Microsoft

Upgrading to Windows 10:
A simple hands-on guide for everyone

If you can plug a USB flash drive into a PC, you can upgrade to Windows 10.

OK, maybe it's not *quite* that easy, but you don't need advanced technical skills. Just follow these simple steps to be a Windows 10 upgrade hero in your office or classroom.

This summer is Windows 10 upgrade season

Microsoft Windows 10 is the latest release of the world's most popular PC operating system. It's packed with new features that make using a PC more productive and more fun. It's also the most secure Windows ever, with built-in protection against viruses and malware.

And yet, despite all those new features, Windows 10 is refreshingly familiar, offering a Start experience that should feel right at home whether you're coming from Windows 7 or Windows 8.1.

Best of all, you can upgrade for free – yes, free – until the Windows 10 Upgrade Offer ends on July 29, 2016.

This guide assumes you need to upgrade more than one device. To upgrade a single device, click the Windows icon in your taskbar and use the Get Windows 10 app. For more details, visit aka.ms/upgrade.

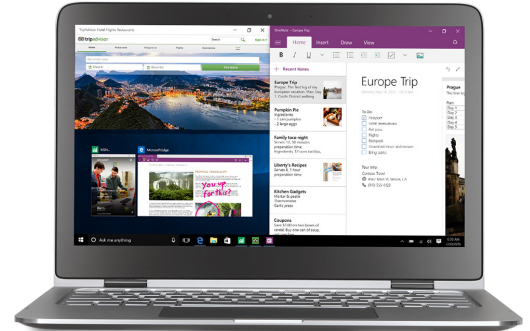## Which PCs qualify for the free upgrade offer?

The Windows 10 Upgrade Offer is valid for any PC (desktop, laptop, or tablet) running a qualified and genuine version of Windows 7 or Windows 8.1.

Devices running Home and Pro editions of Windows are eligible for the free upgrade offer. If your device is running an Enterprise edition of Windows, it is not eligible. Devices running Windows RT, such as the Microsoft Surface RT or Surface 2, can't be upgraded to Windows 10.

Your current Windows installation will be upgraded to the corresponding Windows 10 edition. For Windows 7 Starter, Home Basic, and Home Premium, as well as the core edition of Windows 8.1, that means Windows 10 Home. Windows 7 Professional and Ultimate and Windows 8.1 Pro are upgraded to Windows 10 Pro.

Not sure which version of Windows is installed on a PC you're planning to upgrade? In Windows 7 or Windows 8.1, open Control Panel, click System and Security, and then click System. That information box shows the currently installed Windows edition and the architecture (32-bit or 64-bit). Look at the bottom of the display to confirm that Windows is properly activated and genuine.

The free upgrade offer expires on July 29, 2016, which makes this summer an excellent time to upgrade.

Everything you need to know about the Windows 10 upgrade

✓ **You can make your own installation media.**
You don't need to buy a shrink-wrapped box or mess with DVDs. All you need is a USB flash drive and an Internet connection. Use the free Media Creation Tool to download the installation files.

✓ **The upgrade process is quick and easy.**
To start your Windows 10 upgrade, just insert the USB flash drive and run the Setup program. Answer a few easy questions (there won't be a test), and the remainder of the upgrade proceeds automatically, without requiring any further input from you until it's time to sign in.

✓ **If something goes wrong, you can recover easily.**
Most Windows 10 upgrades go smoothly, but in the rare case an upgrade encounters issues, the system automatically rolls back to the previous version, leaving your files and programs untouched.

✓ **You don't need a product key.**
When you upgrade a properly activated, genuine copy of Windows 7 or Windows 8.1, your new installation is automatically activated with a "digital entitlement" that's tied to the underlying hardware. If you ever need to reinstall Windows 10 for any reason, that digital entitlement means your new installation will also be activated automatically. You can refresh Windows 10 within the product or even use the same USB drive to reinstall if you ever need to.

Windows	
Edition	Windows 10 Pro
Activation	Windows is activated
Product Key	Windows 10 on this device is activated with a digital entitlement.

