

Windows 7 Setup Workflow

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What's in the box?

- Remove from box
- Check setup quick guide and/or packing slips to be sure all parts are there
- If customer plans to connect via wireless:
 - Is there actually a router?
 - Does the customer have the router login and password?
 - Does the customer know the WiFi passphrase?
- Assemble
- Boot up
- Register, etc
- Inventory (Speccy <http://www.piriform.com/speccy> or SIW <http://www.gtopala.com/>)

Update, Uninstall, Install...

- Windows updates then reboot
- Check System Restore
- PC Decrapifier (<http://pcdecrapifier.com/>)
- Install, configure anti-virus software. Do not scan now.
- Ninite (<http://ninite.com/>)
- Windows Live Essentials or alternatives (<http://explore.live.com/windows-live-essentials>)
- Set up ISP-based email. Test send and receive. Set "leave on server" info
- Install (MS) Office and accept EULA. Activate. Open each program.
- For MS Office: review default settings for save location, fonts and paragraphs.
- Autoruns (<http://technet.microsoft.com/en-us/sysinternals/bb963902>)
- Reboot (install more updates if they are there)
- Clean temp files
 - (<http://www.geekstogo.com/forum/files/file/187-tfc-temp-file-cleaner-by-oldtimer/>)
- CCleaner (<http://www.piriform.com/ccleaner>)
- Reboot

Prepare to Transfer files

- Identify everything that needs to be transferred
 - How many user accounts? Do they all need to be transferred?
 - Anyone using iTunes?
 - Any accounting or tax programs?
 - Simply Accounting custom templates are not where you expect them to be
 - Some versions of TurboTax store files in C:\
 - If going to a newer version of Simply or Quicken, you have to do a special export or save procedure on the old machine.
 - What about all that crap on the Desktop? Are those really shortcuts, or actual objects? Create Old_Desktop folder in the new My Documents and place a FAVORITE link to the directory.
- Commonly overlooked things that you will regret not having copied especially if you are only working with one monitor
 - Favorites
 - Cookies
 - Backup IE setting: (<http://backsettings.com/internet-explorer-backup.html>)
 - Backup Firefox settings (<http://mozbackup.jasnapaka.com/>)
 - Email
 - Photos that are someplace unexpected
 - License keys for accounting programs
- Determine best transfer method
 - How much stuff?
 - How complicated?
 - Is there already a backup?
 - Does the customer know all the email passwords?
- Backup to hard drive or whatever you decided to use

Protect

- Create rescue disc
- Get a Diet Pepsi and a slice or check on the backup from the old machine
- Check firewall settings
- WOT for all browsers
- secunia.com

Customize

- Install, test printer
- Install any required software so files from old computer are useable (Simply Accounting, iTunes, etc.)
- Transfer files from old computer or backup drive if necessary and possible
- Test that documents open properly, addresses/favorites are present
- Install, test other peripherals --- webcam, wireless mouse, whatever
- Set up backup
- Do a small backup and a confidence restore
- Finish setting up backup
- More updates!

Home stretch

- Shut down completely, then boot up
- Clean temp files
- Ccleaner
- Restart one more time!
- Show customer how to create recovery disc(s), place shortcut to that on desktop, leave discs in prominent place
- Answer questions
- Document passwords, etc for customer
- Leave business cards
- Book follow up appointment? Secure quarterly maintenance business?
- Get paid! Yay!