

TY2009 AARP HP Laptop Tune-up

This model tune-up procedure is provided by the National Technology Committee as a starting point for each Technology Specialist in each state/split-state to tailor to the specific processes and procedures for computer tune-ups and TaxWise deployment that are used in their state. A TCS may produce a state level AARP Tax-Aide Resource CD to accompany their tailored version of this document that contains some of the files used in this procedure so that every district TC does not have to find and download them themselves.

In preparation for the Tax Year 2009 filing season in 2010, this procedure verifies software settings and applies maintenance and upgrades to the Windows and other software of the HP laptop computers that were purchased by the AARP Foundation in 2005-2008 for use by AARP Tax-Aide volunteers. The models included in this tune-up are:

- 2005 HP Compaq nx6110
- 2006 HP Compaq nx6310
- 2007 HP Compaq 6715b
- 2008 HP Compaq 6735s
- 2008 HP Compaq nc6000 (refurbished)

Some of these steps verify settings that may have already been established. Some of the steps are optional, and are so marked. In tailoring this procedure for their state, a TCS may omit some or all of the optional material. If a step is not marked optional it should be performed as part of this tune-up.

Several of the steps below assume that the target computer is connected to the Internet via a broadband connection. If such a connection is not continuously available to you, or if you have several computers to tune up, you may prefer to download some of the large updates one time onto a flash drive or CD and run them many times from there, rather than download them onto each computer that needs to be updated. When this option is available it will be described below as an alternative to the online update step. Some of these downloads may be included in your state-level AARP Tax-Aide Resource CD.

1. The Numeric Lock shift may be turned on. The light above the keyboard that looks like a lock with a 1 beside it should not be lit. If it is, turn it off by pressing fn + num lk. There is no light on the model 6735s to indicate that the numeric lock is activated. The num lk key is in the first or second row near the right end.

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2. Unplug any Ethernet cables from the computer and turn off the Wide Area Network wireless adapter radio.
3. Log in to Windows using the Administrator login from your AARP Tax-Aide Password letter.
4. If AVG is running, make it stop by right clicking on the AVG tray icon and selecting Exit. Cancel any AVG scan that may be running.
5. Under START > Settings > Control Panel > Security Center, turn off automatic updates. This is important so that we can control the sequence of update events as we use Windows Update, below.

We do not recommend that Windows Automatic Updates be turned back on during the tax season so that unwanted updates that may disturb tax preparation will not be installed automatically. We do recommend running with AVG Internet Security updates enabled.

6. **OPTIONAL:** If you do not want error balloons to be displayed that complain about Automatic Updates being turned off, you can disable the Windows service that displays them, as follows:
 - a. Click START > Settings > Control Panel > Administrative Tools > Services
 - b. Maximize the Services window so you can see the fields better
 - c. Widen the Name column
 - d. Right click on the "Security Center" service and select "Properties"
 - e. Open the dropdown list for "Startup type" and select "Disabled"
 - f. Click OK.
 - g. Click the "Stop the service" link displayed to the left of the list of names.
 - h. Close the Services window
 - i. Close the Administrative Tools window
7. This is important to your EROs.

In Control Panel > Date and Time > Time Zone, select the appropriate time zone, click Apply, and set the clock to the correct date and time.
8. **OPTIONAL:** This step changes a user account and password to correspond with those established for TY2009 on the IRS Computer Loan Program machines. This is a suggestion, not a mandate. One reason for doing this is for IRS and non-IRS computers to network with one another more easily. The actual requirement is that all computers used in the AARP Tax-Aide program must have password protection on all Windows user accounts. The

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values of the user names and passwords may be chosen by state, district, or local AARP Tax-Aide technology leaders. It is a better security practice for the Windows volunteer user log-in password to be different in each Tax-Aide district, rather than be the same password that is known to all Tax-Aide volunteers nation-wide.

AARP Tax-Aide has obtained a commitment from the IRS depot to leave their Windows login user name set to “volunteer” in the future, rather than changing it each year as they have sometimes done in the past.

