Windows 10 Setup Tips for Consumers

Susan Bradley, April 2023

1. Look at the calendar and determine when the second Tuesday is going to occur. Never set up a new computer on the second Tuesday or second Wednesday of the month. You may catch new security releases, and side effects may occur that you weren't expecting.

2. Before you turn on the computer, determine whether you will set up the computer with a Microsoft account or a non-Microsoft account.

3. Boot the computer. Depending on whether the computer is a newer OEM build or a refurbished Windows 10, you may be prompted to set it up with the Internet. Typically, I connect it to the Internet, but you may wish to set up without Internet access to begin with.

4. If you set a password, document it by writing it down along with your reminder question. If you answer these questions without being truthful, they may make it harder to reset the password at a later date. (I can't tell you how many times during setup I have forgotten a password, only to have to start over again.)

5. Once the system begins the initial boot process, ensure that the computer appears healthy. You shouldn't hear any unusual sounds. The fan should be fairly quiet. The screen (whether a laptop or an external monitor) should be fully functional. Color and contrast should be clear and crisp.

6. Type on the keyboard to ensure that it is to your liking — responsive to how you type and with no lag. Now is the time to analyze whether or not you like this computer. You usually have a window of time to return it. From this point, we start the personalization process.

7. Review what is installed on the system by default. I am not a fan of "decrapifier" programs, especially if I am not there to see the impact. I recommend that you go into programs and features (add remove programs) and uninstall anything you don't want. This should include any trial versions of Office software, which you should remove if you wish to install a copy of Office you already have.

8. Review the system for any additional trial versions of software including antivirus, video, or audio. You'll want to install the security software of your choosing, so remove that antivirus trial *before* going any further.

9. Start thinking about how you like your computer menu system set up. Are you someone who prefers icons on the desktop, or a classic menu system? We will determine this later. First we will install updates and software, *then* come back to the menu system.

10. Go to **Start | Settings,** then click on **About.** Determine which version of Windows 10 the system came with.

11. Determine which feature release version of Windows is installed. As of this writing, I am fully comfortable with, and recommend, Windows 10 22H2. If your computer is not on this version, don't worry – it will be soon. Because a new feature release for Windows 10 may arrive in the fall of 2023, I recommend that you download and run the GRC InControl tool. It will allow you to lock the feature version at 22H2 and prevent updates. Keep watching for my recommendations about when Windows feature releases are acceptable.

12. If your PC has Windows 10 S mode – which I've seen sold quite a bit at a cheaper price – you can upgrade to Windows 10 Home. S mode allows you to install only software from the Microsoft store and thus can limit what you are able to install. Follow this Microsoft guidance to change out of S mode.

13. Windows 10 Professional keys are much harder to find these days from legitimate sites, so I no longer recommend that you upgrade from Windows 10 Home to Professional. If, however, you happen to have a legit key lying around, you can follow this guidance. The Professional Edition gives a bit more control over updates, along with other benefits.

14. Now that we have the operating system at a position I call "prebuild," review how you plan to back up the operating system. I always purchase (at a minimum) an external USB-based hard drive in the case of desktop PCs, or a very small but large-capacity USB-based flash drive for my laptops. Using your preferred backup software (I use Macrium Reflect, but there are other vendors out there), make the first of what will be many image backups of your computer. This ensures that, should something go wrong, you can roll yourself back to a functional point in time.

15. Determine what version of Office or LibreOffice you plan to install. I do *not* recommend installing an older, unsupported Office version on your new computer. Also, be careful of Office suites that are advertised at very low prices. Non-subscription copies of Office cannot be installed on up to five computers; only

subscription versions can. If you see an Office suite advertised as a perpetual version that can be installed on five computers, know that this is a scam – you are more than likely buying a bogus, stolen enterprise key. Be aware that newer versions of Office no longer have individual updates but instead install in the background. I recommend that you follow [this guide](#) to set the patching channel to be the slower business type so that you get changes more slowly.

16. Now install all your other software. I am not a fan of software that copies the installation from another machine to your newer machines, because Registry keys and permissions may not be set right. Take the time to dig up all your old downloads and installation CD-ROMs to see whether they will install. Older software that worked perfectly well on an older operating system may not be happy on a newer, more modern system. Anytime you change an operating system, be accepting of change. You may need to find different software that will be equivalent, or you may need to make some adjustments in the settings.

17. If an older application is not happy, right-click on the shortcut on the desktop and go into **Properties;** click the **Compatibility** tab. Try to run the compatibility troubleshooter to see whether it will behave better. You may also want to try a combination of either "Run this program in compatibility mode for Windows 7" or "Run this program as administrator."

18. Don't get frustrated if something doesn't work. Consider this a time to try out a new application. (We were all using DOS at one time, and look at us now!)

19. Once you have all your base applications installed, check to ensure each is running correctly. (Note: We have not yet asked the computer to update for Windows patches, nor have we set up a menu or shortcut system.) Make another backup at this point.

20. What about those files on your old system? How do you get them onto your new computer? It depends. Ideally, your email should be pulled into your computer using IMAP and not POP. IMAP is newer and more secure; the files and data are stored in the ISP storage and can be read and retrieved from any other computer or any device. If you use Outlook PST files, you may need to import them into your computer, depending on your email client, your ISP, and which Office subscription you have. This is a topic that is better served in our forums, with more direct one-on-one advice, depending on your settings.

21. Think of your browsers and all your settings, bookmarks, plugins, etc. For each browser, export out those settings. (You may need to Google and search for the exact instructions for each browser.) Typically, I will use the same USB external drive that I've already used for backups to transport information from new to old.

