CONNECTIONS

New Computer
Quick Start Guide

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Day 1 - Your New Desktop

(For more information, see "Your New Computer Screen Desktop".)
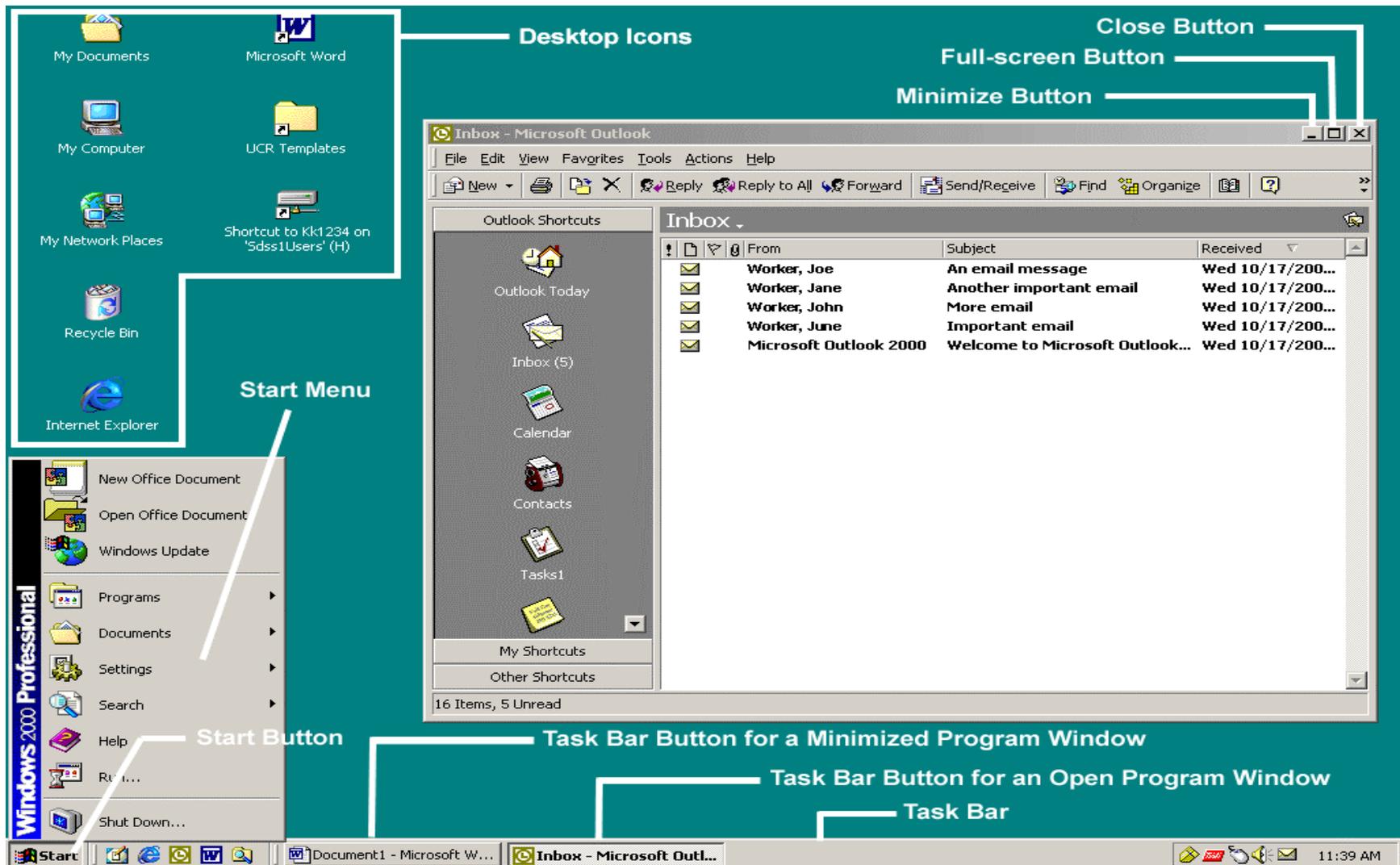
In the illustration above, some desktop icons are obscured by the Start menu. Here is a list of all the icons you will find on your new desktop:


Day 1 - How To Access The Tools You Use The Most

Accessing Your Email & Calendar

Microsoft Outlook 2000 replaces Exchange as your email and scheduling program. You can start Outlook by **double-clicking** on the Outlook icon on your desktop. (For more information, see "Outlook 2000.")

Opening Microsoft Word

Microsoft Word 2000 replaces Word 95 for creating and editing documents. You can start Word by **double-clicking** on the Word icon on your desktop. (For more information, see "Word 2000.")

Accessing CONNECTIONS

You can access CONNECTIONS by double-clicking on the CONNECTIONS desktop icon.
(For more information, see "CONNECTIONS.")

Accessing UCRs

UCR templates are stored on your computer's hard-drive. You can access them by **double-clicking** on the UCR desktop icon.
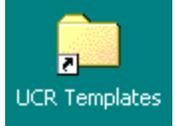
Accessing Your Local Documents

Documents you create outside CONNECTIONS should be stored on a portion of your local server known as your H: drive. You can access these documents by **double-clicking** on the H: Drive desktop icon. (If you do not have an H: Drive icon on your desktop, see "Where to Save Work" for instructions on creating one.)

Your New Computer - What's Different?

The most noticeable improvements in your new computer are:

1. A bigger screen (17" monitor.)

2. The new computer uses Windows 2000 as it's operating system.

> The computer's operating system determines how you access and manage programs and information on the machine. The use of Windows 2000 in the new computer means that the computer screen, specifically your **local desktop**, will look quite different than it has in the past. "Local desktop" refers to what you see on your screen when you are using programs that reside on the PC on which you are working.

3. Outlook 2000

> Will replace Exchange for email, address book, and calendar functions.

4. Word 2000

> Will replace Word 95 for creating and editing documents.

