

BFA Win XP Pro Standard Workstation Configuration

Last Updated June 2005

STEP	PROCESS	INSTRUCTIONS
		<i>Consolidate & Backup User's Data</i>
1.	User Prep	Request user complete the BFA Standard Desktop Application Configuration Request Form. Schedule preliminary meeting with user to discuss data transition.
2.	Update Inventory	If PC is new, request copy of Purchase Order from the department. Tag machine and record State ID on Purchase order. Forward to Connie English.
3.	Vendor Image	For new PC, create Altiris image as received from vendor, for emergency restoration. For rebuilds, create a before-installation image.
4.	Local Account Profiles	Create a local admin account, local user account with a temporary password, and a temporary network directory to save data; i.e., \\quark\BIDS\Users...\
5.	Active Directory Profiles	Request department forward new user domain information to Bob Hart to create a domain account, group membership, network share directories, and if user to be assigned a local, admin account.
6.	Consolidate/Backup Data	User/DARE to consolidate all user's data in "My Documents" on "C" drive. Archive email attachments to CD, Zip, or floppy. Copy entire Eudora directory to "My Documents" on "C". Save Brio query files, ADI themes, and other application configuration files to "My Documents" on "C". Entire "My Documents" on "C" should be saved to CD or Network before proceeding.
		<i>Install and Configure Win XP</i>
1.	Create a Fresh Installation	Configure the BIOS to boot from CD-ROM. Unplug the network cable, place the Win XP Pro SP2 CD into the drive and cold-start the PC. Follow the onscreen prompts to delete any existing Windows installation, to create and format a new partition.
2.	Begin Process	To begin, press <Enter> at the prompt, "To set up Win XP now, press <ENTER>".
3.	License Agreement	Press <F8> if you agree to the Licensing Agreement.
4.	Select an Installation	To continue installing a fresh copy of Win XP without repairing, press <ESC>
5.	Delete old Partition	To delete the selected partition, press <D>
6.	Delete a system partition	To delete this partition, press <ENTER>
7.	Confirm Partician Deletion	To delete this partition, press <L>
8.	Select unpartitioned space	To set up Windows XP on the selected item, press <ENTER>
9.	Format unpartitioned space	Select, "Format the partition using the NTFS file system" then press <ENTER>
10.	Format Process	C: Partition1 [New (Raw)] 76285 MB (76285 MB free)... Setup is formatting...
11.	Files copied to installation folder	"Please wait while Setup copies files to the Windows installation folders..."
12.	System re-boots	Leave the installation CD in the CD-ROM Drive. Ignore the prompt, "Press any key to boot from CD." The system boots from the hard drive.
13.	Installing Devices	No action required.
14.	Regional and Language Options	Press <Next>
15.	Personalize Your Software	Enter <SDSU> for Name and <BFA> for Organization, then press <Next>
16.	Set Computer Name / Admin Password	Enter the State-ID for Computer name. Enter the standard local administrator's password for Administrator password, then press <Next>
17.	Date and Time Settings	Verify the current Date and Time. Time Zone should be set to, "(GMT-08:00) Pacific Time (US & Canada); Tijuana" and the daylight savings check box selected. Press <Next>

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18.	Installing Components	Messages display as Setup installs the Network and Start Menu Items, registers components, saves settings, and removes temporary files. No action is required.
19.	Finalizing Installation	The system restarts. Again, ignore the prompt to Boot from the CD.
20.	Display Settings	When prompted, "To improve the appearance of visual elements, Windows will automatically adjust your screen resolution", press <OK>. Then press <OK> again to accept the settings.
21.	Hibernate Settings	Click on <Start> <Settings> <Control Panel> <Display>, then select the <Screen Saver> tab. Under the header, "Monitor Power", click <Power>. Under the heading, "Settings for Home/Office Desk Power Scheme, set all three parameters equal to <Never>, then press <Apply> <OK> <OK> to exit.
22.	Setting up the Computer	At the Welcome menu, press <Next>
23.	Help Protect your PC	Click on the radio button, "Not right now" to turn off automatic updates, then press <Next>
24.	Who will use this computer	Enter the primary user's account for Your name, then press <Next>. Note: the account created is an administrator account and does not have a password. We'll assign a password and remove it from the Administrator's group later on.
25.	Thank you!	Press <Finish>
26.	Win XP desktop Welcome Menu	Launch Control Panel to set the desktop, taskbar, and folder options to Windows Classic.
27.	Control Panel	Click on <Switch to Classic View>
28.	Folder Options, General Tab	Double-Click on <Folder Options>. The Folder Options Dialog box displays. Under the General tab, turn on the radio buttons, "Use Windows classic folders", "Open each folder in the same window", and "Double-click to open an item (single-click to select)". Then press <Apply>
29.	Folder Options, View Tab	Click on the <View> tab. Under the heading, "Advanced settings" make the following changes: <Select> (check) boxes for "Display the contents of system folders", "Display the full path in the title bar", and "Show hidden files and folders". <De-select> (uncheck) boxes for "Hide extensions for known file types", "Hide protected operating system files (Recommended)", "Show pop-up description for folder and desktop items" and "Use simple file sharing (Recommended)". Then press <Apply>.
30.	Search for files and folders	Click on <Start> <Search> <For Files or Folders>. The "Search Results" window displays. Click on the link <Change Preferences>. When prompted, "How do you want to use search companion?", click on the link <Change Files and Folders Search Behavior> select (click on) <Advanced>, then press <OK>.
31.	Taskbar and Start Menu Properties	From the Control Panel, double-click on <Taskbar and Start Menu>. The "Taskbar and Start Menu Properties" dialog box displays. With the "Taskbar" tab selected, under the heading "Taskbar appearance", de-select (uncheck) "Lock the taskbar" and select (check) "Show Quick Launch". Under the heading, "Notification area" de-select (uncheck) "Hide inactive icons", then press <Apply>
32.	Start Menu Tab	Select the <Start Menu> tab and select (click-on) the radio button, "Classic Start menu", then press <Customize>. In the scrolled region, under the heading, "Advanced Start menu options", select (check) "Display Favorites", select (check) "Show Small Icons in Start menu" and de-select (uncheck) "Use Personalized Menus", then press <OK> <Apply> <OK>