22. For the rest of the data, it may depend on what you need from the old system. I typically will copy the contents of my old computer to an external hard drive and maintain that data, even if I don't copy all of it over to my new system. Turn the old computer off and leave it functional for a bit. Determine whether you have forgotten to copy any files to your new system.

23. A more advanced user may wish to give [Disk2VHD](#) a try. It makes a virtual hard drive out of your old PC. If your new computer can support running a virtual machine (VMware, Hyper-V, etc.), you can even mount the old computer and boot it up later, should you realize you've forgotten something. Eventually, you'll want to wipe the old computer's hard drive and destroy it – I like to get my frustrations out with the hammer method. If you wish to donate the drive (assuming you think it has more life left), do an industrial-strength wipe. If you're like me, you know that the old computer has too much of value inside to merely hand it over as is.

24. Determine how you will set up your computer's organization system. Are you a piler or a filer? I still use "icons on my desktop" as a means to organize my computer. The easiest way to do this is by copying the desktop icons from the old computer to the new one, and then deleting the ones I definitely won't need.

25. At this point in a new system configuration, I have not yet made the two adjustments I do to *every* computer I touch. These are the next two steps.

26. File extensions for known file types are hidden by default in File Explorer. Fortunately, it's easy to show file extensions using a checkbox in the File Explorer ribbon. Open File Explorer by double-clicking the program icon in the Task Bar. Select the **View** tab. Click the **File name extensions** checkbox to show file extensions. In that same section, click **Hidden items.** This exposes such user folders as AppData and others that I may use at a later date. Make sure this setting is on both your old computer *and* your new computer.

27. On the old computer, open File Explorer and go to the main C drive. Click on the **Users** folder. Find your user profile folder, which will usually have the name you use to sign in to Windows. For example, if you sign in as **Susan,** you should find the folder **C:\users\Susan.** There you will find those all-important folders Desktop, Documents, Downloads, Favorites, Links, Music, Pictures, Videos, OneDrive, and perhaps a few more. Copy all those folders to the external device you are using to transport data to your new system. If there are files and folders on your old system that you *don't* want to move to your new one, that's acceptable as well. This is the time to prioritize as you see fit.

28. Go to the new computer and once again ensure that the folder structure is adjusted as noted above to show file name extensions and hidden items.

29. Copy the contents of the \users\username\desktop\ folder to the same location on the new computer. If you are like me, the act of copying the Desktop folder from the old system to the new one will point out those old applications I forgot to install on the new system. I then decide whether I really need these in the future. Follow up with any additional installs as needed.

30. Now, how do *you* organize your computer? I never use the native menu system that Microsoft thinks I should use – I have my own organization method. For me, this means purchasing and downloading the Stardock program [Fences,](#) where I corral all the similar icons of an application. This helps me because I tend to remote into computers from other computers with differently sized monitors; if I don't use a tool like Fences, the icons will move all over the screen. Very annoying.

31. Determine whether you need a classic menu for such items as the operating system or for Office. Even if you purchase a newer Office 365, you can download and install a [classic Office menu system](#) that makes it look like Office 2010.

32. Note that I've *still* not told you to update the operating system. I've spent all this time downloading the applications I want and tweaking the operating system.

33. Desktop tweaking is up next. Want specific desktop pictures to rotate? Want a different wallpaper each day? Want your mouse to have a slightly larger mouse icon, or trails that drag a line across your screen? Need to slow down the mouse so that it doesn't race too fast? Need to adjust the mouse-click so that double-click isn't too fast? But wait – before you delve too deeply into the details of customization of mice and mouses, stop and ensure you've purchased a new one. Yes, you heard me right – when I buy a new computer, I buy a new mouse. My personal preference is Logitech, but be aware that Logitech is now selling mice that are powered via USB rather than with batteries, so you may need to shop around to find the one you like. You may also want to buy a new [mousepad](#) as well. It's amazing how much desktop gunk a mouse can build up.

34. If you have migrated the computer over about as much as you can take it, make another backup.

35. *Now* click on **Start | Settings | Update and Security** and look to see which updates are in the process of being installed and which are pending. My guess is that by this point in the process, the latest release has been installed in the background and it is ready to reboot your system. Note I have not suggested any adjustments to defer updates at this time - I want to have a fresh, new machine for the latest patches. After you reboot during this initial build process, then you can tweak update settings more. For now, ensure this new machine has all its updates.

36. Ensure that the latest cumulative update is installed, and reboot the PC. If the machine was on an older feature release (for example, 21H2) and Windows Update is not offering you 22H2, I suggest going to the ISO site, clicking on the **Update now** button, downloading the small, .exe file, and running it to update the system to 22H2.

37. Does everything function? Back it up again!

38. Now decide whether you are going to use registry keys or the InControl tool to keep your machine on Windows 10 22H2. Notice I have not told you to block any updates yet. You first want to know whether this newly built system is going to have any issues with such updates (especially for Windows 10 Professional versions that may be offered KB5012170, the secure boot patch that on an older system can trigger side effects – such as demanding a BitLocker key). If you see any side effects, use the image backups you made along the way to roll back. Know *now* if a machine is going to misbehave and react to updates. It should function just fine and behave itself at this point in the process.

39. Going forward, you can decide which kind of patcher you'd like to be. You can defer updates merely by adjusting the deferral dates until I approve them, or you can use one of the tools at www.blockapatch.com to selectively install your machine.

40. Also review whether you want to block drivers. On Microsoft surface devices, I do not; on other machines, I may. You can use these settings to block drivers.