

TY2011 Host and Personal Computer Tune-up Document – Windows XP

November 21, 2011

Revision to October 20 document: The requirement to install .NET Framework 4.0 Extended was moved from the “All Computers” section to the “TaxWise Desktop” section. The Extended package is only required for the desktop version.

Summary. This document provides the National Technology Committee general tune-up recommendations for non-AARP Foundation Tax-Aide computers using the Windows XP Professional operating system, i.e., personal computers and host computers, excluding IRS depot computers, used in the Tax-Aide program. They can also be used on non-Professional version Windows computers, but some of the procedures may not be available on those versions and/or the steps may be slightly different. These procedures make all the changes necessary to bring these computers to approximately the same state as the Tax-Aide imaged computers.

The best option for assuring your AARP Foundation Tax-Aide purchased computer meets the tune-up recommendations is to download and install the appropriate Windows image from the image download site, www.taxaideaarp.org. The images can also be applied to Tax-Aide donated computers. If, for some reason, the images can't be applied to your donated computer, these procedures should be used for the donated computer.

Introduction. This document is written primarily for personal and host computers. It is also applicable to computers that are donated to the Tax-Aide program that can't, or the user doesn't want to, be imaged using the Tax-Aide developed images. For instance, the reason a user may not want to image their computer is that they have customized it with several programs and they don't want to have to re-install those programs on the images. Or, it may contain a lot of data that the user doesn't want to transfer to a re-imaged computer.

Because of the multitude of possible computers and Windows configurations to be addressed in this document, it is not feasible to provide exact procedures that will fit every situation. So, there may be some interpretation on your part if the procedure listed doesn't match your configuration, exactly. In these cases, Windows Help or a Google search may help with the procedure.

Some of these steps verify settings that may have already been established on your computer. Several of the steps assume that your computer is connected to the Internet via a broadband connection. If this is not the case, contact your district Technology Coordinator to see if there is a District or State DVD/CD available that can be used to update your computer with the larger updates.

All steps outside of the Appendix should be performed as part of this tune-up.

Control Panel Convention. This document uses the Control Panel Category View. The view you are using can be determined by going to Start -> Control Panel and observing the link in the upper left-hand quadrant under “Control Panel” – you may have to expand this by clicking on the double down-arrows next to “Control Panel.” If it indicates “Switch to classic view,” you are in

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Category View and no action is necessary. If it indicates “Switch to category view,” you should click that link to enter Category View.

Start Menu Convention. This document uses the Start Menu option, not the Classic Start Menu. To check/change this setting, right-click on the Start button and select Properties. Under the Start Menu tab, check “Start Menu.” Then click “OK.”

PROCEDURES FOR ALL WINDOWS XP PROFESSIONAL COMPUTERS

1. Turn on the computer and boot to the Windows login screen - login as you normally would.
2. If you don't have a “Volunteer” User Account, create one (or modify your volunteer account, if needed, to match the below instructions). DO NOT rename an existing account to Volunteer. That can cause huge network problems with respect to TaxWise.
 - a. Go to Control Panel > User Accounts
 - b. Click “Create a new account”
 - c. For the name of the account, enter “Volunteer” and click “Next”
 - d. For Account Type choose “Computer Administrator” and click “Create account”
 - e. Now, double-click the Volunteer account and click “Create a password”
 - f. Enter the current TY 2011 depot computer password, verify it, and enter “Depot Computer” as the Password Hint
 - g. NOTE: If your state/local authority has a different convention for username and password, get that information from them and modify this step, accordingly.
3. The Numeric Lock should not be turned on for laptop computers. Most models will have a NumLock light to indicate the status. Toggle the NumLock key (by pressing NumLock or Fn + NumLock) to find the light. The light should be off.
 - a. If there is no light, and the NumLock is ON, you will not be able to correctly type “Volunteer” in an application such as Notepad. In this case, toggle the NumLock key.
4. If necessary, log off as your current user and login as “Volunteer”
5. Change date, time zone, and time
 - a. Double-click the time in the System Tray (right-hand side of the task bar). Under Time Zone, select the appropriate time zone, click Apply.
 - b. Then set the clock to the correct date and time.
 - c. Click OK.

