

TY2011 IRS Laptop Tune-up Document

October 3, 2011
Preliminary Release

Summary. This document provides NTC established tune-up procedures for computers received from the IRS depot under the IRS Computer Loan Program. This document is in three parts. Part 1, Laptop Startup, gives procedures for starting all depot laptops; Part 2, Security Settings, must be followed for all depot computers; Part 3, Recommended Settings, are recommended settings for all depot computers.

Release note. Since we don't know if TaxWise2011 will affect the laptop settings, we are calling this a Preliminary Release. We will issue a notification via e-mail if the document is updated as a result of that release. Since depot laptops are being distributed now, and the new software release occurs in late November/early December, we thought it better to get this information out now and modify it later if needed.

Control Panel Convention. The depot computers come configured with the Control Panel in "Category View" – the top of the Control Panel window indicates, "Pick a Category." There is also a "Classic View" option. If you are in the Control Panel and you don't see the "Pick a Category" line, it is in "Classic View." Click the "Category View" icon at the top left-hand portion of the screen to change to "Category View." The procedures in this document require that you be in "Category View."

Start Menu Convention. The depot computers also come configured with the Start button defaulted to "Classic Start Menu" view. These procedures are based on that view. If this setting has been changed, you will not get the Start sequence listed in these procedures. In that case, right-click on the Start button, choose Properties, and check the "Classic Start Menu" view.

Please follow the numbered steps below in the order that they are listed. Some of the later steps depend on earlier steps. Contact TaxaideTech@aarp.org if you have questions.

Part 1, Laptop Startup. The following procedures are used to start the laptop in preparation for accomplishing the procedures in the following sections.

1. The Numeric Lock shift may be turned on when you start the computer. The light above the keyboard that looks like an up arrow with a 1 in it on some models, and is just a padlock light with the label "1" on others, should not be lit. If it is, turn it off by pressing Shift + NumLk on the IBM models or Fn + NumLk on the HP or Compaq models. The NumLk key is in the top row near the right end.
2. Log in to SecureDoc (the first login screen) using the login instructions from your IRS password letter.
3. Log in to Windows using the volunteer user login and password from your IRS password letter.
4. When the computer starts you may see a Symantec warning about "Old definition file..." Ignore that warning and click "Don't remind me again..." then "Close." This will be updated later.

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5. You may also see a window that says, “Welcome to the Found New Hardware Wizard.” Ignore that warning and click “Cancel.” This will be updated later.

Part 2, Security Settings – MANDATORY.

This year, some of the depot computers ship with a wireless capability. To close a potential security exposure, the Windows Zero Configuration (WZC) service that is disabled in the software image as shipped by the IRS must be enabled in all depot computers, wireless capability or not. This setting must be made **whether or not wireless networking is to be used**. Otherwise, **if there is an unsecured Wi-Fi network in range, the computer will automatically connect to it**.

6. Click START -> Settings -> Control Panel -> Performance and Maintenance -> Administrative Tools -> Services
7. Maximize the Services window so you can see the fields better
8. Widen the Name column
9. To enable the WZC service:
 - a. Right click on the “Wireless Zero Configuration” service and select “Properties”
 - b. Open the dropdown list for “Startup type” and select “Automatic”
 - c. Click OK
10. Click the “Start the service” link displayed to the left of the list of names.
11. Close the Services window
12. Close the Administrative Tools window
13. Click “OK”

Part 3, Recommended Settings.

Introduction. The Windows portion of this tune-up procedure, not including TaxWise installation and setup, takes about one hour to complete on a computer with 512 MB of RAM using a high-speed Internet connection. The time is mainly due, and dependent on, the number and complexity of the Windows updates. Any specific step may or may not be necessary depending on the intended use of a particular computer for the coming tax season.

Tune-up to be accomplished.

Full tune-up. We recommend the full tune-up if the computer will be used as a server in a TaxWise client/server network or when the computer will connect to the Internet, e.g., to transmit returns, go to the www.irs.gov site, open TaxWise Online, etc.

Selected tune-up. The full tune-up may not be necessary for preparing returns on standalone computers or on workstations in a client/server network not connected to the Internet. In this case, the user can select those procedures they want to accomplish.

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Use of depot computers as TaxWise servers. While IRS computers can be used as the server in a TaxWise client/server network, we do not recommend that they be used in this way unless a more appropriate computer is unavailable. One reason is that some of these computers may only have 512 MB of RAM, which is marginal to assure good performance as a LAN server. Another reason is that we would prefer that the network server be a computer over which the Technology Coordinator has full control. The TC does not have full control over the IRS laptops, since the BIOS Setup, SecureDoc encryption, and Symantec AntiVirus programs are protected by passwords that are not disclosed to AARP Tax-Aide volunteers.

Startup security scans. The security and antivirus programs that the IRS has installed and configured on these computers will run brief scans upon Windows start-up that will use 25-35% of the CPU for less than 2 minutes after start-up. The computer is usable during this start-up period and should provide minimal disruption to the user.

