

MICROSOFT
TRAINING
AND CERTIFICATION

Microsoft Official
Curriculum

Module 6: Configuring the Desktop Environment

Contents

Overview	1
Configuring User Desktop Settings	2
Customizing the Desktop Environment	14
Configuring System Settings	25
Lab 6A: Customizing the Desktop	30
Understanding How User Profiles and Group Policy Affect Desktop Customization	32
Lab 6B: Managing User Profiles	35
Using Remote Assistance	36
Lab 6C: Using Remote Assistance	42
Review	44



Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, places or events is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

© 2001 Microsoft Corporation. All rights reserved.

Microsoft, BackOffice, MS-DOS, Windows, Windows NT, Active Directory, ActiveX, BackOffice, DirectX are either registered trademarks or trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Instructor Notes

Presentation:
60 Minutes

This module provides students with the knowledge and skills necessary to configure and customize the desktop, and use Remote Assistance to provide help to users.

Labs:
75 Minutes

After completing this module, students will be able to:

- Configure user desktop settings.
- Customize the desktop environment.
- Configure System Settings
- Explain how roaming and mandatory user profiles and Group Policy settings affect desktop customization.
- Use local profiles to control desktop customization.
- Use Remote Assistance to assist a user remotely.

Materials and Preparation

This section provides the materials and preparation tasks that you need to teach this module.

Required Materials

To teach this module, you need the following materials:

- Microsoft® PowerPoint® file 2272A_06.ppt

Preparation Tasks

To prepare for this module, you should:

- Read all of the materials for this module.
- Complete the labs.
- Install support for Microsoft Windows® XP Professional Multilanguage Version so that you can demonstrate its uses.
- Thoroughly review the Remote Assistance feature so that you can demonstrate it appropriately.
- Anticipate student questions, and prepare answers.
- Review material in any cross-reference note to ensure that you can add information to the topics if the students need you to.

Instructor Setup for a Lab

This section provides setup instructions that are required to prepare the instructor computer or classroom configuration for a lab.

Lab 6A: Customizing the Desktop

► **To prepare for the lab**

1. Access to a computer running Microsoft Windows 2000 Server configured as a primary domain controller.
2. A computer running Windows XP Professional operating in a domain.

Lab 6B: Managing User Profiles

► **To prepare for the lab**

1. Access to a computer running Windows 2000 Server configured as a primary domain controller.
2. A shared folder on the London computer, named Profiles.
3. The instructor will need to create profile paths to \\London\Profiles\%UserName% for all Domain Users.
4. A computer running Windows XP Professional operating in a domain.
5. In Exercise 2, the students will work with a partner. Decide which computers will be paired prior to class.

Lab 6C: Using Remote Access

► **To prepare for the lab**

1. Access to a computer running Windows 2000 Server configured as a primary domain controller.
2. A computer running Windows XP Professional operating in a domain.
3. In this lab, the students will work with a partner. Decide which computers will be paired prior to class.
4. A share point on the London computer, in the RAHELP folder.

Module Strategy

This module presents the knowledge and skills that students will need to help users configure the desktop environment. Because profiles are essential to the customization of user settings, general information about profiles is presented in this module. However, detailed information about creating and managing profiles is not included in this course. Refer students to Course 2028A, *Basic Administration of Microsoft Windows 2000*. The knowledge in Course 2028A is prerequisite to Course 2272A, *Implementing and Supporting Microsoft Windows XP Professional (Course Beta)*.

Use the following strategy to present this module:

- Overview

In the overview, emphasize that the purpose of customizing the user's environment is to enable users to more efficiently gain access to the resources that they use most.

- Configuring User Desktop Settings

In this section, first present the information about Display properties. Windows XP Professional introduces the concept of themes. Demonstrate how to change and save themes, and explain that they are a group of settings that unify the appearance of the user environment. Next, present the information about configuring shortcuts. Explain that while shortcuts help to easily gain access to resources, too many shortcuts on the desktop can be confusing, and actually reduce productivity. Explain credentials, and explain that only program shortcuts can have additional credentials associated with them. Next, present the information about Accessibility Options. Show the students the Accessibility Wizard, and the Microsoft Accessibility home page at www.microsoft.com/enable. Finally, present the information about configuring Regional Options. If you have installed Windows XP Professional Multilanguage Version, demonstrate how to change the language of the user interface without changing the input language, and explain that this is useful if users are composing documents in languages other than their native languages.

- Customizing the Desktop Environment

In this section, demonstrate the procedures for customizing the **Start** menu, Startup folder, taskbar, and the My Documents folder. When customizing the **Start** menu, emphasize the uses of pinned programs. When customizing the Startup folder, emphasize that the folder can be customized for all users, or individual users. When demonstrating how to customize the taskbar, explain grouped icons. Additionally, discuss the additional toolbars that can be added to the taskbar, their functions, and how to customize them. Finally, present the information about customizing the My Documents folder.

- **Configuring System Settings**

In this section, present the information about modifying environment variables and Startup and Recovery options. Ensure that students understand the differences between user variables and system variables, and discuss when they might alter these variables. Next, present the information about modifying Startup and Recovery options. Remind students who have completed Module 4, “Troubleshooting the Boot Process and Other System Problems,” in Course 2272A, *Implementing and Supporting Microsoft Windows XP Professional (Course Beta)* that they used System Settings to modify the Boot.ini file. Thoroughly explain the purposes of the Recovery options, including the debugging choices.

- **Understanding How Profiles and Group Policy Affect Desktop Customization**

In this section, explain how roaming and mandatory user profiles affect desktop customization. Ensure that students understand the difference between local and roaming profiles, and between changeable profiles and mandatory profiles. Next, explain that Group Policy settings, which are used to support organizational and network policies, will always take precedence over a setting in a profile.

- **Using Remote Assistance**

In this section, explain the Remote Assistance process. If possible, establish a Remote Access session with another computer so that you can demonstrate the various tasks as you present the material. Ensure that students understand that the user requesting help and the support professional or other helper must interact in real time. Emphasize the best practices for maintaining security while using Remote Assistance.

Customization Information

This section identifies the lab setup requirements for a module and the configuration changes that occur on student computers during the labs. This information is provided to assist you in replicating or customizing Training and Certification courseware.

Lab Setup

The following list describes the setup requirements for the labs in this module.

Setup Requirement

The labs in this module require that the student computers operate in a domain. If the student computers are not operating in a domain, have them join the classroom domain.

Prior to starting Lab6B Exercise 2 the instructor must make changes for all domain use's profile paths. Using Active Directory Users and Computers, create a profile path to \\London\Profiles\%UserName%.

Lab Results

There are no configuration changes on student computers that affect replication or customization.

Overview

Topic Objective

To provide an overview of the module topics and objectives.

Lead-in

In this module, you will learn about configuring and customizing the desktop, and using Remote Assistance.

- **Configuring User Desktop Settings**
- **Customizing the Desktop Environment**
- **Configuring System Settings**
- **Understanding How Profiles and Group Policy Affect Desktop Customization**
- **Using Remote Assistance**

As an Information Technology (IT) support professional, you will help users configure and customize their desktops. Users' desktops, contained in their profiles, are a configurable and customizable space that can increase user productivity by making frequently used items easily available. You can also implement and enforce desktop customization policies by using profiles, which can enable users to gain access to their own desktops from any computer that is on the network.

Some of the advantages of configuring the desktop environment in Microsoft® Windows® XP Professional include providing users and organizations that use more than one language the ability to configure desktops for multiple languages and multiple locations. You can also customize the **Start** menu and taskbar to display most commonly used programs and network connections. In addition, Accessibility options, such as Magnifier and On-Screen Keyboard, enable all users to more easily use their computers.

After completing this module, you will be able to:

- Configure user desktop settings.
- Customize the desktop environment.
- Configure System Settings
- Explain how roaming and mandatory user profiles and Group Policy settings affect desktop customization.
- Use local profiles to control desktop customization.
- Use Remote Assistance to assist a user remotely.

Important Because the desktop is stored in the user profile, you can only affect a user's desktop when you are logged on as that user.

◆ Configuring User Desktop Settings

Topic Objective

To introduce configurable user desktop settings.

Lead-in

When you configure user desktop settings, you change the appearance of the work area and the items that it contains.

- **Configuring Display Properties**
- **Configuring Desktop Shortcuts**
- **Configuring Accessibility Options**
- **Configuring Regional Options**

The Windows XP Professional *desktop* is the on-screen work area on which windows, icons, menus, and dialog boxes appear. When you configure user desktop settings, you change the appearance of the work area and the items that it contains. Some of the more commonly changed user desktop settings are:

- Display Properties
- Desktop Shortcuts
- Accessibility Options
- Regional Settings

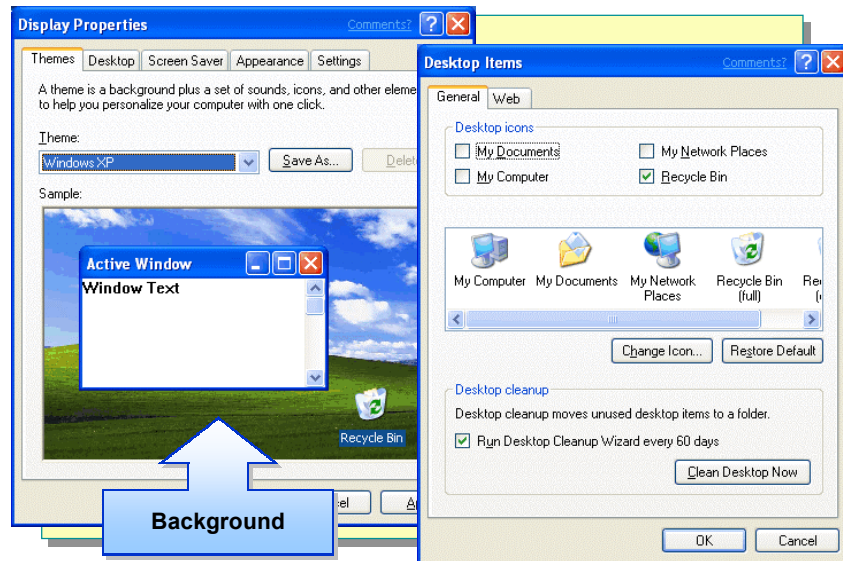
Configuring Display Properties

Topic Objective

To introduce configurable display properties.