5. Scrolling capability

> The mouse on your new machine features a **scroll stick** that makes it easier to move through documents and navigate in windows. Once you have clicked in a window that has a scroll bar, you can use the scroll stick on the mouse to scroll the window up or down instead of clicking on and dragging the scroll bar. Information on how to adjust this scrolling capability appears later in this Quick Start Guide.

Logging on

When you turn on your computer, you will see a box asking you to press **Ctrl + Alt + Del** to begin logging on. Doing so will open the Logon dialog box.

You will need to enter your *user name* and *password*, choose the *domain* (referred to as "Log On To" in the dialog box) you normally log on to, and click **OK**. In most cases, the logon procedure will be the same as it was with your old machine. If not, your LAN Administrator or Implementation Coordinator can provide you with a logon procedure for responding to these prompts.

Once you have completed the logon process, the screen will display your desktop.

Your New Computer Screen "Desktop"

(As you read the following descriptions, you can refer to the diagram on page 3.)

Desktop Icons

In Windows 2000, program icons appear directly on the desktop rather than in Program Group windows as in Windows NT 3.51. <u>Double-clicking</u> on a desktop icon will start the program represented by that icon, opening a window on your desktop for that program.
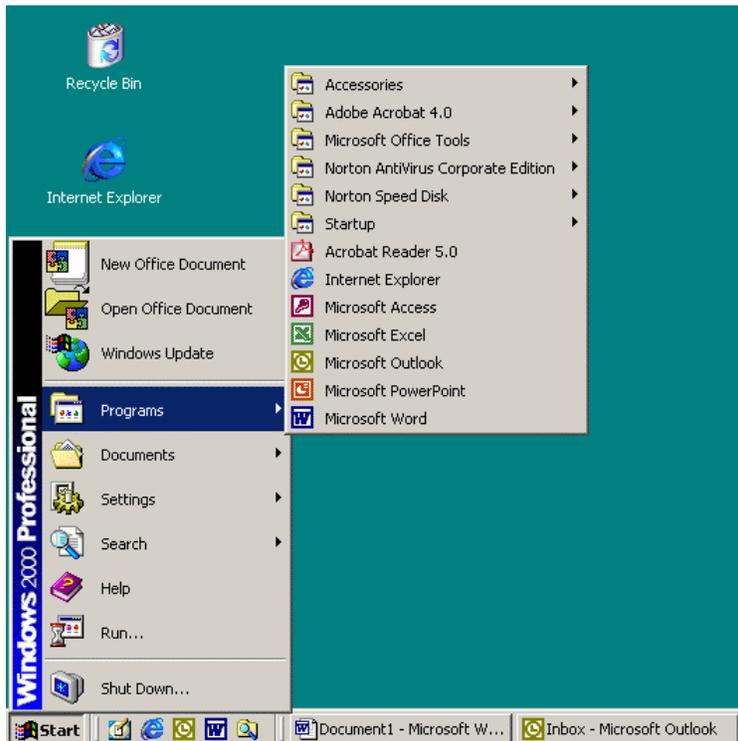
The Task Bar

Across the bottom of the screen you will notice the Task Bar**.** Like Windows NT 3.51, Windows 2000 allows you to have more than one window open on your desktop at one time. The Task Bar provides a method of accessing and organizing the program windows that you have open on your desktop. Every program you open has a **Task** button associated with it that appears on the Task Bar when you open that program. When you click the **Minimize** button on an open window, that program will appear only as a **Task** button on the Task Bar. This makes room for other windows you need to use at that moment. Clicking on that program's **Task** button on the Task Bar will re-open the program window on your desktop, making it the active window and putting it "on top of" any other open windows.

The Start Button

At the left end of the Task Bar you will see the **Start** button. Clicking this button displays the *Start* menu. The *Start* menu provides access to programs, documents you've recently worked on, Windows on-line Help, and the *Windows Shut Down* procedure. When you open the *Start* menu, you will notice a strip running vertically along its left side that reads "Windows 2000 Professional".

Selecting *Programs* on the *Start* menu opens the *Programs* sub-menu.

Clicking on a program icon on this menu will open that program. This allows you to open programs that do not have a desktop icon.

Making a Window Active

The system of desktop icons, the *Start* menu, and the Task Bar described above replaces the "Program Manager and Program Group" system of program management found on original CONNECTIONS PCs using Windows 3.51. In this new system, there are three ways to make a window the active window on your desktop. (**Note**: If a window is active, it appears "on top of" any other windows on your screen. Any mouse or keyboard actions affect only the <u>active</u> window.)

- If the program is not open, you can <u>double-click</u> its desktop icon to open the program as the active window on your desktop.

- If the program is open but its window has been minimized, you can click its **Task** button on the Task bar to reopen it as the active window on your desktop.

