use just for the conversion (Outlook 2003 may also work).*
39. **PROGRAM UPDATES:** Do a "Check for updates" on every newly installed program.
40. **SECURITY & ANTI-MALWARE PROTECTION:**
- a. **BROWSER SECURITY**
- WOT: Verify the WOT add-on is installed for all browsers and all Users
  - SPYBOT S&D: Update and immunize.
  - SPYWAREBLASTER: Verify it is installed and updated for all browsers.
  - SANDBOXIE: Set up and test SANDBOXIE for all Users.
- b. **ANTIMALWARE PROGRAM ICONS:** Verify that all are set to "Run as administrator". (*Click Properties > Shortcut tab > "Advanced" button*). Check the box for " Run as Administrator" for all the ANti-Malware program Icons.
- c. **MISC**
- 1) UPDATES: Check & re-check all these programs for online updates until no more show up.
  - 2) SCHEDULED SCANS: for MSE or your preferred Anti-Malware suite: Set up scheduled scans: (*See the MSE writeup in my "ANTI-MALWARE TOOLS & TIPS"*)
  - 3) Drag Icons for all the above programs into the new "Anti-Malware Programs" folder created on the Desktop in an earlier step.
  - 4) ESET ON-Line SCAN:
    - ✓ Install the ESET online scanner into Internet Explorer = [www.eset.com/online-scanner](http://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](http://www.eset.com/online-scanner)" website.
  - 5) MSRT: Create a shortcut Icon for the Malicious Software Removal Tool: (*Right-click desktop > New > Shortcut*). In the Location box, enter: %windir%\system32\MRT.exe and name the shortcut: "MSRT Run".
- d. **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**.
- e. **PASSWORD EXPIRATION:** For Windows 7 Pro/Enterprise/Ultimate: Log-in passwords expire every 42 days by default. If you want to disable Password timeout, see my WINDOWS 7 TIPS sheet.
41. **SCANS:**
- a. **HARD-DRIVE TESTS:**
- 1) Run the HD-TUNE "slow" error scan and make sure all hard-drives look OK.
  - 2) Run the HD-TUNE drive benchmark speed test on all hard-drives. \_\_\_\_\_MB/sec
  - 3) Run CRYSTAL DISK INFO and make sure all hard-drive status show as "Good".
- b. **SECUNIA PSI SCAN:** Run a full scan [http://secunia.com/software\\_inspector/](http://secunia.com/software_inspector/) See the Secunia Overview in my "UTILITY PROGRAMS" sheet.  
*Issues found:* \_\_\_\_\_
- 1) Make sure Secunia is configured to auto-start on boot and to autoupdate.
  - 2) Resolve all insecure and end-of-life issues before continuing.
- c. **ANTIMALWARE SCANS:**
- 1) 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.
  - 2) MBAM SCAN: MalwareBytes AntiMalware: Do updates, then run a full scan on all drives.
  - 3) SAS SCAN: SuperAntiSpyware: Do updates, then run a full scan on all drives.
  - 4) SPYBOT S&D: Do updates, then run a full scan
  - 5) SPYWAREBLASTER: Do online updates, then activate all protections.
  - 6) ESET Online Scan. Run a full-scan including archives.
- d. **SPEEDFAN:** Benchmark PC Temperatures; \_\_\_\_\_  
**Resolve all issues before continuing!**

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

- a. Do the following three checks for every Application Program, including the installed Office Suite:
  - 1) Make sure that each Program opens OK for this user.
  - 2) Initialize or customize it as necessary.
  - 3) If you have restored any User data to this PC, verify that all user data files are accessible from the Program they are related for this User.
- b. SOUNDS
  - 1) Check that the system "Sounds" are working OK. (Control Panel > Sounds & Audio Devices > Sounds)
  - 2) Test the Front Panel Headphone Jack that you hear sound and that is cuts off the speaker sound.
- c. 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 UN-CHECKED.
  - 2) MENU: Right-click in the menu area and select View. If "Show Menu bar" is not already checked, check it.
  - 3) FILETYPES: To change any multimedia filetype associations, go to (Control Panel > Default Programs).
- d. MUSIC CD: Load & play a Music CD. Default music player is: \_\_\_\_\_
- e. DVD MOVIE: Load & play a DVD Movie FULL SCREEN. Default Video player is: \_\_\_\_\_
- f. .JPG WINDOWS PHOTO VIEWER TEST: Open a .jpg file. The default Viewer is: \_\_\_\_\_
- g. WINDOWS MEDIA PLAYER TESTS: Play the following file types: .  
 AU     AVI     MID     MP3     MPG     WAV     WMA     WMV
- h. .DOC & .DOCX: Set the default application to open these files. Default Office Program is: \_\_\_\_\_
- i. 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.
- 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. FIREFOX TESTS: (FF 32-bit only)
  - 1) FLASH TEST. Play a youtube video FULL SCREEN:    [www.youtube.com/trailers](http://www.youtube.com/trailers)
  - 2) JAVA 32 TEST. Go to:    [www.java.com/en/download/installed.jsp](http://www.java.com/en/download/installed.jsp)
  - 3) QUICKTIME PLUG-IN TEST. Play a QUICKTIME video: [www.apple.com/trailers](http://www.apple.com/trailers)
  - 4) WMP PLUGIN TEST. Play a video from:    [www.windowsmedia.com](http://www.windowsmedia.com)
- l. INTERNET EXPLORER 8 or 9 TESTS: ( Test both IE 32-bit and IE 64-bit. Note: Flash 64-bit no-go )
  - 1) FLASH TEST. Play a youtube video FULL SCREEN:    [www.youtube.com/trailers](http://www.youtube.com/trailers)
  - 2) JAVA 32 TEST & JAVA 64 TEST Go to:    [www.java.com/en/download/installed.jsp](http://www.java.com/en/download/installed.jsp)
  - 3) QUICKTIME PLUG-IN TEST. Play a QUICKTIME video: [www.apple.com/trailers](http://www.apple.com/trailers)
  - 4) SILVERLIGHT TEST. Play a video from:    [www.silverlight.net/learn/videos/all/](http://www.silverlight.net/learn/videos/all/)
  - 5) WMP PLUGIN TEST. Play a video from:    [www.windowsmedia.com](http://www.windowsmedia.com)
- m. REALPLAYER/REAL ALTERNATIVE: Play a REAL video file: Try .ram file or .ra file ([guide.real.com](http://guide.real.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.