Lead-in

Display properties affect how icons, fonts, and the background appear on the desktop.



Display properties configure the visual aspects of the desktop, including the background, icons, and fonts. Additionally, display properties control the properties of all windows and dialog boxes, and the screen resolution. To gain access to the **Display Properties** sheet, right-click the desktop, and then click **Properties**.

Choosing a Theme

Themes are a predefined set of icons, fonts, colors, sounds, desktop backgrounds, and other window elements that give your desktop a unified and distinctive look. You can choose from existing themes, create your own theme by modifying an existing theme and then saving it with a new name, or restore the look used in previous versions of Windows by using the Windows Classic theme.

New (modified) themes are saved in the My Documents folder. An organization may create a theme to distribute to all employees. However, unless the users are prevented from changing the theme by using Group Policy or mandatory profiles, they will be able to select alternate themes, or modify the organization's theme.

To choose a theme, select it from the drop-down list on the **Themes** tab, click **Apply**, and then click **OK**.

Key Points

Changes made to display properties are saved in a theme called *Current Theme* (modified).

If the modified theme is not saved with a unique name, all changes will be lost when a new theme is selected.

Delivery Tip

Make changes to your display properties to show students how the theme is modified, then save the theme.

Important Any changes made on the **Desktop**, **Screen Saver**, **Appearance**, or **Settings** tabs are saved in a new profile called *Current Profile* (Modified), for example Windows XP (Modified). You must save the modified profile with a unique name, or the next time you select a theme from the list, your changes to the theme will be lost.

Customizing the Desktop

Customizing the desktop entails choosing a background, and determining which shortcut icons will appear on the desktop.

The *background*, known as wallpaper in previous versions of Windows, is the image or color that you see when a portion of the desktop is showing. To choose a background, click the **Desktop** tab on the **Display Properties** sheet. Background images can be stretched to fill the desktop, tiled over the entire desktop, or centered on the desktop. You can use any image as a background. Saving an image in the My Pictures folder automatically makes it available as a background.

You can customize the desktop to include shortcuts, and change the icons that are associated with those shortcuts. To customize the desktop, on the **Desktop** tab, click **Customize Desktop**. The **Desktop Items** property sheet displays, which has a **General** tab and a **Web** tab.

On the **General** tab, you can choose which of the following icons to display on the desktop: **My Computer**, **My Network Places**, **My Documents**, and the **Recycle Bin**. Only the **Recycle Bin** icon displays on the desktop by default, unlike previous versions of Windows in which all of these icons displayed on the desktop by default. On the **General** tab, you can also select the style of the icons to represent the shortcuts, and perform or schedule a desktop cleanup.

Desktop Cleanup moves all unused icons into a folder named Unused Icons, which is then automatically displayed on the desktop.

On the **Web** tab, you can choose to display content from Web pages, or other items collectively known as *Desktop Items*, on the desktop. Displaying links to Web content, or an organization's home page on the desktop can enable users to quickly gain access to Web-based content that is essential to their job roles.

Configuring a Screen Saver

On the **Screen Saver** tab, you can select a screen saver, configure the number of minutes without user interaction before the screen saver starts, and select whether the screen saver should be password protected, which requires the logged on user to enter a password to gain access to the contents of the computer. For security purposes, it is recommended that you apply password protection to screen savers. The **Screen Saver** tab also enables you to configure power management options.

Note For more information about configuring power management options, see Module 11, “Configuring Windows XP Professional for Mobile Computing,” in Course 2272A, *Implementing and Supporting Microsoft Windows XP Professional (Course Beta)*.

Configuring Appearance Options

On the **Appearance** tab, you can choose the style of windows, buttons, color schemes, and font sizes. The **Effects** button enables you to configure the visual effects used by menus and windows. The **Advanced** button enables you to configure the color of windows, the desktop, and other items, such as borders and title bars.

Configuring Settings

The **Settings** tab enables you to configure screen resolution and color quality. The higher the screen resolution, the smaller the size of the normal icons that appear on the screen. Clicking the **Advanced** button on the **Settings** tab enables you to configure additional monitor display properties.

Configuring Desktop Shortcuts

Topic Objective

To describe the processes for configuring desktop shortcuts.

Lead-in

Desktop shortcuts enable convenient access to programs, folders, and Web sites.

- Adding a Program Shortcut
- Adding a Folder or Document Shortcut
- Adding a Web Site Shortcut
- Configuring Shortcuts

Desktop *shortcuts* appear as icons on the desktop. Shortcuts can help users make their desktops a central point from which they can quickly gain access to often used and most important items, such as a program, online or offline folder, document, or Web site. Users can choose the icons that represent those shortcuts.

Note Too many shortcuts can clutter the desktop, which may eliminate the benefit of convenience. To avoid a cluttered desktop, consider placing shortcuts on the taskbar, rather than on the desktop.

Adding a Program Shortcut

A desktop shortcut to a program enables the user to open the program by double-clicking the shortcut, rather than using the **Start** menu. This is especially helpful when the program is used frequently, or when it is several layers deep in the menu. For example, to gain access to the Backup utility, you must click **Start**, click **All Programs**, click **Accessories**, click **System Tools**, and then click **Backup**. If this utility were used often, a desktop shortcut would be more convenient.

To add a program shortcut, navigate to the user's **Programs** folder, right-click the desired program icon, click **Copy**, then right-click the Desktop, and click **Paste Shortcut**. You can also use the drag-and-drop feature to create a program icon onto the desktop to.

Adding a Folder or Document Shortcut

A shortcut to a folder or document, whether it is online or on the local drive, enables the user to quickly gain access to the document or folder. Shortcuts also enable users to more easily save documents to the folder. Saving to a folder that has a shortcut is easier because in the document's program, in the **Save** or **Save As** dialog boxes, the user can click **Desktop**, and then click the shortcut to save the file, rather than clicking through multiple layers of folders.

To add a folder or document shortcut to the desktop, use Windows Explorer to locate the folder or document, right-click the folder or document, click **Create Shortcut**, and then drag the new shortcut to the desktop.

Note For a shortcut to an online folder to work when the user is offline, the Offline Files option must be enabled on both the user's computer and the online folder. For more information about using offline options, see Module 11, "Configuring Windows XP Professional for Mobile Computing," in Course 2272A, *Implementing and Supporting Microsoft Windows XP Professional (Course Beta)*.

Adding a Web Site Shortcut

In many organizations, an intranet or Internet Web sites contain information that is essential to the work of the organization's employees or members. A Web site shortcut enables the user to gain access to the Web site directly from the desktop by using the computer's default Web browser.

To add a Web site shortcut, open Microsoft Internet Explorer, go to the desired Web site, right-click anywhere on the page, click **Create Shortcut**, and then click **OK**.

Configuring Shortcuts

You can change the icon that represents a shortcut, configure the shortcut to work with different user credentials, arrange the shortcuts on the desktop, and hide all or specific desktop icons.

Changing Icons

To change the icon that represents a shortcut, right-click the shortcut, click **Properties**, click **Change Icon**, and then select an icon. You can choose from the hundreds of icons in Windows XP Professional, or click **Browse** to locate another icon image.

Associating Credentials with a Shortcut

You can configure program shortcuts to use credentials other than those of the logged on user. To do so, open the properties of the shortcut, click **Advanced**, and then select **Run with Different Credentials**. When you use the shortcut, you will be prompted to enter the credentials that you want to use. A user might use this option when connecting to a resource on another computer by using a different user account.

For Your Information

A user can also store credentials using the **Manage Passwords** function on the **Advanced** tab of the **User Accounts** dialog box.

Arranging Shortcuts on the Desktop

You can arrange shortcuts on the desktop by name, type, or when the resources they point to were last modified or used. Usually, users prefer to arrange their shortcuts in a way that makes sense to them. You can also hide any or all the desktop shortcuts, and lock the shortcuts on the desktop so that they will not move.

You can manually arrange the icons, or arrange the icons by right-clicking the desktop, clicking **Arrange Icons by**, and then selecting an arrangement scheme.

To hide all of the items on the desktop, right-click the desktop, click **Properties**, click **Arrange Icons By**, and then click **Show Desktop Items**.