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33.	User Accounts	Set the password for the logon account created in Step 21. From the control panel, double-click on <User Accounts>. Click "Change an account" select the account, then select "Create a password". Enter a temporary password for "Type a new password" and "Type the new password again to confirm". Enter a word or phrase for "password hint", then press <Create Password> . Note: This password will be used for the rest of the configuration process. Later we'll reset it so that the first time the user logs in, they will be required to re-set this temporary password. In addition, do not remove the account from the administrator's group until after the configuration process is complete.
34.	Change Logon	Under "User Accounts", press <Home> , then select "Change the way users log on or off". De-select (uncheck) "Use the Welcome screen, then press <Apply Options> , and close "User Accounts". Note: This will require the user to press <Ctrl> + <Alt> + <Delete> at the welcome screen to log on with their account and password.
35.	Add or Remove Programs, Windows Components	Under Control Panel, select "Add or Remove Programs". Select "Add/Remove Windows Components". In the scrolled region, under the heading "Components", select "Accessories and Utilities, then press <Details> . In the "Accessories and Utilities dialog box, de-select (uncheck) Games, then press <OK>
36.	Windows Components, continued	Scroll down the components list and de-select (uncheck) the following: "MSN Explorer", "Networking Services", "Outlook Express", and "Windows Messenger", then press <Next> , and <Finish> . Press <Yes> to restart your computer.
37.	Boot Sequence	Press <F2> to update the computer BIOS. Reset the boot sequence to (1) hard drive, (2) CD-ROM, and (3) Floppy Drive
38.	Log On to Windows	Enter your user name and password , then press <OK>
39.	Set the Desktop to Win Classic	Right-click on the desktop, then select <Properties> . Under the "Themes" tab, select <Windows Classic> from the Theme pull-down menu. Click on the <Desktop> tab. Press <Customize Desktop> . Under the heading Desktop icons, de-select (uncheck) <Internet Explorer>. Under the heading, "Desktop cleanup" de-select (uncheck) "Run Desktop Cleanup Wizard every 60 days", then press <OK>
40.	Screen Saver	Click on the <Screen Saver> Tab. In the Screen saver pull-down menu, select <Windows XP> . Set the wait time to 15 minutes and select (check) "On resume, password protect". Then press <Apply>
41.	Display Power Settings	Click on the <Screen Saver> Tab. In the Screen saver pull-down menu, click on POWER button.. Set the wait time to power off monitor to 20 minutes and select NONE for remaining two power save selections . Then press <Apply>
42.	Appearance	Click the <Appearance> tab. From the "Windows and buttons" pull-down menu, select "Windows Classic style". From the "Color scheme" pull-down menu, select <Windows Standard> , then press <Apply>
43.	Settings	Click the <Settings> tab. Set the screen resolution to <1024 X 768> for CRT displays, or <1280 X 1024> for LCD displays. Set color quality to <Highest> , then press <Apply> , <yes> to accept the settings, then <OK>
44.	Desktop Icons	Rename "My Network Places" to "Network". Rename "My Computer" to "Computer".
45.	Load Drivers	Remove the Win XP installation disk from the CD-ROM and insert the Drivers and Utilities CD to load any on-board NIC, Video, and sound adapters, then reboot.
46.	Configure Network Settings	Right-click on the Network icon from the desktop. Set the IP Address to static if possible, or DHCP if the department has not requested a static address from TNS. Configure the DNS settings.
47.	Install McAfee from CD-ROM	From CD media, install the current McAfee anti-virus software. At the last step of the installation process, plug in the network cable and restart the computer.
48.	Apply Windows updates and critical patches	Go to windows updates and search for and install all available windows updates and critical patches.
		<i>Install Standard BFA Desktop Applications</i>
1.	Stand. Desktop Request Form	Refer to the BFA Standard Desktop Application Configuration Request form