✓ **Is your environment more complex?**
If your environment includes one or more PCs running a Windows Enterprise or Education edition, you'll want to call in an IT Pro for help. Find more technical guidance for school-wide and larger deployments at aka.ms/edudeploy. For expert assistance, you can find a Microsoft partner at pinpoint.microsoft.com/.

Assembling your upgrade toolkit

The fastest, most reliable way to upgrade multiple PCs in an office or classroom is to download the Windows 10 installer and copy it to a USB flash drive that you can carry from one PC to the next. You'll use Microsoft's Media Creation Tool, which is available as a free download.

You can use a PC running any version of Windows to download the installation files. Make sure you're signed in with an administrator account before proceeding.

And, of course, you'll need a USB flash drive. If you're certain that every PC you plan to upgrade is using the same architecture (32-bit or 64-bit), you can choose a drive with as little as 4 GB of storage. For maximum flexibility, choose a drive with at least 8 GB of capacity. Any files on the drive will be erased when you create the installation media, so be sure to back up any important files from the drive before creating the installation media.

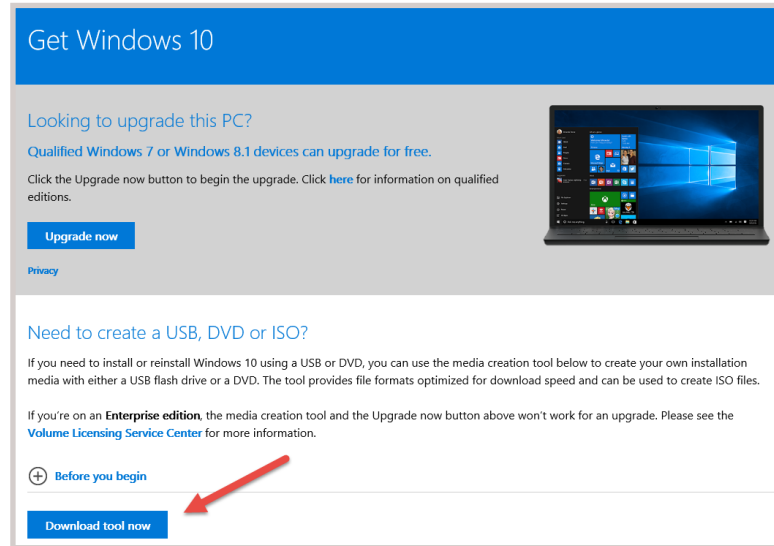With those prerequisites out of the way, let's get started.

Run the Media Creation Tool

The first step is to visit the Get Windows 10 page at microsoft.com/software-download/windows10. The **Upgrade now** button near the top of the page is the right choice for upgrading a single device. If you're planning to upgrade more than one PC, find the section headed "Need to create a USB, DVD or ISO?" and then click the **Download tool now** button.

Using Internet Explorer, you'll see a banner at the bottom of the page where you can click Run. If you visit the Get Windows 10 page using a different browser, you need to save the file before running it. After the download is complete, press Ctrl+J to open your Downloads folder and then double-click MediaCreationTool.exe to run the program.
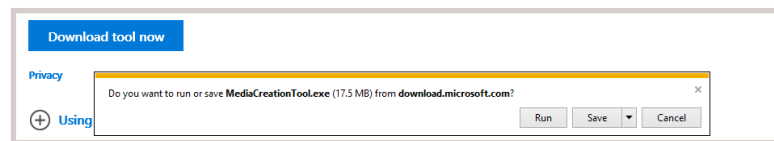
Know your options

The Media Creation Tool is a simple, straightforward wizard. You might be tempted to just click **Next** repeatedly to get this chore out of the way, but it's worth spending some time to understand your options.
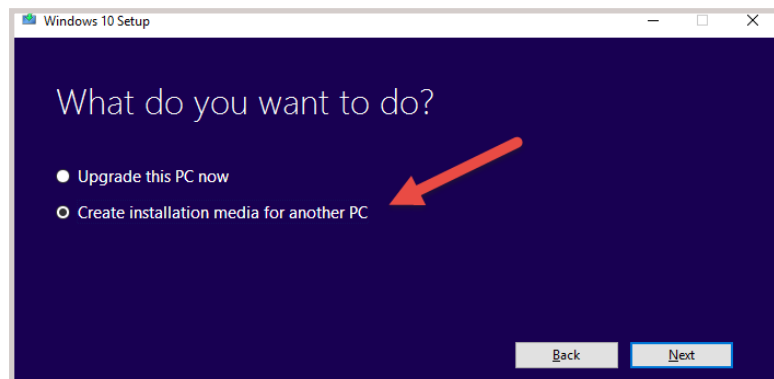

