

Overview

Hello!

We are excited that you are rolling out Windows 8.1 in your organization. User readiness is an important part of operating system deployment. Use this in-house trainer toolkit to provide your users with a great introduction to their Windows 8.1 devices. You'll want your users to be able to take full advantage of Windows 8.1.

This toolkit includes three training modules. Each module includes scripts and PowerPoint slide decks that you can use to prepare your own in-house training session. You can present one of these modules in about 30 minutes, and you can customize it to fit your organization's needs.

Here's an overview of the three modules:

Module 1: Warming up and starting out

Learn the basics of the Windows 8.1 modern user interface and navigations. Accomplish daily tasks from the familiar desktop.

Module 2: Gaining efficiency

Learn about multitasking, managing apps and files, and advanced features on the desktop.

Module 3: Advancing and customizing

Learn about personalization options, group collaboration, security, and mobility capabilities in Windows 8.1.

We hope that you use this in-house trainer toolkit to provide your users with an empowering learning experience. This toolkit is designed to make you, IT pro, the HERO!

Preparing your training session

To prepare for your training presentation, follow these guidelines:

- Read the scenarios and make necessary adjustments on the device that you will use for the training. (We recommend using a touch device). For example, you might want to make sure that the apps, websites, and documents that you will display during the session are related to your organization and are a good fit for your audience.
- Familiarize yourself with Windows 8.1 enhancements as well as how to talk about them.
- Review the touch, mouse, and keyboard commands presented in the scenarios. If you are using a touch device, enable touch points so that the audience can see where you are touching. Here's how to enable touch points:
 - Open the **Settings** charm.
 - Select **Change PC settings**.
 - Select **Ease of Access**.
 - Select **Other options**.
 - Under Touch feedback, select **Show visual feedback when I touch the screen**, and select **Use darker, larger visual feedback (ideal for presentation)**.

If you are not using a touch device, be sure to explain how the same activity can be accomplished on a touch device.

- Although you may choose the topics that will best resonate with your users, we highly recommend that you follow the basic flow of the scenarios. Remember, learning unfolds over time, building one skill on top of another. This staged approach to learning is the foundation of this Windows 8.1 in-house trainer toolkit.

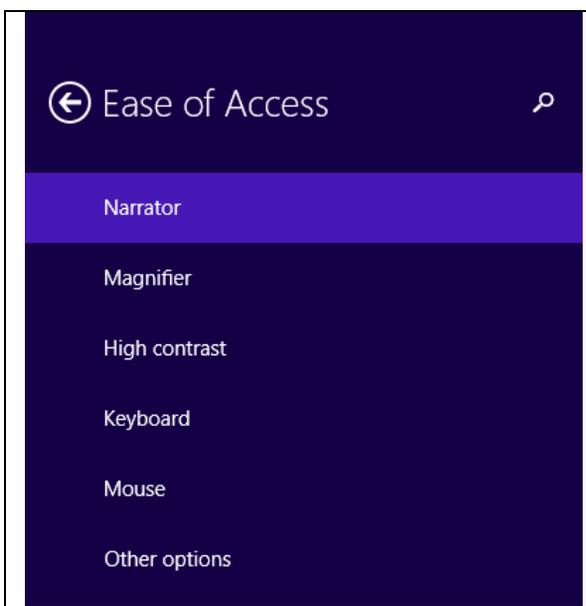
Now the journey begins. Enjoy!

Module 1: Warming up and starting out

Present the following topics to help users understand how to navigate Windows 8.1 and the traditional desktop. The suggested scripts are accompanied by instructions for both touch-screen devices and devices that use a keyboard and mouse.

Topic 1: Navigating Windows 8.1

Script	Demo steps
<p>Understanding the lock screen and signing in (PowerPoint slide 3) Getting started with Windows 8.1 is intuitive, even before you sign in for the first time. The customizable lock screen shows you the date and time. You will log in with your existing DCFS network ID and password for fast, secure access.</p> <p>Ease of Access You can access the Ease of Access settings directly from the lock screen by clicking/tapping the Ease of Access icon.</p> <p>Laptop Mouse Tracking Pad The new laptop features a mouse tracking pad at the bottom of the keyboard with left and right click buttons. NOTE: If you double tap the upper left corner of the tracking pad, a small yellow dot appears on the tracking pad. Additionally, a disable message appears on the laptop screen to let you know the tracking pad has been disabled. To enable the tracking pad, simply double tap the tracking pad again. The yellow dot disappears and a message appears on the laptop screen to you know the tracking pad is enabled.</p>	<p>Touch and Mouse</p> <ol style="list-style-type: none"> 1. Turn the laptop on. (Power button is on upper left corner) 2. Display the lock screen. Point out the notifications that appear, such as the date, time, Ease of Access, Network Connection (Broadband/WiFi) indicator, battery or A/C indicator. 3. Tap the Ease of Access icon. Tap the onscreen keyboard. Click X to close the onscreen keyboard. It will be retained in the task bar tray. 4. Press Ctrl+Alt+Delete to show the log in screen (Unlock the PC) to enter the existing DCFS network ID and password. <p>NOTES: The links for signing in to another domain and sign in options are reserved for DCFS OITS technical staff and will not be used by most DCFS staff.</p> <p>When logging in for the first time, some applications might have slower response times due to synchronization occurring between the laptop and the worker’s network location.</p> <p>On the new laptops, synchronization is “transparent to the worker” meaning that it is occurring in the background without the obvious desktop messages.</p>



