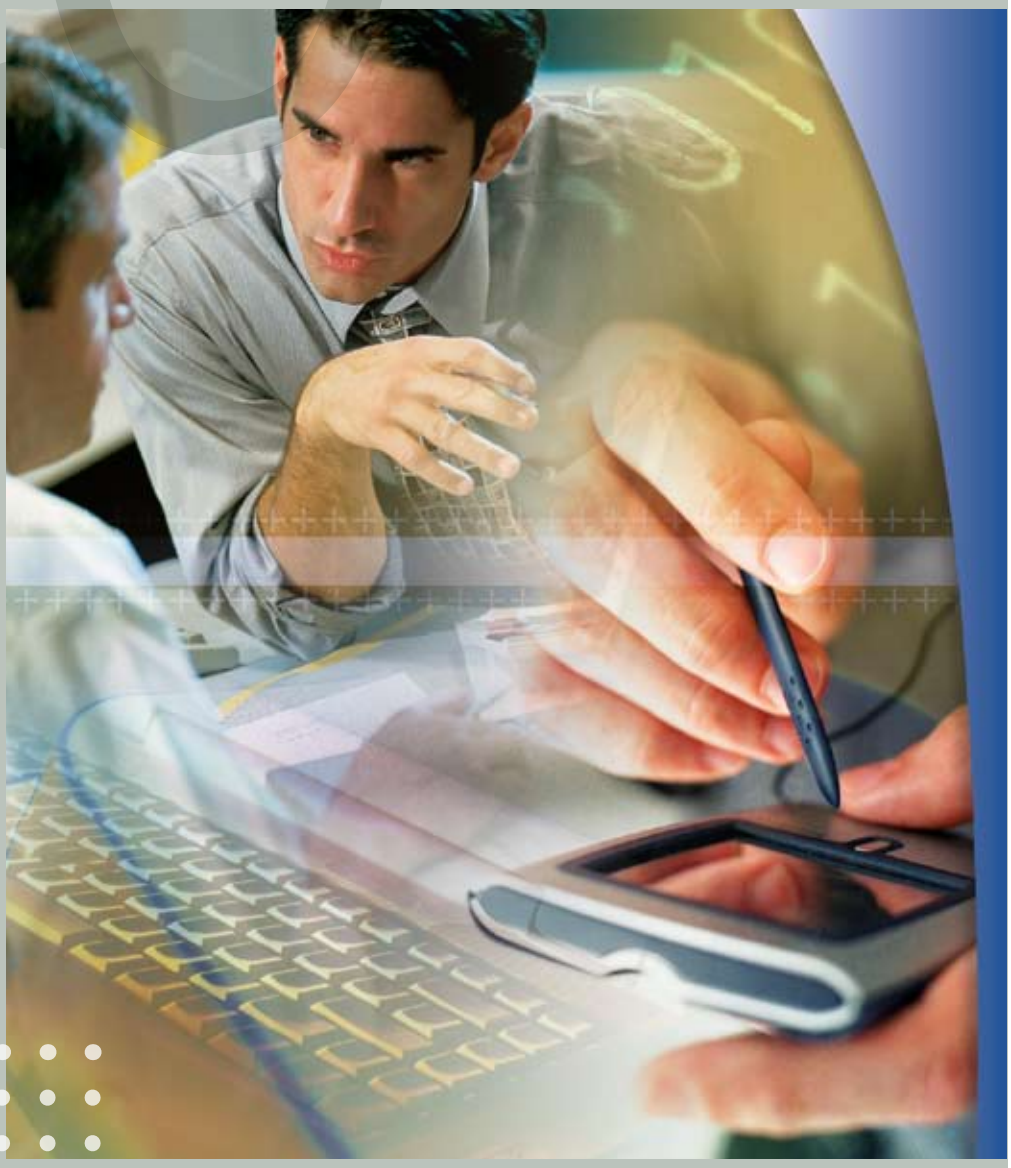
SOLUTION OVERVIEW

SmartOffice® 6.0 User Guide



Configuration Tool

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Overview and Objective

This document provides a comprehensive understanding of SmartOffice® 6's new Configuration Tool. Included are descriptions of the available configuration options as well as an explanation of the default settings. Many changes have been made to SmartOffice 5's server configuration file. The most prominent ones being:

- **New graphical user interface**

  Configuring SmartOffice 6 is easier than ever with simple navigation of category options and data validation to help prevent incorrect settings.

- **Instant setting changes**

  With the Configuration Tool, new settings are instantly saved and activated. It is no longer necessary to restart the application.

- **Simplified options**

  SmartOffice 6 contains a concise set of the most frequently used options.

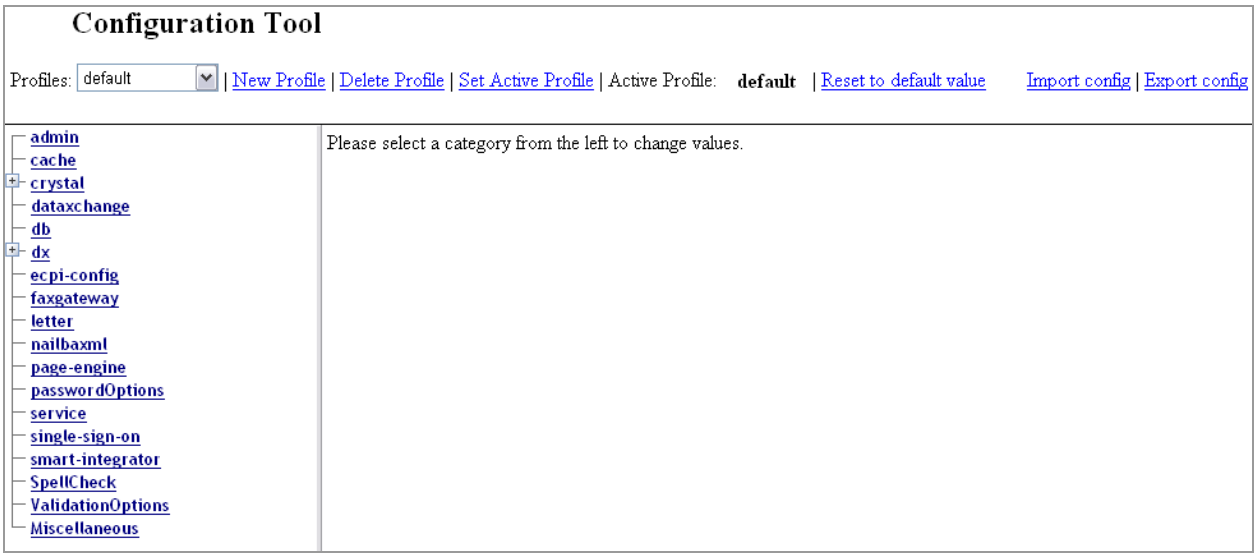
SmartOffice administrators typically only need to configure the settings in the Configuration Tool during the initial setup. This is done to enhance performance, add features, or when performing hardware changes that involve name alterations. Contact E-Z Data Technical Support for detailed instructions on reconfiguring the settings.

Configuration Tool Access

The Configuration Tool can only be accessed by the *Admin* user of the *System* office. It will not display under any other office and user combination. Select the **Configuration Tool** from the expanded **Setup** menu.

General Usage

The Configuration Tool is divided into three main panels. The top panel consists of the Profile options and Import/Export. The side menu lists all of the available setting categories. The right panel displays the selected category settings.



Profiles

Profiles are individual containers of information where certain settings are specified and saved. Different profiles can be selected and used without affecting other profiles.

- **Profiles drop-down list**

  Enables you to select the appropriate profile and display the settings. The selected profile does not need to be active for changes to be made.