1. Visit the Windows 10 site.
You'll find the page at microsoft.com/software-download/windows10. Scroll down and click the **Download tool now** button.

2. Run the Media Creation Tool.
The Media Creation Tool should download quickly. Click **Run** and accept a license agreement before proceeding to the next step.

3. Begin creating installation media.
Choose the second option on this screen and then click **Next** to download the installation files so that you can upgrade multiple PCs.

The Windows 10 installer is not a one-size-fits-all download. Instead, you have to make three choices that determine how your installation media will work.

In its default setting, the Media Creation Tool makes these choices for you, based on the configuration of the PC on which you're running the tool. Those choices are ideal for instantly upgrading a single PC. If you plan to upgrade more than one device, click to clear the "Use the recommended options for this PC" box. That unlocks these three options:
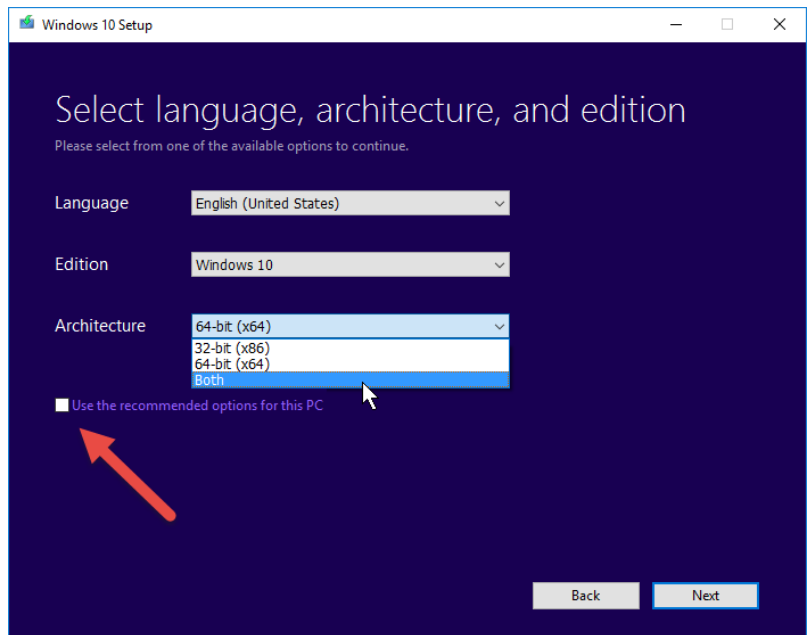
- **Language** – Choose the language and region that matches the PCs you plan to upgrade.

- **Edition** – For the overwhelming majority of cases, the default selection, Windows 10, is correct.

- **Architecture** – This option allows you to choose 32-bit (x86) or 64-bit (x64) installation files, either of which will fit on a 4 GB flash drive. Click **Both** to download a combined installer that requires an 8 GB flash drive but will work on either architecture.

After making your selection, click **Next** and choose the type of media you plan to use. The USB flash drive option is first, for a very good reason: Every modern PC has at least one USB port.