You can also access the Ease of Access settings from the Settings charm, Change PC settings, Ease of Access or by typing Ease of Access in the search text box.

NOTE: The new HP laptops do not have a “Windows Security Button.” Strictly touch devices such as a tablet or a hybrid device that has a removable keyboard will have a “Windows Security Button”. The new laptops *do* have a touch screen so the prompt for the “Windows Security Button” will appear. However, since the laptops have a permanent keyboard they do not need a “Windows Security Button”. This feature cannot be removed without hindering the operation of the touchscreen.

The DCFS “lock screen”



Using the Start screen and tiles (PowerPoint slide 4)

Now we are on the Windows 8.1 Start screen. Here you have access to all of your favorite app and commonly used programs by simply swiping across the screen or scrolling with the mouse.

As you can see, the app tiles are available in several sizes so that you can arrange your app groups efficiently. With the larger tiles you get a rich canvas, and with the smaller tiles you can group your most-used apps close together. Because you can mix and match tile sizes, you can arrange your apps in a way that works best for you.

We will talk about customizing the Start screen later.

Touch

1. On the Start screen, point out the tiles.
2. Swipe to the right and then back to the left to show the width of your Start screen.
3. Point out the standard Microsoft app tiles, such as Documents, Microsoft Office and Desktop.
4. Point out the various tile sizes.

Mouse

1. On the Start screen, point to the tiles.
2. Scroll to the right and then scroll back to the left to show the width of your Start screen. NOTE: Demonstrate scrolling in the app list since tiles are limited to one screen.
3. Point out the standard Microsoft app tiles, such as Documents, Microsoft Office and Desktop.
4. Hover the mouse pointer over tiles of various sizes.



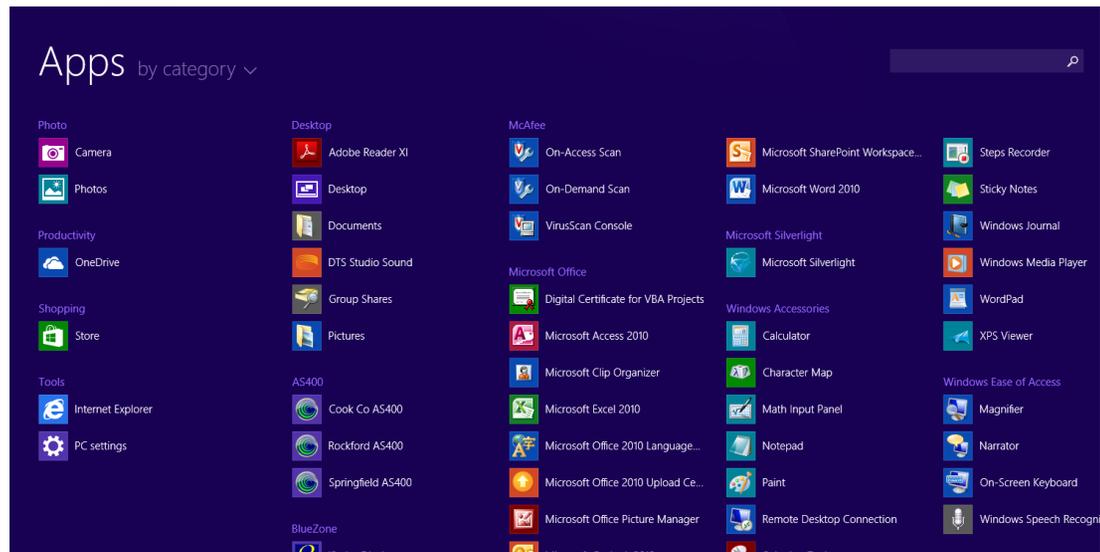
Opening a program (PowerPoint slide 5)

To open a program, just click or tap the corresponding app tile. Just tap the down arrow in the lower left corner of the touch screen to view all available apps. Or, click the arrow with your mouse. Once viewing the apps, right-click the app to show commands.