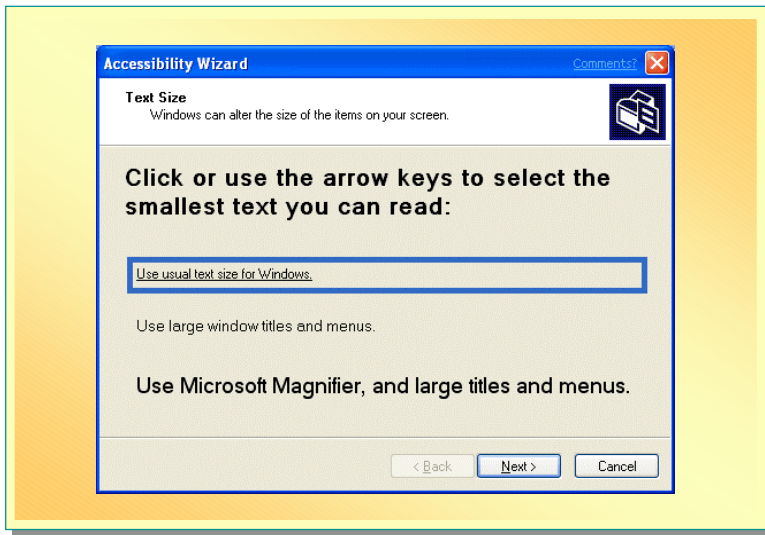
Configuring Accessibility Options

Topic Objective

To introduce the purpose and functions of the accessibility options in Windows XP Professional.

Lead-in

Windows XP Professional includes accessibility options that improve the computing experience for users of all abilities.



Microsoft has included a wide variety of options to enhance the computing experience for people that are blind or have low vision, are deaf or hard-of-hearing, or have motion disabilities. The accessibility tools that are included with Windows XP Professional are intended to provide a minimum level of functionality for users with special needs, and do not require additional software or hardware.

You can configure each accessibility option individually; however, the easiest and most effective way to configure them is by using the Accessibility Wizard. The wizard asks a variety of questions about the user's abilities, and then enables the Accessibility tools that best meet the user's needs. To run the Accessibility Wizard, click **Start**, click **All Programs**, click **Accessories**, click **Accessibility**, and then click **Accessibility Wizard**.

Some of the Accessibility options you can configure include:

Accessibility Option	Purpose
FilterKeys	Adjusts the response of the keyboard
StickeyKeys	Enables user to press one key at a time when simultaneous keystrokes are usually required. For example, enables users to press Alt, Ctrl, and Delete one key at a time.
ToggleKeys	Emits a sound when locking keys, for example Caps Lock, are pressed.
SoundSentry	Provides visual warning for system sounds
ShowSounds	Instructs programs to display captions for program speech and sounds.
MouseKeys	Enables keyboard to perform mouse functions
SerialKeys	Allows the use of alternative input devices instead of a keyboard and a mouse.
High Contrast	Improves screen contrast with alternate colors and font sizes.
Magnifier	Creates a separate window that magnifies a portion of the screen.

Note For more information about available Accessibility options, see Windows XP Professional Help, and the Microsoft Accessibility home page at www.microsoft.com/enable

Configuring Regional Options

Topic Objective

To describe the processes for configuring Regional Options.

Lead-in

Regional Options provide users with additional language and locale options.

- **Changing Time, Date, Number and Currency Formats**
- **Changing Keyboard Layout or IME**
- **Adding a Language**
- **Switching to a Different Language**

Many organizations require that their employees use languages or formats other than the defaults provided in Windows XP Professional. Sometimes the employees must work in more than one language while using a single computer. The settings that can be changed are collectively known as *regional settings*.

Changing Time, Date, Number and Currency Formats

By using **Regional and Language Options** in Control Panel, you can change the format that Windows uses to display dates, times, currency amounts, large numbers, and numbers with decimal fractions. To configure these options, click **Start**, click **Control Panel**, click **Date, Time, Language, and Regional Options**, select a task, change the appropriate options, and then click **OK**.

Changing Keyboard Layout

Each language has a default keyboard layout, but many languages have alternate versions of keyboard layouts. Even if you do most of your work in one language, you may want to try other keyboard layouts. In English, for example, typing letters with accents might be simpler by using the U.S.-International layout. Changing your keyboard layout affects which characters appear when you press the keys on the keyboard.

When you select a keyboard layout an *Input Method Editor (IME)* is automatically selected if needed. An IME is a program that enables you to enter the thousands of characters in written Asian languages by using a standard 101-key keyboard. An IME consists of an engine that converts keystrokes to phonetic and ideographic characters, and a dictionary of commonly used ideographic words. As the user enters keystrokes, the IME engine attempts to identify which character or characters to which the keystrokes should be converted.

To add a new keyboard layout:

1. Click **Start**, click **Control Panel**, click **Date, Time, Language, and Regional Options**, and then click **Regional and Language Options**.
2. On the **Languages** tab, click **Details**.
3. In the **Text Services and Input Languages** dialog box, highlight the language for which you want to change the keyboard layout, and then click **Add**.
4. In the **Add Input Language** dialog box, select **Keyboard layout/IME**, choose a keyboard layout from the drop-down list, and then click **OK** three times.

Adding a Language

You must add a language if you want to enter or display text in that language.

To add a language:

1. Click **Start**, click **Control Panel**, click **Date, Time, Language and Regional Options**, and then click **Regional and Language Options**.
2. On the **Languages** tab, under **Text services and input languages**, click **Details**.
3. Under **Installed services**, click **Add**.
4. Select an **Input language** and a **Keyboard Layout/IME** from the drop-down lists, and then click **OK** three times.

Note You can also use this procedure to change the keyboard layout or IME.

By default, Windows XP Professional installs the files for most input languages that are supported by Windows. However, if you want to enter or display text in the East Asian languages (Chinese, Japanese, or Korean) or the complex script and right-to-left languages (Arabic, Armenian, Georgian, Hebrew, the Indic languages, Thai, or Vietnamese), you can install the language files from the Windows CD (compact disc) or, if applicable, a network.

To add support for these languages, click **Start**, click **Control Panel**, click **Date, Time, Language, and Regional Options**, and then click **Add support for additional languages**.

Switching to a Different Input Language

If you compose documents by using multiple languages, you can easily switch from one installed input language to another by using buttons on the taskbar.

1. In Control Panel, open Regional and Language Options.
2. On the **Languages** tab, under **Text services and input languages**, click **Details**.
3. Under **Preferences**, click **Language Bar**.
4. In the **Language Bar Settings** dialog box, select the **Show additional Language bar icons in the Notification area** check box.

5. Click **OK** three times.
6. Click the **language** icon or the **keyboard** icon on the taskbar to display a menu.
7. Click a **language** or **keyboard**.

When you switch to another input language, some programs offer special features, such as font characters or spelling checkers that are designed for different languages.

Changing the Display Language

You can also change the language that displays on menus and windows to a language other than that in which you are composing documents. To do so, you must first install support for Windows XP Professional Multilanguage Version. You can install Multilanguage support during installation or at a later time by using the Setup CD.

◆ Customizing the Desktop Environment

Topic Objective

Describe the purposes of customizing the desktop environment.

Lead-in

You can customize the desktop environment to increase user productivity by making it easier to gain access to important resources.

- Customizing the Start Menu
- Customizing the Startup Folder
- Customizing the Taskbar
- Customizing the My Documents Folder

The desktop environment can help a user be more productive by providing easy access to the most used resources, or it can hinder productivity by being cluttered, disorganized, and difficult to locate icons when you need them. When you customize the desktop environment, you will focus on making access to resources as easy and efficient as possible.

Four areas that you can customize are the:

- **Start** menu
- Startup folder
- Taskbar
- My Documents folder

Customizing the Start Menu

Topic Objective

To introduce the **Start** menu, and show how to customize it.

Lead-in

Windows XP Professional has a new **Start** menu that makes gaining access to files easier



Clicking **Start** displays a menu that enables users to easily gain access to the most used items on the computer. The following sections describe the organization of the **Start** menu and provide instruction about how to customize it.

Examining the Windows XP Professional Start Menu

The right frame of the **Start** menu consists of three sections that display frequently used folders and items. The left frame also consists of three sections. The top section displays the *pinned* programs, which are programs that are manually attached to the top left of the **Start** menu. The default email program and browser always appear in pinned programs. Beneath the pinned programs, recently used programs appear.

The **Start** menu is color-coded. The white area of the **Start** menu is user-based, while the light blue area is operating-system-based. The light blue area can only be customized in limited ways. When customizing the different sections of the **Start** menu, you have the choice of customizing it for the user who is currently logged on, or for all users on the computer.

Customizing the Start Menu for All Users

When you customize the **Start** menu for all users, you are adding an item anyone logged on to the computer can use.

You can add a submenu to the **Start** menu for easy access to a group of programs. For example, if everyone who uses a computer performs the same job function, you might want to add a submenu that contains the programs the employees use most. You can also add to the **Start** menu a shortcut to a specific program or resource.

Adding a Submenu for All Users

To add a submenu for all users, perform the following steps:

1. Right-click **Start**, and then click **Open all Users**.
2. Double-click the folder to which you want to add the submenu.
If you place the submenu in the Start Menu folder, it becomes pinned to the top of the **All Programs** menu. If you place the submenu in the Programs folder, it will be placed alphabetically in the list of programs.
3. On the **File** menu, point to **New**, and then click **Folder**.
4. Type a name for the folder, and then press ENTER.
5. In My Computer or Windows Explorer, drag any programs or shortcuts that you want to appear on the menu into the folder that you just created.

Adding a Shortcut for All Users

To add a shortcut for all users, perform the following steps:

1. Right-click **Start**, click **Open All Users**, click **File**, point to **New**, and then click **Shortcut**.
2. Type the location of the item for which you want to create a shortcut, or click **Browse** to locate the item, and then click **OK**.
3. Click **Next**, type a name for the shortcut, and then click **Finish**.

Customizing the Start Menu for Individual Users

There may be instances when you will want to customize the **Start** menu for a particular user only. You can add shortcuts and submenus, and pin programs to an individual's **Start** menu.