(The ISO option downloads the installer files as a single large disk image file that can be transferred to a writeable DVD using third-party software. It's a good choice for technical professionals, but using a USB flash drive is simpler and doesn't require any extra steps.)
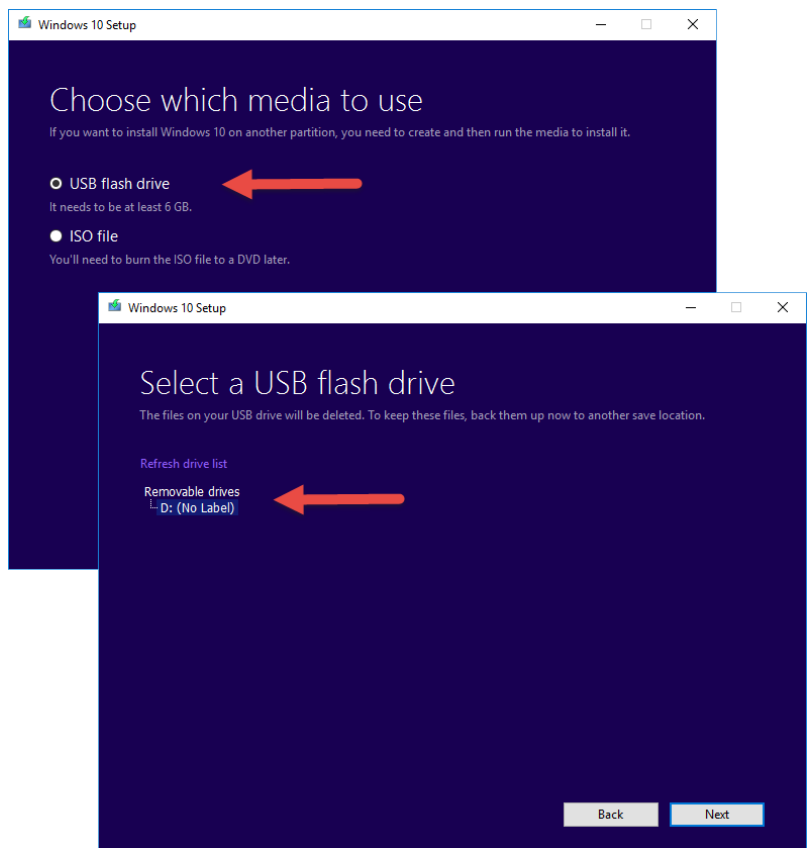
Insert your USB flash drive and click **Next**. You should see the drive listed in the Media Creation Tool. (If it's not visible, click **Refresh drive list** and try again.) Select its entry from the list and click **Next** to begin downloading the installer files that match your selection.

How long will that download take? That depends on the speed of your Internet connection. Feel free to minimize the Media Creation Tool and use your PC for other work; you can check the progress indicator occasionally to see how close you are to being finished.

4. Select a language, architecture, and edition.
Clear this check box to unlock these three options. From the Architecture list, choose **Both** for maximum flexibility.
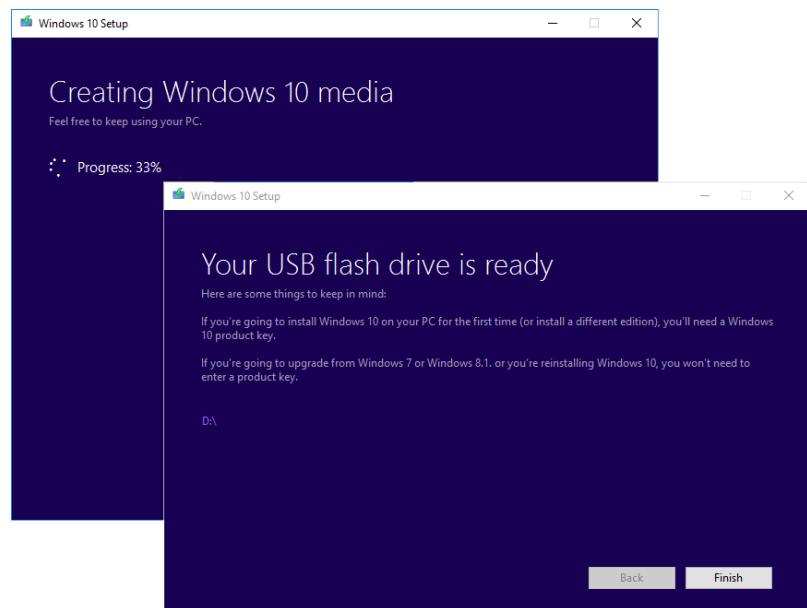

5. Choose your USB flash drive.
Click the entry for your USB flash drive here to select it, then click **Next** to begin creating your installation media.