To return to the Start screen, just press the WINDOWS key on the keyboard, or move your mouse to the lower left corner of the screen, and click the **Start** button.

Touch

1. Tap the **Desktop** app tile to open the traditional desktop.
2. Tap the down arrow to view the available apps.
3. OR **SWIPE** from the middle of the start screen in an upward motion to view available apps.
4. Press the WINDOWS key (keyboard) or tap the Windows button to return to the modern desktop. View the calculator app.
5. Right click on the calculator app from the modern desktop and select Unpin from Start.



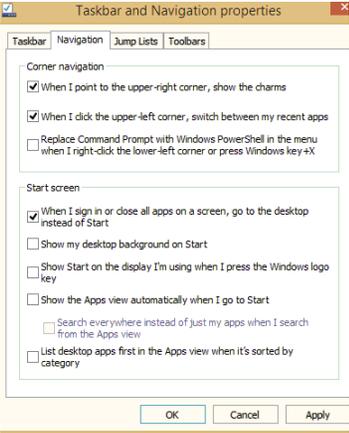
Mouse

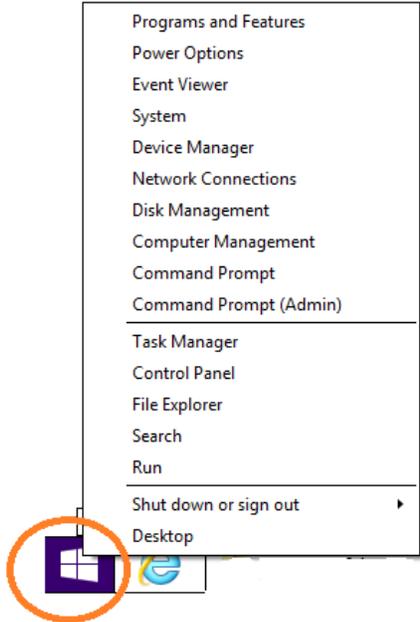
1. Click the Sticky Note app (or whatever app you want to demo) to open it.
2. Right-click on the app to access the app command menu. Point to the options on the app command menu.
3. To return to the Start screen, in the lower-left corner, click the **Start** button. Or, press the WINDOWS key.

<p>Accessing all of your apps from the Start screen (PowerPoint slide 6)</p> <p>To list all of the apps on your device, just click this down arrow near the bottom of the screen. With a touch device, you swipe up on the Start screen.</p> <p>In Apps view, you can easily sort the apps by name, date installed, most used, or category.</p>	<p>Touch</p> <ol style="list-style-type: none"> 1. Swipe up from the middle of the Start screen.  <ol style="list-style-type: none"> 2. At the top of the Apps view, tap the sort by option and point out options to sort by name or by most used. Tap by category. <p>Mouse</p> <ol style="list-style-type: none"> 1. Click the down arrow near the lower-left corner of the Start screen. 2. At the top of the Apps view, click the sort by option and point out options to sort by name or by most used. Click by category.
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Topic 2: Navigating your familiar desktop