- If the program is open and any part of the window is visible on your desktop, clicking anywhere within the visible part of the window will make it the active window.
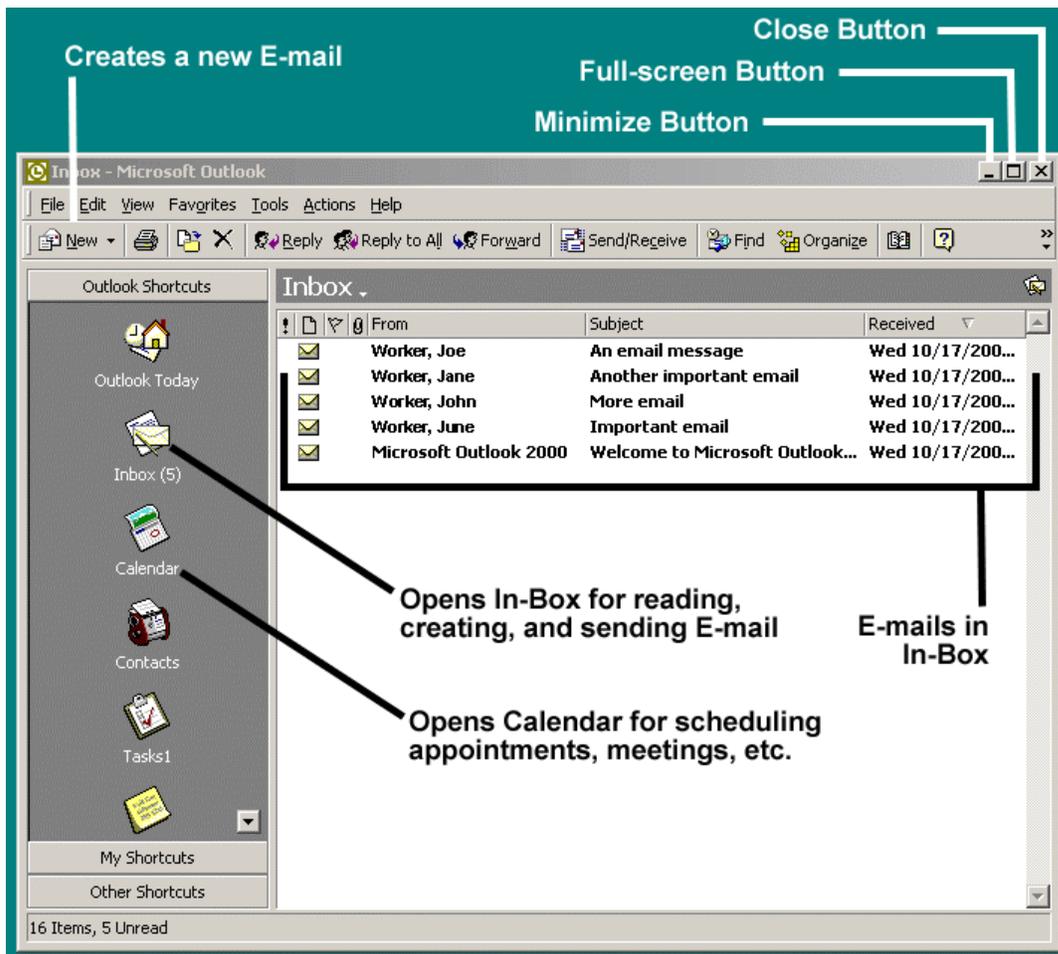
Outlook 2000

Outlook 2000 replaces Exchange for managing your email, address book, and calendar.

Starting Outlook

The easiest way to start Outlook is by double-clicking the Outlook icon on your desktop.

The Outlook Window

<u>Finding more information on how to use Outlook</u>

Outlook contains an extensive online Help system. Help can be accessed in one of two ways. Each of these methods requires that Outlook be open and the active window on your desktop.

- Use the F1 key.

    1. Press the F1 key in the upper left-hand corner of your keyboard.
    2. Online Help for Outlook will open.

- Use the *Help* menu.

    1. Click *Help* on the menu bar of the Outlook window.
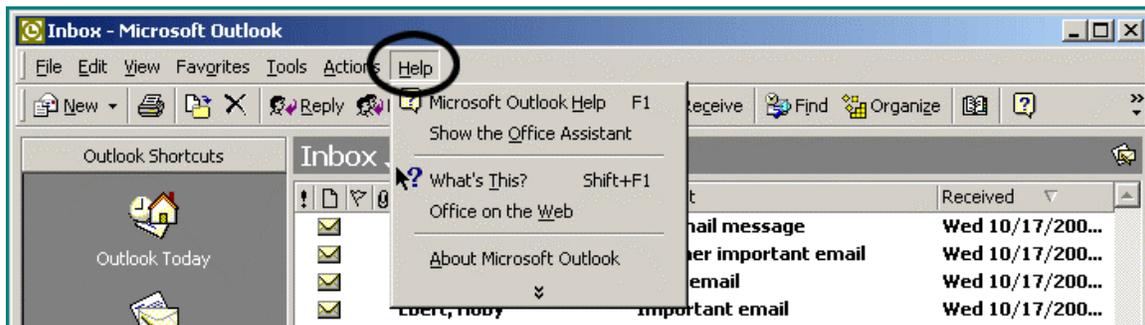
    2. Click on *Microsoft Outlook Help* on the Help drop-down menu.
    3. Online Help for Outlook will open.

- Quick Tips on how to use Outlook's most common features and functions can be found on the Outlook 2000 Quick Source guide that came with your computer. Please note that some of the features and functions described in the guide may not be active on your computer.

Word 2000

CONNECTIONS will use Microsoft Word 2000 to create documents. In many respects, this version of Word will look and operate similarly to Word 95.

<u>Starting Word 2000</u>

The easiest way to start Word is by double-clicking on the Word icon on your desktop.

Smart Menu

One difference of which you should be aware is the appearance of menus in Word 2000 and other programs in Windows 2000.

Word 2000 uses a feature known as "Smart Menu", which displays only those menu options that have been accessed recently. Other menu options are accessed by clicking on the double arrows that appear at the bottom of the menu.
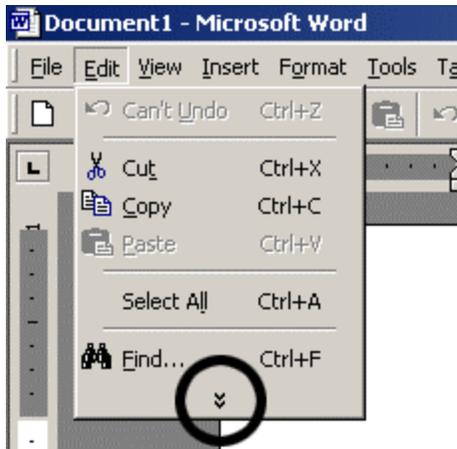
You can set your menus to display all menu items as follows:

1. Click on *Tools* on the menu bar in the Microsoft Word window.
2. Select *Customize* from the drop down menu.
3. Select the **Options** tab in the *Customize* window.
4. Click the white check box next to "Menus show recently used commands first" to remove the check mark.
5. Click the close button in the *Customize* window.

Printing

As in the past, you can print an open Word 2000 document by clicking on the *File* menu and then clicking on *Print*.

The document will print to the default printer for the computer on which you are working. Your LAN Administrator or Implementation Coordinator has information on making sure your new computer is "pointing to" and communicating with the correct printer.