Delivery Tip

Tell students that when users work on a computer that is part of a domain, each of the users may have more than one user account; for example, a domain user account and a local user account. Be sure that you are customizing the **Start** menu for the correct account.

Adding a Submenu for an Individual User

The process for adding a submenu to an individual's **Start** menu is similar to adding a submenu for all users. The difference is between the two procedures is the first step of the process, which changes as follows:

- Right-click **Start**, click **Explore All Users**, expand the folder of the user whose **Start** menu that you want to customize, and then click **Start Menu**.

Adding a Shortcut for an Individual User

To add a shortcut to an individual's **Start** menu, perform the following steps:

1. Right-click the object for which you want to create a shortcut, and then click **Create Shortcut**.
2. Drag, or cut and paste, the shortcut into the individual's Start Menu or Programs folder.

Changing Start Menu Properties

You can alter the properties of the **Start** menu; for example, you can change whether items are displayed as links or menus or not displayed at all. When you make this type of alteration, the change affects only the logged on user.

To make changes to **Start** menu properties, perform these steps:

- Right-click **Start**, click **Properties**, click **Customize**, make desired changes on the **General** and **Advanced** tabs, and then click **OK** twice.

Note You can use the **Start** menu that is used in previous versions of Windows instead of the **Start** menu in Windows XP Professional by changing the properties of the **Start** menu.

Pinning a Program to the Start Menu

Programs are the only items that you can pin to the **Start** menu. When you pin a program to the **Start** menu, it only applies to the user that is currently logged on. To accomplish this task:

- Right-click the program that you want to pin to the **Start** menu, and then click **Pin to Start menu**.

Delivery Tip Demonstrate this process.
--

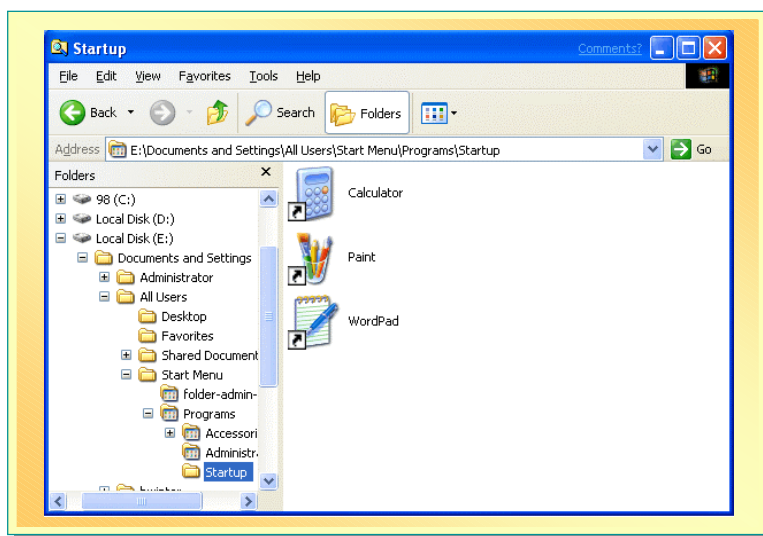
Customizing the Startup Folder

Topic Objective

To describe the process and purpose of customizing the Startup folder.

Lead-in

By customizing the Startup folder, you can enable programs to automatically start when a user logs on.



If users always use a particular program or programs as soon as they log on, it is convenient to have those programs automatically start when the user logs on. To enable a program to start automatically when a user logs on, place a shortcut to that program in the appropriate Startup folder. You can customize the Startup folder for all users or individual users.

To enable programs to start automatically upon logon, perform the following steps:

1. Right-click **Start**, and then click **Explore All Users**.
2. Expand either **All Users** or a specific user.
3. Expand **Start Menu**, and then click **Programs** in the left pane.
4. In the right pane, copy the shortcut for the programs that you want to start automatically upon logon.
5. Expand **Programs**, right-click **Startup**, and then click **Paste**.

The shortcuts to the desired programs will now appear in the Startup folder. When the user whose Startup folder you have customized next logs on, the programs will automatically start.

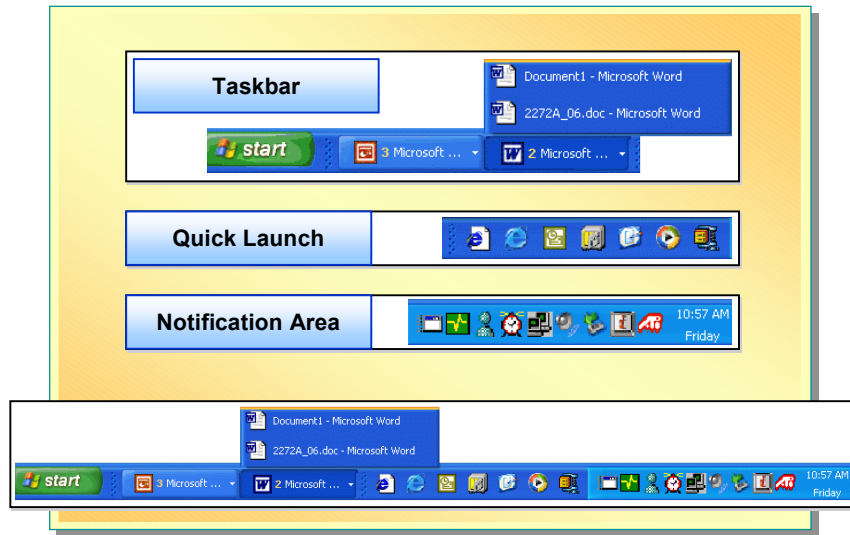
Customizing the Taskbar

Topic Objective

To describe the function of the taskbar in Windows XP Professional.

Lead-in

Customizing the taskbar enables users to easily gain access to and manage resources.



The taskbar in Windows XP Professional is substantially different than it is in previous versions of Windows.

Examining the Taskbar

The taskbar is made up of the following three distinct areas:

- The *Taskbar* includes buttons for each open document. Because the taskbar can become crowded when you are working in multiple programs or with multiple documents, Windows XP Professional groups the buttons representing documents from a single program into one taskbar button that is named for the program. A down arrow on the right of the button indicates that multiple documents from this program are open, and clicking the button displays a list of documents from which to select.
- *Quick Launch* is a menu that you can add to the taskbar. It contains frequently used programs that you can open by using a single click. To add this toolbar, right-click an empty area on the taskbar, point to **Toolbars**, and then click **Quick Launch**.
- The *Notification Area* of the taskbar is where you usually see the time displayed, and icons indicating status or certain events. For example, you may see an icon representing a new e-mail message, an icon for network connectivity, or an icon for speaker or volume status. This area can become crowded with notification icons, so Windows XP Professional automatically hides inactive icons. You can view the inactive icons by clicking the chevron (<) in the notification area.

Adding Programs to the Quick Launch Toolbar

To add frequently used icons to the Quick Launch toolbar for easy, one-click access, perform the following steps:

1. Right-click an empty area of the Quick Launch bar, and then click **Open Folder**.
2. On the **File** menu, click **New**, and then click **Shortcut**.
3. Type the location of, or browse to, the desired program, click **Next**, and then click **Finish**.

Customizing Taskbar Properties

You can easily customize the properties of the taskbar. For example, you can control whether the taskbar is automatically hidden, whether inactive icons are hidden, and when individual icons should display in the notification area. To customize taskbar behavior:

1. Right-click an empty area on the taskbar, and then click **Properties**.
2. Make desired changes on the **Taskbar** tab, click **Customize** and make desired changes to individual notification icons, and then click **OK** twice.

Adding Toolbars to the Taskbar

There are a number of different toolbars that you can add to the taskbar. The following table delineates the functionality of those toolbars, and how to customize them.

Toolbar	Function	To customize
Address	Provides a Web browser address bar into which you can type the URL (uniform resource locator) to a Web site that you want to open.	Each time you type a URL into this toolbar, that URL will become part of a list from which you can choose.
Links	Provides a quick way to open Web pages, shortcuts, and other items.	Drag the Web page's icon from the Address bar directly to the Links bar. Or drag any link from a Web page, your Favorites bar, or your desktop onto the Links bar.
Desktop	Provides easy access to all items on the desktop.	Because this toolbar shows all items on the desktop, you can change what is available on the toolbar by adding or removing items from the desktop. Users who do not like a crowded desktop can hide all items on the desktop and open them from this toolbar.
Language Band	Provides easy access to text tools such as IMEs and writing and speech recognition programs. It also provides a way to switch between languages and keyboard layouts.	This bar automatically displays when you have any of the appropriate programs installed. The buttons displayed depend on which programs are installed.
New Toolbars	Provides a quick link to any folder or network place on your computer.	Right-click the taskbar, point to Toolbars , click New Toolbar , move to the desired resource, and then click OK . The toolbar will be named the same as the resource, and you will be able to gain access to everything within that resource from the toolbar.