After the download is complete, the Media Creation Tool performs a brief verification and then proceeds directly to the next step, formatting your USB flash drive and copying the installation files to it. That process takes considerably less time than the download, and when it's complete, you'll see the screen shown at the right.

Remove the USB flash drive, label it, and get ready to begin upgrading.

It's a good idea to start by upgrading a single PC. After you've succeeded with that first upgrade, you can move on to the rest of the classroom or office.

For each device you upgrade, you'll need to wait until the "Copying files" stage has completed before you can move to the next one. If you have many devices to upgrade, you can create multiple USB flash drives.

Windows 10 Setup

Creating Windows 10 media
Feel free to keep using your PC.

Progress: 33%

Windows 10 Setup

Your USB flash drive is ready
Here are some things to keep in mind:

If you're going to install Windows 10 on your PC for the first time (or install a different edition), you'll need a Windows 10 product key.

If you're going to upgrade from Windows 7 or Windows 8.1. or you're reinstalling Windows 10, you won't need to enter a product key.

D:\

Back   Finish

6. Label your Windows 10 installation media.
The Media Creation Tool lets you know when the job is done. Remove the USB drive, label it, and store it in a safe place.

Getting ready for the Windows 10 upgrade

A little bit of preparation can help your upgrade go more smoothly. Run through this checklist before you begin the upgrade process.

✓ **Check software compatibility, especially third-party antivirus programs.**
Most Windows desktop programs that run on Windows 7 and Windows 8.1 are compatible with Windows 10, but there are exceptions. Some programs might require an updated version to work properly. Others might be uninstalled or disabled during the upgrade process. For important programs, check the developer's website to see whether you need to do anything.

✓ **Check hardware requirements and compatibility.**
Any PC that runs Windows 7 or Windows 8.1 should be capable of running Windows 10. Some hardware (printers and scanners, for example) might require updated drivers. Many of those drivers will be supplied by Windows Update after you upgrade, but you can speed up the process by checking the hardware manufacturer's website first.

✓ **Install BIOS and firmware updates before upgrading.**
Every PC includes built-in software that manages the start-up process before Windows takes over. In older PC designs, this software is called the BIOS. On newer PCs that use the UEFI standard, it's known as firmware. Check with the PC

maker's support website to determine whether an update is available to help the PC work better with Windows 10.

✓ **Choose what to keep.**

During the installation process, the Windows 10 Setup program asks you what it should keep. Effectively, this lets you choose the upgrade type:

• **Keep personal files and apps**
Most of your Windows desktop programs (and Windows Store apps, if you're upgrading from Windows 8.1) will be preserved, as will most settings for user accounts.

• **Keep personal files only**
This option discards all apps and settings but keeps personal files for each user account. The end result is the same as a clean install without the need to back up and restore personal files.

• **Nothing**
This option is, effectively, a clean install. You'll need to re-create your user account when you first sign in.
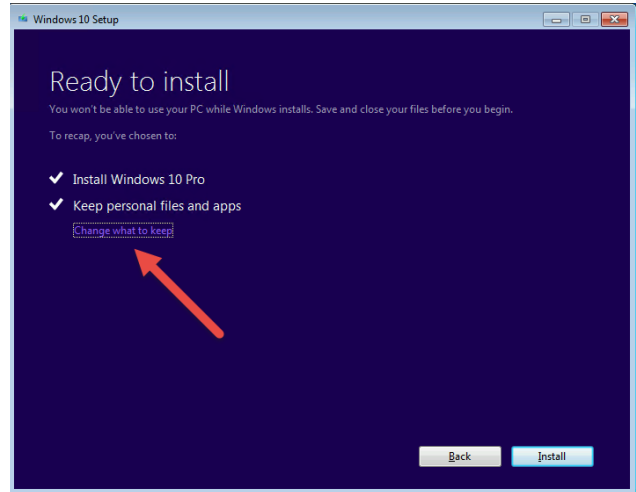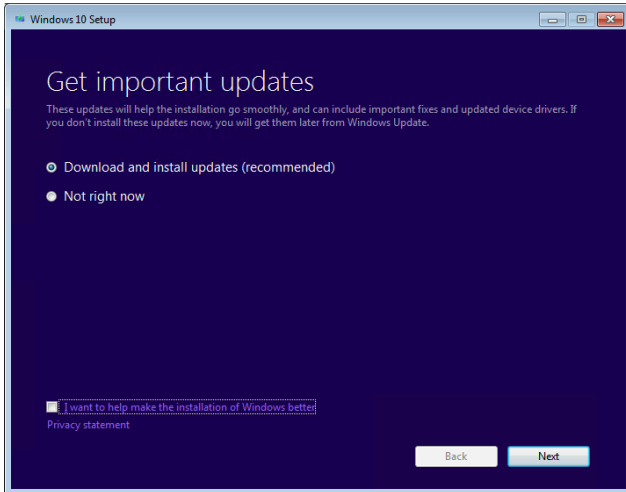
✓ **Write down any network settings.**