- **New Profile**

  Enables you to create a new profile. All newly created profiles will have the default settings.

- **Delete Profile**

  Deletes the selected profile. A confirmation dialog box will open when this option is selected. The active profile cannot be deleted.

- **Set Active Profile**

  Sets the selected profile as active.

- **Active Profile**

  The profile that is currently in use.

- **Reset to default value**

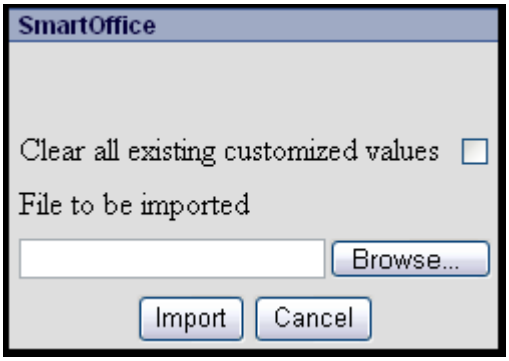
  Returns all settings to the factory default for the selected profile. A warning displays after selecting this option. Be certain that the default settings are appropriate. Remember that a new profile can be created with factory default settings without affecting any profiles.

Import and Export

Settings can be saved to an .xml file and imported to another instance of SmartOffice 6. Should special debug settings be required, special configurations from E-Z Data can be imported.

Import

The following dialog box is displayed when **Import** config is selected:

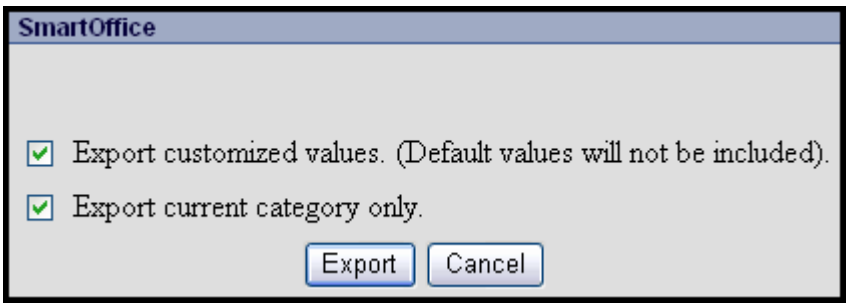


- **Clear all existing customized values:** Enabling this option will clear any customized values belonging to an imported value for the entire category. It will not clear all customized values under all categories. To import to a clean profile, either reset the profile or create a new one before importing.
- **File to be imported:** Click the **Browse** button to open a dialog box and select a previously exported xml file.

Click the **Import** button to import the values from the chosen file. The import values will overwrite any previous values. The **Cancel** button may be selected at any time to cancel the import.

Export

The following dialog box is displayed when **Export** config is selected:



- **Export customized values. (Default values will not be included):** Enabling this option will only export changes that differ from the default values from any category. It is advisable to keep this enabled.
- **Export current category only:** Enabling this option will only export settings from the current category page. This option is unavailable when exporting from the Configuration Tool Home Page or under the Miscellaneous category.

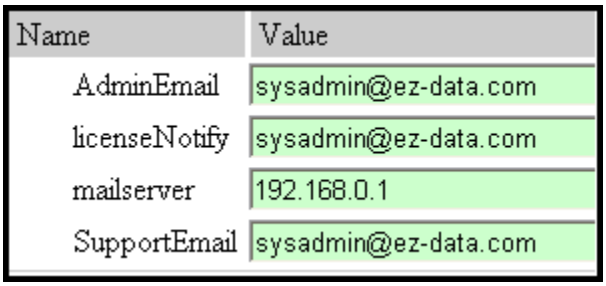
Click the **Export** button to export the customized values to a file. The **Cancel** button may be selected at any time to cancel the export.

Settings

There are 18 categories in the side menu. The right panel changes to display the selected category's settings page. Each settings page contains the common Save and Reset buttons. Click the **Save** button to save changes. Click the **Reset** button to return values to their last saved value. A Confirmation dialog box will open and must be approved before another category can be selected.

Admin

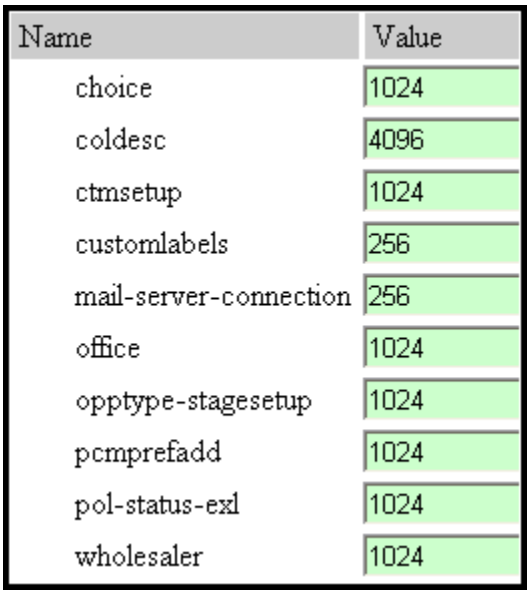
The Admin category houses the administrative user and support staff settings, specifically e-mail notifications to the staff responsible for the SmartOffice application server. These defaults should be customized for each installation. E-mail addresses can be separated by either a comma or a semicolon.



- **AdminEmail:** The reply e-mail address used in the e-mail messages that SmartOffice sends out. It is usually the mailing list address of the administrative support staff.
- **licenseNotify:** The e-mail address of the person(s) to be notified in case of a license breach. An E-Z Data administrator should be notified of license violations.
- **mailserver:** Sets the host IP address of the appropriate SMTP server. The SmartOffice automatic e-mail capability is affected if a SMTP server is not present. The office-level settings, such as Lotus Notes, Outlook, and Form Letters, can override the SMTP settings in the Configuration Tool.
- **SupportEmail:** Sets the reply e-mail address of the support staff. In many situations, this will be the same as the AdminEmail setting.

Cache

The Cache category specifies the maximum amount of space pre-allocated for the browser cache. The recommended settings are already set and should not be changed without first consulting E-Z Data.

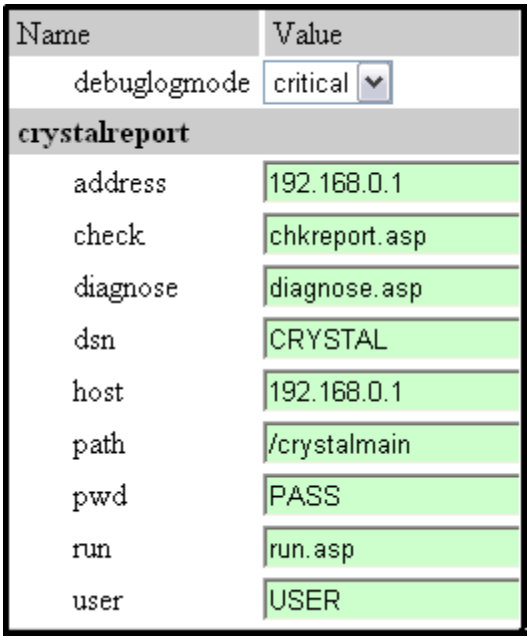


Name	Value
choice	1024
coldesc	4096
ctmsetup	1024
customlabels	256
mail-server-connection	256
office	1024
opptype-stagesetup	1024
pcmprefadd	1024
pol-status-exl	1024
wholesaler	1024

Crystal

In the Crystal category, changes can be made to the settings used with the Crystal Reports server. By default, SmartOffice 6 is set to use Crystal Reports XI with the Java implementation.

debuglogmode: Specifies the level of debug logging for Crystal Reports. If **Critical** is selected, only the critical errors will be logged. If **All** is selected, everything will be logged. Critical is the default setting.