Customizing the My Documents Folder

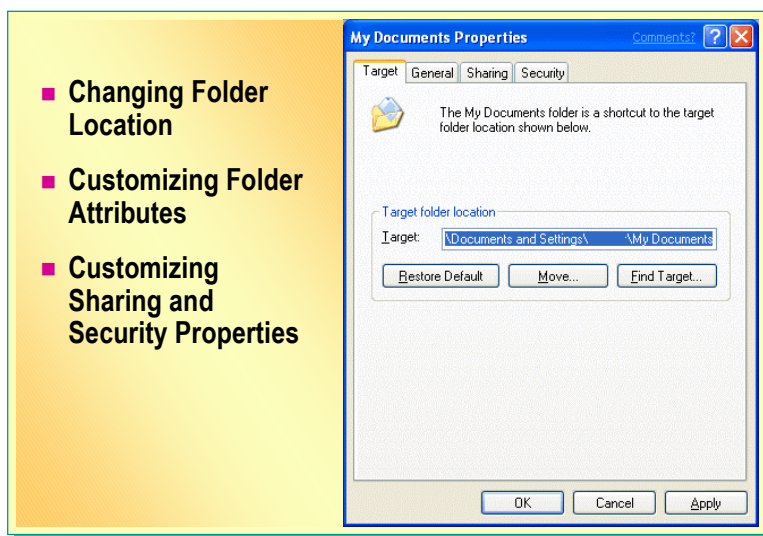
Topic Objective

To explain how to customize the My Documents folder.

Lead-in

You can change the default properties and attributes of the My Documents folder.

- Changing Folder Location
- Customizing Folder Attributes
- Customizing Sharing and Security Properties



My Documents is a commonly used folder for storing a user's data. Customizing this folder can improve a user's productivity by enabling that user to more easily and efficiently store and gain access to data.

For Your Information

This discussion of the My Documents folder assumes that the folder resides on an NTFS partition.

A user's My Documents folder is by default available only to that user and administrators when on an NTFS file system partition. However, My Documents can be shared, and another user can be given specific permissions to the folder.

You can change the default properties of the My Documents folder. To gain access to these configurable properties, click **Start**, right-click **My Documents**, and then click **Properties**.

Changing Folder Location

You can change the location of the My Documents folder from its usual position within Documents and Settings\\Username\\My Documents (where Username is the user's logon name). You may want to change the location of the folder when you want to move the storage of documents to:

- a local drive other than the one on which programs reside, so that programs and user data are stored separately.
- a network share, to prevent the loss of data if the local disk becomes corrupted.

Note If you choose to move My Documents to a server, be sure that both the local computer and the server are configured for caching. For more information about caching, see Module 11, "Configuring Windows XP Professional for Mobile computing," in Course 2272A, *Implementing and Supporting Microsoft Windows XP Professional (Course Beta)*.

If you change the location of the My Documents folder, then you must also change the target of the My Documents shortcut.

To change the target of the My Documents shortcut:

1. Click **Start**, right click the **My Documents** folder, and then click **Properties**.
2. On the **Target** tab, click **Move**, browse to the new location of the My Documents folder, and then click **OK** twice.

Customizing Folder Attributes

The My Documents folder, like all other folders, has four important attributes that can be customized:

- *Archiving*. Specifies that the folder contents should be archived when that content changes. Some programs on the computer, for example Backup, will use this attribute to determine which folders and documents should be backed up.
- *Indexing*. Enables documents within the folder to be found during a search of files on the computer.
- *Compression*. Compresses the documents within the folder to save disk space.
- *Encryption*. Enables only the user that is encrypting the folder to gain access to the folder's contents, and only when that user is logged on using the same credentials that were used when encrypting the folder.

To change the attributes of the My Documents folder:

1. Click **Start**, right click the **My Documents** folder, and then click **Properties**.
2. On the **General** tab, click **Advanced**, select or clear the desired attributes, and then click **OK** twice.

Customizing Sharing and Security Properties

You can share your My Documents folder, and set its NTFS security permissions.

When you share the My Documents folder, you are granting other users network and local access to the folder. If you need to share only a specific file, you should consider putting that file in a folder designated for shared files, thus protecting the confidentiality of other files in the My Documents folder. However, if you do want to share all of the files within the My Documents folder, perform the following steps:

1. Click **Start**, right-click **My Documents**, and then click **Properties**.
2. On the **Sharing** tab, click **Share this folder**, set **User limit**, **Permissions**, and **Caching** properties, and then click **OK** until all boxes are closed.

If you do need to configure security parameters at the folder level, use the **Security** tab in the **My Documents Properties** sheet.

Important When setting permissions or configuring security, always set the most restrictive permissions possible. For example, if other users need only to read the documents in the folder, set all permissions to Read only.

◆ Configuring System Settings

Topic Objective

To describe the system settings that can be configured to customize the user's desktop.

Lead-in

System Settings enable you to modify environment variables, and startup and recovery options.

- **Modifying Environment Variables**
- **Modifying Startup and Recovery Options**

System performance can vary over time because of changes in workload and resource usage. Windows XP Professional contains configuration options that enable you to optimize system performance.

When you configure operating system settings, they apply to all users who log on to the computer; therefore, you do not need to reconfigure the settings for each user. In Control Panel, you can configure the following operating system settings:

- *Environment Variables*. Enables you to alter user and system variables. For example, you can change the location of the system's temporary files to optimize space.
- *Startup and Recovery*. Enables you to configure startup and recovery procedures. For example, you can set the counter to zero to minimize the restart time.

To gain access to these system settings, click **Start**, click **Control Panel**, click **Performance and Maintenance**, click **System**, and then click **Advanced**.

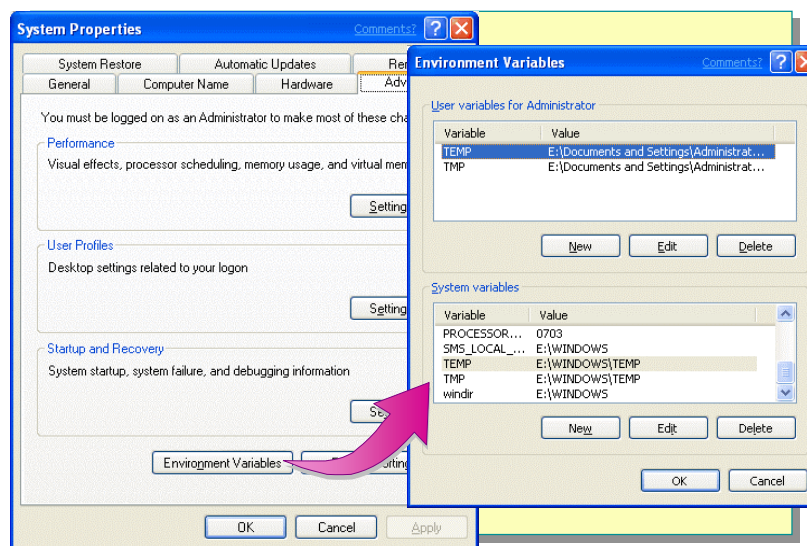
Modifying Environment Variables

Topic Objective

To demonstrate the process for modifying environment variables.

Lead-in

The **Environment Variables** dialog box enables you to modify variables, such as the location of temporary files.



The ability to configure the system environment variables can be useful, especially when several users share a computer. For example, if you install a new program that requires that a variable be configured for each user, you can add the variable to the system variables. This modification would enable all users of the computer to run the new program without needing to make the changes individually.

The **Environment Variables** dialog box contains specific configuration information, such as the location of temporary files that are used by the operating system and specific applications. There are two types of environment variables that are available from the **Advanced** tab of the **System Properties**.

- *User variables.* Specify the locations of the currently logged on user's temp files.
- *System variables.* Specify the location of the specific computer files and folders.

Each area has buttons for creating, editing, and deleting variables. Windows XP Professional uses this information to control various applications; for example, the TEMP environment variable specifies where an application places its temporary files.

Delivery Tip

Open the **Environment Variables** dialog box, and describe the configuration options that are available.

Students will not configure environment variables in a lab.

To display or edit the active user and system environment variables that are listed in the **Environment Variables** dialog box, open the **System Properties** sheet, click the **Advanced** tab, and then click **Environment Variables**.

Configuring User Variables

The user environment variables differ for each user and are contained in the user profile. The user environment variables include any user-defined settings, such as the Temp folder, and any variables that applications define, such as the path to the location of the application files. Users can add, modify, or remove their user environment variables in the **Environment Variables** dialog box.

Configuring System Variables

System environment variables apply to the entire system. Consequently, these variables affect all users. During Windows XP Professional installation, Setup configures the default system environment variables, including the path to the Windows XP Professional files. Only an administrator can add, modify, or remove a system environment variable.

Setting Default Environment Variables

During startup, Windows XP Professional searches the startup files and sets any environment variables. Windows XP Professional sets environment variables in the following order:

1. Autoexec.bat variables
2. System environment variables
3. User environment variables

For example, if you add the line **SET TMP=C:** to Autoexec.bat, a startup file, and a **TMP=X:\TEMP** user variable is set, the user environment variable setting (X:\TEMP) overrides the **SET TMP=C:** setting from the Autoexec.bat file.

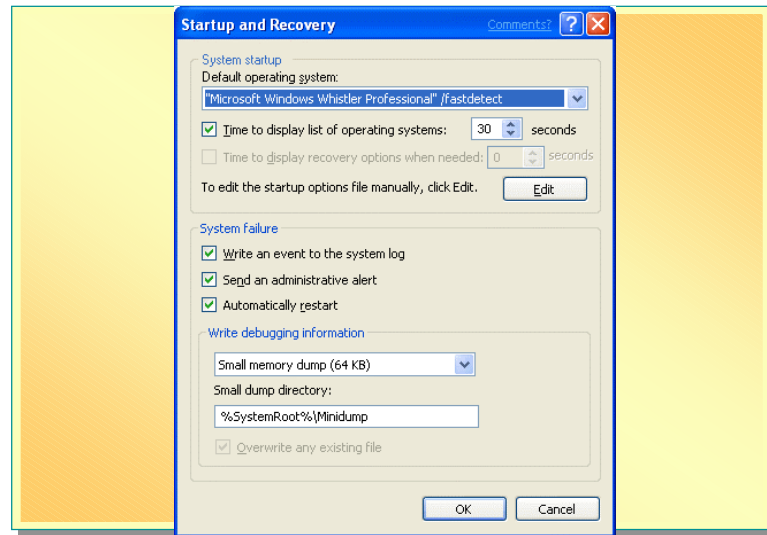
Modifying Startup and Recovery Options

Topic Objective

To describe the process for modifying startup and recovery options.

