

Workstation Standard Build Samples

DISCLAIMER: Sample documentation provided in this section is for example only. Each department should develop their own documentation based on processes, requirements and risks that are unique to them.

The following is an example of a Windows XP Pro Standard Workstation Configuration. In this example, software and user profiles are stored on a server called "Server1", and the standard applications include McAfee anti-virus, Acrobat Reader, Eudora, WinZip, Spybot, Meeting Maker, Office 2003 and Altiris. Also, an Active Directory domain is used.

Figure 1: Win XP Pro Standard Workstation Configuration

Win XP Pro Standard Workstation Configuration		
<i>Last Updated xx/xx/2007</i>		
STEP	PROCESS	INSTRUCTIONS
<i>Consolidate & Backup User's Data</i>		
1	User Prep	Request user complete the 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 appropriate manager.
3	Vendor Image	For new PC, create Altiris image as received from vendor, for emergency restoration. For rebuilds/replacement build, create a before-installation image. Image preserved for (30) days for restore purposes.
4	Local Account Profiles	Create a local user account with a temporary password. Create temporary network directory to save data; i.e., \\server1\DeptName\Users...\
5	Active Directory Profiles	Request department forward new user domain information to Sys Admin 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. Make a temporary copy of the Eudora directory to the users' "My Documents"; for example, C:\Documents and Settings\smith\My Documents. 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	Notify AD Admin	Send email with the machine ID#(s) and department name to Active Directory Admin so the machine(s) are added to appropriate domain Org Unit.
2	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 and partitions. Create and format a single, new partition.
3	Begin process	To begin, press <Enter> at the prompt, "To set up Win XP now, press <ENTER>".
4	License agreement	Press <F8> if you agree to the Licensing Agreement.
5	Select installation	To continue installing a fresh copy of Win XP without repairing, press <ESC>
6	Delete old partitions	To delete the selected partition, press <D>
7	Delete system partition	To delete this partition, press <ENTER>

8	Confirm partition deletion	To delete this partition, press <L>
9	Select unpartitioned space	To set up Windows XP on the selected item, press <ENTER>
10	Format unpartitioned space	Select, "Format the partition using the NTFS file system" then press <ENTER>
11	Format process begins	C: Partition1 [New (Raw)] 76285 MB (76285 MB free)... Setup is formatting...
12	Files copied to installation folder	"Please wait while Setup copies files to the Windows installation folders..."
13	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.
14	Installing devices begins	No action required.
15	Set regional/language settings	Press <Next>
16	Personalize software	Enter <SDSU> for Name and <DeptName> for Organization, then press <Next>
17	Product Key	Enter the Windows Product Key (if necessary)
18	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>
19	Set date & time	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>
20	Install components	Messages display as Setup installs the Network and Start Menu Items, registers components, saves settings, and removes temporary files. No action is required.
21	Network Settings	<Select> (click-on) radio button "Typical" then press <Next>
22	Workgroup or Domain	<Select> (click-on) radio button "no", leave as WORKGROUP then press <Next>
23	Install components	Messages display as Setup installs the Network and Start Menu Items, registers components, saves settings, and removes temporary files. No action is required.
24	Finalize installation	The system restarts. Again, ignore the prompt, "Press any key to boot from CD." The system boots from the hard drive.
25	Configure display	When prompted, "To improve the appearance of visual elements...", the display resolution settings are optimized, press <OK> <OK> to accept the new settings
26	Welcome to Windows	Press <Next>
27	Help Protect your PC	<Select> (click on) the radio button, "Not right now" to turn off automatic updates, then press <Next>
* The next two steps may or may not appear during set up of Windows XP		
28	How will computer connect to the Internet	<Select> (click on) the radio button, "Local Area Network (LAN)", then press <Next>
29	Setting up Connection	<Select> (click-on) the radio button "Obtain IP automatically" and configure DNS for IPs 16.81, 16.85, 1.1 and 200.1. IF the IPs cannot be entered then <Select> "Obtain DNS automatically" then press <Next>
30	Ready to register with Microsoft?	<Select> (click on) the radio button, "Not at this time", then press <Next>
31	Set primary user account "Who will be using this computer?"	Enter a temporary user account "admin2" then press <Next>. No local accounts are to be made available for department users. Note: the account is created without a password. Additionally the account is added to the Administrator group. Later, we'll remove the account from the system.
32	Setup completes	At the "Thank you!" prompt, press <Finish>
33	Welcome to Windows	The computer logs in under your user account to the desktop.
33	Prep for Admin log in	Launch Control Panel, <select> "User Accounts", <Select> "Change the way users log on or off" <De-select> (uncheck) "Use the Welcome screen" <Apply Options> <close>. Log Off Machine. Note: disabling Win XP's welcome screen forces Windows Classic logon: <Ctrl> + <Alt> + <Delete> enter <account> enter <password>
34	Log in as Administrator	Log in using user name: administrator
35	Win XP desktop	Launch Control Panel to set the desktop, taskbar, and folder options to Windows Classic view.

