Transitioning from One Machine to Another (3/16/20)

In previous handouts I have addressed items such as speeding up a slow computer and also giving your computer a checkup for viruses, malware and spyware. In another, I talked about some settings to make the computer more user-friendly. There are other subjects that are also important including backing up your data. This write up is going to address two common situations that, sooner or later, all computer owners must face - cleaning a computer before throwing or giving it away and taking a new computer out of the box and making it ready for daily use.

In this write up I am not going to give details about where to click or how what to do to exactly carry out the task. This will be more of a check list to make sure certain things get done. See other handouts or check on the Internet to get details on how to accomplish some of these things. I'm assuming new machine in Windows 10.

Preparing a New Machine

- Unpack the machine and connect all wires. With laptop insert battery and plug it in. Most laptop batteries are shipped only partially charged. Some are preinstalled, but only partially chaged.
- Save packing material in case of early failure and unit must be returned to store.
- Save any disks or write ups that came with the new one. Most likely they will not be needed, but keep them just in case. In general, if you need these disks you are in dire trouble. Most machines today don't come with CDs any more. Rather there is a 'Recovery Partition" on the hard drive. Reason for this is that it takes too many CDs to have all necessary information
- Turn machine on and be prepared to be "interviewed" by Windows - specifically Cortana.
- Enter your name, which will sometimes become the computer's name. (Some brands have a name already that can be changed.) You obviously must agree to the EULA - End User License Agreement.
- I would suggest not entering a password (to open and use machine). You can just skip this step.
- Interview will urge you to open a "Microsoft Account". They may not let you skip this step. If you had a Microsoft Account on you old machine, use the same on.
- Set the time to appropriate time zone. Note: Arizona time is different from Mountain Time because AZ does not observe daylight saving time. If you choose Mountain Time, machine will change time in March.
- Connect to the Internet. Virtually all new machines have wireless capability and work well with your router. This includes desktops. You must know your WiFi password, if there is one. If there is no WiFi password, you should set one up in your router.
- Wait for desktop to appear, which may include a few icons and wallpaper. The wallpaper (background) may give the manufacturer's name. Sometimes the only icon to appear automatically is the recycle bin.
- You will likely be asked to register the new equipment. This isn't really necessary as it will generate many emails. Warranty still applies as long as you have the receipt. I would go ahead and register in case you need to call the manufacturer for help. Be careful of the number you call for help. Manufacturer help lines typically don't charge any fee on a new computer while under warany. If you call someone and they ask for money, the number is likely wrong.
- Personalize your computer with desktop background and screen saver by right clicking desktop and going to Personalize. You can use a personal photograph it you'd like.
- Get to Control Panel (Right click start and type "Control Panel" in Run box and change the view from Category to Large Icons. Then, under System, check the specs of the machine. You can also left click Start, left click the little gear, choose System and then About. Note the version of Windows 10. At this writing latest is #1809. If this is not the number installed, go to windows update and search for updates. Also, make sure you note the RAM. This lets you know that you got the computer you thought you bought and will help later if asked about specs.
- In Control Panel go to User Accounts and the click on User Account Control and reduce notification to zero.
- If you have a router in your house, go to Control Panel, Windows Firewall and disable the firewall for private networks. This will facilitate easier installation of wireless devices - especially printers. The router provides the firewall as long as you are within your home. You might want to leave the Public Firewall enabled, which will protect you if you connect at Starbucks or McDonalds.
- In the Control Panel, go to Folder Options and the View and UNcheck the box that says to hide extensions for known file types. This will show file extensions if Windows Explorer
- In Control Panel go to Programs and Features and uninstall any commercial virus checker that is pre-loaded such as Norton or McAfee. These will eventually want payment. Avast or AVG are good and they are free. In addition, Windows Defender is preinstall by Microsoft but doesn't show on this list.
- Windows Defender is built into Windows 10. It is easier to use this than Avast or AVG. Set virus checker to run automatically - even free ones. I would avoid McAfee even if it is free from Cox. It still burdens your machine more than it should. Same goes for Norton. If those were preinstalled, remove them from Programs and Features in the Control Panel.
- Install other cleaner programs from www.filehippo.com including CCleaner, Malwarebytes and SuperAntiSpyware.