Lead-in

Startup and recovery options tell the computer what to do when the system unexpectedly stops.



You can configure startup and recovery options to indicate which operating system that your computer uses when it starts, and what actions it performs if the system stops unexpectedly.

Delivery Tip

Open the **Startup and Recovery** dialog box and describe the configuration options.

To configure startup and recovery options, open the **System Properties** sheet, click the **Advanced** tab, and then click **Startup and Recovery**.

Modifying System Startup

When you first turn on the computer, the system displays a menu that lists the available operating systems. By default, the system chooses one of the operating systems and displays a countdown timer. If you do not choose another operating system, the system starts the pre-selected operating system when the countdown timer reaches zero or when you press ENTER.

Use the options in the **System startup** area to designate which operating system starts by default. Select the appropriate operating system from the **Default operating system** list. Adjust the countdown timer value to control how long the system waits to automatically start the default operating system. A time of zero automatically starts the default operating system without offering the user a choice of operating systems.

Configuring System Failure Settings

You can configure the system failure settings to indicate the actions that your computer performs if the operating system generates a stop error. A *Stop error* is a severe error that causes the operating system to stop all processes.

The following system failure settings options are available:

- *Write an event to the system log.* Records the source of the stop error in the system log for later review.
- *Send an administrative alert.* Sends an alert to an administrator via e-mail.
- *Automatically restart.* Restarts the computer as part of the recovery process.
- *Write debugging information.* Sends information to a file called `Memory.dmp` that support engineers can use for debugging. You have three options for the type of debugging information to be recorded, and you must determine where the file containing the debugging information, called the *dump file*, is stored. The available types of debugging information are:
 - **Small Memory Dump.** Records the smallest set of useful information that will help identify the reason that the system stopped unexpectedly. This option requires a paging file of at least 2 megabytes (MB) on the boot partition of the computer, and specifies that Windows XP Professional will create a new file each time the system stops. A history of these files is stored in the Small dump directory.
 - **Kernel Memory Dump.** Records only kernel memory, which speeds up the process of recording information in a log. Depending on the amount of RAM in your computer, you must have between 50 MB and 800 MB available for the paging file on the computer's boot partition. To determine how much disk space is needed:
 1. Right-click the taskbar, and then click **Task Manager**.
 2. In Task Manager, click **Performance**.
 3. View the entry for **Kernel Memory, Total**.
 - **Complete Memory Dump.** Records the entire contents of system memory when the computer unexpectedly stops. If you choose this option, the paging file on the boot partition must be large enough to hold all of the physical RAM, plus one megabyte.
- *Overwrite any existing file.* When you select this option, the `Memory.dmp` file is overwritten whenever a Stop event occurs. If you do not select this option, the file cannot be overwritten, and you may not be able to record the information that you need to identify the cause of the Stop error.

Interpreting the Memory.dmp File

The `Memory.dmp` file contains the debugging information that you choose to record. Two utilities in the Resource Kit can help you interpret the information in this file.

- **Dumpchk** Converts the hexadecimal file to text so it can be read.
- **Dumpexam** Displays the contents of the file.

Lab 6A: Customizing the Desktop

Topic Objective

To introduce the lab.

Lead-in

In this lab, you configure and customize the desktop.



Objectives

After completing this lab, you will be able to:

- Configure the Desktop
- Configure desktop properties.
- Customize **Start** menus.
- Modify the location of My Documents folder.

Prerequisites

Before working on this lab, you must have:

- Knowledge about the difference between a workgroup and a domain.
- Network access to a computer running Microsoft Windows 2000 Server configured as a primary domain controller.

Lab Setup

To complete this lab, you need the following:

- A computer running Windows XP Professional operating in a domain.
- Access to a computer running Windows 2000 Server configured as a domain controller.

Scenario

You are responsible for supporting a department of users whose computers have just been upgraded to Windows XP Professional. A number of users would prefer to use a desktop display similar to what they used in Microsoft Windows 98. Other users want to change their wallpaper and other desktop settings. You are going to show them how to change their desktop display to the desired configurations.

Estimated time to complete this lab: 30 minutes

◆ Understanding How User Profiles and Group Policy Affect Desktop Customization

Topic Objective

To examine how profiles and Group Policy affect desktop customization.

Lead-in

Profiles and Group Policy can affect a user's ability to customize the desktop.

- Examining How User Profiles Affect Desktop Customization
- Examining How Group Policy Affects Desktop Customization

Both profiles and Group Policy can affect a user's ability to customize the desktop environment.

In Windows XP Professional, a user's computing environment is determined primarily by the user profile. For security purposes, Windows XP Professional requires a user profile for each user account that has access to the system.

The user profile contains all of the settings that the user can define for the work environment of a computer running Windows XP Professional. These settings include display, regional, mouse, and sounds, and also network and printer connections. You can set up user profiles so that a profile follows a user to each computer that the user logs on to.

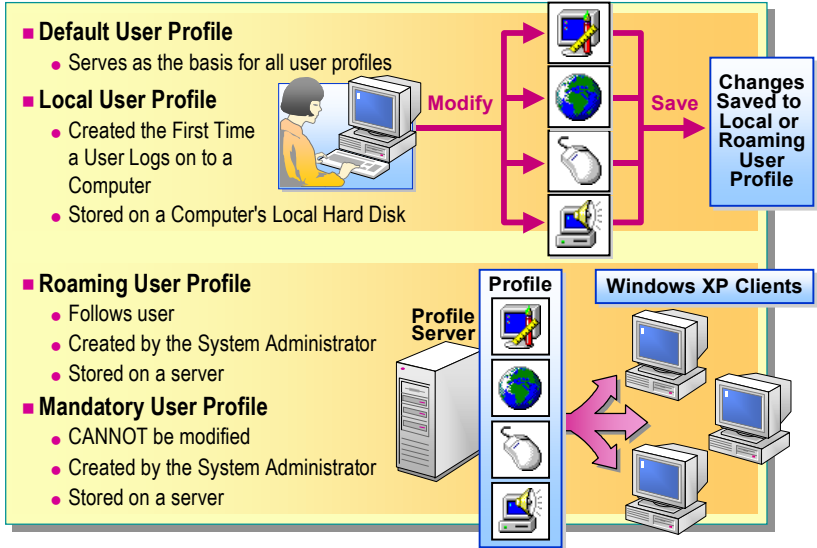
Examining How User Profiles Affect Desktop Customization

Topic Objective

To explain how profiles affect Desktop customization.

Lead-in

Local or roaming profiles can be modified, but mandatory profiles cannot.



A user profile is created the first time that the user logs on to a specific computer. All user-specific settings are saved in the user's profile within the Documents and Settings folder. When the user logs off from the computer, the user's profile is updated on that computer. Thus, the user profile maintains the desktop settings for each user's work environment on the local computer, unless the profile is *mandatory*, in which case the user cannot update it.

Mandatory profiles are used to standardize desktop settings across an organization. Only system administrators can make changes to mandatory user profiles. Types of profiles include:

- *Default user profile.* Serves as the basis for all user profiles. Every user profile begins as a copy of the default user profile, which is stored on each computer running Windows XP Professional.
- *Local user profile.* Created the first time a user logs on to a computer, and is stored on the local computer. Any changes made to the local user profile are specific to the computer on which the changes were made. Multiple local user profiles can exist on one computer.
- *Roaming user profile.* Created by the system administrator and stored on a server. This profile is available every time a user logs on to any computer on the network. If a user makes changes to his or her desktop settings, the user profile is updated on the server when the user logs off.
- *Mandatory user profile.* Created by the system administrator to specify particular settings for a user or users, roaming profiles can be made mandatory by changing the profile file name from *Ntuser.dat* to *Ntuser.man*. A mandatory user profile does not enable users to save any changes to their desktop settings. Users can modify the desktop settings of the computer while they are logged on, but these changes are not saved when they log off.

Examining How Group Policy Affects Desktop Customization

Topic Objective

To explain how Group Policy affects desktop customization.

Lead-in

Group Policy is applied to network resources, and overrules any local policy or profile setting.

- **Network Settings to Enforce Organizational Policies**
- **Can Be Used to Define a Desktop Environment**
 - User desktop settings
 - Environment variables
 - System settings
 - Restricted access to files, folders, and Windows XP Professional system settings
- **Override Local Settings**

Network configuration settings that are used to support organizational and network policies by assigning the policies to specific objects are collectively known as *Group Policy*. The policies can be applied to one or more objects in the Active Directory™ directory service, such as user accounts, groups, and computers.

You can use Group Policy settings to define users' desktop environments, including:

- User desktop settings.
- Environment variables.
- System settings
- Restricted access to files, folders, and system settings in Windows XP Professional.

When a conflict occurs between Group Policy on the domain and a user's local profile settings, Group Policy overrules any local setting. For example, if a Group Policy setting restricts logon hours, and the local profile allows the user to log on at any time, the restricted hours will take effect. Any Group Policy settings that are used to define users' desktop environments cannot be changed by the user.

You should be familiar with the Group Policy settings that affect the computers for which you are responsible, and gain a thorough understanding of how those settings will affect the users that you support.