<u>Finding more information on how to use Word 2000</u>

Word 2000 contains an extensive online Help system. Help can be accessed in one of two ways. Each of these methods requires that Word be open and the active window on your desktop.

- Use the F1 key.

  1. Press the F1 key in the upper left-hand corner of your keyboard.
  2. Online Help for Word will open.

- Use the *Help* menu.

  1. Click *Help* on the menu bar of the Word window.
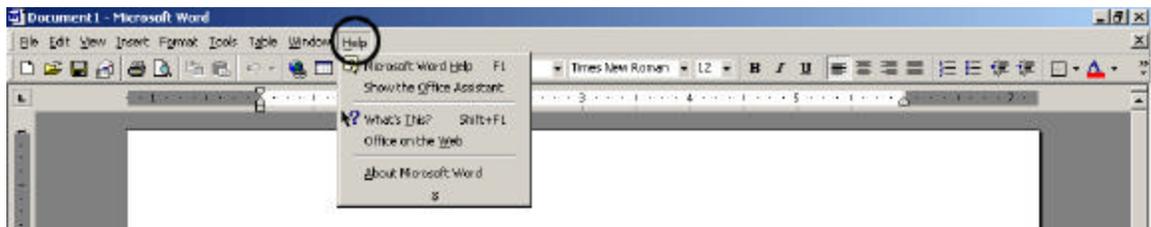
  2. Click on *Microsoft Word Help* on the Help drop-down menu.
 3. Online Help for Word will open.

Saving Documents Created Outside of CONNECTIONS

It is possible that some of the people with whom you work and share files will still be using Word '95. This can cause complications because Word 95 may not recognize all the features of a document created with Word 2000. (Note: The reverse is not true. Word 2000 can recognize all features of a document created in Word 95)

To avoid these problems, Word 2000 allows you to save documents in older Word formats. This is called "saving down." If you create a document in Word 2000 and save it down to the Word 95 format, it will be compatible with Word 95, allowing another worker to open it even if they have Word 95 rather than Word 2000.

For documents created outside of CONNECTIONS (such as UCRs), whenever you save such a document for the first time, you need to be sure to save it in "Word 6.0/95" format.

1. Selecting *File > Save* or pressing *Ctrl + S* on your keyboard will open the *Save As* window.

2. Click the arrow to the right of the *Save As Type* drop-down field and scroll down until you find **Word 6.0/95**.

3. Select **Word 6.0/95** by clicking on it, enter a file name in the *File Name* field**,** and click **Save**.
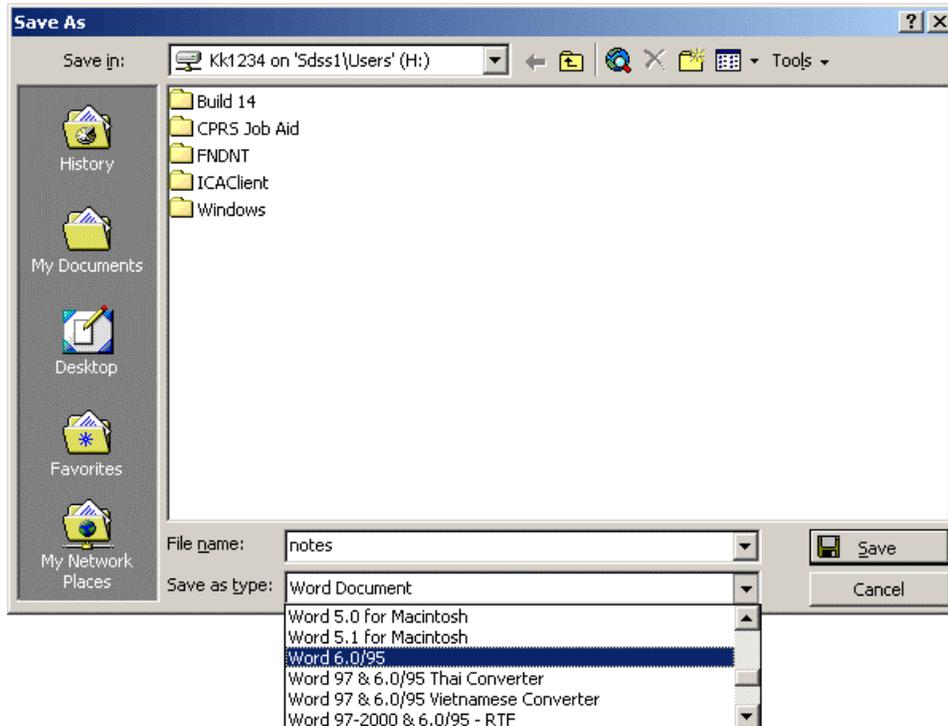
When you save down, Word 2000 checks your document and replaces formatting that is not supported by Word 95 with formatting that is supported. Word notifies you of these changes with a dialog box showing what formatting will change in your document.

Subsequent saves of the document will automatically be saved down.

Where to Save Work - The H: Drive, The C: Drive, and UCRs

The H: Drive
Documents you create outside of CONNECTIONS (on your local desktop) should be saved to a portion of your LAN server that is reserved solely for your files. This is known as your H: drive. Each user will have their own H: drive and each user will have access to only their own H: drive.