36	Control Panel	Click on <Switch to Classic View>
37	Folder Options, General Tab	Double-Click on <Folder Options> . The Folder Options Dialog box displays. Under the "General" tab, <Select> (click-on) on the following 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>
		Click on the <View> tab. Under the heading, "Advanced settings" make the following changes: <Select> (check) the following boxes: "Display the contents of system folders", "Display the full path in the title bar", and "Show hidden files and folders". <De-select> (uncheck) the following boxes: "Hide extensions for known file types", "Hide protected operating system files (Recommended)" press <Yes> , "Show pop-up description for folder and desktop items" and "Use simple file sharing (Recommended)". Then press <Apply> then press <OK>
38	Change Folders to List View	Open the "My Documents" Folder. <Select> "view" and then "details". <Select> "tools" and then "folder options." <Select> the "view" tab and click "Apply to all folders" and then click "yes."
39	Taskbar and Start Menu Properties	Double click <Taskbar and Start Menu> . The "Taskbar and Start Menu Properties" dialog box displays. Select the <Taskbar> tab. 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>
40	Start Menu Tab	Select the <Start Menu> tab and <select> (click-on) the radio button, "Classic Start menu", then press <Customize> . From 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>
41	Add or Remove Programs, Windows Components	Double Click <Add or Remove Programs> <Add/Remove Windows Components> . Under the heading "Components", from the scroll-down menu, select <Accessories and Utilities> <Details> de-select (uncheck) <Games> <OK>
42	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.
43	Bios Boot Sequence	On restart enter the computer BIOS. Reset the boot sequence to (1) hard drive, (2) CD-ROM, and (3) Floppy Drive
44	Log On to Windows	Log on as administrator.
45	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>
46	Screen Saver	Click on the <Screen Saver> Tab. From 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>
47	Display Power Settings	On the Screen saver tab, click on POWER button.. Set the wait time to power off monitor to 20 minutes and select NONE for turn off hard disks . Then press <Apply> , it may be the default setting so only <OK> may need to be selected.
48	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> , it may be the default setting, if so then go to step #48. Do not press <OK> .
49	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>
	Set Refresh Rate	In the Settings tab click on <Advanced> button. Click on the Monitor tab. Refresh frequency should be set to 75 Hertz or higher.