CD Autorun feature disabled. The IRS has disabled the CD Autorun feature on these computers as a security precaution. Most CDs that have autorun capability also have instructions for starting the CD if the autorun feature is disabled. This usually entails opening the drive with Windows Explorer and double-clicking the autorun or startup files – these files could have other names.

1. If the computer will be used in a TaxWise desktop client/server network and never connect to the Internet, turn off the firewall.
 - a. Click START -> Settings -> Control Panel -> Security Center -> Windows Firewall
 - b. Turn off the Windows Firewall
 - c. Click “OK”
 - d. Close all windows

2. It is important to your EROs that the correct time and date be entered. To set these, go to the system tray along the right-hand bottom border of the window, then
 - a. Double-click the time display
 - b. On the Time Zone tab, select the appropriate time zone
 - c. Check “Automatically adjust clock for Daylight Savings Time” as appropriate
 - d. Click “Apply”
 - e. Click the “Date and Time” tab
 - i. Do not change the **date** in the backward direction, since doing this may cause a SecureDoc lockout that will require obtaining a replacement computer from the Depot.
 - f. Set the clock to the correct time.
 - g. Click “OK”

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3. If this computer will ever be connected to a network of any kind, it must have a unique Computer Name on that network. For file and printer sharing to work correctly, all computers on the network must belong to the same Workgroup.
 - a. Click START -> Settings -> Control Panel -> Performance and Maintenance -> System -> Computer Name tab
 - b. Click "Change"
 - c. Change the Computer Name to the IRS Asset Tag bar-code number
 - d. Verify that the Workgroup name is set to VOLGROUP.
 - e. Click OK
 - f. Click "OK" at the "...Restart..." window. It is not necessary to restart Windows at this point.
 - g. Click "OK"
 - h. Click "No" when asked to restart
 - i. Close all windows

4. If this computer will ever be connected to the Internet, the current Microsoft High Priority updates must be installed.
 - a. Connect the computer to the Internet with a high-speed connection.
 - b. Launch Internet Explorer, click on "Tools" on the Menu bar and then choose "Windows Update."
 - c. Turn on Automatic Updates in the ensuing Windows Update page.
 - d. **Choose the Express option.**
 - e. Click "Install Updates" when it appears. The updates can take a long time to download and install.
 - f. When finished, restart Windows if requested.
 - g. On restart, you may get a window to configure Windows genuine software validation – click "Accept" and follow the instructions.
 - h. You may also get the "Found new hardware..." wizard
 - i. Click one of the "Yes" options and continue
 - ii. If the driver cannot be found, check the "Don't prompt me again..." box then "Finish"

5. If this computer will ever be part of a TaxWise client/server network, disable write caching on the hard disk drive, as follows:
 - a. Open "My Computer" by double clicking on the icon "volunteer on <computer name>"
 - b. Right click on Local Disk C: and select "Properties".
 - c. On the Hardware tab, select the first entry of type "Disk drives"
 - d. Click on "Properties".
 - e. In the Properties window, click on the Policies tab
 - f. UNCHECK the box that says "Enable write caching on the disk."
 - g. Click OK, OK.
 - h. Close all windows

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6. Update the Symantec AntiVirus virus definitions, as follows:
 - a. Double-click the “Symantec Antivirus” icon in the System Tray in the bottom right-hand corner of the desktop
 - b. Click on “LiveUpdate...”
 - c. On the LiveUpdate Options box, click “Next” – download will start
 - d. Click on “Finish” when it appears
 - e. Click “Exit”
 - f. A progress box will show “Updating virus protection...”
 - g. When the progress box closes, Symantec AntiVirus will have been updated.

7. If this computer will ever be used as a TaxWise Online workstation, change the following web browser security setting:
 - a. Click START > Settings > Control Panel > Network and Internet Connections > Internet Options > Advanced tab
 - b. Scroll down to the Security section
 - c. Check the box “Empty Temporary Internet Files folder when browser is closed”
 - d. Click “OK”
 - e. Close all windows

8. **Optional steps, depending on your local policies.**
 - a. You may need to change the Windows volunteer user login password from the value contained in the IRS password letter to a different value selected by your district or local AARP Tax-Aide technology leaders. If so:
 - i. Press Ctrl+Alt+Del
 - ii. Select “Change Password”
 - iii. Type the old password from the IRS password letter
 - iv. Type the new password in both new password boxes
 - v. Click OK
 - vi. Click “Cancel” to dismiss the security dialog box

 - b. Programs that you may want to install, depending on the use of this computer (all available free on the Internet – search Google):
 - i. Install appropriate printer driver(s) for your district
 - ii. CutePDF writer and its Converter
 - iii. OpenOffice.org – “free, almost compatible, version of Office” by Oracle
 - iv. FastStone Capture - screen shot capture
 - v. CDcheck - test the CDs you burn for others
 - vi. Print Folders utility