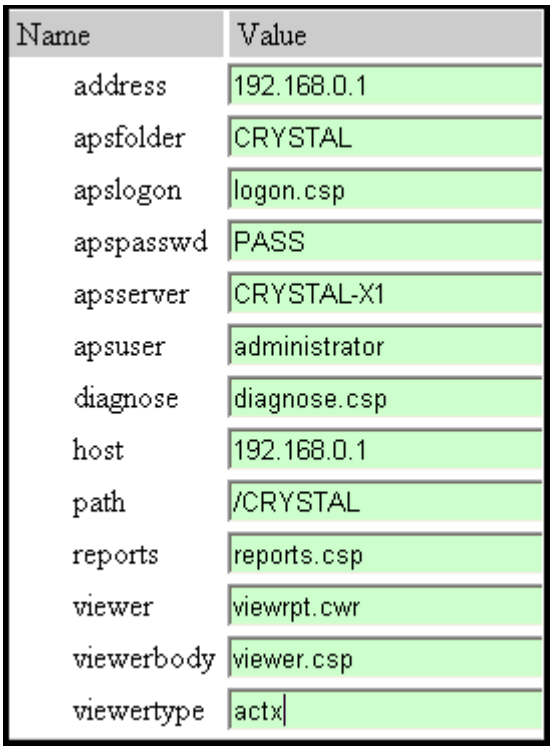
Name	Value
debuglogmode	critical
crystalreport	
address	192.168.0.1
check	chkreport.asp
diagnose	diagnose.asp
dsn	CRYSTAL
host	192.168.0.1
path	/crystalmain
pwd	PASS
run	run.asp
user	USER

Crystalreport

- **address:** Sets the host name or IP address of the designated Crystal Reports server.
- **check:** Checks for the existence and validity of the requested .rpt file on the server.
- **diagnose:** Shows xml data for Crystal Reports.
- **dsn:** DSN of the database to be used with the Crystal Server.
- **host:** Host name of the Crystal Reports server. This will usually have the same value as the address setting.
- **path:** Virtual directory on the Crystal server for generating reports.
- **pwd:** Password for the DSN.
- **run:** File initializing report and viewer when a report is first run.
- **user:** Login name for the DSN.

Crystalenterprise

Crystal Enterprise is a sub-category of Crystal. These settings are used to configure a Crystal Reports Server, the enterprise server edition of Crystal Reports.

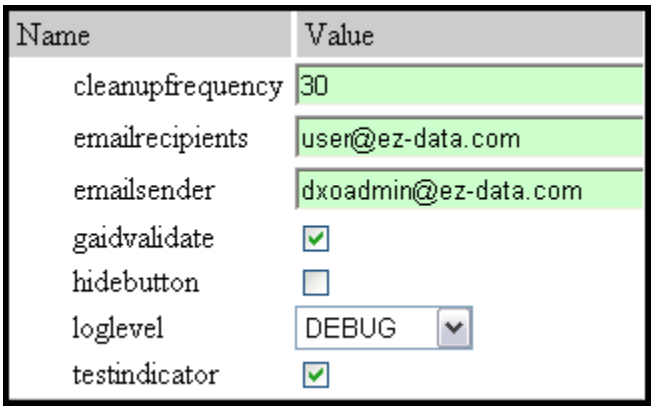


- **address:** Sets the host name or IP address for the designated Crystal Reports Server.
- **apsfolder:** Directory on the Crystal Server for publishing reports.
- **apspasswd:** Sets the login password for the Crystal Server.
- **apsserver:** Computer name of the Crystal Server.
- **apsuser:** Sets the login name/user for the Crystal Server.
- **host:** Host name of the Crystal Reports Server. This will usually have the same value as the address setting.
- **path:** Virtual directory on the Crystal Server for generating reports.

Do not change the following settings: apslogon, diagnose, reports, viewer, viewerbody, and viewertype.

DataXchange

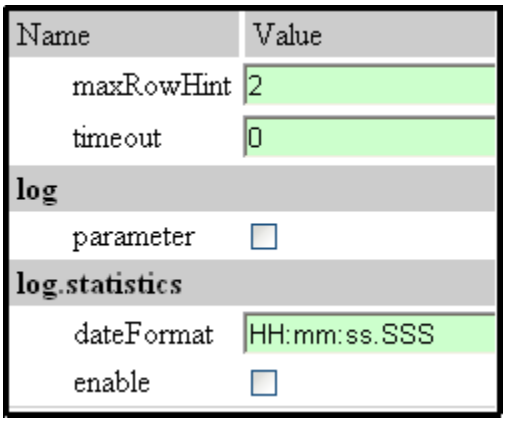
The DataXchange category modifies settings on the DataXchange server. Before using DataXchange, it must be enabled under the service category for dxservice.



- **cleanupfrequency:** Sets the frequency in days for the DataXchange server log to be cleared.
- **emailrecipients:** Where the e-mail will be sent when a DataXchange download is completed. This e-mail is sent whether or not the download was successful.
- **emailsender:** Sets the e-mail sender's address.
- **gaidvalidate:** Enables gaid validation. For more information, see the *Pending Case Download* documentation.
- **hidebutton:** Hides the two buttons in SmartOffice that simulate pending case downloads and SmartLink for iPipeline.
- **loglevel:** Used to specify the level of logging for DataXchange. If **Debug** is selected, everything is logged. If **Warning** is selected, only the generated warnings are logged. If **Error** is selected, only the generated errors are logged. Debug is the default setting.
- **testindicator:** Enables the test indicator flag for downloads.

Db

The Db category enables modifications to the settings related to database use by the application.



- **maxRowHint:** When a query is made, the records returned may contain deleted and private records. Such records are not filtered out of the query at the database level, but are suppressed from the user interface by the application. In order to do this, the application must preview more than the number of records specified in order to display the full number of records requested in case the first 50 contain deleted or private records. For example, if a page size of 50 is set with a maximum Row Hint Factor of 2, the application will preview 100 records before displaying 50 on a page. Clients should consult with E-Z Data before setting this parameter. It is not recommended to change this value.
- **timeout:** Sets the database query timeout in seconds. If a request to the database is not fulfilled within the specified timeout period, it will be cancelled. If the timeout is set to 0, then the query will not time out.

Log

The log section controls a setting for SmartOffice SQL logging. Note that there is no actual setting in the Configuration Tool to enable logging, as logging all SQL output consumes a great deal of hard disk space. It should be used for debugging by E-Z Data personnel only.

parameter: Enables the inclusion of parameters when logging SQL statements.

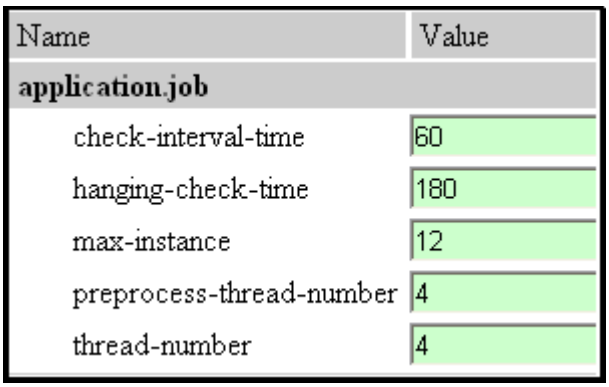
Log.statistics

The log.statistics section contains a few more options for SQL logging.

- **dateFormat:** Sets the date format used for the timestamp in the log.
- **enable:** Enables the use of timestamps and other simple statistical information.

