The New York Times | http://nyti.ms/2507kw3

PERSONAL TECH

Why Windows 10 Upgrades Go Wrong, and How to Avoid It

Tech Fix

By BRIAN X. CHEN   MAY 18, 2016

M. J. RUMMINGER, a freelance writer in Chicago, recently clicked a button to upgrade her laptop to the latest version of Microsoft's Windows operating system. The upgrade took all day to download — and then nothing happened, not even a message about a failure.

Ms. Rumminger feared that installing the upgrade again would do more harm than good, like breaking her apps, so she decided not to try. Yet reminders to upgrade from Microsoft frequently pop up on her computer screen.

"I get the sense from their messages they're getting increasingly desperate in trying to get people to upgrade," she said.

Ms. Rumminger belongs to a majority of Windows users who are still shirking Windows 10, the free and newest upgrade that Microsoft released for its flagship operating system last July. Microsoft said this month that 300 million devices were running Windows 10, a fraction of the roughly 1.5 billion Windows PCs on the market.

Tech writers (including me) gave generally positive reviews to Windows 10 last year, but The New York Times has since received emails every week from readers about upgrade headaches. Some say that the software system rendered their

machines inoperable, while others say it broke compatibility with apps or devices they rely on.

One reader, Maureen Moss, emailed that Windows 10 was a "nightmare" after the system broke her computer's networking capability and compatibility with a printer. Another reader, James Bass, said Windows 10 took apart two Toshiba laptops "piece by piece." First the Wi-Fi stopped working, he wrote, and then the keyboard failed.

Yet the consensus among information technology professionals is that upgrading to Windows 10 is a wise idea because the system is faster, well built and more secure. And Microsoft's free-upgrade window for Windows 10 is closing soon: After July 29, the company will start charging $119 for a copy.

Microsoft said that the Windows 10 release had been smooth, but that there were bound to be some issues among the millions of devices running the system, given the complex ecosystem of PC hardware and accessories.

"When you've got 300 million devices, there's going to be edge cases that we don't pick up," said David Dennis, a Microsoft spokesman. He said the company was continuing to update the system to address problems.

To help overcome upgrade issues, Microsoft and tech experts offered tips on diagnosing and treating Windows 10 problems.

Back Up Your Data

Before starting an installation, back up all of your data. Microsoft designed the Windows 10 upgrade to be seamless — a push of a button and you get going. While the company does not officially recommend that you create a backup, this is a must for any operating system upgrade. You never know if an unforeseen circumstance, like a power or Internet failure, could interfere with your installation. Services like Backblaze and CrashPlan are handy tools for making backups.

Identify the Problem

Brian Denslow, a technician for Tech Collective, an information technology consulting company in San Francisco, said his experience upgrading clients to Windows 10 had been smooth. For example, when upgrading a law firm's machines to Windows 10, only one out of 50 PCs had issues, he said.

So what is the culprit behind Windows 10 upgrades going wrong? Mr. Denslow said the machines that tended to have problems were cheap computers that cost $300 or less, like budget models made by Acer or Asus.

Cheaper machines tend to be loaded up with parts manufactured by component makers that have neglected to update their drivers — the software written for devices or components to work with the operating system — for the new Windows system, he said.

Before users switch to Windows 10, Microsoft runs a "compatibility checker" to see if any apps or devices will stop working after an upgrade to Windows 10. Yet many readers said that the checker failed to identify issues before installing the upgrade.

Mr. Dennis of Microsoft said the compatibility checker was imperfect. Some manufacturers and component makers may not have kept their software drivers up to date, which can lead to problems.

So if a specific accessory or part of your computer acts badly, an outdated driver is often the culprit. If, say, your printer stopped working, go to the manufacturer's support website and search for a new driver for that printer model with Windows 10 compatibility. If there is no updated driver, your best options are to stick with the older version of Windows or buy a new printer.

If Things Go Wrong, Revert

A lesser-known feature in Windows 10 is a button to roll back to the previous version of Windows if you are having problems. Microsoft basically creates an archive of your past Windows version and puts it in a directory so that you can revert easily.

In the Settings window, select the Recovery tab, and there will be an option to go back to an older version of Windows. Click "Get started," and Microsoft will return you to the previous version of Windows.

In other words, when you install Windows 10, you need not purge all the data from the hard drive to install a fresh copy of the operating system. Doing so would wipe out the directory with that older version of Windows, killing an important protection. So create a backup, install the operating system, see how it hums and revert if the system is unstable. The option to return to a previous version of Windows is available for only one month after an upgrade to Windows 10.

Kill the Reminders

If you have tried all of the above and Windows 10 is still not playing well, you can stick with your older version and tell Microsoft to leave you alone.

Mr. Dennis said the company had heard feedback about it being too aggressive with encouraging people to upgrade. So Microsoft recently clarified the wording of the upgrade reminder to read: "Click here to change upgrade schedule or cancel scheduled upgrade." Clicking through will let you opt out of the upgrade.

Consider a Hardware Upgrade

If you are eager to get on Windows 10 and your machine is not cooperating, consider upgrading the parts or buying a new computer, Mr. Denslow said. He and other I.T. professionals recommended that owners of PCs with older, spinning hard-disk drives upgrade to solid state, a newer storage technology. Solid-state drives generally have less storage capacity than spinning hard-disk drives, but they load Windows 10 applications faster and are more durable because they lack moving parts.

Mr. Denslow also suggested that Windows users who want to hold on to their machines for many years consider spending a bit more on higher-quality computers like the ThinkPad by Lenovo, a company that is diligent about keeping drivers up to date. Even buying a used ThinkPad for $500, he said, will go a long way.

Problems with Windows 10 are usually because of user error, but not because a user installed the system wrong. "It's the user error based on shopping on price alone," Mr. Denslow said.

J.D. Biersdorfer contributed reporting.

A version of this article appears in print on May 19, 2016, on page B6 of the New York edition with the headline: How to Avoid Problems With the Windows 10 Upgrade.