<p>Getting to the desktop (PowerPoint slide 7)</p> <p>When you need to work on the traditional desktop, you can get there easily by clicking the Desktop tile on the Start screen.</p> <p>This is exactly like the previous Windows desktop and should be familiar and comfortable to all staff. This is most likely the method that most staff will use to access their most used programs.</p> <p>To return to the Start screen, you just press the WINDOWS key or click the Start button.</p>	<p>Touch</p> <ol style="list-style-type: none"> 1. On the Start screen, tap the Desktop tile. 2. Tap the SACWIS icon to open SACWIS. 3. Tap the Outlook icon to open Outlook. 4. Tap a program on the taskbar to navigate to that window. 5. Point out shortcuts and file icons on the desktop background. 6. Tap the Windows button to return to the Start screen. 7. Tap the Desktop tile to return to the desktop. 8. OR SWIPE from the middle of the modern desktop to the left to bring back the traditional desktop. <p>Mouse</p> <ol style="list-style-type: none"> 1. On the Start screen, click the Desktop tile. 2. Click the SACWIS icon to open SACWIS. 3. Click the Outlook icon to open Outlook. 4. Hover over a program on the taskbar to reveal the thumbnails.
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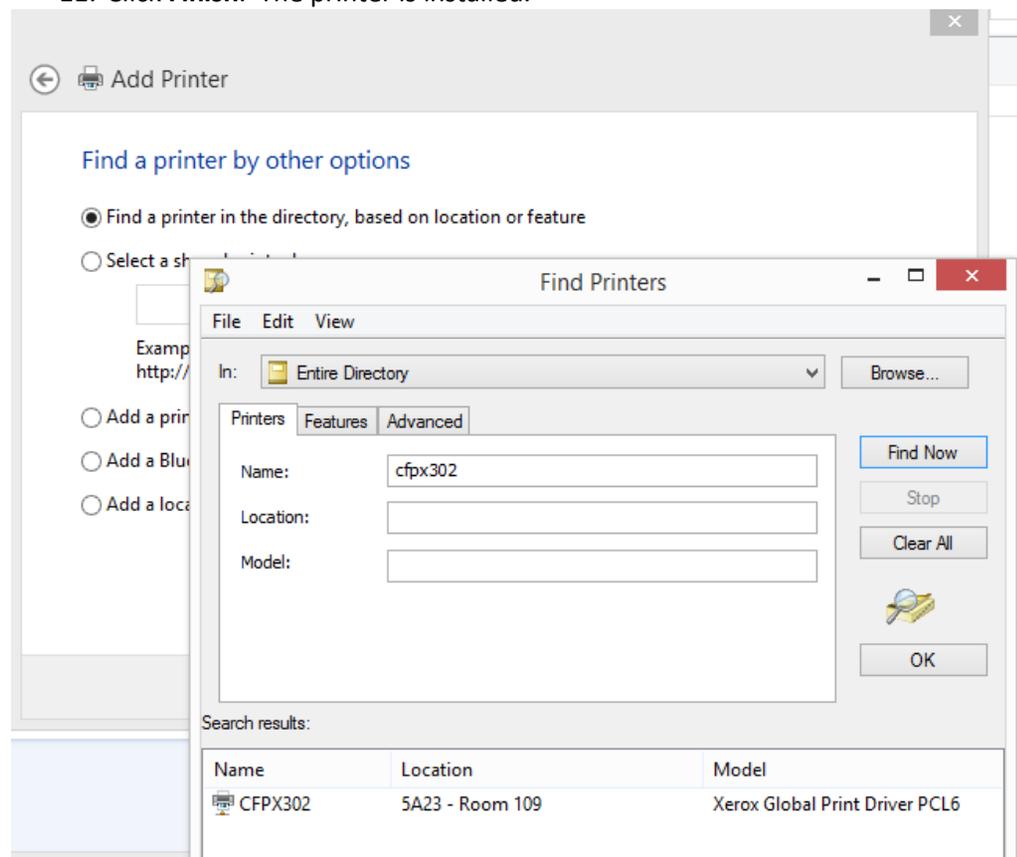
	<ol style="list-style-type: none"> 5. Click the taskbar thumbnail to navigate to that window. 6. Point out shortcuts and file icons on the desktop background. 7. Press the WINDOWS key to go back to the Start screen. 8. Press the WINDOWS key again to return to the desktop.
<p>Booting to the desktop (PowerPoint slide 8) If you want to bypass the Start screen and get directly to the desktop when you first sign in to your device, Windows 8.1 gives you that option. You just need to change a desktop property.</p>	<p>Touch</p> <ol style="list-style-type: none"> 1. On the desktop, press and hold the taskbar. 2. Tap Properties. 3. In the Taskbar and Navigation properties box, tap the Navigation tab. 4. In the Start screen section, select the first box: When I sign in or close all apps on a screen, go to the desktop instead of Start. <p>Mouse</p> <ol style="list-style-type: none"> 1. On the desktop, right-click a blank area on your taskbar. 2. Click Properties. 3. In the Taskbar and Navigation properties box, click the Navigation tab. 4. In the Start screen section, select the first box: When I sign in or close all apps on a screen, go to the desktop instead of Start. 

<p>Accessing the Quick Link menu (PowerPoint slide 9)</p> <p>From the Quick Link menu, you can accomplish traditional tasks (like signing out of the device), or you can tackle more advanced tasks in Task Manager and Control Panel. You can even access File Explorer to manage your files and folders.</p> <p>You can access the Quick Link menu by pressing and holding the Start button or by right-clicking it with your mouse. On the Quick Link menu, you can start a search, sign out of the device, and return to the desktop. You can also access Task Manager, Control Panel, and more advanced options such as Device Manager and Command Prompt.</p>	<p>Touch</p> <ol style="list-style-type: none"> 1. From the Start screen, tap the Desktop tile. 2. Press and hold the Start button to open the Quick Link menu. 3. Point to Search, and point to Shut down or sign out. 4. Point to Task Manager, Control Panel, Device Manager, and Command Prompt. <p>Mouse</p> <ol style="list-style-type: none"> 1. From the Start screen, click the Desktop tile. 2. Right-click the Start button to open the Quick Link menu. 3. Point to Search, and point to Shut down or sign out. 4. Point to Task Manager, Control Panel, Device Manager, and Command Prompt. 
<p>Adding a printer from the Quick Link menu (PowerPoint slide 10)</p>	<p>Mouse</p> <ol style="list-style-type: none"> 1. From the Start screen, click the Desktop tile. 2. Right-click the Start button to open the Quick Link menu.