Dx

The Dx category makes changes to the DataXchange Enterprise server settings, including the database connection information. Note that this is different from the DataXchange category as this is for Enterprise users and must be enabled under the service category for dxenterpriseservice.

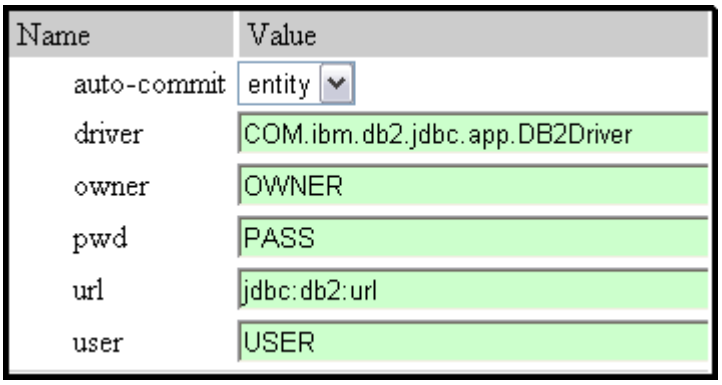


Name	Value
application.job	
check-interval-time	60
hanging-check-time	180
max-instance	12
preprocess-thread-number	4
thread-number	4

- **check-interval-time:** Sets the amount of time in seconds that DataXchange checks for new jobs.
- **hanging-check-time:** The waiting time in seconds before performing the next check to see whether the current job is finished.
- **max-instance:** Sets the maximum number of instances. DataXchange will use this number and thread number together to determine how many jobs should be created for each staging table. If this number is less then the number of actual instances running on SmartOffice, some of the instances will not receive any jobs.
- **preprocess-thread-number:** Sets the maximum number of threads for preprocessed DataXchange jobs.
- **thread-number:** Sets the maximum number of threads to be used for DataXchange jobs.

Jdbc

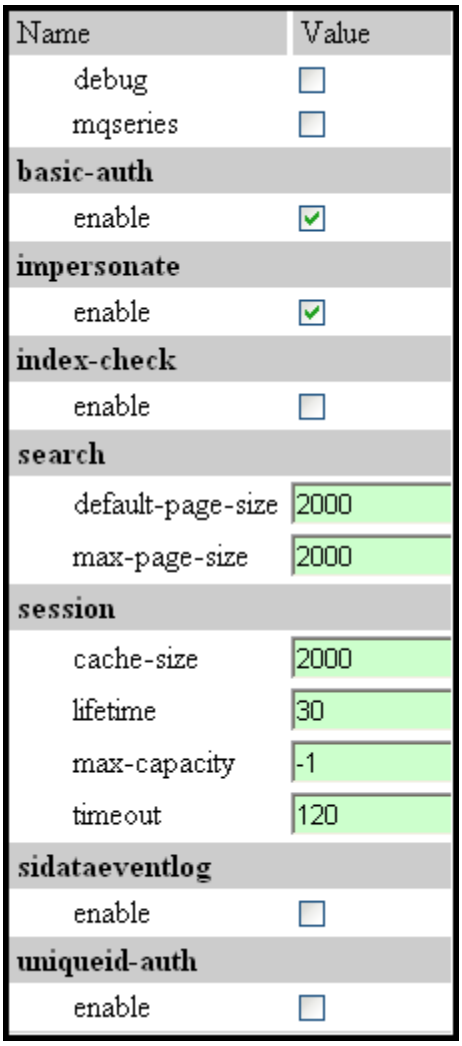
The Jdbc sub-category sets the database configuration required for running DataXchange Enterprise.



- **auto-commit:** Sets the type of entries that get automatically committed to the database.
  - true - Commits after every entry.
  - false- Commits only when there is a commit command in the code.
  - entity - Commits after special blocks of queries. This is the most efficient setting. Entity is the default setting.
- **driver:** Sets the driver required to access your particular type of database.
- **owner:** Sets the name of the database owner.
- **pwd:** Sets the database password.
- **url:** Sets the database URL.
- **user:** Sets the database username.

Ecpi-config

The Ecpi-config category enables the configuration of SmartIntegrator API. The information provided below is only for informational purposes. Do not modify the default settings without first consulting E-Z Data.



- **debug:** Enables debug mode for ECPI.
- **mqseries:** Enables the application to support mqseries (Message Queue Series) mode. Mqseries will be available in a future release.

Basic-auth

Enables the application to accept basic authentication.

Sidataeventlog

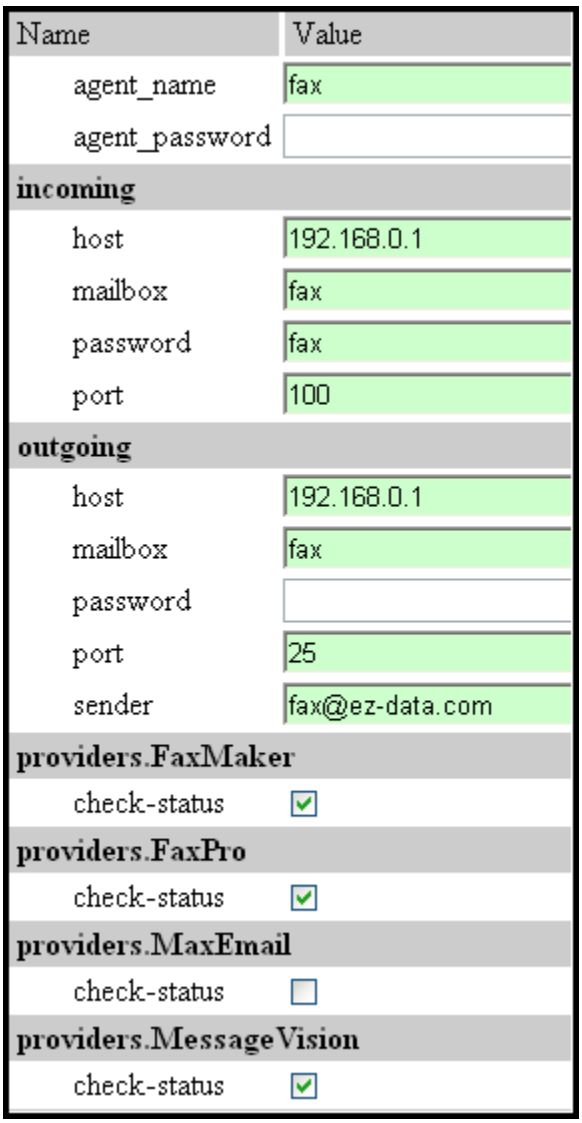
Enables the SmartIntegrator event log.

Uniqueid-auth

Determines if unique ID's will support SmartIntegrator.

Faxgateway

The Faxgateway category contains the configuration information for setting up SmartOffice with a fax server. Note that the jobscanner and faxstatuschecker must be enabled under the Services category for faxing to work correctly.



- **agent_name:** Sets the name of the fax agent. The setting should be left as Fax to match the job agent.
- **agent_password:** This security feature is used if the fax server is remote. A password is not required for any of the listed providers.

Incoming

This section is the information SmartOffice uses for retrieving fax status reports through an e-mail server.

- **host:** Sets the host name of the e-mail server through which SmartOffice receives fax status reports.
- **mailbox:** The e-mail account name used to receive status reports.
- **password:** Sets the mailbox password.
- **port:** Sets the port number of the e-mail server.

Outgoing

This section is the information SmartOffice uses for sending out facsimiles through an e-mail server.