- Customize your desktop with icons or shortcuts to frequently used programs. To do this, find then on the programs list after Left clicking the start button and then Right clicking the program desired. Navigate to the area that says "show file location", Right clicking the file name and send it to desktop. This creates a shortcut.
- Examine MSCONFIG (in Run field type "msconfig" without quotes) and disable some unneeded programs so that they don't start at boot time.
- There is likely a copy of Microsoft Office installed, but not activated. You can purchase a copy or you can load a free office suite from www.filehippo.com under Office/New - Kingsoft, LibreOffice and Apache Open Office all work fine. All these suites also include a word processor and a spreadsheet. Defaults need be set to open real Office Docs. This default setting happens automatically during custom setup. It is often convenient to put icons on the desktop for frequently used programs. If you have Office 365 it can be loaded to three computers.
- With Windows 10, Edge will be your default browser. Internet Explorer that you've come to know through all previous versions of Windows, is still there. If you want it, open File Explorer, click on the C: drive, click on Program Files, click on Internet Explorer folder, find "iexplore.exe" right click it and put it on the desktop. This is IE 11 and is more familiar than Edge. IE 11 may not work properly with all websites.
- IE is be replaced by Edge in Win10. In addition, consider adding at least one other browser such as Chrome or Firefox. Be sure to recognize that you can only have one DEFAULT browser. It doesn't matter which one, but the default will be the one that opens a link in an email. All browsers have the ability to set a "Home Page". This will be done in the browser's settings area - different in each browser Set start or home page in each browser.
- If you have a webcam, download and install Skype from www.filehippo.com. Open a free account. A free Skype account allows computer to computer video calls. Paying for Skype allows you to call telephones.
- Windows Live Mail (WLM) is not installed, so, if you want it, go to a Microsoft website and download and install Windows Essentials 2012, which includes Live Mail. Essentials also include some other items such as DVD maker. WLM can be used instead of the newly installed Win10 Email Handler. It's your choice what to use. Also know that Mozilla Thunderbird is a very good and versatile email handler.
- If you are using WLM you can import your contacts from another machine. If you are using a web-based email such as Gmail, contacts will be accessible from website.
- PDF files will be opened by Edge by default. No need for Acrobat Reader in Windows 10
- Import any data you want on the new machine from your old machine using an external source.
- Import your favorites from other machine into your browser of choice.
- Load Programs such as MS Office, Quicken, TurboTax, Photoshop, etc from original disks.
- Install Printers and other peripherals such as an external webcam. In many cases, using a printer wired, can be accomplished by just plugging it in and turning it on. Wireless is trickier. It is always a good idea to use the disk that came with the printer to achieve installation with full features - e.g. scanning.

The above list will get you started on a new machine. I guess it is evident that a new machine can't be pulled out of the box and used efficiently without a little (or a lot) of preparation.

Preparing an Old Machine for "Demise"

An old computer saying is: There are two kinds of machines - those that have failed and those that will fail. If your machine is aging, as evidenced by five to eight years of service, or beginning to act strangely, or the hard drive is nearly filled to capacity, or the Operating System (version of Windows) is really old such as Window XP or Vista, it may be time to get a new one before the actual failure of the old one. Transition to a new machine is easier and less expensive if done before the old machine fails completely. Here is a list of things to do before your machine goes down for the count.

A Magic Fix??

Here is one thing to try before writing off your old machine as "dead". The prime symptom here may be that a machine will not boot at all or it may appear to "freeze" during boot up. It could get as far as the windows screen at which time the circle or hourglass keeps spinning. Or it may even get to the desktop but it doesn't have full functionality - that is, certain mouse clicks don't work. You try rebooting several times with no improvement. This is often indicative of a static electricity buildup on the motherboard and can sometimes be fixed using the following procedure:

- In a Laptop, remove the power cord
- Close machine, turn it over and remove the battery. In most units this is easy to do with a couple of toggle switches. In some units the battery is hidden behind a panel with 8 or 10 screws. In the latter case, don't open it up.
- With no battery of power (so it can't possibly go on), hold in the on/off button for 20 seconds. This grounds the static. In the case where you can't remove the battery, just hold on/off button down for 20 seconds without releasing it. This can accomplish the same thing.
- Replace battery and plug in a try it again. This works about half the time.