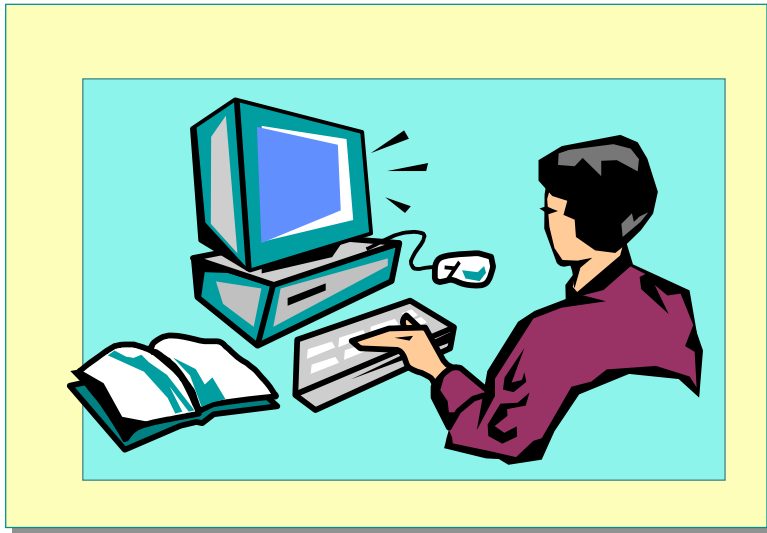
Lab 6B: Managing User Profiles

Topic Objective

To introduce the lab.

Lead-in

In this lab, you will configure user profiles, and examine roaming user profiles.



Objectives

After completing this lab, you will be able to:

- Manage local user profiles.
- Understand roaming user profiles.

Prerequisites

Before working on this lab, you must have:

- Completed Lab 1C Upgrading Windows 98 to Windows XP Professional.
- Completed Lab 5B: Operating in a Domain
- Knowledge about the difference between a workgroup and a domain.

Lab Setup

To complete this lab, you need the following:

- A computer running Windows XP Professional configured as a member of a domain.
- Access to a computer running Windows 2000 Server configured as a domain controller.

Estimated time to complete this lab: 30 minutes

◆ Using Remote Assistance

Topic Objective

To describe the purpose and function of Remote Assistance.

Lead-in

Remote Assistance enables you to help users by viewing and controlling their computer screens from your own workstation.

- **Establishing a Remote Assistance Sessions**
- **Examining the Helper's Remote Assistance Console**
- **Sharing Control of the User's Computer**
- **Sending a File Using the Remote Assistance console**
- **Best Practices When Using Remote Assistance**

Remote Assistance is a Windows XP Professional feature in that enables a user to send a request for remote help. The helper, who may be an IT support professional, accepts the request, and is able to then:

- Chat with the user.
- See the user's desktop.
- Take shared control of the user's computer if the user allows it.
- Send files to and receive files from the user.

Remote Assistance enables users to get direct, remote help from a more experienced IT support professional, friend, or colleague. As an IT support professional, Remote Assistance enables you to see and control a user's computer without needing to go to the user's workstation. Viewing a user's computer screen remotely may help you find solutions to problems that you would not otherwise be able to solve. Remotely sharing control of the user's computer may enable you to remotely solve problems that would otherwise require you to visit the user's workstation. For example, if a user's computer has a malfunctioning driver, and you need to uninstall the driver, you can remotely run programs as an administrator of the computer and uninstall the driver. Then you can send the correct driver to the user's computer, and install it on the computer.

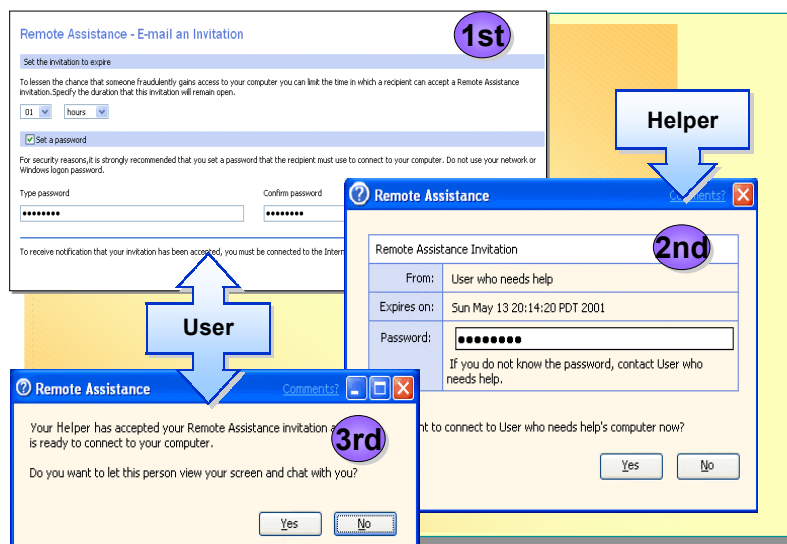
Establishing a Remote Assistance Session

Topic Objective

To describe the process for establishing a session.

Lead-in

Establishing a remote access session is a collaborative effort between the user and the helper.



Before you can remotely assist a user, the user must initiate a remote access session. A session is established in three stages:

Delivery Tip

Ensure that students understand that both the user and the helper must participate in this process in real time.

1. The user requests help by sending an invitation.
 - a. Click **Start**, click **Help and Support**, click **Ask for Assistance**, click **Invite a friend to connect to your computer with Remote Assistance**, and then click **Invite Someone to Help You**.
 - b. Select a method to send the invitation, fill in your helper's information, and then click **Invite this person**. You can send an invitation by using Microsoft Windows® Messenger, e-mail, or by saving the invitation to a file and sending it to the helper.
 - c. Type your name and a message, click **Continue**, set the time for the invitation to expire, type and confirm a password, and then click **Send Invitation**.
2. The helper responds to the Remote Assistance request.
 - a. To open the invitation, double-click the file named **rcbuddyx.MsRcIncident** (where *x* is an identifier, such as a number, that may or may not appear).
 - b. If an **Opening E-mail Attachment** dialog box appears, click **Open**, and then click **OK**.
 - c. In the **Remote Access** dialog box, type the password, and then click **Yes**.
3. The user accepts the helper's assistance.
 - a. In the **Remote Assistance** dialog box, click **Yes** to enable the helper to view your screen and to chat with you.

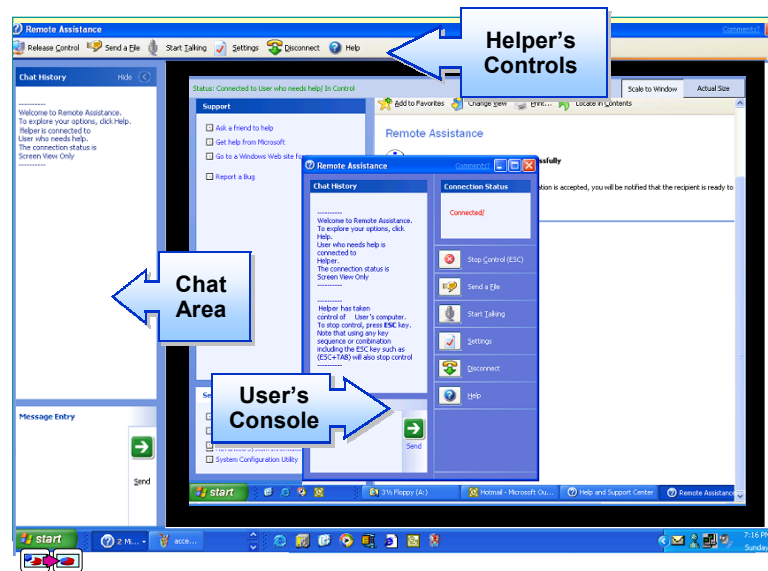
Examining the Helper's Remote Assistance Console

Topic Objective

To examine the helper's Remote Assistance Console.

Lead-in

The helper's Remote Assistance console covers the entire screen. The left pane is the helper's chat area, and the right pane is the user's screen area.



When a Remote Assistance session has been established, each participant sees a unique Remote Assistance console.

The helper's console covers the entire monitor, and has two panes. The smaller left pane contains the helper's chat area, where the helper sends messages to and receives messages from the user. The larger right pane contains the user's screen area, including the user's Remote Assistance console, **Start** menu, and taskbar. In this pane, the helper can see everything that appears on the user's screen. The helper's controls appear at the top of the helper's console.

Delivery Tip

Either point to each section in the slide, or establish a Remote Assistance session with a class member, and demonstrate the uses of the different screen areas.

The Remote Assistance controls include:

- **Take Control/Release Control** (helper only)
Sends a request to the user to share control of the user's computer, or releases control of the user's computer while maintaining the Remote Assistance session.
- **Send a File**
Sends a file from the helper's computer or a network share to the user's computer.
- **Start Talking**
Enables voice communication on computers with voice capabilities.
- **Settings**
Enables you to adjust sound quality, and resize the console.
- **Disconnect**
Severs the Remote Assistance connection.

The user's screen shows a remote access console with a chat area on the left, and user controls on the right. The user's **Start** menu and taskbar appear at the bottom of the user's screen.