In Control Panel > Administrative Tools > Computer Management > System Tools > Local Users and Groups > Users:

- a. Select the user account that volunteers use; if there is more than one such account and one has the Name “volunteer”, select that one. Note that there are two different fields for each account, **Name** and **Full Name**.
- b. If the **Name** of the user account is not “volunteer”, right click and Rename the user account “volunteer”.
- c. If the **Full Name** of the user account is not “volunteer”, right click on the volunteer account and select Properties. Set Full Name to “volunteer” and click OK.
- d. Change the password of the volunteer user account to the password of the user account from the IRS password letter for tax year 2009, or to a different value specified for use in this tax season by state, district, or local AARP Tax-Aide technology leaders.
 - i. If you DO NOT know the password for this account, change it here; then log off as Administrator and login as volunteer.
 - ii. If you DO know the password for this account, first log off as Administrator and login as volunteer; then use Ctrl-Alt-Del to change the password.

9. In Control Panel

- a. You may **optionally** want to change the default folder view, if you have not done so already. If so:
 - i. On the Control Panel View menu, select Tiles or Icons or something else, whichever you prefer.
- b. Click on Folder Options in the Tools menu.
- c. On the General tab, select “Show common tasks in folders.” [I have not found a way to write to CDs without enabling “Show common tasks in folders.”]
- d. Then on the View tab, click on “Apply to All Folders.”

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- e. Still on the View tab of Folder Options, verify that the following boxes in Advanced settings are UNCHECKED:
 - i. Automatically search for network folders and printers
 - ii. Hide extensions for known file types
 - iii. Use simple file sharing (UNCHECK even though recommended)

10. In Control Panel > Power Options

- a. **Hibernate** may be enabled as may have been taught in the past. Upon further reflection and experience, we have decided against using Hibernate for security and other reasons, so **disable its use**. Set other power settings to a scheme that you like and teach your users how to use it.
- b. On the Advanced tab, check the box for **Prompt for password when computer resumes from standby**.

11. In Control Panel > System

- a. Change the Computer Name to T followed by the AARP Asset Tag barcode number if it is not already set to this.
- b. Change the workgroup to VOLGROUP if it is not already set to this, unless directed to set it to a different workgroup name by AARP Tax-Aide state, district, or local technical leaders.
- c. On the Advanced tab, click Environment Variables. Look both in the User variables and the System variables for the variable name **"workstation"**. If you find it in either place, delete that variable, unless instructed to leave it defined by your AARP Tax-Aide district or local expert on TaxWise client/server networking.

12. For model nc6000 laptops refurbished in 2008 only:

In Control Panel > Network Connections, Disable the Bluetooth Network

13. For model nc6000 laptops refurbished in 2008 and model 6735s only:

Change the following settings if they have not already been changed:

- a. In Control Panel > Display Properties
 - i. On the Desktop tab, click "Customize Desktop"
 - 1. In Desktop Items, uncheck 'Run Desktop Cleanup Wizard every 60 days'
 - ii. On the Screen Saver tab,
 - 1. Change the Wait interval to 30 minutes
 - 2. Check the box "On Resume, password protect"
- b. In Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > Security Options

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- i. Double click on “Interactive Login: Do not require CTL+ALT+DEL”
 - ii. In the box that opens, select “Disabled”
 - iii. Click OK
- c. Close all open windows

14. **OPTIONAL:** Installing Windows XP Service Pack 3 is highly recommended, and required for TaxWise On-Line. If Windows XP Service Pack 3 is installed, it will say so on the General tab of the System Properties Page, accessed from Settings > Control Panel > System. If it is not yet installed, we recommend that you install it.

SP-3 is a huge update. With a broadband connection to the Internet, it is feasible to install it online using Windows Update. Alternatively, if you do not have continuous access to a broadband Internet connection or if you are updating several computers, you may prefer to download the service pack installer once, put it on a flash drive or CD, and run it from there on your several machines, before running online Windows Update.