To add printers using the most familiar method, staff can add printers from the Quick Link Menu, Control Panel.

TRAINER NOTE: There are multiple ways to add printers. We will also cover how to add a printer from the Settings Charm, Control Panel on slide 15.

3. Click **Control Panel**.
4. Click **Devices and Printers**.
5. Click *Add a Printer*.
6. Select **Find a Printer in the Directory, based on location or feature**.
7. Type the printer name (from the printer label attached to the physical printer) in the Name field.
8. Click **Find Now**.
9. Double click on the printer in the Search results.
10. Click **Next**.
11. Click **Finish**. The printer is installed.



Accessing the charms (PowerPoint slide 11)

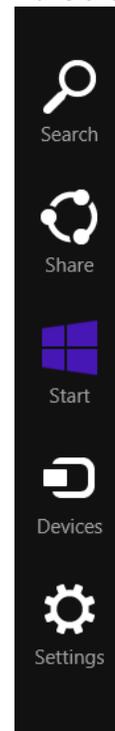
The charms help you with common tasks such as Search, Share, Start, manage Devices, and change Settings. To access the charms, swipe in from the right edge of the screen and tap the charm.

Or, use the keyboard shortcut WINDOWS + C.

With a mouse, point to the upper-right or lower-right corner of the screen. Once the charms appear, move up or down along the right edge to click a charm with the mouse.

Touch

1. Swipe in from the right edge of your screen to open the charms.
2. Tap away from the charms to make them disappear.



Mouse

1. Point to the upper-right (or lower-right) corner of the screen and then move down (or up) along the edge.
2. Click away from the charms to make them disappear.

<p>Search (PowerPoint slide 12)</p> <p>From anywhere in Windows, you can open the Search charm to find the info you need. The charm uses Bing Smart Search to look for apps, documents, and settings on your device, as well as the best of the web. All of these sources are included in a single search.</p> <p>For example, I'm planning a business trip to Chicago, and I want to find out more about the city before I go. I simply open the charms and then tap or click Search. Then in the Search pane I start typing "Chicago." My search results immediately appear. I click a result to get a beautiful app-like view of related documents on my device, local weather, attractions, and more. I can even filter image results by several criteria, including the color of images I want to see.</p> <p>Tip: If you are on the Start screen, you can begin a search simply by typing.</p> <p>Start</p> <p>Using the Start charm you can return to the most recently used program or to the Start screen with one click.</p> <p>Devices (PowerPoint slides 13)</p> <p>You can use the Devices charm to extend to a second monitor.</p>	<p>Search</p> <p>Touch</p> <ol style="list-style-type: none">1. On the Start screen, tap the Search button on the upper-right corner of the Start screen. Or, swipe in from the right edge of your screen to open the charms. Tap the Search charm.2. In the search box type "Chicago".3. Select one of the appropriate online search results. <p>Mouse</p> <ol style="list-style-type: none">1. On the Start screen, click the Search button on the upper-right corner of the Start screen. Or, move your mouse to the upper-right corner (or lower-right) of your screen to open the charms. Click the Search charm.2. In the search box type "Chicago".3. Select one of the appropriate online search results. <p>Devices</p> <p>Touch</p> <ol style="list-style-type: none">1. Open the charms and tap Devices.2. Point out the various options.3. Select Project. If an extra monitor is connected to the laptop, the screen can be extended to that monitor.
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<p>Settings (PowerPoint slide 14)</p> <p>From the Settings charm you can manage settings for the app that you are using. For example, because I am on the Start screen now, I can personalize the background and color. But if I am in a different app or on the desktop, I have access to different settings, such as Control Panel and Personalization.</p> <p>Regardless of the app I'm using, I can always manage these settings at the bottom of this pane. Here I can connect to a network, adjust volume and brightness, change notification and keyboard settings, and access power options, such as Shutdown and Restart. I can access all of my other device settings by choosing Change PC settings.</p>	<p>Mouse</p> <ol style="list-style-type: none">1. Open the charms and click Devices.2. Point out the various options.3. Click away to close the Devices charm. <p>Settings</p> <p>Touch</p> <ol style="list-style-type: none">1. On the Start screen, open the charms and tap Settings.2. Point out the Settings selections from the Start screen/modern desktop (Start, Personalize, Tiles, Help).3. Go to the traditional desktop.4. Swipe in from the right edge of the screen to access the charms, tap Settings5. Point out the Settings selections from the traditional desktop: (Desktop, Control Panel, Personalization, PC Info, Help).6. Point to Control Panel in the upper-right corner.7. Point to Personalization and then PC info.8. Point out the other options at the bottom of the menu, such as networks, volume, Brightness, Notifications, Power and keyboard. <p>Mouse</p> <ol style="list-style-type: none">1. On the Start screen, open the charms and select Settings.2. Point to the settings in the upper-right corner.3. Go to the desktop (WINDOWS + D).4. Press WINDOWS + I, and then point to Control Panel, then Personalization, and then PC info.5. From the Settings charm, point out the other options at the bottom of the menu, such as networks, volume, Brightness, Notifications, Power and keyboard.
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Adding a Printer from the Settings Charm