Documents stored on your H: drive can be accessed by double-clicking on the H: drive icon on your desktop.
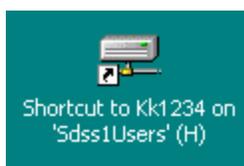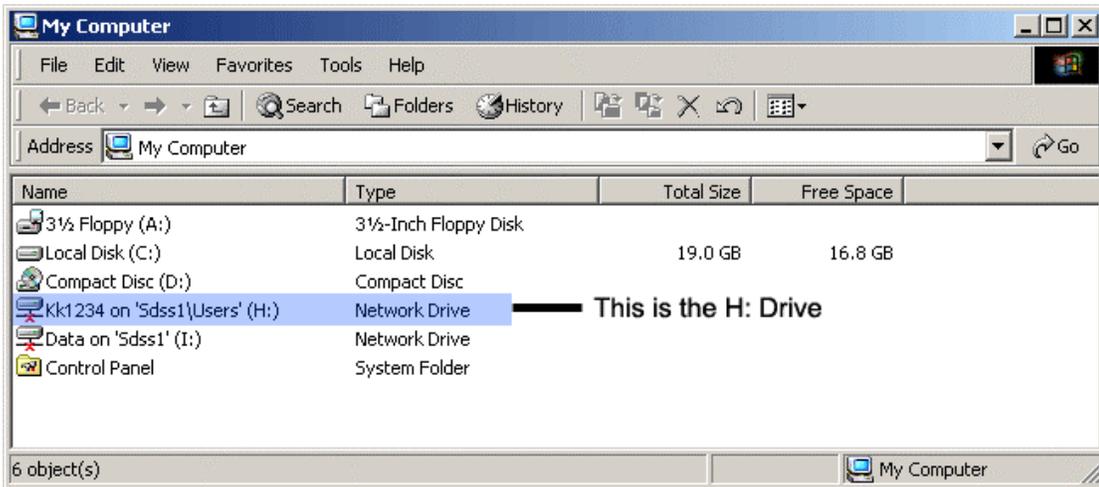

Creating an H: Drive Desktop Icon

If you do not have a desktop icon for your H: drive, you can create one as follows:
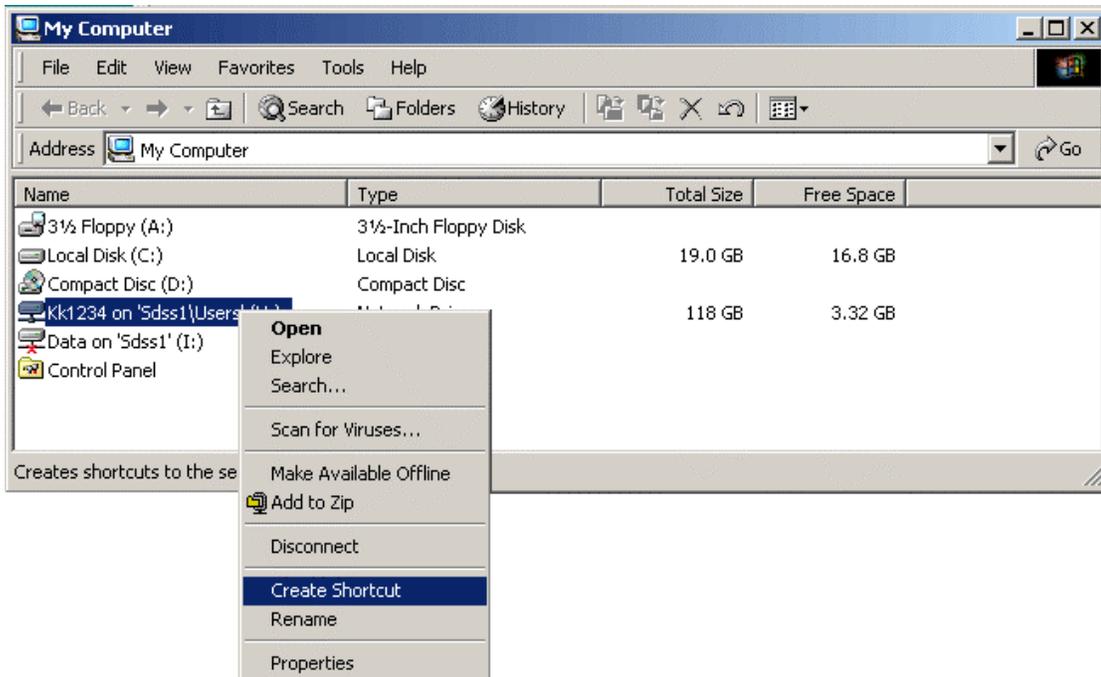
1. Double-click on the **My Computer** desktop icon.

My Computer

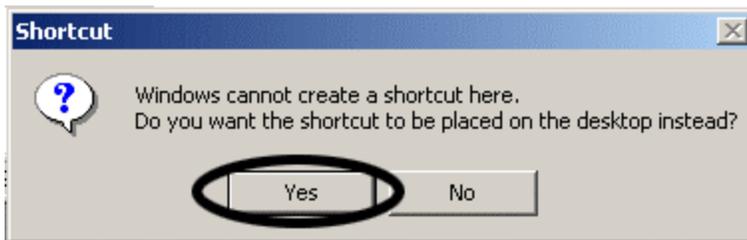2. In the *My Computer* window, click the right-hand mouse button ("right-click") on
   <your user name> on <your server name>\users (H:).

   - <your user name> will be your CONNECTIONS ID - such as KK1234.

   - <your server name> depends on the name of your server. The key is to look for **(H:)**.

3. Right-clicking as described in Step 2 (above) will open the drop-down menu shown below.

4. Click **Create Shortcut** on this menu and you will see the following message:

5. Click **Yes** in this message box and a shortcut for your H: drive will be placed on your desktop.

The C: Drive and UCRs

UCR templates can still be found on the C: drive of your local PC. (Think of the **template** as an empty "form" that resides on a server. To create a UCR for a particular case, you open the template and enter information into the form to create a **document**. You then save the document. The blank template does not change.) When you create a UCR for a case, save it to your H: drive.

CONNECTIONS

Accessing CONNECTIONS

Getting to the Citrix Logon From Your Local Desktop

When you log onto your PC, among the icons you see on your desktop will be one for logging onto CONNECTIONS Production (where you do your work on the live CONNECTIONS database.)

Double-clicking this icon will start the process of connecting you to a Citrix server. The resulting connection is referred to as a "Citrix session."

Logging onto and using CONNECTIONS

As with your old machine, after clicking the **Logon for CONNECTIONS** icon on your local desktop you will see the logon dialog box for Citrix.

The *Citrix Logon Dialog* box opens in a Microsoft Internet Explorer window we'll call the *Citrix Logon Browser* window.