- **host:** Sets the host name of the e-mail server through which SmartOffice sends out facsimiles.
- **mailbox:** Sets the e-mail account name used to send facsimiles /e-mail. This information is needed if the e-mail server requires authentication when sending messages.
- **password:** Sets the mailbox password.
- **port:** Sets the port number of the e-mail server.
- **sender:** Sets the e-mail address from which SmartOffice sends out facsimiles as e-mail.

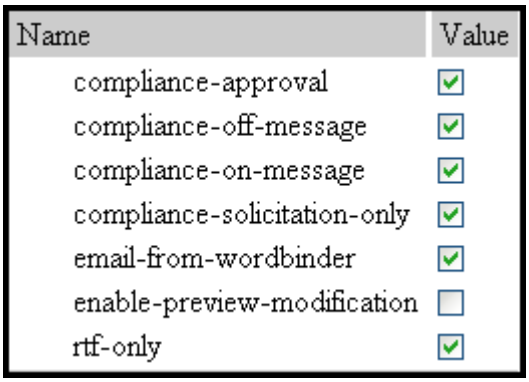
Providers

The providers include FaxMaker, FaxPro, MaxEmail, and MessageVision.

Enabling the check-status for the listed providers will enable SmartOffice to check that particular provider's fax server.

Letter

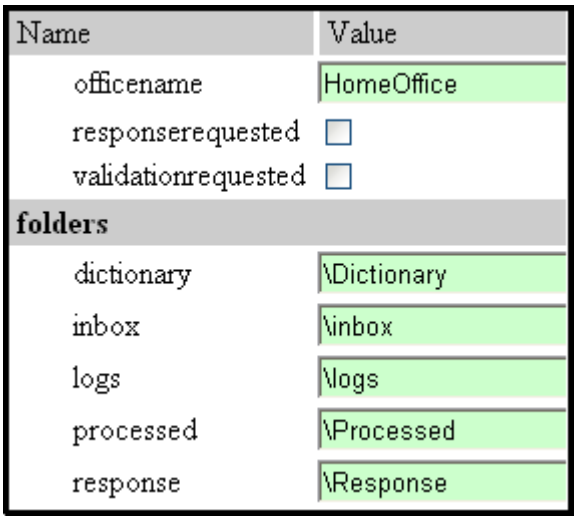
The Letter category sets the various settings for Form Letters to the appropriate level of functionality and compliance. These settings are intended for corporate users.



- **compliance-approval:** Enables the form letter compliance feature. This provides a means of approving Form Letters to be sent by users to contacts.
- **compliance-off-message:** Enable this option to show the compliance message when compliance-approval is off. This opens a dialog box advising the user to send the newly created Form Letter to their compliance department prior to being used. **Note:** For versions 5.0.2 and later, there is a conflict between the compliance-on-message and compliance-off-message within the code. This feature will be fixed in a future release. For all implementations, enable both compliance message settings until the issue is resolved.
- **compliance-on-message:** Enable this option to display the compliance message when compliance-approval is enabled. This opens a dialog box advising the user that their newly created Form Letter will not be available to them for use until it is approved by a user in the System office with administrative rights (see **Note** above).
- **compliance-solicitation-only:** Enable this option when compliance is only required for solicitation letters. This will only prompt the user with compliance messages for those Form Letters where they specifically select the Solicitation option. This setting has no effect if compliance-approval has already been enabled.
- **email-from-wordbinder:** Enable to e-mail letters from WordBinder; disable to e-mail from the application server. This setting provides the ability to reduce the traffic on the SmartOffice application server for the processing of Letters sent by e-mail. These Letters will instead be processed using the locally installed version of Microsoft Word on the computer of the sending user.
- **enable-preview-modification:** This enables users to modify Form Letters before sending them out. This should be disabled to meet the terms of compliance-approval.
- **rft-only:** Enable this option to store and send all Form Letters in RTF document format. If disabled, a Microsoft Word server must be deployed to store and send Letters in Microsoft Word .doc format.

Nailbaxml

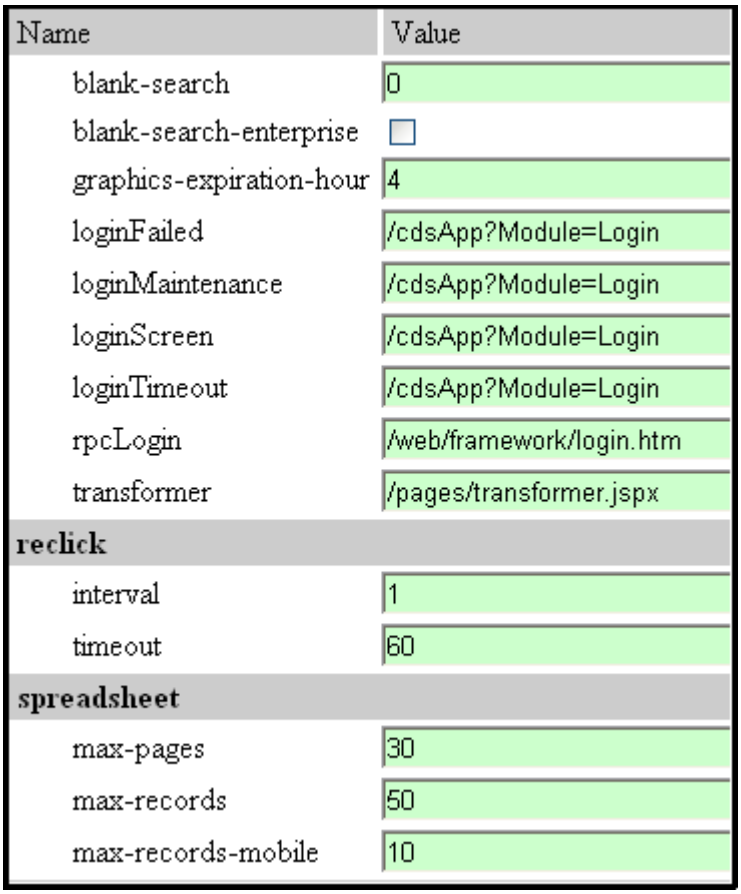
The Nailbaxml category contains the settings for Nailba XML configuration. This is configured by default. Do not make any changes without first consulting E-Z Data.



Name	Value
officename	HomeOffice
responserequested	☐
validationrequested	☐
folders	
dictionary	\Dictionary
inbox	\inbox
logs	\logs
processed	\Processed
response	\Response

Page-engine

The Page-engine category houses settings related to record retrieval performance. The default settings are already set for optimal performance. Changes are not recommended.



Name	Value
blank-search	0
blank-search-enterprise	☐
graphics-expiration-hour	4
loginFailed	/cdsApp?Module=Login
loginMaintenance	/cdsApp?Module=Login
loginScreen	/cdsApp?Module=Login
loginTimeout	/cdsApp?Module=Login
rpcLogin	/web/framework/login.htm
transformer	/pages/transformer.jspx
reclick	
interval	1
timeout	60
spreadsheet	
max-pages	30
max-records	50
max-records-mobile	10

- **blank-search:** This setting limits the ability to perform Blank Searches when the number of rows in a table exceeds the specified value. If the value is set to zero (0), blank searches are always permitted. If the value is set to negative one (-1), blank searches are not permitted.
- **blank-search-enterprise:** This setting only affects Enterprise mode. When enabled, it allows blank searches based on the blank-search setting. When disabled, no blank searches will be allowed in enterprise mode regardless of the blank search setting.
- **graphics-expiration-hour:** Do not modify this setting.
- **rpcLogin:** Do not modify this setting.
- **transformer:** Do not modify this setting.

Login Pages

SmartOffice uses multiple login zones to direct the user based on their actions. The login screen displayed depends on the particular scenario taken by the user. Note that each of the URLs could refer to the same server. When a host name is not specified, make sure the URL value begins with a forward slash "/" otherwise an incorrect URL error will display.