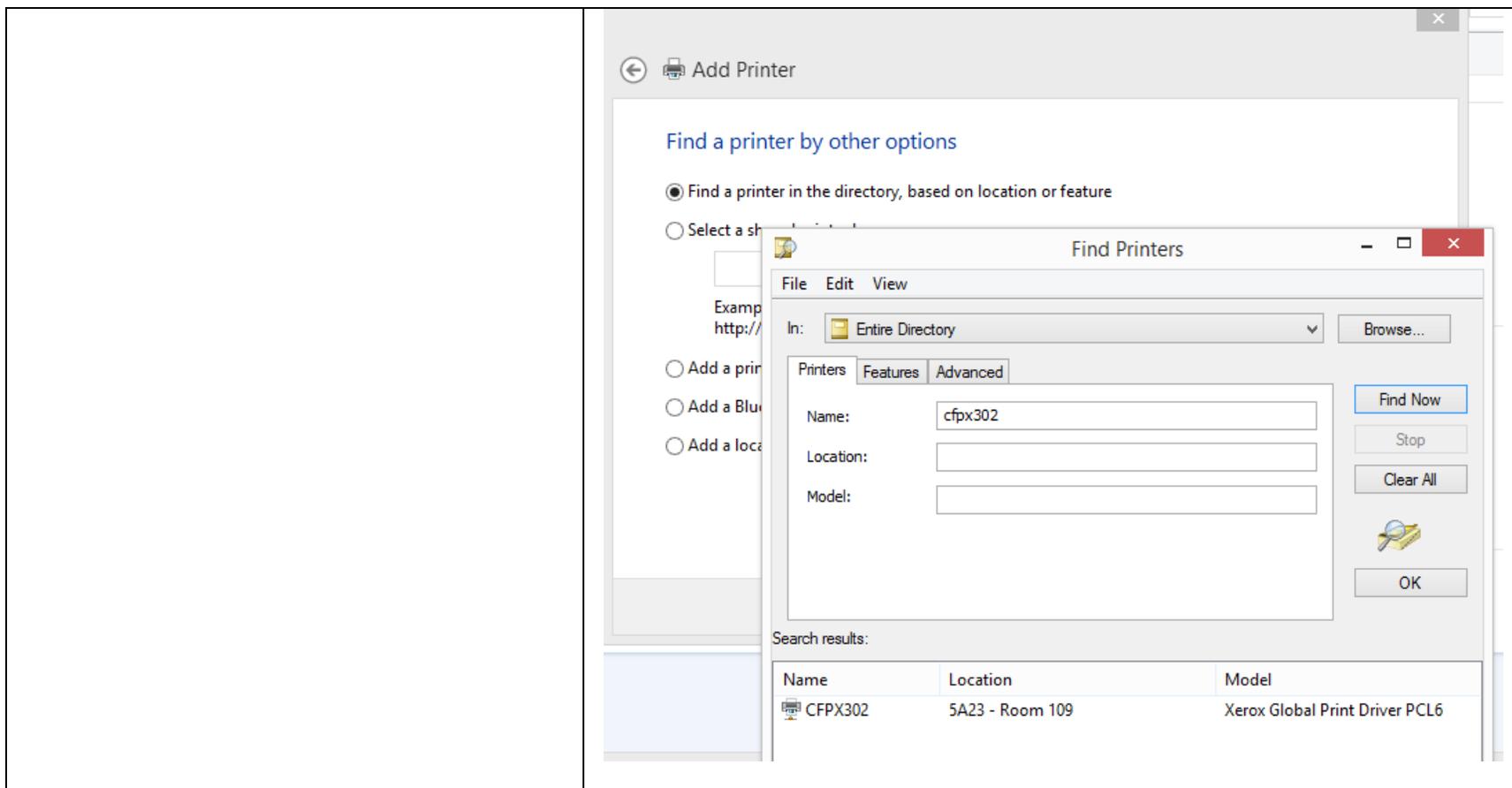
(PowerPoint slide 15)

There are multiple ways to add printers. We have covered how to add a printer from the Start menu on the traditional desktop. Now, we will demonstrate how to add a printer using the setting charm and accessing Control Panel.