- In a Desktop, the procedure is the same except there is no battery to remove - remove the power cord from the back of the tower.
- Hold in the on/off button for 20 seconds
- Reconnect the power cord and try to boot again. This has even worked on an all-in-one machine.

Backup

It is always a good idea to back up your data and anything you would hate to lose. Backup can be done manually on an external drive or on the cloud. This includes, but is not limited to:

- Pictures
- Documents including Spreadsheets, .doc files, .xls files, .pdf files etc
- Music, including songs you have downloaded (such as iTunes) or CDs you have copied.
- Videos you may have created or downloaded.
- Contacts from you email program - Especially if you are using Windows Live Mail or MS Outlook. Use .csv format for compatibility (Comma Separated Value).
- Favorites - export your favorites from the old machine so you can import to the new machine
- Any financial records that could be in a proprietary format such as Quicken, Quickbooks or Turbo Tax.
- Programs such as Word, Excel, Quicken cannot be backed up. They have to be reloaded on the new unit.

See "Backing Up Your Files - Revisited" at the end of the File Management section below. File Management gives you some pointers on how to accomplish the above. Since backing up usually involves an external device, it provides a mechanism for getting items to a new machine.

If your plan is the throw away the old one, after rescuing the data as indicated above, your task is easy. Simple open the appropriate compartment and remove the hard drive. In a desktop, it takes a couple of minutes and usually involves removing four screws. Save the removed hard drive (it can be read with a special device) and recycle the rest of the computer. It is essentially worthless without a hard drive and would contain NO user data. If you want to destroy the drive, hit is with a hammer or bend the pins so it can't be connected to anything. IMO keep it just in case you have forgotten to remove something from it.

If, after you are satisfied that the old computer is of no more use to you, it can be a charitable thing to donate to a good cause. There is someone in the computer club who can clean it and donate to an under privileged school. If this is what you'd like to do, give me a call and I can put you in touch with him. He makes sure it's clear of all personal data.
Note: Starting with Windows 7, there is "Recovery" option, that, when executed reloads the operating system (i.e. Windows) and makes the computer look like the day it was purchased. Since this wipes out all your personal data, including programs personally installed, you don't want to do this unless you are ready to give the machine away. Getting to this option is usually done by forcing your computer into a repair state - turn it on and then turn it off during boot three times. It gets mad at you and goes into repair mode and then you can go to advanced options. Slightly different in Windows 8. Google it for details.

My Thoughts on New Computers

Personal Opinion - Not a hard-and-fast rule, but the general average useful life of a well-maintained computer is somewhere from five to seven years. It certainly could be longer OR shorter. But usually, after this time, the machine actually may appear to be performing "satisfactorily" but the march or technology almost always (there is one of my oxymorons) renders it far inferior to the performance of a new purchase. If you are using a machine that is ten years old and you are dissatisfied by its slowness, absolutely consider a new one. Moore's Law states that about every two years (maybe two and half years) a new computer's capability doubles that of one two years old. It you apply Moore's Law three times, 2 x 2 x 2 means a computer is 8 times (remember it doubled every cycle) as good and one bought 6 or 7 years ago. At this point, a new one makes sense. This is assuming you are buying one in about the same price range. If you are tempted to upgrade an operating system - e.g. go from Widows 7 to 10, you must consider the expense involved and the possibility that the old computer's hardware cannot handle the new program.

The above obviously has exceptions. I've also found that if you buy a high-end machine with very good specs, it tends to "age slower"

Older computers can tend to run into trouble where certain updates to programs won't take. Windows 7 (and older) not being supported any longer, will not permit certain updates. Also new peripherals, such as newer printers, may not function properly with older systems. One more opinion… if you are still using a machine running Vista, it had to be purchased in 2009 or before, therefore it honestly means it's time for a new one. Same is true for older systems.