The upgrade process should preserve your network settings. But just in case it doesn't, make a note of any special network settings, including Wi-Fi passwords, that you might need to re-enter after the upgrade is complete.

Getting the upgrade started...

The steps shown here are for an in-place upgrade of a PC running Windows 7 or Windows 8.1. Insert the USB drive that contains the Windows 10 installation files. Sign in to Windows as an administrator, open File Explorer (called Windows Explorer in Windows 7), double-click the icon for your USB flash drive, and double-click Setup.

After accepting the license terms, the Setup program begins. Here's what to do next.
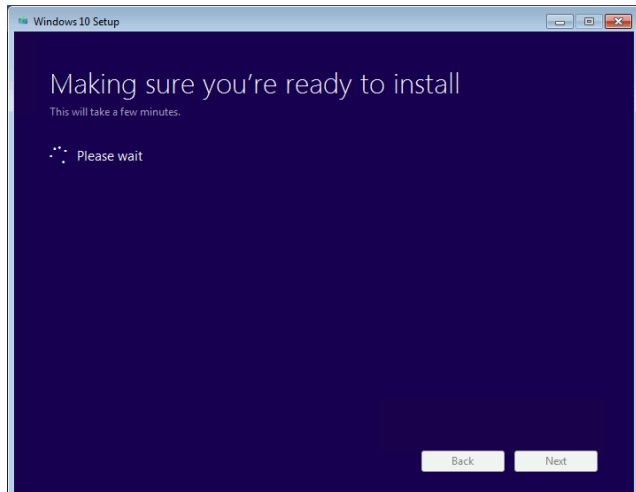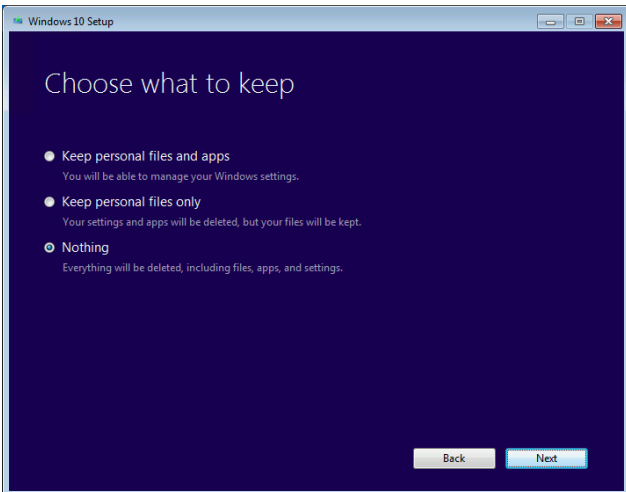

1. Say yes to updates.
As the first step in the upgrade process, Windows 10 offers to download and install the most recent updates. These updates can make the setup process smoother and help you avoid compatibility issues.

2. Decide what to keep.
The recommended option is a full upgrade, which keeps all installed desktop programs, Windows Store apps, and personal files. To change these default settings, click the link below those two check marks.