Touch

1. Swipe in from the right edge of your screen to open the charms.
2. Tap **Settings**.
3. Tap **Control Panel**.
4. Tap **Devices and Printers**.
5. Tap *Add a Printer*.
6. Tap **Find a Printer in the Directory, based on location or feature**.
7. Type the printer name (from the printer label attached to the physical printer) in the Name field.
8. Tap **Find Now**.
9. Double Tap on the printer in the Search results.
10. Tap **Next**.
11. Tap **Finish**. The printer is installed.





Pinning apps to the taskbar (PowerPoint slide 16)

With Windows 8.1, accessing your favorite apps is easy. Just add them to your taskbar for quick access from the desktop. And you can unpin them when you don't need them around.

Touch

1. Swipe in from the right edge of your screen and tap **Search**. Type "Outlook" to start a search.
2. In the results list, press and hold **Outlook**.
3. Tap **Pin to Taskbar**.
4. Tap the **Desktop** tile.
5. Point out the Outlook icon on the taskbar.
6. Press and hold the **Outlook** icon on the taskbar.
7. To remove the icon from the taskbar, tap **Unpin this program from taskbar**.

Follow these steps to pin SACWIS to the taskbar.

1. On the Start screen, tap the desktop tile.
2. Right click on the SACWIS icon.
3. Select Pin to Taskbar.
4. To remove the icon from the taskbar, tap and hold the SACWIS button or right click the SACWIS button and select **Unpin this program from taskbar**.

Mouse

1. On the Start screen, type "Outlook" to start a search.
2. In the results list, right-click **Outlook**.
3. Click **Pin to Taskbar**.
4. Click the **Desktop** tile to return to the desktop.
5. Point to the Outlook icon on the taskbar.
6. Right-click the **Outlook** icon on the taskbar.
7. To remove the icon from the taskbar, click **Unpin this program from taskbar**.

Personalizing your Desktop Background

(PowerPoint slides 17/ 18)

Take advantage of the desktop's time-saving features.

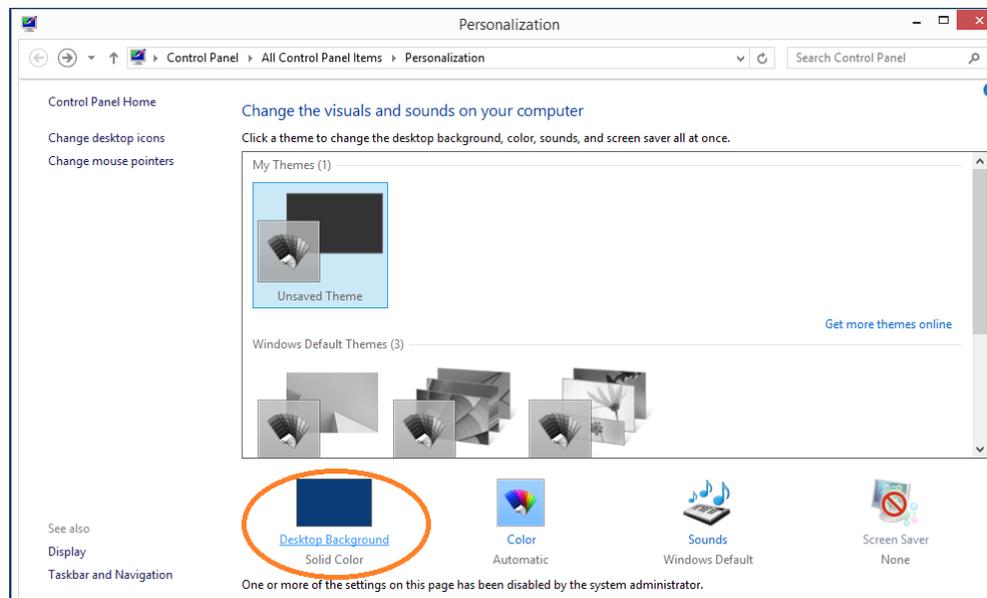
Use the taskbar to manage open apps and files.

Access the charms.