50	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> <OK> <Close Window>
51	Desktop Icons	Rename "My Network Places" to "Network". Rename "My Computer" to "Computer".
52	Load Drivers	Remove the Win XP installation disk from the CD-ROM drive and insert the vendor's "Drivers and Utilities" CD to install drivers for onboard components such as: NIC, Video, and sound adapters.
53	Connect network cable	Connect network cable to the computer
54	Map Network Drive	\\server1\DeptName). Connect with user name and password. Open "Install Shortcuts" folder.
55	Install McAfee from Server	Double-Click on McAfee 8.0i icon and install McAfee, For license expiry type select "perpetual". On next screen select "typical" setup. When complete uncheck Run On-Demand Scan . press <Finish> McAfee updates and then click <OK> and restart computer.
56	Log On to Windows	Log on as administrator.
57	Install Microsoft Update	Start Internet Explorer, (click on) <Tools> <Windows Update>, <Select> Don't Install for Windows Update. <Select> Microsoft Update. (New browser window opens) <Select> Start now.<Continue> <OK> <Select> Install the ActiveX control from the toolbar. <Select> Install. <Select> Install. Install will continue. You may have to restart your computer. If so, restart and run Microsoft update again following the steps here.
58	Change Automatic Updates	Leave off and <Select> Check for updates. <Select> custom. Select all available updates. Continue the updates (sometimes restarting computer) until all updates are completed.
59	Delete Windows Update	From desktop click <Start> and right click on windows update and delete, click <Yes>.
		<i>Install Standard BFA Desktop Applications</i>
60	Install Shortcuts	Map a drive to \\server1\DeptName\Install Shortcuts, then install applications from network by launching each of the following shortcuts
61	Acrobat Reader 7.0	Double Click "AcrobatReader708.exe" <next> <next> <next> <install>
62	Eudora Installation	Eudora 7.0.1. Do not select <deselect> pure voice or Importers. Grant Full Control to Users via security tab for the Qualcomm directory. This will have to be done after user logs in with domain account first time. 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.
	<i>Eudora Configuration</i>	<i>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.</i>
63	DEPT W2K-XP Changes.reg	Double-click DEPT W2K-XP Changes.reg. <select> "yes" and "ok"
64	Winzip	Double Click "Winzip (Run this 1st!)" <ok> <next>. License agreement click <yes> <select> "start with WinZip Classic" <next>. <select> "Express setup" <next> <finish>, close open windows. In \\Quark\install shortcuts double click "Winzip (Run this 2nd!)" Click-on "Setup" <ok> <ok> <ok> <next>. License agreement click <yes>. <select> "start with WinZip Classic" <next> <select> "Express setup" <next> <finish>, close open windows.
65	FTP	Double Click "WS_FTP32". <Continue> and then <select> "A student, faculty member or staff of an educational institution." <next> <select> boxes "At School" and "For academic work" <next> <ok> <ok> <ok> <ok>
66	SpyBot	See SpyBot documentation for install

67	Meeting Maker 8.5	Double-Click "Meeting Maker 8.5" <next> <next>... Select yes for "default calendar application. <finish> Meeting Maker will run. For server <select> to configure. Protocol is SSL and select proper server. From start menu move the MeetingMaker icon from C:\documents and settings\administrator\start menu\programs to C:\documents and settings\all users\start menu\programs. Next right click on the icon and select properties. and the security tab. Click add and type users. Allow users full control and <select> "Apply" . <select> advanced. Under "permission properties" highlight users and then check both boxes on bottom of window. Click <apply> <yes> <ok> <ok>. Go to C:\program files and right-click on the Meeting Maker folder. <select> properties and then the security tab. Click on users and allow full control. <select> advanced and check the box that states "Replace permission entries..." <apply> <yes> - close the windows, install complete.
68	Office 2003	Double-Click Office2003 to install.
69	Microsoft Update	<Start> <Microsoft Update> Select "custom" and install updates for Office Programs and other updates that were missed. Continue to check for updates until none are available.
70	Disconnect Network Drives	Disconnect \\Server1\DeptName as a mapped drive.
71	Shortcuts	set up shortcuts in Quick Launch bar for applications MeetingMaker, Eudora, Excel, Word and others that user may want.
	***	Next step for single install. If set up is for deployment by image this step should be done on each separate computer after deployment.
72	Altiris	Double-click "Altiris agent download" Allow Install the active X control.<select> "install" and click on "click here to begin the download and install." Close Internet Explorer.
	***	Next steps are for prepping machine as primary for image deployment. If this install is for a single machine then skip this section and proceed to "Domain Set UP and DNS Servers."
73	Install A-Client & SIDGEN	On \\Server1\PCApps\Altiris\Aclient double click on Aclient.exe to install Aclient. In first window check the box that says "Enable changing of security ID (Windows NT only)" then click "advanced" and enter host name: 130.191.16.87. Click <ok> <next> <next> <finish>
	***	Next steps for single install. If set up is for deployment by image this step should be done on each separate computer after deployment.
		<i>Domain Set Up and DNS Servers</i>
74	Join computer to DEPT Domain	Join the computer to the DEPT domain. Right Click <Computer> Select properties. <Select> change. Under "member of" menu, <select> Domain. Type "DEPT.SDSU.EDU" Enter your domain user name and password. <OK> <OK>. Restart computer.
		The BA Domain, Active Directory re-names the Administrator account to Claub. If you desire, copy the appropriate account profile and copy it to Default Users; i.e., copy the user profile if configured, or claub profile if a user account was not created. For any new user, Win XP uses the Default User profile to set the desktop and configuration settings, the first time that user logs on. All standard BFA profile settings will be carried over to the new users profile.
75	Login using admin2 account	Login into Windows under the admin2 account. From start menu go to control panel, click on <Switch to Classic View> and then double-click Folder Options. Click on the view tab and then under advanced settings make sure that "Show hidden files and folders" is selected.Click <Apply> if necessary and then <OK>. (Don't close control panel)
76	Check LAG & LPUG	Check that domain GPO has taken effect; go to Computer/Manage/Local Groups and under Administrators confirm that LAG-(dept name) appears. Under Power Users confirm that LPUG-(dept name) appears. Examples: LAG-EHS; LPUG-EHS
77	Set a default user profile	In control panel double click <System> and click <Advanced> tab and click <Settings> under the User Profiles menu. Under user profiles select the user profile for the jsmith account.