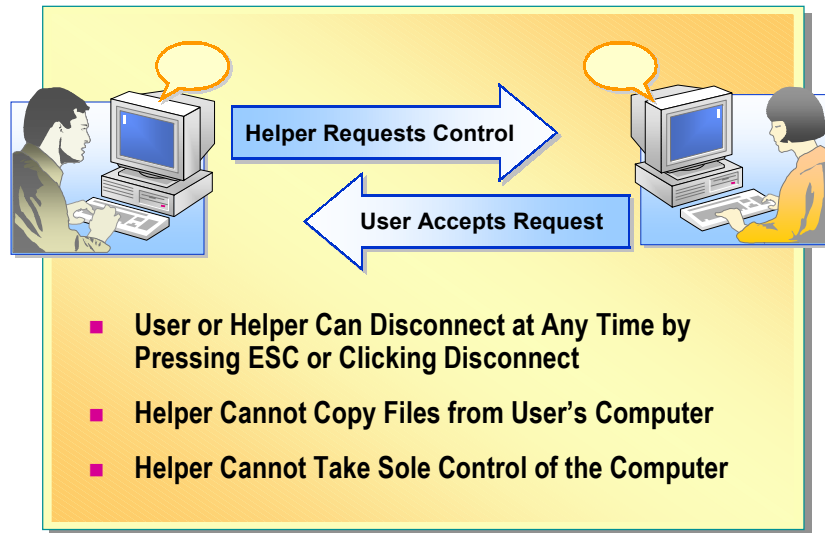
Sharing Control of the User's Computer

Topic Objective

To describe the process for sharing control of the user's computer.

Lead-in

If allowed by the user, the helper can share control of the user's computer.



Communication between the user and helper usually begins through the Chat functionality. If you need to share control of a user's computer to help solve a problem, you must first request permission to do so. To request permission to share control of the user's computer, click **Take Control** on your console controls. The user will receive your request, and will accept it if appropriate.

When your request has been accepted, you will be able to control the user's computer by using your keyboard or mouse. To use your mouse, position it over the user's screen area on the right side of your console.

Note Because you will be sharing control with the user, you can each use your mouse and keyboard. However, both of you should not try to control the computer at the same time. Use the Chat area or the voice communication capability to communicate with the user about when you should each exercise control.

Some users may have concerns about sharing control of their computers. To help alleviate their concerns, provide them with the following information:

- A user can close the Remote Assistance connection at any time by pressing ESC or clicking **Disconnect**.
- A helper cannot copy any file from the user's hard drive. The only way to get a file from the user is for the user to send the file.
- Control is always shared. The helper cannot take sole control of the computer.

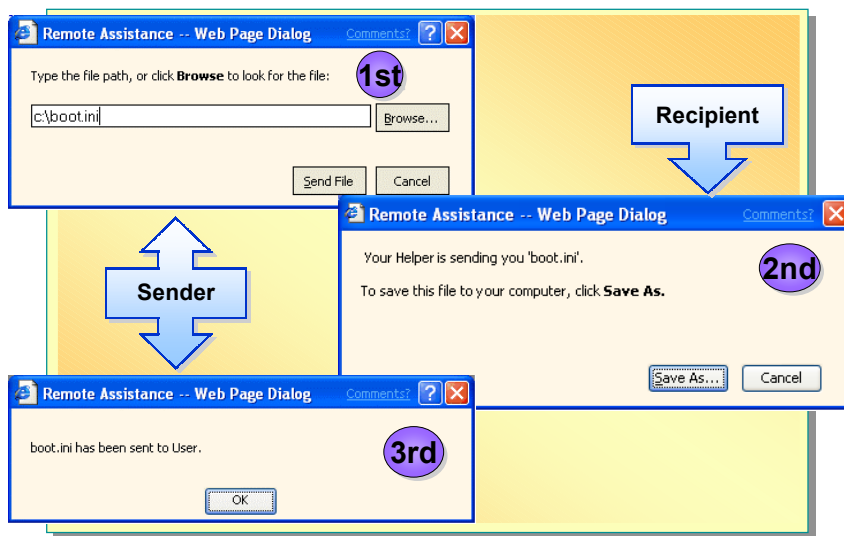
Sending a File Using the Remote Assistance Console

Topic Objective

To describe the process for sending and receiving a file by using the Remote Access console.

Lead-in

The user and the helper can exchange files by using the Send a File control.



The user can send you a file, or you can send a file to the user, by using the Remote Assistance console. To send a file as a helper or user, perform the following steps:

1. The sender selects a file to send.
 - a. In the Remote Assistance console, click **Send a File**, type the file path and name or click **Browse** to locate the file, and then click **Open**.
 - b. Click **Send File**.
2. The recipient saves the file.
 - a. Click **Save As**, locate the folder in which you want to save the file, and then click **Save**.
 - b. If the user wants to open the file, click **Yes**, otherwise click **No**.
3. The sender acknowledges that the file is sent.
 - Click **OK**.

If you are a helper sending a file to a user, you can share control of the user's computer and save the file in the correct location on the user's computer.

Best Practices When Using Remote Assistance

Topic Objective

To describe the best practices for using Remote Assistance.

Lead-in

The following best practices will help ensure that users' computers remain safe from unauthorized access.



Always Set a Password and Expiration Time



Only Allow Helpers You Trust to Connect to Your Computer



Do Not Share Control Unless Helper Has a Specific Need To Do So



Always Disconnect at the End of a Session

Follow these best practices when using Remote Assistance:

- Always set a password and expiration time.

Whether you are the user or the helper, you should always insist that a password and an expiration time be a part of the Remote Assistance invitation.

Important Never use the password to your user account as a Remote Assistance password.

- Allow only trusted helpers to connect to your computer.

Never allow someone that you do not know or trust to connect to your computer. Never share your login name or password over Remote Assistance.

- Do not share control unless the helper must perform a specific task.

Helpers should not request shared control unless there is a specific task that they must perform on the user's computer. The helper should communicate to the user the need to perform the task, request shared control, perform the task, and then relinquish shared control.

- Always disconnect at the end of a session.

You must always actively disconnect at the end of a session. The user then deletes or closes the invitation. The disconnection ensures that no one will be able to use the invitation to obtain unauthorized access to the user's computer.

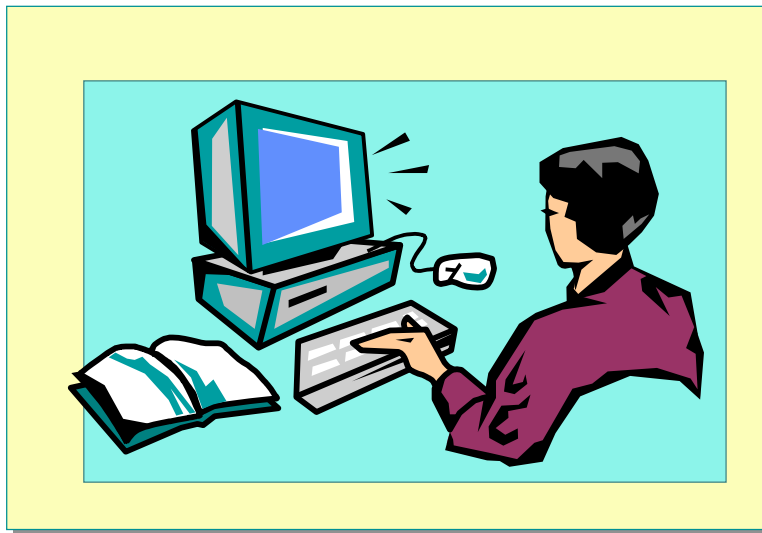
Lab 6C: Using Remote Assistance

Topic Objective

To introduce the lab

Lead-in

In this lab you will configure and use Remote Assistance.



Objectives

After completing this lab, you will be able to:

- Send a Remote Assistance invitation.
- Respond to a Remote Assistance invitation.

Prerequisites

Before working on this lab, you must have:

- Completed Lab 1C Upgrading Windows 98 to Windows XP Professional.
- Completed Lab 5B: Operating in a Domain
- A computer running Windows XP Professional.
- A share point on the network called RAHELP with Full Control permissions.

Scenario

You are responsible for providing technical support to users within your department. A large number of these users are new and have limited computer experience. They frequently ask questions about how to perform certain tasks. To avoid spending too much of your time answering these types of questions, you need to configure Remote Assistance to reduce the amount of time that you spend supporting these users.

Estimated time to complete this lab: 15 minutes

Review

Topic Objective

To reinforce module objectives by reviewing key points.

Lead-in

The review questions cover some of the key concepts taught in the module.

- **Configuring User Desktop Settings**
- **Customizing the Desktop Environment**
- **Configuring System Settings**
- **Using Profiles and Group Policy to Control Desktop Customization**
- **Using Remote Assistance**

-
1. One of the users that you support complained that they had numerous icons on the desktop, and now a number of them have disappeared. What desktop item would you configure to stop the icons from disappearing?

Do not run Desktop cleanup, and clear the check box to run Desktop Cleanup Wizard every 60 days.

2. You want to add a shortcut to an individual's Start menu, but all users are seeing the shortcut. What possible mistake occurred?

The shortcut was copied to All Users\Start Menu instead of the individual's Start Menu.

3. Your organization has users that move from computer to computer on a daily basis. They need access to the same files and programs no matter which computer they are sitting at. What type of profile would best in this type of situation?

Roaming profiles and saving My Documents to a file server, would support the users moving from computer to computer.

4. You are instructing your users on the availability and use of Remote Assistance. What are the three most important best practices to tell your users concerning the use of Remote Assistance?

Create a Password. Specify an expiration time. Allow only trusted helpers to connect to your computer, and only for specific tasks.

5. Your department has just installed a new custom application. You are capable of supporting the new application. To ease the transition and support for the new application, what recommendations would you make to your managers for supporting the users of this application?

They should instruct the users how to use Remote Assistance, so that they can support the users without needing to be physically present.