If so, you can download this file: [WindowsXP-KB936929-SP3-x86-ENU.exe](#) from this web page:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=5B33B5A8-5E76-401F-BE08-1E1555D4F3D4&displaylang=en>

15. **OPTIONAL:** Installing Internet Explorer 7 (IE7) is highly recommended, and required for TaxWise On-Line. If Internet Explorer 6 is still installed the desktop icon for Internet Explorer will not have a gold ring around the blue “e”; we recommend that you upgrade it to Internet Explorer 7. The best way to do so at this time is not to use online Windows Update, since it will try to skip IE7 and install IE8. (*NOTE: TaxWise does not currently support Internet Explorer 8, but we are told it will be supported, but not required, when TaxWise 2009 is released later this year*) Instead:

- a. Download this file: [IE7-WindowsXP-x86-enu.exe](#) from this web page: <http://www.microsoft.com/downloads/details.aspx?FamilyID=9ae91ebe-3385-447c-8a30-081805b2f90b&DisplayLang=en>
- b. Put this file on a CD or flash drive and use it to install IE7 on the IRS laptop.
- c. Restart Windows when requested.

16. **OPTIONAL.** You may want to install the free viewers for Microsoft Office: Word, Excel, and Power Point, if they are not already installed. You can download these from the Microsoft Office downloads web site:

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- a. Word Viewer 2007 – wordview_en-us.exe from this page:
<http://www.microsoft.com/downloads/details.aspx?FamilyID=3657CE88-7CFA-457A-9AEC-F4F827F20CAC&DisplayLang=en>
- b. Excel Viewer 2007 - ExcelViewer.exe from this page:
<http://www.microsoft.com/downloads/details.aspx?FamilyID=1cd6acf9-ce06-4e1c-8dcf-f33f669dbc3a&displaylang=en>
- c. PowerPoint Viewer 2007 - PowerPointViewer.exe from this page:
<http://www.microsoft.com/downloads/details.aspx?FamilyId=048DC840-14E1-467D-8DCA-19D2A8FD7485&displaylang=en>

17. **OPTIONAL** – If this computer will ever be connected to the Internet, the current Microsoft High Priority updates should be installed. It is impossible for us to know exactly what updates will be needed, since these machines have been out in the world for a while and may have evolved to many different configurations of applied updates.

Make sure that AVG Internet Security is turned off, as in step 4 above. Connect the computer to the Internet with a safe high-speed connection. Launch Internet Explorer and then choose “Windows Update” from the Tools menu. Do not turn on Automatic Updates. There are two flavors of online update from Microsoft. “Windows Update” updates Windows but not Office, while “Microsoft Update” updates both Windows and Office. If either Office or the free viewers for Office are installed, use “Microsoft Update.” **Choose the Custom option.** DO NOT choose the **Express** option, since it would install IE8 without giving you a chance to reject it.

Accept all High Priority updates, except uncheck the box for IE8; check the box under IE8 that says “Don’t show this update again.” Ignore any offered “Software updates.” Accept any offered Hardware related updates, including the drivers for the Broadcom WLAN and the Synaptics Touch Pad. Install the selected updates.

After these updates are all downloaded and installed and Windows has restarted, launch Windows Update again. **Choose the Custom option again.** A few High Priority updates will be selected. Install the selected updates.

18. **For model 6715b ONLY:** There are three HP softpaqs (software update packages) that we need to install on machines of this model. They are

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important, in that they can help prevent a serious system crash.

You can tell whether these softpaqs have been installed on a particular laptop by looking in the C:\SWSETUP\ folder. It contains a folder with the name of each HP softpaq that has been installed on the machine. The names are in bold in the steps below.

To download and install these softpaqs, follow these steps:

- a. Close all open windows and programs.
 - b. Download all three softpaqs before installing any of them:
 - i. Open Internet Explorer and browse to www.hp.com
 - ii. Select "Support and Drivers"
 - iii. Select "Download Drivers and Software"
 - iv. Enter the product model number "6715b" (without the quotes)
 - v. Select "Operating System – Enhancements and QFE's"
 - vi. Download "AMD Processor Update for Microsoft Windows XP" – this will be **sp40535.exe**
 - vii. Choose a download location – the desktop works OK
 - viii. When the download completes, dismiss the download dialog
 - ix. Scroll up in the browser window to the "Driver – Chipset" section
 - x. Download "Infineon Trusted Platform Module (TPM) Driver" – this will be **sp40431.exe**
 - xi. Save this file in the same folder where you saved the first one.
 - xii. Scroll down in the browser window to the "Driver – Graphics" section
 - xiii. Download "ATI Video Driver and Control Panel for Microsoft Windows XP" – this will be **sp38780.exe**
 - xiv. Save this file in the same folder as above.
 - c. Install **sp40535.exe (it is important that it be installed first)**
 - d. Accept default settings until asked about restart
 - e. When asked about restarting the computer, choose "restart later."
 - f. Install **sp40431.exe** using default settings
 - g. Install **sp38780.exe choosing the "Express" option.**
This takes a long time to finish and looks like it is stuck for a while.
 - h. When asked about restarting the computer, choose "restart now."
19. In My Computer, right click on Local Disk C: and select "Properties". On the Hardware tab, select the first entry of type "Disk drives" and click on "Properties." In the Properties window, click on the Policies tab and UNCHECK the box that says "Enable write caching on the disk." [This box may be grayed out on some models.] Click OK, OK.