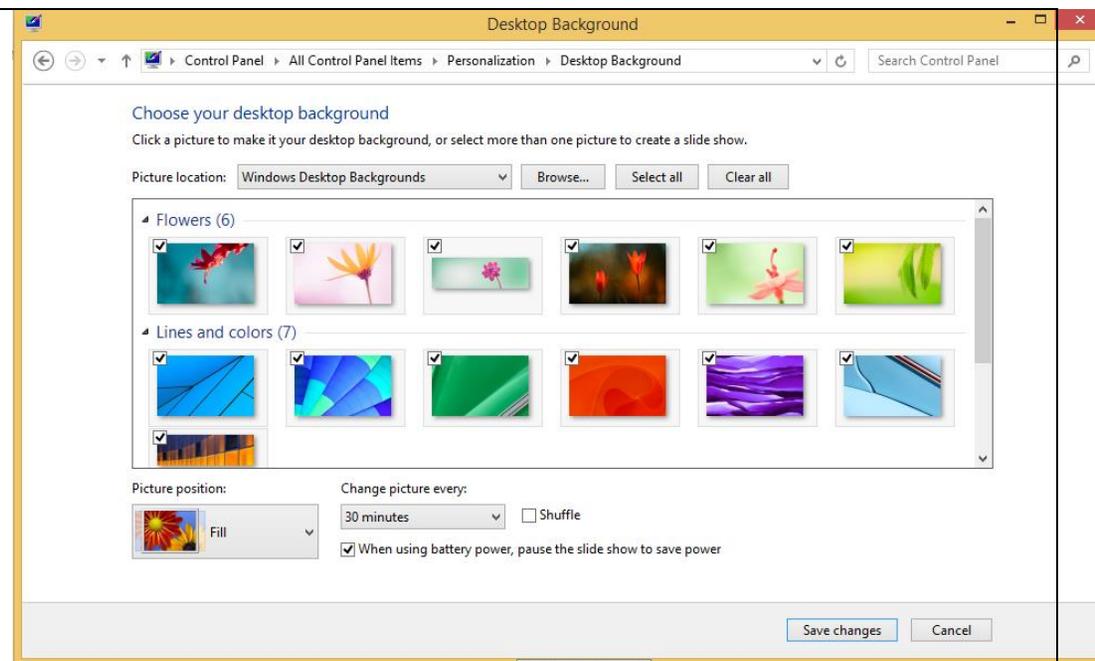
Customize the desktop background with a Windows Desktop Background picture or a solid color.

Touch

1. On the Start screen, tap the **Desktop** tile.
2. Point out shortcuts and file icons on the desktop background.
3. Open the charms and tap **Settings**.
4. Tap **Control Panel**.
5. Tap Personalization, select **Desktop Background**.



6. Select Windows Desktop Backgrounds from the Picture Location drop down menu.

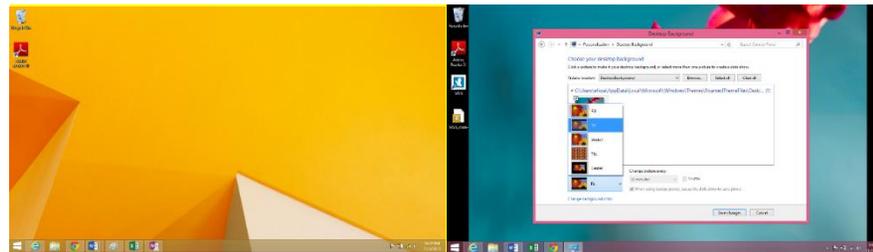


7. Discuss the other options in the Picture Position list, including Fit, Stretch, and Tile.
8. Under Picture location, select one or multiple graphics and tap **Change picture every**. Then tap **10 seconds**.
9. Tap **Save Changes** and then close Control Panel.
10. Watch the desktop slide show and point out the background alignment.

Mouse

1. On the Start screen, click the **Desktop** tile.
2. Hover over a program on the taskbar to reveal the thumbnails.
3. Point out shortcuts and file icons on the desktop background.
4. Press the WINDOWS key to go back to the Start screen.
5. Press the WINDOWS key again to return to the desktop.
6. Open the charms and click **Settings**.

7. Click **Control Panel**.
8. Under **Personalization**, select **Desktop Background**.
9. In the Desktop background box, select Windows Desktop Backgrounds.
10. Discuss the other options in the list, including Fit, Stretch, and Tile.
11. Under Picture location, try to select multiple graphics and click **Change picture every**. Then click **10 seconds**.
12. Click **Save Changes** and then close Control Panel.
13. Watch the desktop slide show and point out the background alignment.



TRAINER NOTE: To return the desktop to a solid blue color, follow either the **TOUCH** or **MOUSE** steps outlined above to access Desktop Background and select **Solid Color** to select the original **Blue** background color and save changes.