- **loginFailed:** This page is used when login fails. It is most commonly displayed when the user incorrectly types a user name or password.
- **loginMaintenance:** This page is displayed when the particular user's office is under maintenance.
- **loginScreen:** This page is used when the application needs to display the login page. In general, this is the Main Page.
- **loginTimeout:** This page is used when a session is terminated by the application. This is most commonly due to session timeout settings or multiple logins to the same office/user.

Reclick

The Reclick section sets the parameters controlling the reclick function. The reclick function is designed to decrease server load when the user clicks again on the same item that calls for a spreadsheet or query while waiting for the first query to be returned. If the redundant click(s) occur within the specified timeout period, the redundant query will be cancelled and the Please Wait message is displayed.

- **interval:** Sets the delay of the error message in seconds.
- **timeout:** Sets the timeout period in seconds thus canceling the Reclick logic.

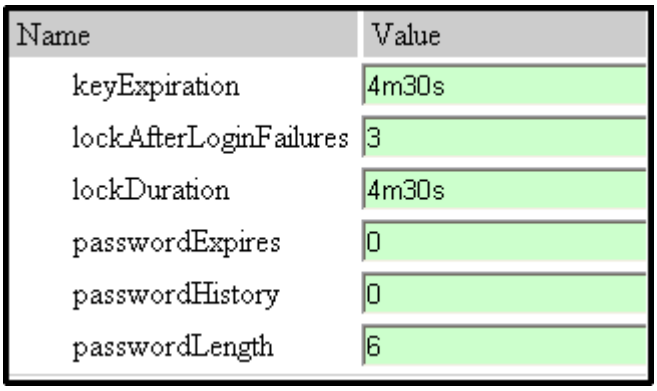
Spreadsheet

The Spreadsheet settings are used to determine the number of pages and records displayed when searching.

- **max-pages:** Sets the maximum number of pages that will be displayed on one spreadsheet in SmartOffice.
- **max-records:** Sets the maximum number of records (rows) SmartOffice will return per page.
- **max-records-mobile:** Sets the maximum number of records to be displayed per page on mobile devices.

PasswordOptions

The Passwordoptions category sets the options available for the handling of passwords when users log in. If Single-Sign-On (SSO) is being used, these options are not needed.



Name	Value
keyExpiration	4m30s
lockAfterLoginFailures	3
lockDuration	4m30s
passwordExpires	0
passwordHistory	0
passwordLength	6

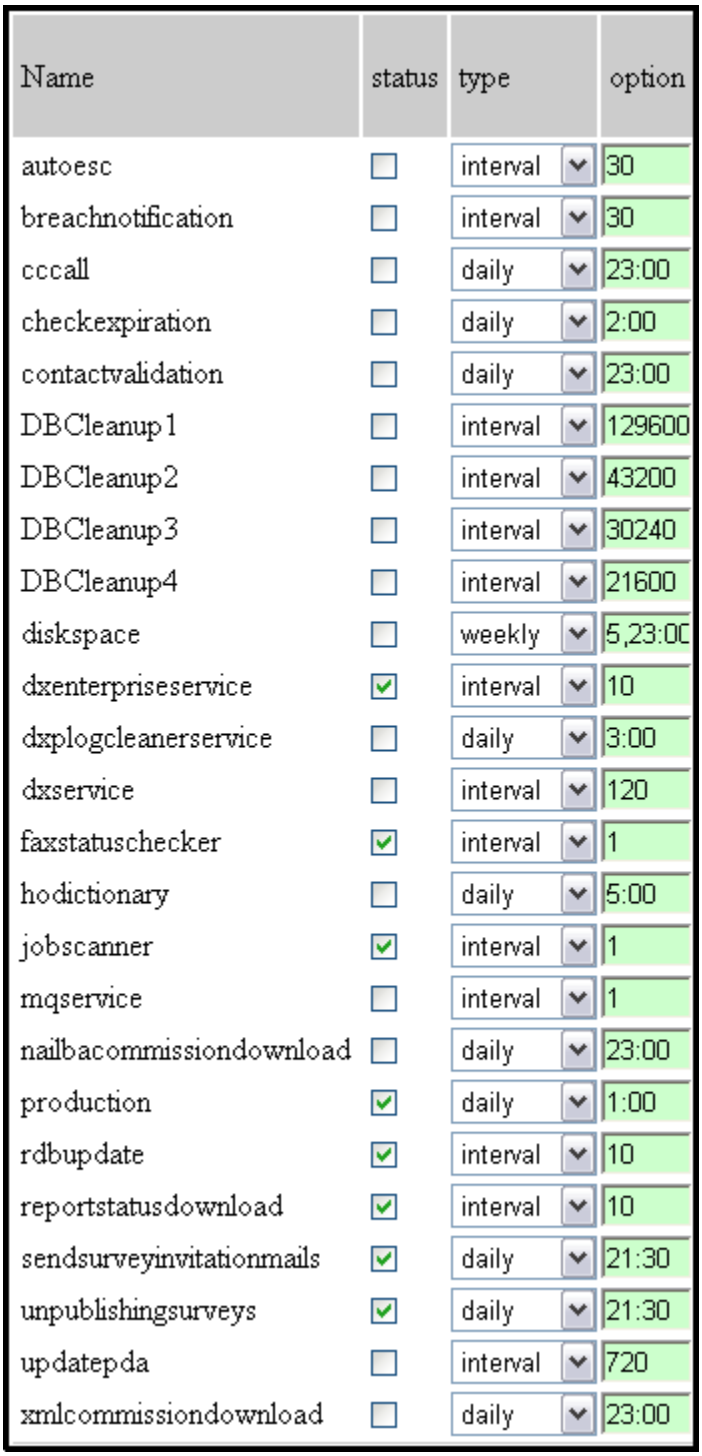
- **keyExpiration:** Do not modify this setting.
- **lockAfterLoginFailures:** Sets the number of failed login attempts before the user is locked out.
- **lockDuration:** Sets the amount of time before the user may attempt to log in again after being locked out. **Note:** The format for values that require a time is number + time unit. (s = seconds, m = minutes, h = hours, d = days). For example, 4m30s means four minutes and thirty seconds.
- **passwordExpires:** Sets the number of days before the password expires. If the value is set to zero (0), the password never expires.
- **passwordHistory:** Sets the number of expired passwords to store in the database. The passwords stored in the history cannot be reused. If the value is set to zero (0), then expired passwords are not stored. If the number of expired passwords for a user exceeds this number, then the oldest password is removed from the history.
- **passwordLength:** Sets the minimum password character length. If a user's password does not meet the minimum length, the user will be forced to add/change the password to one that is greater than or equal to the specified value. **Note:** Despite what passwordLength is set to, the password prompt in SmartOffice 6 will always display the number six (6). This is a known issue and will be addressed in a future release.

Service

The service category houses all of SmartOffice's internal services. Each service has its own row for configuration.

- The **status** column enables the service if it is selected.
- The **type** column, along with the option value, determines the frequency at which the service is run.
  - Interval sets the minutes of sleep time between service run intervals.
  - Hourly sets a wake-up at a specific minute every hour. Option: (0-59)
  - Daily sets a wake-up at a specific time every day. Option: (0-23):(0-59)
  - Weekly sets a wake-up at a specific time every week. Option: (0-6, where 0 = Sunday, 1 = Monday . . . 6 = Saturday),(0-23):(0-59). For example: 5,23:00 would mean every Friday at 11 PM.
  - Monthly sets a wake-up at a specific time every month. Option: (1-31, day of the month),(0-23):(0-59)

- The **option** column shows values for the time based on the Type chosen. See the format under the Type explanation.