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If you unchecked the “Enable write caching on the disk” box **for the models 6715b or nc6000**, test the computer to see if it takes a very long time (several minutes) to shut down. If it does, follow the procedure described in Microsoft Knowledge Base article KB313222 to “Reset security settings back to the defaults.” This article is at <http://support.microsoft.com/kb/313222/en-us>

20. **OPTIONAL - For the model 6715b**, there is a problem with the Broadcom Wireless Utility. You have to turn the WLAN radio off and back on again each time you want it to connect to a wireless network. To resolve this issue, you can remove the Broadcom Wireless Utility and use “WZC” instead.

The Wireless Zero Configuration (WZC), also known as Wireless Auto Configuration, or WLAN AutoConfig is a wireless connection management utility included with Windows XP and later operating systems as a service that dynamically selects a wireless network to connect to based on a user's preferences and various default settings. This can be used instead of, or in the absence of, a wireless network utility from the manufacturer of a computer's wireless networking device.

Other AARP Tax-Aide HP laptop models may also have the Broadcom Wireless Utility installed and working as expected. You may want to remove it from those models as well, so that all of your wireless computers use Windows WZC. Then you won't have to cope with different ways of managing wireless network connections on different computer models.

If you want to remove the Broadcom Wireless Utility and use WZC instead, follow these steps:

- a. In Settings > Control Panel > Add or Remove Programs, select the Broadcom Wireless Utility and remove it. NOTE: DO NOT remove other Broadcom items, such as the Broadcom 802.11 Wireless LAN Adapter or the Broadcom NetXtreme Ethernet Controller.
- b. Turn on the WLAN radio.
- c. Right click on the wireless network connection icon  on the Task Bar, and select “View Available Wireless Connections.”
- d. If you see the message, “Windows cannot configure this wireless connection”
 - i. Select Change Advanced Settings
 - ii. Select the Wireless Networks tab

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- iii. Check the box “Use Windows to configure my wireless network settings”
 - iv. Click OK
 - v. Go back to step c. above.
21. We don't know what release level of Adobe Reader will be installed on any given AARP computer. 8.1.x is an adequate level; 7.0.0 is not. If the level is 7.x.x, install 8.1.x or 9.1 from your state level AARP Tax-Aide Resource CD and it will replace version 7. If you don't have it on a CD, you can download this file: [AdbeRdr813_en_US.exe](http://get.adobe.com/reader/thankyou/activex/?installer=Reader_8.1.3_English_for_Windows) from this web page: [http://get.adobe.com/reader/thankyou/activex/?installer=Reader_8.1.3_English for Windows](http://get.adobe.com/reader/thankyou/activex/?installer=Reader_8.1.3_English_for_Windows) by right clicking on “click here to download”; then select “Save target as.” Even though it says 8.1.3, it will install 8.1.6, as of this writing.
22. **If AVG Internet Security 8 is not installed, you must install it.** The needed files and instructions may be on your state level AARP Tax-Aide Resource CD in the AVG Security Suite folder. Otherwise, you can find them on the AARP Tax-Aide ExtraNet Technology web page.

If AVG Internet Security 8 is already installed, update it to the latest version. It will try to update itself automatically whenever it is connected to the Internet. Open the AVG User Interface and check the “Last Update” and “AVG Version” in the bottom left corner. The last update should be yesterday or today, and the AVG Version should be 8.5.409 or later. If these fields are not up to date, click on “Update Now” in the AVG user interface. Refer to the installation instructions mentioned above if you need help getting the update to work, or if you would prefer to install downloaded AVG updates offline from a CD or flash drive.