File Management (3/16/20)

Having discussed setting up a new machine, the topic of file management becomes very relevant. MS Office documents (Word/Excel/PowerPoint) are files, which represent correspondence, stories, budgets and investment data, important lists (like lists of passwords) and names/addresses that often need to be categorized and kept track of. Pictures and Songs, also saved in a computer as files, need to be sorted and managed. What follows is a brief description of some items that pertain to this subject.

File Explorer (aka Windows Explorer)

It is first important to note that this is not a web browser and is, therefore, different from Internet Explorer, Chrome, or Firefox. File Explorer (called Windows Explorer in Win 7 and prior) opens a two-paned window that shows how files are stored on your hard drive or any drive/CD/DVD/Flash Drive/Camera connected to the computer. In the left pane is the structure or hierarchy of files and in the right pane is a detailed view of what is highlighted in the left pane.

The most common way to open this feature is to right click on the start button and then choosing Open Windows Explore (Win 7). Since Win 8 has no start button you can click on the icon in the task bar that looks like a manila folder or hold down the Windows Key and hit the letter "E". In Win 10 use folder on task bar, the keyboard shortcut or right click the start button.

Once open you may notice subtle difference in the way they are displayed in each version of Windows. The way the right pane is viewed can be changed by using choices in the View Ribbon or dropdown menu. List, Details and Large Icons are the most common choices. Pick the one that meets your needs.

List - just gives the file names in several columns
Details - gives file names along with file size, date last changed as well as the file type (probably most used view).
Large Icons - especially useful with pictures because it shows you a miniature picture.

There is a place in the Control Panel under Folder Options that lets you see the three-letter extension after a file name. Unfortunately this feature is off by default (Microsoft doesn't do everything right). Under Folder Options, choose View and take the checkmark away from the line that says "hide extensions of know file types". This makes life much easier.

Folder Creation and Moving (or Copying) Files

Creating a new folder is often desirable as you can save things (files) by subject, by date or by occasion (e.g. birthday or reunion). To create a folder, highlight the folder you want the new one to be under. Then right click and select New, then Folder. After you click on Folder you will see a new entry waiting to be named. If you just hit enter a folder called "New Folder" will be created. Better to name it something meaningful.

Arranging/moving/copying files it is best done across the panes in Windows Explorer. Find the file you want to manipulate in the right pane, note the target folder in the left pane. Then click and hold the left button down while you drag the folder across the "pane line" and hover over the destination. Let go and the file will be moved or copied according to these rules: If you are within the same drive (e.g. "C:" drive) the file will be moved. If you go to a different drive it will be copied and there will still be a copy where you started. If you hold down the control button (CTRL) on the keyboard while you are clicking and dragging within a drive, it will copy instead of move.

Multiple files can be selected to move/copy by clicking while holding down the shift or CTRL key. Also CTRL and "A" highlights "All" the files in a directory. CTRL+Click allows you to choose a number of non-contiguous files. Use the same rules here that you use to highlight emails. BTW, you can use these rules to move email messages from one folder to another. Also entire folders can be moved. Be careful here, it you click and drag in an uncontrolled manner you may accidently relocate a folder and then have trouble finding it.

Backing Up Your Files- Revisited (Because this is REALLY important)

Use the procedures from this page, with an external drive, to backup pictures, documents, songs and important data such as Quicken or Tax stuff. Plug an external device into a USB port and the computer will assign it a letter. Make some appropriately named folders on that drive and then use Window Explorer to drag files, that you want backed up, to the external drive. Remember they will be copies not truly moved. If your computer's main disk is critically full, you will have to delete from the source drive in order to achieve free space. Backing files up also facilitates moving them to a newly purchased machine. Some external drives, notably Passport by Western Digital, come with a backup program that you can install and it takes care of backing up critical files automatically. **I can't overemphasize the importance of backing up data.** Commercial services such as Carbonite work well too, but they charge a monthly fee.