3. Get a fresh start, if you prefer.
If you clicked **Change what to keep** in the previous step, you can choose from these three options. Choose the final option (**Nothing**) to discard all files, apps, and settings and perform a clean install.
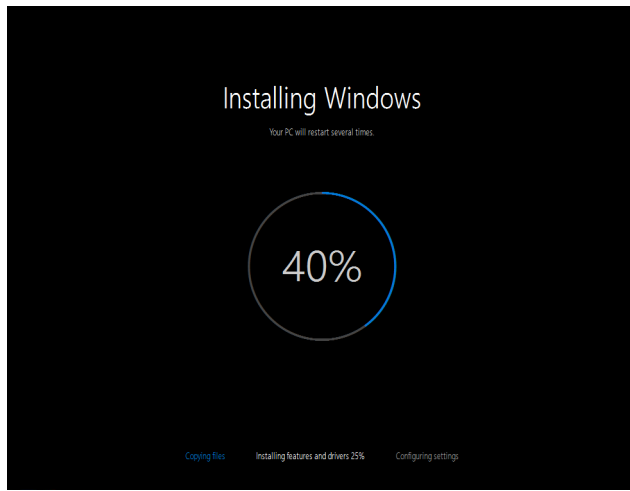

4. Begin the upgrade.
The Setup program does a few checks, including one to ensure that you have enough free space for the installation to succeed. Click **Next** after each step is complete to get the upgrade started.
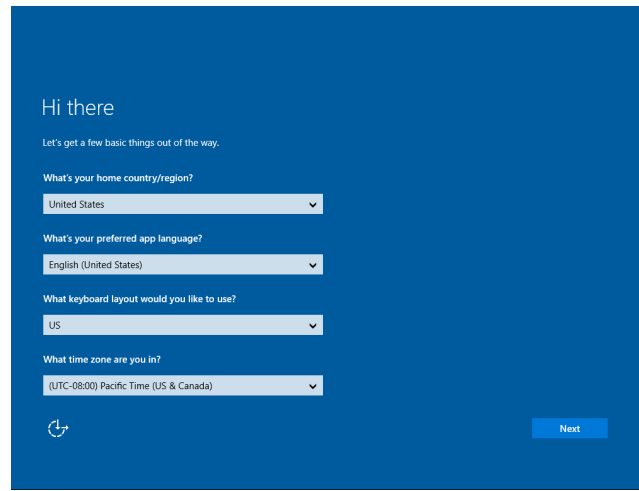
Finishing the upgrade

Once the upgrade begins, you can go do something else. Your PC will restart several times, with a progress indicator keeping you informed as each step completes. The current Windows version is preserved for 30 days, allowing you to roll back in the unlikely event of a problem.

When the process is complete, your final step is to set up the first user account on the newly upgraded PC. In most cases, this will be the same user account you used to start the upgrade.
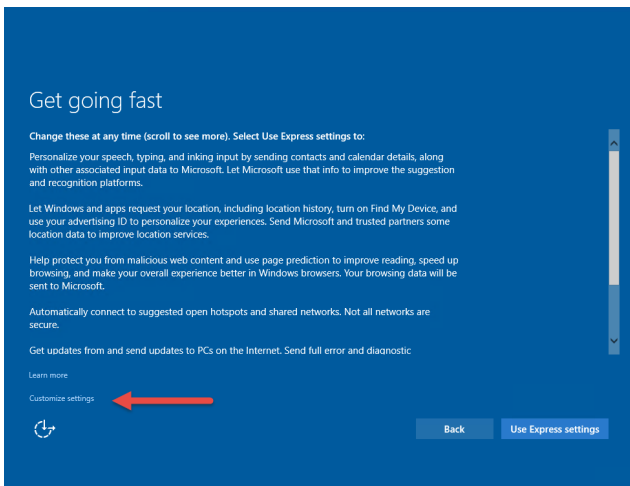