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6. In Control Panel -> Performance and Maintenance -> System

- a. Under the General Tab, check to see that Windows Service Pack 3 is installed. If it is not yet installed, you must install it, following the instructions later in this document.
- b. On the Computer Name tab, verify/change (by clicking the “Change” button) the Computer Name to a unique name for the site(s) you will be working at. You may have to consult your site manager or Technology Coordinator for this name.
- c. Verify/change the workgroup to VOLGROUP. NOTE: If your state/local authority uses a different workgroup name, use that name.
 - i. NOTE: If you use your computer in a home network and that network is not named VOLGROUP, your home network will not be configured properly anymore. In that case, you will either have to re-configure the other equipment on your network to use the VOLGROUP workgroup or change your computer workgroup name when you switch the computer between home and site use
- d. 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. NOTE: If your state/local authority recommends not changing the value, leave it as it is.
- e. Press OK then OK
- f. Restart the computer.

7. If not already connected, connect the computer to the Internet with a safe high-speed connection – wired or wireless.

NOTE: If step 6.a indicated that you need to install Service Pack 3, be aware that it 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 you may be able to get the update on a CD/DVD from your Technology Coordinator.

8. Install Microsoft Security Essentials (MSE) if you do not already have an Anti-Virus program installed. The program can be found at this link: http://www.microsoft.com/security_essentials/. Alternatively, do an Internet Search for “Microsoft Security Essentials” and choose the link that goes to Microsoft to find and download the file.

Detailed instructions for installing and configuring MSE and for configuring the Windows Firewall are contained in a separate document, “Antivirus Program for TaxWise Computers 2011,” posted in the “Security” topic under the “Hardware” tab of the Technology page of the AARP Tax-Aide Extranet www.aarp.org/tavolunteers.

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NOTE: If your computer already has a reputable anti-virus program installed, e.g., Norton, McAfee, Kaspersky, etc, and you keep it updated, there is no need to install MSE.

9. Update Windows using the Express Update. If Service Pack 1 is not installed, install it at this time.

- a. Click Start -> All Programs -> Windows Update
 - i. NOTE: Clicking Windows Update will generally take you to the Microsoft Update site. This is the preferred site since it will update any Microsoft Office installations on your computer. If you are directed to the Windows Update site, rather than the Microsoft Update site, you may want to get your updates from the Microsoft Update site instead. If you can't find that site, do a Google search. Once you have used the Microsoft Update site, future clicks on Windows Update will take you to Microsoft Update.
- b. Look along the right-hand side of the Microsoft Update screen and assure that Automatic Updates are Turned On. If not, turn on Automatic Updates
- c. Select Express Options and install all High Priority updates, including Service Pack 3
- d. When finished, repeat this procedure until there are no more updates to download

10. Update Windows again (as in step 9.)

- a. Install any High Priority, Express Updates
- b. When finished, click "Microsoft Update Home," in the upper left-hand quadrant
- c. Click the "Custom" button
- d. Click the "Software, Optional" link along the left-hand side
- e. Select all .NET Framework 4 updates and download and install them
 - i. This update can take a long time
- f. Close all windows and return to the Desktop

11. Turn on the Windows Firewall

- a. Start -> Control Panel -> Security Center
- b. Under "Manage Security Settings For," choose "Windows Firewall"
- c. Click "On"
- d. Click "OK"
- e. Close the window

12. In Control Panel -> Appearance and Themes

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

13. In Control Panel > Performance and Maintenance -> Power Options

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- a. Uncheck **“Enable Hibernation”** under the Hibernate tab, if it exists.
 - b. On the **Advanced** tab:
 - i. Check the box for **Prompt for password when computer resumes from standby.**
 - ii. For laptop computers
 1. Under **“When I close the lid on my portable computer”** select **“Do nothing”**
 2. Under **“When I press the power button on my computer”** select **“Shut down”**
 3. Under **“When I press the sleep button on my computer”** select **“Do nothing”**
 - iii. Click OK
14. Change the following settings if they have not already been changed:
- a. In Control Panel > Appearance and Themes -> Display
 - i. On the Desktop tab, click **“Customize Desktop”**
 1. In Desktop Items, uncheck **“Run Desktop Cleanup Wizard every 60 days”**
 2. Select **My Documents, My Computer, and My Network Places**
 3. Click OK
 - ii. On the Screen Saver tab,
 1. Select the **Windows XP** screen saver
 2. Change the **Wait interval** to **30 minutes**
 3. Check the box **“On Resume, password protect”**
 4. Click **“OK”**
 - iii. NOTE: You may prefer a different screen saver for your computer. That is okay, but the selection you make must have the capability to require a password before displaying the screen after a 30 minute interval.
 - b. In Control Panel > Performance and Maintenance -> Administrative Tools > Local Security Policy > Security Settings > Local Policies > Security Options
 - i. Double click on **“Interactive Login: Do not require CTL+ALT+DEL”**
 - ii. In the box that opens, select **“Enabled”**
 - iii. Double click on **“Interactive Login: Do not display last username”**
 - iv. In the box that opens, select **“Disabled”**
 - v. Close all open windows
15. If you have less than Adobe Reader X
- a. Uninstall it, Start -> Control Panel -> Add or Remove Programs
 - b. Select your Adobe Reader version and uninstall it
 - c. Restart the computer

