TY2009 AARP Dell Vostro 1520 Laptop Tune-up

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 Dell Vostro 1520 laptop computers that were purchased by the AARP Foundation in early 2010 for use by AARP Tax-Aide volunteers.

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 an arrow with a 9 inside it should not be lit. If it is, turn it off by pressing Fn + NumLk. The NumLk key is in the first row near the right end.

2. Unplug any Ethernet cables from the computer and turn off the Wide Area Network wireless adapter radio. The WLAN switch is on the left side of the case on the end away from the hinges.

3. Log in to Windows using the Administrator login from your AARP Tax-Aide Password letter.

4. Cancel any AVG scan that may be running.

5. Use the separate instructions provided with the AARP Tax-Aide Dell 1520 Image DVD dated Jan 10, 2010, to re-write the software image on the hard disk drive.

6. Log in to Windows using the Administrator login from your AARP Tax-Aide Password letter.

7. Cancel any AVG scan that may be running.

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8. Under START > 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.

9. **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 > Security Center >
   b. Click on the "change the way Security Center alerts me" in the Resources box.
   c. Now uncheck the three checked boxed for 'Firewall', 'Automatic Updates" and 'Virus Protection'.
   d. Click OK and close the Security Center.

10. **This is important to your EROs.**
    In Control Panel > Date and Time > Date and Time > Time Zone, select the appropriate time zone, click Apply, and set the clock to the correct date and time.

11. **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. 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.
    In Control Panel > Performance and Maintenance > Administrative Tools > Computer Management > System Tools > Local Users and Groups > Users:
    a. Right click on the "volunteer" account and select Properties. Set Full Name to "volunteer" and click OK.
    b. 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.

12. In Control Panel > Folder Options
    a. On the General tab, select "Show common tasks in folders."
    b. Click OK.

13. In Control Panel > Network Connections, Disable the 1394 connection.

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14. In Control Panel > Display Properties
    a. On the Desktop tab, click "Customize Desktop"
        i. In Desktop icons, check "My Network Places"
        ii. In Desktop Cleanup, uncheck "Run Desktop Cleanup Wizard every 60 days"
        iii. Click OK.
    b. On the Screen Saver tab,
        i. Change the Wait interval to 10 minutes
        ii. Check the box "On Resume, password protect"
        iii. Click OK.

15. In Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > Security Options
    a. Double click on "Interactive Login: Do not require CTL+ALT+DEL"
    b. In the box that opens, select "Disabled"
    c. Click OK

17. **OPTIONAL.** Although OpenOffice.org is already installed, you may want to install the free viewers for Microsoft Office: Word, Excel, and Power Point. 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 2003 - 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

18. **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.

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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 might 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.

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.

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." Click OK, OK.

20. **AVG Internet Security 9 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 9.0.725 or later. If these fields are not up to date, click on "Update Now" in the AVG user interface. Refer to the installation instructions posted on the Technology page of the AARP Tax-Aide ExtraNet 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.

    Enable the Removable Device Scan feature of AVG:
    a. From the AVG user interface,
    b. Click on Tools > Advanced settings
    c. Click the + sign next to "Scans"
    d. Click "Removable device scan"
    e. Check the box at the top of the right-hand pane that says "Enable Removable device scan"
    f. Click "OK"

    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

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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 9 Installation* document that is posted on that same web page.

21. From your state-level AARP Tax-Aide Resource CD:
    a. Copy your district's current year "Printer Drivers" folder to the Desktop
    b. Install appropriate printer driver(s) for your district.

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.

22. **OPTIONAL** - Installation of a TrueCrypt volume. **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. Double click on the TrueCrypt 6.3 Installer.exe icon on the desktop.

    b. Read and follow the instructions for creating a Local Mode TrueCrypt volume in the TrueCrypt for Tax-Aide Manual Version 6.3 that will be placed in the My Documents folder of this computer as soon as you launch the installer from the desktop.

23. **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 6.3 of TrueCrypt for Tax-Aide; then you will need to upgrade your TWMapTools installation to the July 2009 version (or later) that includes support for TrueCrypt for Tax-Aide V6.3. The installation package and instructions can be downloaded from the Technology page of the AARP Tax-Aide ExtraNet.

24. Mount your Local TrueCrypt volume using the "Start Tax-Aide Drive" icon and your encryption password.

25. **Things yo**u 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.

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26. 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, it is always a good idea to take the time to defragment the C: drive.