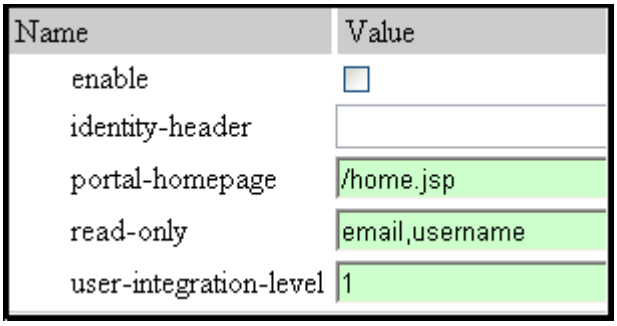
Name	status	type	option
autoesc	☐	interval	30
breachnotification	☐	interval	30
cccall	☐	daily	23:00
checkexpiration	☐	daily	2:00
contactvalidation	☐	daily	23:00
DBCleanup1	☐	interval	129600
DBCleanup2	☐	interval	43200
DBCleanup3	☐	interval	30240
DBCleanup4	☐	interval	21600
diskspace	☐	weekly	5,23:00
dxenterpriseservice	☑	interval	10
dxplogcleanerservice	☐	daily	3:00
dxservice	☐	interval	120
faxstatuschecker	☑	interval	1
hodictionary	☐	daily	5:00
jobscanner	☑	interval	1
mqservice	☐	interval	1
nailbacommissiondownload	☐	daily	23:00
production	☑	daily	1:00
rdbupdate	☑	interval	10
reportstatusdownload	☑	interval	10
sendsurveyinvitationmails	☑	daily	21:30
unpublishingsurveys	☑	daily	21:30
updatepda	☐	interval	720
xmlcommissiondownload	☐	daily	23:00

- **timezone** (not pictured) - Sets the service to a specific time zone from the drop-down list. Leave blank to use the same time zone as the System office.
- **process-timezone** (not pictured) - Sets the service to process at a particular time zone. Note that the previous time zone value must be set to use the process-time zone ability.
- **autoesc:** Auto-escalation service of the SmartService module.
- **breachnotification:** Do not modify this setting.
- **cccall:** Call Center Call is a legacy setting for the Call Center module.
- **checkexpiration:** Check Expiration will clear certain entries out of the database that have met the expired condition.
- **contactvalidation:** Enables contact validation checking in SmartOffice. This must be disabled if Contact Validation needs to be run as a background process.
- **DBCleanup1:** Controls the first database cleanup service. By default, this service runs every 90 days and cleans out the old entries for the Access log.
- **DBCleanup2:** Controls the second database cleanup service. By default, this service runs every 30 days and cleans out the old entries for the following logs: Module Access, Log Data, Comm Error, SP Request, Service Provider Interface Request, SmartLink for iPipeline (RDB), Service Request Module Timer History, Auto-escalation, and Job Queue.
- **DBCleanup3:** Controls the third database cleanup service. By default, this service runs every 21 days and cleans out the old entries for the Deleted Contacts log.
- **DBCleanup4:** Controls the fourth database cleanup service. By default, this service runs every 15 days and cleans out the old entries for the following logs: SmartIntegrator Data Event, Sync Error Report, Login Attempt, SmartRule, DataXchange Download, DataXchange Pending Case Error, Conversion Error, Conversion Report, ECPI Event, Leads Process, and Data Migration Tools Error.
- **diskspace:** Disk Space will check the server for an appropriate amount of free disk space.
- **dxenterpriseservice:** DX Enterprise must be enabled to use DataXchange Enterprise. The DataXchange Enterprise settings can be modified from the Dx category.
- **dxplogcleanerservice:** DXP Log Cleaner Service will clear the DataXchange logs based on the settings in the DataXchange category. This should be enabled for DataXchange Pending Case Download users.
- **dxservice:** DX Service downloads the HO (Home Office) Pending Case status file from the DataXchange server and updates the staging tables. The DataXchange settings can be modified from the DataXchange category.
- **faxstatuschecker:** Fax Status Checker provides the means of transporting the faxes to the Job Queue and monitors the progress of any sent faxes. It must be disabled if SmartOffice's Fax facility is activated.
- **hodictionary:** HO Dictionary Service is part of the DataXchange Pending Case Download. Enable this option to activate population of the HO Dictionary for the DataXchange service.
- **jobscanner:** Job Scanner enables users to process their own Data Validations, fax documents out of the system, and process certain downloads. The Job Scanner should be disabled if SmartOffice's Job Facility is activated and then enabled to allow the Job Agents to process.
- **mqservice:** Enables the application to support Message Queue Series mode. Mqseries will be available in a future release.
- **nailbacommissiondownload:** Nailba Commission Download enables the download of Nailba commission data from the DataXchange mailbox(es). This must be enabled in conjunction with dxservice.

- **production:** Do not modify this setting.
- **rdbupdate:** RDB Update is now known as SmartLink for iPipline. It must be enabled to process all files found on the DX Server for all offices.
- **reportstatusdownload:** Report Status Download enables the use of 3rd party service provider information. This must be enabled in conjunction with dxservice.
- **sendsurveyinvitationmails:** This option will send survey invitation e-mail if you have configured it to do so in SmartOffice.
- **unpublishingsurveys:** Unpublishing Surveys will remove unpublished surveys based on the settings in SmartOffice.
- **updatepda:** Update PDA is used to automatically sync certain information between SmartOffice and a PDA if it has been idle.
- **xmlcommissiondownload:** XML Commission Download enables the download of XML commission data from the DataXchange mailboxes. This must be enabled in conjunction with dxservice.

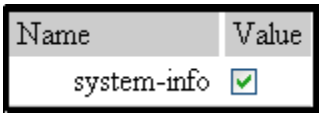
Single-Sign-On

The Single-Sign-On category configures SmartOffice in a Single-Sign-On environment. These settings affect the user authentication process. When Single-Sign-On is used, a computer is paired with the SmartOffice application and a particular user so that the computer does not need to enter any login information to gain access to SmartOffice. See the *Single-Sign-On* documentation for more information.



- **enable:** Enables Single-Sign-On and disables the standard login process.
- **identity-header:** Sets the HTTP header field name for passing user identification. SmartOffice will find the value of this field in the HTTP request header and attempt to match it to the value of the column EXTLINK in the SmartOffice user information table. The system administrator is able to change the name to follow the settings in a particular SSO environment. This enables the application to recognize a computer automatically. Leaving this setting blank means the identity value is a remote user.
- **portal-homepage:** Sets the home page URL of a customer's portal site if it exists.
- **read-only:** Sets the fields on the SmartOffice User Detail page to read-only. This applies to user integration level 2 only. When set, these fields can be modified by the Home Office user management routine only.
- **user-integration-level:** Sets the level of user integration/management, in other words, how the user ID will be administered to and by which application. Possible values:
  1. The external user ID is manually updated in SmartOffice.
  2. ECPI is being used for updating the External User ID.
  3. The home office provides an administrative tool.

