

Surface Pro Setup and Training

STS's or Principals can contact IST (973-4200) to schedule a time to pick up Surface Pros for staff who missed deployment. **Please note**** STS will need to bring the old device and accessories to IST within 2 days of deploying the Surface Pro 7 to staff.**

Staff will need to make sure all their information is backed up by following the process in the [SWAY Link](#).

The Surface Pro 7 user needs to be the **first person to sign into the device**. Surfaces should not be added to the domain; they will automatically enroll into Intune device management.

Surfaces are assigned to the school and will stay at that school when staff move from one building to another. The surfaces will be reset between users.

Resources:

Surface Pro PowerPoint <HTTPS://BIT.LY/259SURFACEPRO7>

Take Home Sheet <https://bit.ly/Takehomesheet>

Intro:

There should be five items in the Microsoft bag.

Surface

Surface Case

Surface Pen

Docking station

Keyboard

Turn on computer and follow the prompts for setup. Connect to WPSJoin the first time.

Facial Recognition:

When users see the desktop mountains, restart the device to set up facial recognition (start button -> Power button -> Restart). After signing in users are prompted to setup facial recognition (if users wear glasses, 2 facial recognitions can be set up- See PowerPoint slide 27) and a PIN to sign-in (users will need their cell phone to set up facial recognition). On the Additional Security Verification screen, leave the first option as Authentication Phone, select region, add phone

number area code first and change the bottom option to send text message. Once the text message is received, open the message and put in the code. The user will then create their own PIN number. This is a two-factor authentication. If the user tries to sign in with facial recognition and it doesn't work, they can sign in with this PIN number.

Pairing Surface Pen:

Pair the Surface Pen via Bluetooth. *If you are setting up multiple users instruct them **NOT to OPEN** their Surface Pen.* NOTE- Only one Surface Pen can be paired at a time. Instructions on pairing a Surface Pen is in the PowerPoint slide #16.

Using Surface Pen:

- Double tap with the pen in Cortana (search bar) to bring up the Writing Input tool. Users can write what they are searching for. A video on Digital Inking is in the PowerPoint slide 20.
- Pen Short cuts- The eraser in the Surface Pen doubles as a clicker in presentation mode. Short click advances slides, press and hold the eraser goes to the previous slide.
 - Outside of PowerPoint, users can click the eraser and open short-cuts. These shortcuts can be customized in Pen Settings. Instructions are in the PowerPoint slide 17.

Allowing programs to load:

It takes a **minimum of 30 minutes** for most programs to load. Instruct users to **not open** any programs or the install will be delayed. Teams will open automatically. It can be closed.

Physical Aspects of the Surface Pro 7

Cover the physical aspects of the Surface (power buttons, ports, kickstand). Video is in the PowerPoint slide 5.

Usage:

- **Action center** – place finger on the right-side of the screen swiping from right to left. The notifications coming in are programs being loaded or emails received. Above the first box on the bottom, select EXPAND.
 - Show how to connect to a wireless projector by tapping connect
 - Show project (duplicate, extend screen)
 - Show rotation lock (only when not connected to keyboard)
 - Tablet mode (how to turn on and off)

- Show how to change the screen brightness right from here.
- **Task View**- Shows a 30-day history – place finger on the left-side of the screen swiping from left to right.
 - Find recent documents quickly
- **Cortana**- Cortana was designed to search the device as well as the internet. If a user is having trouble with their battery, search battery. If a user can not remember where they saved a document, search the name of the document. This is the easiest way to find what you need on a Windows 10 machine.
- **Camera**- Search for Camera in Cortana. The camera app is similar to the camera app on a phone. Features include: Front and back facing camera, Video, Timer, etc.
- **Microsoft App Store**- Click on the Shopping bag located on the task bar or write Store in Cortana. Across the top is a tab **usd259.net**. This is our app store. If users have an educational app they wish to use in their classroom, users can submit using the **Software Approval App** located on the portal. Once the app information is submitted a committee will verify it is CEPA, COPA and FERPA compliant. If the app gets approved it will be available for download in the USD259.net app store.
 - **Install Office Lens**. This is a mobile scanner which takes a hard copy and makes it a digital copy. The PowerPoint has more about Lens on slide 22.
- **OneDrive**- Open File Explorer on task bar (yellow folder). OneDrive- Wichita Public Schools will be listed on the left side. If the OneDrive doesn't have Wichita Public Schools or usd259, it was more than likely set up as a personal account and not a work account.

Open Outlook:

- Search in Cortana for Microsoft Outlook. Make sure Outlook opens correctly before the user leaves. (Troubleshooting- If Outlook spins without opening, press Ctrl + Alt + Delete and close Outlook. Open Outlook back up, when it asks if you want to open it in Safe Mode **-NO**)
- Pin Outlook to the taskbar by right-clicking on the icon -> Pin to Taskbar
- Unpin the white envelope from the task bar by right-clicking on the icon -> Unpin from Taskbar. This is mail we don't use.

Set Default Apps

- Search for Default in Cortana, open Default Apps
 - Change Mail -> Outlook

- Set Web Browser to Edge or Chrome (do not use IE, it is no longer being supported)
- Click Set Defaults by App
 - Click on Adobe Acrobat Reader -> Manage -> Click on the Microsoft Edge option and change to Adobe Acrobat Reader DC

Updating WIFI Surface Driver

- Click on the Start button and scroll to Company Portal.
- Open Company Portal and install the WIFI Surface Driver
 - If the driver fails to load, exit out of the Company Portal and try again.

Running Updates:

After deploying the Surface Pro 7 to staff, please make sure to have staff run updates (Information in the Take Home Sheet <https://bit.ly/Takehomesheet>).
This is very important to run efficiently.