[**Note**: Microsoft Internet Explorer must be configured the first time a machine attempts to use it. In most cases, this first time configuration will have been handled as part of the installation of your machine. If not, the first time you attempt to logon to CONNECTIONS, you will see a window welcoming you to the Internet Connection Wizard. You will need to go through a short configuration process before you can continue logging onto CONNECTIONS. See Appendix A at the end of this guide for step-by-step instructions on this process.]

In the Citrix Logon Browser window, enter your Username and password, and select the domain you normally logon to.
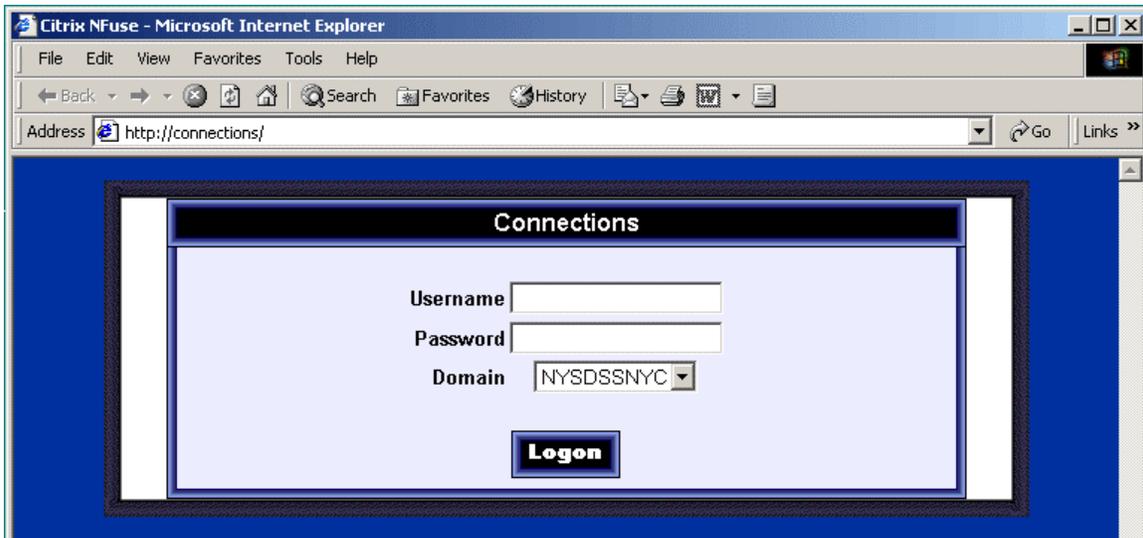
When you click the **Logon** button, you will see the following message box:

Click in the white box next to "Don't offer to remember any more passwords" to place a checkmark there, then click the **No** button.

Note: It's important to take these steps because Windows remembering your password, bypasses an important element of the CONNECTIONS system security.

Note: Once you have logged onto Citrix, it is very important that you **do not close** the *Citrix Logon* browser window on your local desktop. This window will provide you with a method of returning to your local desktop from a Citrix session. (See the section titled "Moving Between CONNECTIONS and Other Open Programs" for more information.)

From this point, procedures for logging onto Citrix, working with CONNECTIONS in Citrix, and logging off of CONNECTIONS and Citrix are all the same as they have been.

The Citrix Desktop

When you've correctly entered your logon information, your computer will connect to a Citrix server and your Citrix session will begin. After clicking **OK** in the Confidentiality Warning box, you will see a new desktop. Remember that while it does have a distinctive background pattern, the Citrix desktop and your local desktop now look similar in many respects.
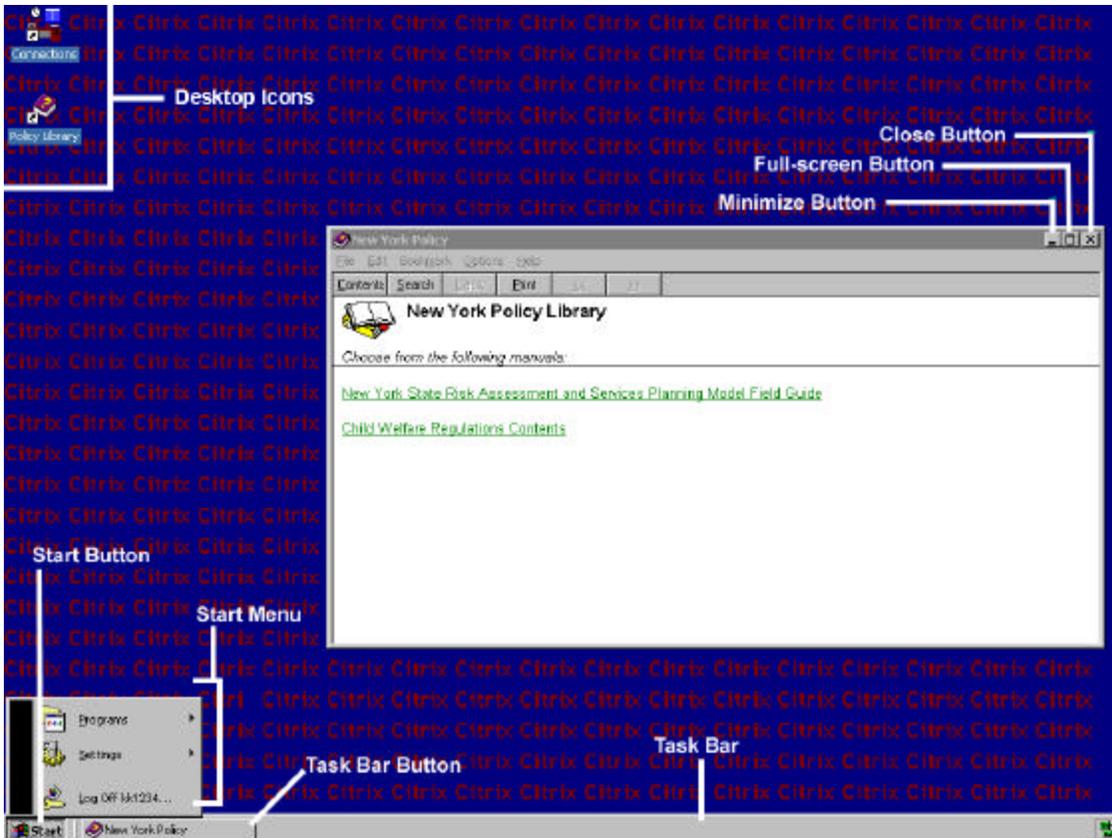
The only change you will notice on your Citrix desktop is the absence of scroll bars. On your new machine, with Windows 2000, the entire Citrix desktop is now visible without scrolling.