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2.	Install Shortcuts	Map a drive to //quark/Install Shortcuts, then install applications from network by launching each of the following shortcuts
3.	McAfee	Launch "VSE 8.01i" followed by "Current ePO Agent"
4.	Altiris	Copy the URL found in the file, "link.txt" located in the Altiris sub-directory in Install Shortcuts. Launch Internet Explorer, click on <File> <Open>. Past the URL into the Open File dialog box. When installation completes, an "Altiris" directory will have been created under "C" root directory.
5.	Acrobat Reader 6.0.1	Acrobat Reader 6.0 Full
6.	Eudora Installation	Eudora_6.2.1. Do not select PureVoice or Importers. Create an attachmentd directory under Program Files, "C:\Program Files\Qualcomm\Eudora\". Grant Full Control to Users via security tab for the Qualcomm directory. Restore User's configuration settings from the backup copy, from the Consolidate/Backup User's procedure. Files to restore are: Mailboxes, tocs, NNdbase.txt & .toc, and descmap.pce. Also include attachments, embedded, Filters, Sigs, Stationery, Nickname & any user-created mailbox folder.
7.	Eudora Configuration	After Eudora has been installed, launch the application under the user's profile to configure the Eudora settings. Eudora Junk settings -- set score to (50), deselect "put not Junk-ed senders in Address Book", select "Mail is not junk if sender is in Address book", adjust "Remove mail" to (10) days old.
8.	Spybot Installation	SpybotXP.msi
9.	Spybot Configuration	Launch application and allow the update process to apply program updates. Click on <Immunize>. Upon successful completion, message should display "All known bad products are already blocked". Re-rerun <Immunize> and <check again> if required. Click on <Search & Destroy> to verify all spyware has been removed and/or blocked.
10.	Internet Explorer ver 6 SP1	Launch IE, click on <help> <About Internet Explorer>. Version should be set to 6.0. Update Versions set to SP1 with critical patch ":Q823353"
11.	Configure IE	Check cache Setting: TOOLS > Internet Options > Advanced tab > CHECK the box to: Empty Temp Internet Files when Browser is Closed.
12.	Meeting Maker	MeetingMaker V7.1. Grant Full Control Security rights to primary user of PC on the Meeting Maker directory.
13.	Office 2003	Deselect Outlook, Publisher & Info Path. After Office 2003 install, remove any Outlook Express; delete Outlook desktop icon(s). Add/Remove Programs > Add/Remove Windows Component; uncheck Outlook Express. Launch Windows Update & check for MS Office Updates
14.	WSFTP	
15.	WINZIP	WinZip (Start with WinZip Classic) Step 1 and Step 2
16.	Oracle Settings	Configure IE browser with pertinent Oracle settings: change Security setting of Internet & Intranet>Customize>first & second Active X controls to "prompt". Also General>Settings>Every visit to every page checked
17.		Jinitiator
18.		Install Oracle Jinitiator v1.1.8.19. Launch IE> URL: https://lilly.sdsu.edu:5400. When the Oracle screen appears, click on APPS LOGON LINK & click on Personal Home Page
19.		Enter the BIDS Oracle User Name & Pwd, click on E-Business link. Allow Jnitiator to load & install. Select a menu item & confirm the Oracle screen opens.
20.	Markview	Install Markview via login to https://lilly.sdsu.edu:5400
21.		Use BIDS tech generic Uname/pwd for Oracle login

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22.		Select AP/PO Web Link
23.		Select Document Inquiry from tab at upper right
24.		Select INVOICE from pulldown & enter 6652 for invoice #
25.		Click on IMAGE icon & wait for Markview install
26.		When image of invoice appears, close windows
27.		Non-Standard s/w
28.	ADI	ADI = Map first to: \\Quark\Bis-Oracle directory
29.		Install the Oracle Installer by running Set Up located in BIS-Oracle directory on Quark.
30.		From Start > Progs > Oracle Installer, use installer to select ADI from \\Quark\Bis-Oracle
31.	BRIO	Install v8.0 or higher
32.		BRIO located in BIDS/PC APPS directory on Quark.
33.		BRIO = registration is required. Find code in text doc in BRIO/PC APPS on Quark
34.	Printing #1	Standard TCP/IP Port printing is a Local (not network) Printer. Select default tray as paper source & paper size.
35.		Add primary network printer & backup, if possible. Designate user's default printer
36.		Under user login verify local user access to printers
37.		LAPTOP - Dial-Up & Wireless Config
38.	Laptops	Laptops should have an image via Altiris made to preserve factory delivered o/s installation. Proceed to configure & install same as a desktop PC.
39.		Remove any non-BFA standard applications that the vendor may have installed. Allow driver or system related utilities to remain.
40.		Use BFA laptop toll free # only for an out of town dial-up config: 866-459-3510.
41.	Dialup configs	Create two copies of the out-of-town config: one with 8 and one with 9 as the outside line prefix.
42.	User login	TACACS toll-free local numbers vary by user's home city; if user does not know their local dial-up number, see TNS dox at: http://tns.sdsu.edu/helpdesk/accessdocs.html to determine.
43.		For any user's home dial-up config, remember to enable Call Waiting override and select *70, from popup list