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16. Install Adobe Reader X by going to <http://get.adobe.com/reader/>. If the download has an option to download other software as well, e.g., Google Toolbar, uncheck that box.
 - a. Once installed, start Adobe Reader X, click Help, and click “Check for Updates”
 - b. Install any updates and close Adobe Reader X

17. Run the Secunia and Norton Online scans
 - a. Refer to the Extranet Document, “*Computer Security Scanning Procedure v3*,” at www.aarp.org/tavolunteers, under the Technology Hardware tab, Security group. This document gives procedures for running the scans and reporting the results.
 - b. The scans require that Java be installed. So, if given the option to install Java, accept it. Then the Secunia scan will notify you if Java requires an update.

18. Run disk cleanup, Start -> All Programs -> Accessories -> System Tools, click Disk Cleanup

19. Run defrag, Start -> All Programs -> Accessories -> System Tools, click Disk Defragmenter

20. Lastly, you may need to install a driver for a site printer. Links to printer driver download sites for most printers used in the Tax-Aide program can be found on the Extranet under the Technology Hardware tab, in the Networking section.

PROCEDURES FOR TAXWISE DESKTOP, ONLY

21. **Install the .NET 4 Extended package. NOTE: This installation must be accomplished to run TaxWise Desktop (standalone, client, or server) this year.** If you are connected to the Internet when installing TWD, the Extended package will be installed at that time and this step can be skipped.
 - a. Go to:
<http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17718>
 - b. Download and install the Extended package
 - c. Click Start -> Control Panel -> Add or Remove Programs and make sure that .NET Framework 4 Client Profile and Extended are installed

22. **Installation or adjustments to TrueCrypt volume(s) for the coming season** (not necessary for workstations in a client-server network). The latest version TrueCrypt installer (version 7.42 as of Oct 11, 2011) and the *Tax-Aide TrueCrypt Utility – Quick Start Guide TY 2011* can be found in the “Security” topic of the “Hardware” section on the AARP Tax-Aide Extranet Technology web page.
 - a. **If there is no TrueCrypt volume on the computer’s local hard drive**, use the AARP Foundation Tax-Aide TrueCrypt Utility to create a TrueCrypt volume on the system

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- b. **Highly recommended:** If the version of the Tax-Aide TrueCrypt Installer last used on this computer is **earlier than version 6.2 (for Tax Year 2009)**, use the latest TrueCrypt Utility to automatically convert the TrueCrypt volume to the latest TrueCrypt software on this computer.
- c. **Recommended:** If the version of the Tax-Aide TrueCrypt Installer last used on this computer is **version 6.2 or version 6.3 (for Tax Year 2009)**, use the latest version TrueCrypt Utility to automatically convert the TrueCrypt volume to the latest TrueCrypt software on this computer.
- d. 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 in the “Encryption” topic of the “Software” section on the AARP Tax-Aide Extranet Technology web page.

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APPENDIX - OPTIONAL SOFTWARE

1. You may want to install the free viewers for Microsoft Office, Word, Excel, and Power Point, if you do not have Microsoft Office installed on your computer. It is not necessary to install these viewers if you have installed OpenOffice. You can download these from the Microsoft Office downloads web site:
 - a. Word Viewer 2003 – 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 2003 - 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>
 - d. To use these three viewers for Office 2007 documents you also need to first run Microsoft Update, (and the Office Compatibility Pack) from this page:
<http://www.update.microsoft.com/microsoftupdate/v6/default.aspx?ln=en-us>
 - e. After running Microsoft Update you need to install this Office Compatibility Pack from this web page:
<http://www.microsoft.com:80/downloads/details.aspx?familyid=941b3470-3ae9-4aee-8f43-c6bb74cd1466&displaylang=en>
2. There are also several free optional software programs that you may want to install on your computer. The list of these programs can be found in the “Other Useful Software for Tax-Aide” document on the Extranet under the Technology Software tab in the “Non-Tax Software” section. The document gives a description of the program and gives the link where it can be downloaded.