Moving Between CONNECTIONS & Other Open Programs

Moving between CONNECTIONS and other open programs (i.e. to check your calendar or copy and paste information from a document stored on your C: drive) is somewhat different with a Windows 2000 computer.

If you are on your local desktop and you have an open Citrix session that is not your active window, you can return to that session, making it the active window, by clicking on the appropriate **Task** button on the Task bar.

The "Alt+Tab" hot key combination is now the only hot key combination available for moving between your Citrix session and other applications on your local desktop.

(The Ctrl+Esc hot key combination is no longer available.)

Note: The Alt+Tab function in Windows 2000 switches between Citrix and other individual open programs (rather than between Citrix and the Program Manager as in Windows NT 3.51). Therefore, you must have at least one open program on your local desktop (or minimized on the local desktop task bar) in order to be able to Alt+Tab back to the local desktop from Citrix. This is why it is important that you not close the Citrix Logon browser window. It will provide you with a way to Alt+Tab back to your local desktop.

Note: For the purpose of "Alt+Tabing" between open programs, Windows 2000 will treat your Citrix session in the same manner as other programs that you have open on your local desktop. The Alt+Tab list will still present only one icon for your Citrix session. Even if you have opened two applications within your Citrix session (i.e. the training database and the policy library), you'll only see one icon for your Citrix session in the Alt+Tab list. Once you have switched to the Citrix session, you can then navigate between the programs you have open in Citrix.

Remember that even though parts of a window may be visible, that window might not be the active window. Clicking anywhere within the visible part of a window will make it the active window and place it on top of any other open windows.

To be sure of your active window, use Alt+Tab or the appropriate **Task** button to switch to the program you wish to have be active or, if the program's window is visible, click anywhere in the visible part of that window.

Adjusting Your Mouse's Scrolling Capability

The mouse you received with this new computer features a "scroll stick" (the blue button in the middle of the mouse) that makes it easier to move through documents and navigate in windows. Once you have clicked in a window that has a scroll bar, you can use the scroll stick on the mouse to scroll the window up or down instead of clicking on and dragging the scroll bar. You may decide that you want to adjust the performance of the scroll stick. You can do so as follows:

Double click on the small picture of a computer mouse that appears in the bottom right-hand corner of your local desktop.

The *Mouse Properties* window will open.
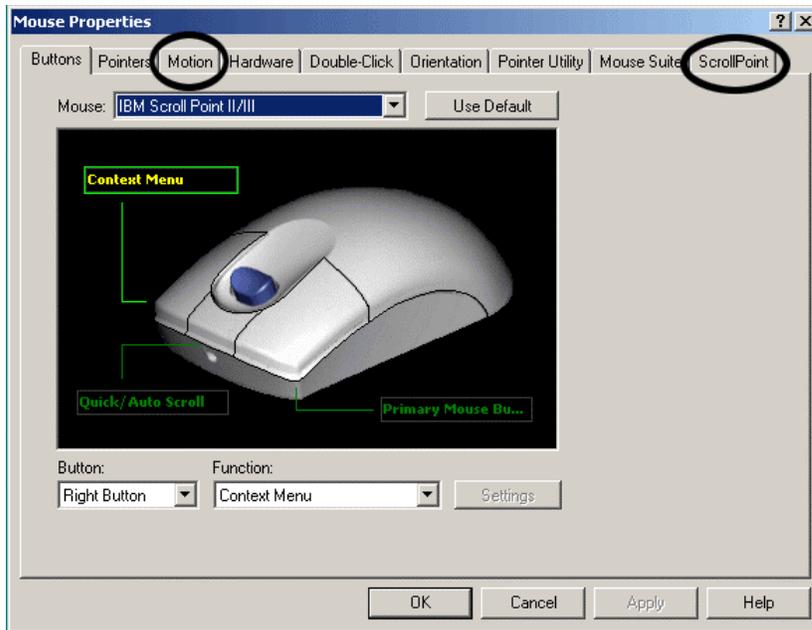
- Clicking the **ScrollPoint** tab accesses the controls for adjusting the speed of the scrolling action and the force required on the mouse scrollstick to activate the scrolling function.

- Clicking the **Motion** tab accesses the controls for adjusting the speed and acceleration of your mouse cursor on the screen.

- Clicking **OK** applies whatever changes you've made and closes the *Mouse Properties* window.

Logging Off Your Machine

Exiting CONNECTIONS and Citrix will continue to function as it has in the past. You can exit CONNECTIONS using the **Close** button on the CONNECTIONS toolbar.

When you have closed CONNECTIONS, you can end your Citrix session by clicking on the **Start** button in the bottom left-hand corner of the Citrix desktop. Select **Log Off <user name>** from the pop-up menu that appears.

The *Log Off* dialog window will open. Finish the log off process by clicking **Yes**.

Remember, this is not logging off your machine. You are ending your session with the Citrix server and when the log off is complete you will be returned to your local desktop.

Logging off your computer itself is now quite similar to logging off of Citrix.

Start by closing any applications still open on your local desktop using the Close button in each program window's upper right-hand corner. Then, click on the **Start** button that appears in the bottom left-hand corner of your screen. The difference is that this **Start** button is for your local desktop rather than the Citrix session. (See "Day 1 - Your New Desktop.")

When the Start menu opens, select **Log Off <user name>** and click **OK** in the S*hut Down Windows* box.

