Remote setup of a new Windows 11 computer for a small office

Demonstration checklist. A template I'd adapt to each client's policies; not a record of client work.

BEFORE SETUP

- ☐ List the apps, licenses, printers and shared folders the user needs.
- ☐ Confirm the old computer is backed up and agree which folders move.
- ☐ Agree who holds the admin account. The user works from a standard account.
- ☐ Agree the remote-access tool, time window, and whether access is removed at handoff.

SETUP

- ☐ Install approved Windows updates and confirm no restart is pending.
- ☐ Name the computer to the office's pattern.
- ☐ Confirm the client's approved antivirus and the firewall are on.
- ☐ Check the Windows edition and encryption status. Use Device Encryption on eligible Home PCs, or the client's BitLocker setup on Pro.
- ☐ Back up the recovery key to the client's approved location (such as their Microsoft work account), confirm the owner can retrieve it, and never put it in email or ticket notes.
- ☐ Install Microsoft 365 apps from the client's account, plus other approved apps.
- ☐ Add printers and print a test page.
- ☐ If the client uses OneDrive: confirm the account and storage, turn on folder backup, and wait for sync to finish.

FILE MOVE

- ☐ Copy only the agreed folders. Check for copy errors, compare counts and sizes, and open a few key files.
- ☐ Don't wipe the old computer until the client accepts in writing and the agreed hold period ends.

TEST AND HANDOFF

- ☐ The user signs in, opens email, prints, and opens three files they use daily.
- ☐ Set screen lock to the client's policy (10 minutes if they have none).
- ☐ Give the client a record: apps installed, settings changed, where the recovery key is kept (not the key).
- ☐ Client acceptance: name _____ date _____

Not included unless agreed: on-site hardware work, reinstalling Windows, enrolling in a company device-management system, large data migrations.