5. Watch the progress of the upgrade.
The large, circular indicator tracks the overall upgrade. The bottom of this screen shows the progress of each phase. After the Copying Files stage completes, you can safely remove the USB flash drive.
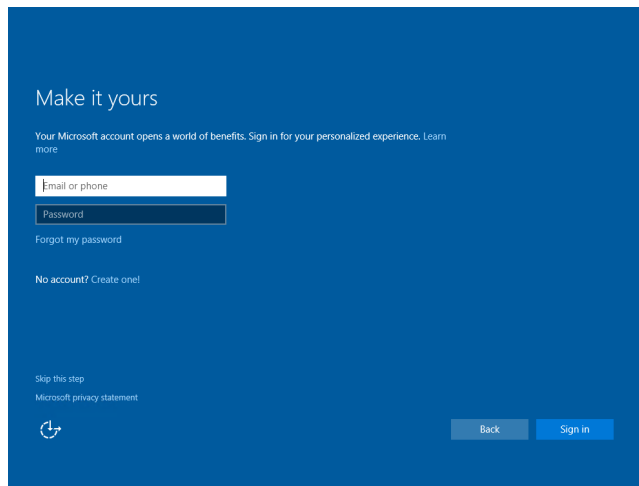

6. Choose settings for a clean install.
For either of the upgrade options, you'll be prompted to sign in with the same username and password you used to start the upgrade. If you chose to keep nothing, you'll need to choose region, language, and time zone.

7. Use express settings for quick results.
In the interest of a fast upgrade experience, Windows 10 defines a group of default settings for personalization, connectivity, error reporting, and browsing. Click **Customize settings** to review all of these settings.

8. Set up the primary user account.
If you chose to keep nothing, you'll need to create the first user account for Windows 10 and sign in. Use an existing Microsoft account or create a new one; to set up a local account, click the small **Skip this step** option.

Upgrade complete–what comes next?

Congratulations! You've successfully upgraded your first PC to Windows 10. Now is a good time to make sure everything's working as expected. With that job done, use the same USB flash drive and the same installation options to upgrade the remaining PCs in your classroom or office.

Follow this checklist:

✓ **Verify that your hardware, software, and network connections are working properly.** If you chose the option to keep apps and personal files, check those apps to make sure they're working properly. For all other options, you'll need to reinstall any desktop programs and Windows Store apps you plan to use. This is also a good chance to check out any attached devices: Print a test page. Scan a document. Play an online video to make sure your network and your speakers are working.

✓ **Install the latest updates.** Windows 10 downloads and installs security updates automatically. Windows Update also supplies updated drivers for devices. To adjust Windows Update settings, click Start, then click Settings > Update & Security > Windows Update. Click **Check for updates** to get the most recent cumulative update; click **Advanced options** to set up update notifications.

✓ **Check your security software.** Windows Defender provides protection against malware and spyware for all editions of Windows 10. If your organization uses a third-party program, check to make sure it has the most recent updates and is working properly.

✓ **Verify that Windows 10 is properly activated.** To check the PC's activation status, open Settings, then click Update & Security > Activation. That page displays the currently installed edition and its activation status. If you see the words "Windows 10 on this device is activated with a digital entitlement," no further action is necessary. For activation errors, follow the links to get troubleshooting help.

✓ **Add Microsoft Office.** The perfect companion for Windows 10, of course, is Microsoft Office 365. Every Office 365 subscription includes the latest version of Word, Excel, PowerPoint, Outlook, OneNote, and the other members of the Office family, which are indispensable productivity and learning tools. (For more on how Windows and Office work together in education, visit microsoft.com/education.)

If you chose the option to keep apps and personal files when upgrading, all of your Office apps should be right where you left them, ready to begin working with immediately.

Education customers can sign up for Office 365 Education and use the online versions of Office at office.com/education/. For freshly upgraded PCs that don't have the Office desktop programs available, visit office.com/myaccount/, sign in with your Office 365 credentials, and use one of your available PC/Mac installs to download and install the latest version of the Office desktop programs.

In larger organizations, Microsoft Office 365 ProPlus might be available through Volume Licensing. If that applies to you, contact your IT department. They can get the necessary installation files to install and activate Office properly.

✓ **Set up additional user accounts.** If you chose the option to keep apps or files, any user accounts previously set up on the PC are still available. Each of those users needs to go through a brief setup the first time they sign in. To add new user accounts, go to Settings, click Accounts > Family & other users, and then click **Add someone else to this PC**.

And one last item on your checklist:

✓ **Have fun!**