The AVG Firewall component may not be configured properly for the intended use of this computer for next tax season. If the computer will be used on a private Local Area Network for TaxWise desktop client/server networking or printer sharing, configure the AVG Firewall as described in Appendix C of the *Networking TaxWise for Tax-Aide* paper that is posted on the ExtraNet Technology page. Otherwise, configure the Firewall component as described in the *AVG 8.x Install and Use* document that is posted on that same web page.

23. **OPTIONAL** programs that you may want to install, depending on the use of this machine, from your state-level AARP Tax-Aide Resource CD or from the software vendors' websites:
- a. Copy your district's current year “Printer Drivers” folder to the Desktop

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- b. Delete all printers other than CutePDF Writer from the computer
- c. Install appropriate printer driver(s) for your district
- d. CutePDF writer and its Converter
- e. OpenOffice.org 3.1.0 – “free version of Office”
- f. FastStone - screen shot capture
- g. CDcheck - test the CDs you burn for others
- h. Print Folders utility

NOTE: The following steps are specific to the desktop version of TaxWise and are not applicable if the computer will only be used for TaxWise Online.

24. **OPTIONAL** - Installation or adjustments to TrueCrypt volume(s) for the coming season. **If TaxWise desktop is to be installed on this computer, this section is NOT optional.** If the only uses of this computer are as a network workstation for TaxWise desktop or for TaxWise Online, TrueCrypt need not be installed.
- a. **If there is no TrueCrypt volume on the computer**, read and follow the instructions for creating one in the TrueCrypt for Tax-Aide Manual Version 6.2 that can be found on the AARP Tax-Aide ExtraNet Technology web page.
 - b. **OPTIONAL – but highly recommended:** Download the “Tax-Aide TrueCrypt Installer Version 6.2” and its Manual from the Encryption section of the AARP Tax-Aide ExtraNet Technology web page. Use this installer to automatically convert the TrueCrypt for Tax-Aide installation on this computer to the Version 6.2 level. Detailed instructions for doing this are contained in the Manual.
 - c. With your TrueCrypt volume(s) dismounted, **change the TrueCrypt password** on volumes P: (and S:, if used), using files TPDATA.TC (and TSDATA.TC, if used), to the new encryption password that you have chosen for your district for this season. We recommend that you use the “Tax-Aide TrueCrypt Volume Password Changer” tool available for download from the AARP Tax-Aide ExtraNet Technology web page.
25. **OPTIONAL:** If you are using the **TaxWise Mapping Tools (TWMapTools)** to facilitate using this computer in multiple roles at different times during the tax season; and if you have installed Version 6.2 of TrueCrypt for Tax-Aide; then you will need to upgrade your TWMapTools installation to the July 2009 version that includes support for TrueCrypt for Tax-Aide V6.2. The installation package and instructions can be downloaded from the

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Technology page of the AARP Tax-Aide ExtraNet.

26. Mount your Local TrueCrypt volume using the “Start Tax-Aide Drive” icon and your new encryption password.
27. **OPTIONAL:** TaxWise 2008 is probably installed on TrueCrypt volume P: from last season. I would uninstall TW2008, clean the desktop of TW2008 icons, and delete the UTS08 folder from P: and reinstall TW2008 from your 2009 state-level AARP Tax-Aide Resource CD.
28. Things you may want to install for training use from your state’s TaxWise 2009 clone CD or state-level AARP Tax-Aide Resource CD:
 - a. TaxWise 2008 (version 23.15 with the last version of your state program and paper filing defaults), including the Site References documents for TY2008 that you may have made available from within TaxWise.
 - b. Later, TaxWise 2009 version 24.00 (federal only) for one of your EFINs after you have added it to your state’s clone CD.
29. Things you may want to install from your District TaxWise 2009 clone CD (after you create it):
 - a. TaxWise 2009 fully configured for your state and district - Including the Site References documents for TY2009 that you may have made available from within TaxWise
 - b. Set the unique starting DCN for this machine from your district-level DCN control document that you placed on your District clone CD

OPTIONAL NOTE: After each session of installing stuff, you may want to take the time to defragment the C: drive. Some think this is worthwhile to do in that it will make the computer run faster in normal usage. Others don’t think it is worthwhile.

Defragmenting the P: drive also helps performance, if only marginally.