43. **CLEAN TEMP FILES, COOKIES, ETC:**
- TFC: Close all programs and run the Temp File Cleaner utility (*This will auto-reboot*). \_\_\_\_\_MB
  - CCLEANER SCAN: Verify the latest version of CCleaner is installed. Set-up & configure CCleaner. Run "File Clean":, then for each User, run "file clean" again. FILES cleaned: \_\_\_\_\_MB.
44. **EASY TRANSFER TOOL:** If you are migrating from an XP PC, now is the time to run this tool to create your regular User Accounts, including all Data files, settings, and customizations.
- WARNINGS:
    - I recommend doing an image backup before running this tool in case things go awry.
    - See my Tips on running this Tool in my Windows 7 sheet called "MIGRATE OR UPGRADE FROM VISTA OR XP".
  - All Accounts will probably come over from XP as "Administrator" Accounts. They should be changed to "Standard" Accounts. See my Windows 7 Easy Transfer Tool tips in my Win 7 Upgrade sheet.
45. **CREATE YOUR MAIN "STANDARD" USER ACCOUNT.**
- This is the account you plan to use all the time and should be named your preferred Account name. This user account should be a "Standard" user Account, not an "Administrator" Account. (*From the Administrator Account, go to Control Panel > under User Accounts and Family Safety, click "Add or remove user accounts" > Create a new account*). **WARNING: Plan to never change any Account Name. If you do, the C:\Users\<Your Username> Folder name will not change and will not match your new username.**
  - Repeat steps 25 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 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
46. **ADDITIONAL "STANDARD" USERS as needed.**
- From the Administrator Account, manually create any additional desired "Standard" user accounts.
  - Repeat steps 25 through 43 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.
47. **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.
48. **DEFRAG:** (*Control Panel > System & security > System > Performance Information & tools > Advanced tools > Open Disk Defragmenter*) or simply Search: 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.
49. **POWER PLAN:** (*Control Panel > System and Maintenance > Power Options*)
- CHOOSE A FINAL POWER PLAN: For Desktops, set "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".
  - BUTTON FUNCTION: Verify the "Power Button" action, the "Close Lid" action, "When to turn off the display" action, "When the computer sleeps" action, "Adjust the display brightness" and etc.
50.  **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.

51. **BACKGROUND PROGRAMS:** If desired, turn off any unnecessary background programs or services using the "STARTER" Utility Program. Be careful.
52. **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.
53. **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.
54. **IMAGE BACKUP:** Do a Windows 7 full image back-up of your new install to an external Hard-drive. To create a Windows 7 backup image, click (*Control Panel > System and security > Backup and restore center > "Create a system image"*).
55. **BURN RECOVERY DVD's:** For new PC's, burn a set of Recovery DVD's per the PC's User Manual.
56. **AUTOMATIC UPDATES:** (Windows Update) Configure to "Install Updates automatically" - (*Control Panel > System and Security > under "Windows Update", click "Turn Automatic updating on or off"*). 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.
57. **SYSTEM PROTECTION (SYSTEM RESTORE):** (*Control Panel > System and security > 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. SET A RESTORE POINT: This a good time to create a Windows Restore Point. Click "Create".
58. **USER ACCOUNT SECURITY:** Make sure that all user accounts are "Standard" except for the on "Admin-PC" User Account which should be "Administrator".
59. **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!**
  - b. If you have multiple printers, be sure to select which printer is to be the Default printer for each User.
  - c. From each printer's Properties Window, send a Test Page to the printer and see if it comes out OK.
60. **Make sure the CD/DVD Drive is empty before powering down the PC !**