

Setup and Configuration Checklist

Storm King Computer Consulting will use the following checklist when setting up and configuring your computer(s).

For computers, initial setup and configuration usually takes two to three hours per computer. Peripheral and printer setups typically take one-half to one hour.

General Computer Information

- Make/Model/Type: _____
- Serial Number: _____
- Part Number: _____
- Asset Tag: _____
- Mac Address: _____
- Wireless Card Mac Address: _____
- Operating System: _____
- Hard Drive Type/Size: _____
- Video Card Type: _____
- RAM Type and Amount: _____
- Monitor Model/Serial Number: _____
- Windows Serial Number: _____ - _____ - _____ - _____ - _____

Type of Operating System Install

- OEM factory install.
- Clone, Sysprep, or ISO.
- Remote/network install.
- Re-installation - for a computers that need to be re-installed, always create an Archive (Mac) or Disk Image (PC) and do a clean install by wiping the hard drive (delete and re-create primary partition and reformat).

Initial Configuration and Setup

- Boot up, log in as Administrator, and set the local Administrator password.
- Check vendor websites for latest downloads, utilities, drivers, BIOS firmware, etc.
- Check My Computer > Properties > Hardware > Device Manager (PC) or Apple Menu > About This Mac > More Info > System Profiler (Mac) for compatibility issues.
- Adjust clock and time zone.
- Change folder view.
- Adjust mouse speed.
- Optimize screen resolution.
- Disable hibernate/standby/sleep (desktops) or enable (laptops).
- Adjust power settings depending whether the computer is a laptop or desktop.
- Uninstall any pre-installed software programs.
- Setup wireless/wired internet connection.
- Connect to the local network.
- Rename computer, and join workgroup or domain. Check Active Directory or LDAP Computer list to avoid duplications. (reboot as necessary).
- Install anti-virus (AVG Free, ClamXAV or other) and anti-spyware (Spybot, MacScan or other) software.
- Enable firewall.
- Enable and configure Automatic Updates (PC) or Software Update (Mac).
- Download and install all appropriate software updates.

Windows Specific Configuration

Go to Start > Control Panel > Add Remove Programs > Windows Components and uninstall:

- In Networking Services, Remove Internet Gateway Device Discovery and Control Client
- MSN Explorer.
- Outlook Express (if applicable).
- Windows Messenger.
- Install current Service Pack on PC if not already installed.

Click on My Computer > Properties:

- Adjust for Best Performance or Let Windows Choose What's Best.
- Disable error reporting.
- Allow users to connect remotely to this computer.
- Setup user accounts and passwords.
- Setup Shared Documents folders (Workgroup) or Map Network Drives (Domain).
- Setup account privileges and security.
- Disable Automatic Login.
- Disable the Guest Account (unless instructed otherwise).

Uncheck allow remote assistance.

Go to Start > Run > Type: msconfig > Services > Uncheck:

- Error Reporting and any Services that don't need to be running.

Go to Start > Run > Type: msconfig > Startup > Uncheck:

- Any Startup Items that don't need to be running.

Right-click on the Taskbar > Properties

- Uncheck Hide Inactive Icons.
- Check Show Quick Launch.
- Check show Administrative Tools.

Go to Gpedit.msc: User Config > Admin Templates > Windows Components > Internet Explorer > Internet Control panel > Advanced Page > Empty Temporary Internet Files folder when browser is closed. "Enabled"

- Setup rescue and recovery/backup partition.
- Defragment the hard drive.

Mac Specific Configuration

- Setup user accounts and passwords.
 - Setup Public folder and file sharing.
 - For non-administrative users enable SimpleFinder.
 - Configure iChat, Safari and Dictionary permissions.
 - If enabled, disable the root account.
 - Disable the Guest Account (unless instructed otherwise).
 - Go to System Preferences > Appearance > Set Number of Recent Items to None for all Documents, Applications, and Servers.
 - Go to System Preferences > Dashboard and Expose > Setup a hot corner to put the user to sleep.
- From System Preferences > Security button > Check:
- Require password to wake this computer from sleep or screensaver.
 - Disable Automatic Login.
 - Logout after 60 minutes of inactivity.
 - Use secure virtual memory.
 - Defragment the hard drive.
 - Go to System Preferences > Sharing > Disable all unused services.
 - Enable Apple Remote Desktop and set access privileges.
 - Defragment the hard drive Go to System Preferences > Accounts and disable Allow user to administer this computer for all unprivileged accounts.
 - Enable FileVault (as needed).
 - Enable and configure the Keychain from System Preferences > Keychain Access.

- Setup backups/restoration with Time Machine or other software.

Subsequent Configuration

- Install Adobe Acrobat or equivalent.
- Install Microsoft Office or Open Office/NeoOffice.
- Install Mozilla Firefox.
- Install other software as requested (any non-free or open-source applications require a valid license or original installation CD/DVD).
- Verify network connection.
- Setup web browser. Set default homepage. Enable pop-up blocker. Configure Preferences/Internet Options. Configure security settings.
- Setup email client and account(s). Check POP3/IMAP/SMTP settings. Verify usernames and passwords. Download mail.
- Install printer drivers.
- Setup network printers, and configure any additional peripheral devices.
- Setup common icons/shortcuts for all users.
- Show client how to access Help and Support and search computer via the Start Menu or Spotlight.
- Provide client with copy of checklist and account information.