Appendix A: The Internet Connection Wizard

Microsoft Internet Explorer must be configured the first time a machine attempts to use it. In most cases, this first time configuration will be handled as part of the installation of your machine. If not, you will need to go through the following steps to configure Internet Explorer:

1. Internet Explorer will automatically attempt to launch when you click on the Logon for CONNECTIONS icon on your local desktop. This attempt will open the Internet Explorer Setup Window.
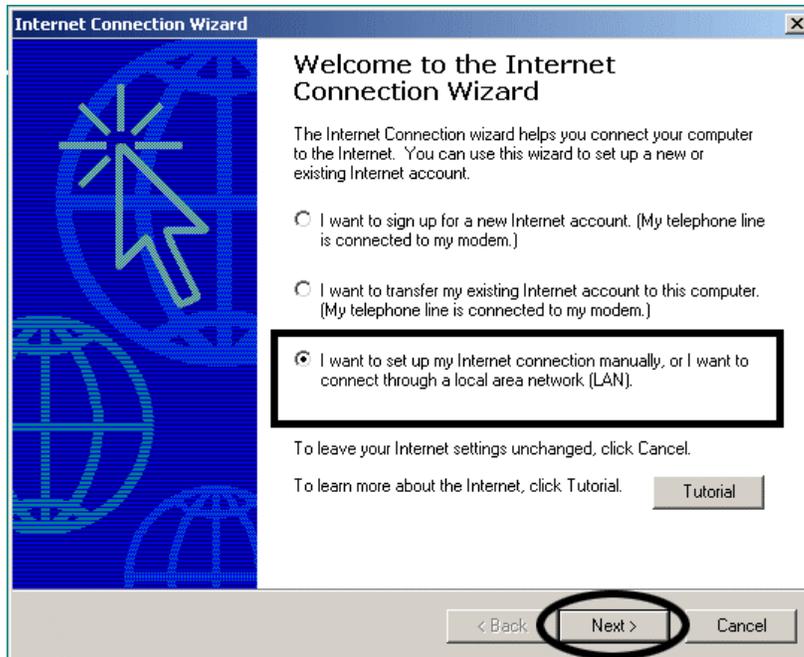
2. Select "I want to setup my Internet connection manually or I want to connect through a Local Area Network (LAN)." Then click **Next**.
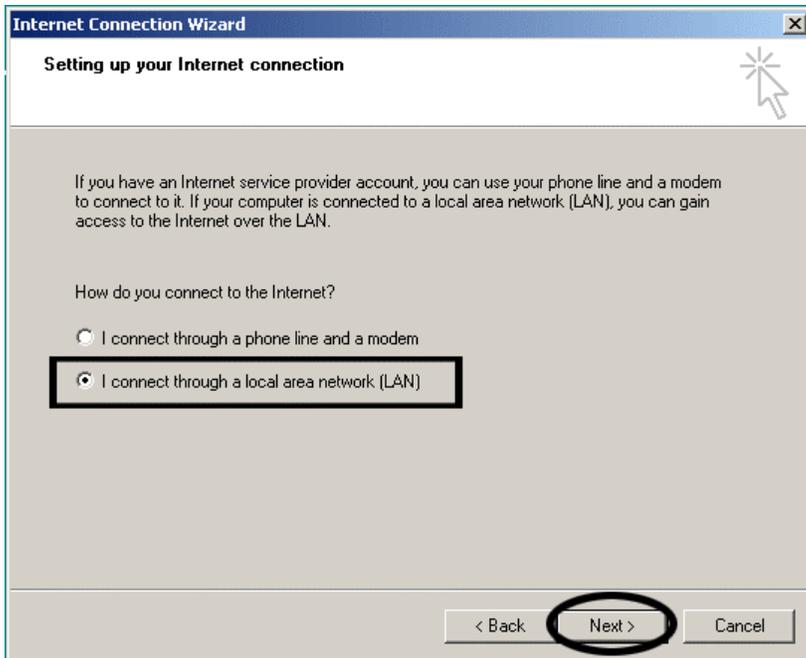
3. Select "I connect through a Local Area network (LAN)." Then click **Next**.

4. Next you will see the proxy setup screen. If you don't have internet access, click **Next**. If you do have Internet access, your LAN administrator needs to provide you with the correct proxy server information to enter on this screen.
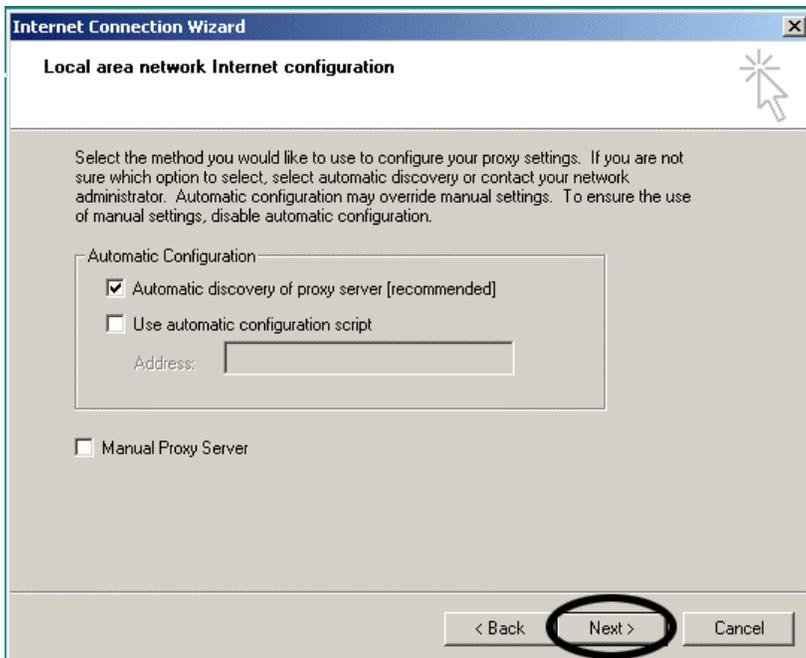
5. The next screen refers to Internet mail Accounts. Select "NO." Then click **Next**.

6. Click **Finish** on the final screen to complete the process.