77	Set a default user profile	In control panel double click <System> and click <Advanced> tab and click <Settings> under the User Profiles menu. Under user profiles select the user profile for the jsmith account.
		Select <Copy To> and browse/navigate to "C:\Documents and Settings\Default User", click <OK>. In the Permitted to use field click <Change> and type "EVERYONE" Click <OK>. You will then need to log in using your domain login account. Click <OK> <YES>. Log off computer as admin2.
78	Login using claub account	From desktop, right click <Computer> select properties. Click <Advanced> tab and click <Settings> under the User Profiles menu. Under user profiles select the user profile for the admin2 account. Click <Delete>, delete the admin2 user profile. Confirm click <Yes>.
78	remove admin2 account	Launch Control Panel to delete the admin2 account set up in step 30. <Control Panel> <User Accounts>. Select the admin2.. Click <Remove> <Yes> <OK>.
79	Configure Network Settings	Right-click on the "Network" icon from the desktop <select> "properties". Right-click on the "Local Area Connection" and <select> "properties." Left-click on "Internet Protocol (TCP/IP)" and <select> "Properties." If the department specified a static IP Address, configure it now. If a static IP Address is not available, then configure DHCP connectivity. Note: the department must request a new IP Address assignment from TNS.
80	Configure DNS Servers (if unable to do so at Step 28)	<Click> "Use the following DNS Server addresses" The preferred DNS Server is 130.191.16.85. Alternate DNS server is 130.191.16.81. <Select> "advanced." <Select> "DNS" tab. Under the DNS server addresses <select> "add." Add 130.191.1.1 and then add 130.191.200.1.<Click> Ok OK Close.
	***	Next steps for image deployment systems only. If set up is for single computer then steps are completed.
	SIDGEN Delete	If the primary image has been deployed SIDGEN must be deleted on each of the computers that received the image as well as on the primary computer. SIDGEN is found in the C:\Program Files\Altiris\Aclient Directory. Delete after the first boot up of the computer.
	Rename computer	Rename the computer to its specific State ID Tag.
	Install Altiris	See step 72 for instructions.
	Join computer to BA Domain	Join the computer to the DEPT domain. Right Click <Computer> Select properties. <Select> change. Under "member of" menu, <select> Domain. Type "BA.SDSU.EDU" Enter your domain user name and password. <OK> <OK>. Restart computer.