Smart-integrator

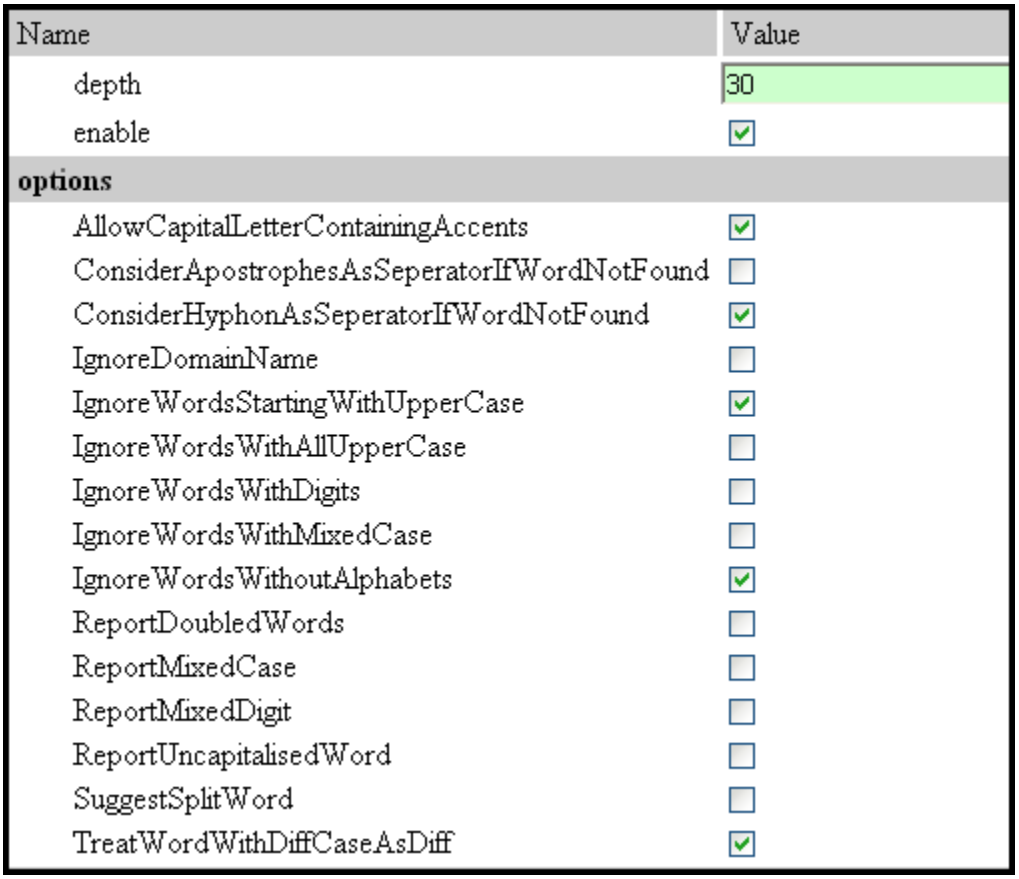


Name	Value
system-info	☑

system-info: Enables the Admin user of the System office to view SmartIntegrator information in SmartOffice 6. Select **SmartIntegrator** from the expanded **Utilities** menu.

SpellCheck

The Spellcheck category is used to change the spelling checker options enforced by SmartOffice.



Name	Value
depth	30
enable	☑
options	
AllowCapitalLetterContainingAccents	☑
ConsiderApostrophesAsSeperatorIfWordNotFound	☐
ConsiderHyphonAsSeperatorIfWordNotFound	☑
IgnoreDomainName	☐
IgnoreWordsStartingWithUpperCase	☑
IgnoreWordsWithAllUpperCase	☐
IgnoreWordsWithDigits	☐
IgnoreWordsWithMixedCase	☐
IgnoreWordsWithoutAlphabets	☑
ReportDoubledWords	☐
ReportMixedCase	☐
ReportMixedDigit	☐
ReportUncapitalisedWord	☐
SuggestSplitWord	☐
TreatWordWithDiffCaseAsDiff	☑

- **depth:** Do not modify this setting.
- **enable:** Enables the spelling checker function in SmartOffice.

Options

These options control the functionality of the built-in Spelling Checker in the SmartOffice program. The recommended settings are enabled by default.

- **AllowCapitalLetterContainingAccents:** When enabled, capital letters containing accents (e.g., *Être*) are considered acceptable.
- **ConsiderApostrophesAsSeperatorIfWordNotFound:** When enabled, apostrophes will be treated as word separators and each sub-word will be checked individually.
- **ConsiderHyphonAsSeperatorIfWordNotFound:** When enabled, hyphens will be treated as word separators and each sub-word will be checked individually.
- **IgnoreDomainName:** When enabled, words that appear to be an Internet domain name will be ignored.
- **IgnoreWordsStartingWithUpperCase:** When enabled, words that begin with an upper-case letter will be ignored.
- **IgnoreWordsWithAllUpperCase:** When enabled, words that consist entirely of upper-case letters will be ignored.
- **IgnoreWordsWithDigits:** When enabled, words that contain a mixture of letters and digits will be ignored.
- **IgnoreWordsWithMixedCase:** When enabled, words that contain an unusual mixture of upper- and lower-case letters will be ignored.
- **IgnoreWordsWithoutAlphabets:** When enabled, words that contain no alphabetic characters will be ignored.
- **ReportDoubledWords:** When enabled, two occurrences of the same word in a row will be identified.
- **ReportMixedCase:** When enabled, words containing an unusual combination of upper and lower-case letters will be identified.
- **ReportMixedDigit:** When enabled, words containing a combination of letters and digits will be identified.
- **ReportUncapitalisedWord:** When enabled, words that exist in the dictionary in capitalized form will be identified.
- **SuggestSplitWord:** When enabled, the spelling checker will suggest two valid sub-words in place of a single word when deemed appropriate.
- **TreatWordWithDiffCaseAsDiff:** When enabled, words with different letter-case patterns will be treated as separate words.

ValidationOptions

The Validationoptions category houses contact, policy, and investment-related validation options used for electronically downloaded data. Changing these values is not recommended.

Name	Value
UpdateHOPolicies	☑
UpdateHOPositionsLiabilities	☑
UpdateHOPositionsPrice	☑
UpdatePositionHistory	☑

Miscellaneous

The Miscellaneous category contains settings that do not belong under any other specific module.

Name	Value
helpServer	http://192.168.0.1/gen6.0
HTMLEditor	☑
SuperSearch	☑
authenticateOptions	
authenticate	☐
authenticateValidTime	600
contact	
HIPPA	☑
fileupload	
filesize	2
mergeoptions	
delete-source-automatically	☐
security	
putNamesOnHomePageURL	☑
security.cdscluster	
key-expiration	120
serviceintegration	
ftpurl	http://192.168.0.1/ftp
session	
oneSessionPerUser	☑
sosync	
can-delete-record	☑

- **helpServer:** The location of the Help Server used for SmartOffice may be edited. A corporation's help link can be pointed to an internally hosted custom server instead of the generic version for retail users.
- **HTMLEditor:** Enables the HTML editor functionality in SmartOffice.
- **SuperSearch:** Enables the Super Search functionality in SmartOffice. Super Search enables the user to search by string instead of the standard first name, last name convention.

authenticateOptions

The authenticateOptions section houses settings pertaining to the user's access to the User Preferences and User Management areas.

- **authenticate:** Enable the option to require authentication when a user accesses User Preferences or User Management.
- **authenticateValidTime:** If authentication is enabled, authenticateValidTime sets the amount of time in seconds that the authenticated user has to make changes before needing to re-authenticate.

contact

HIPPA: Enable or disable HIPAA protection.

fileupload

filesize: Sets the maximum file size to be uploaded through SmartOffice. Set the value to negative one (-1) for an unlimited file size.

mergeoptions

delete-source-automatically: Enable this option to automatically delete the source when a merge is successfully completed.

security

putNamesOnHomePageURL: Enable this to display the user name and office name on the home page URL.

security.cdscluster

key-expiration: Sets the key expiration time in minutes.

serviceintegration

ftpurl: Sets the URL to access 3rd party service provider information.

session

oneSessionPerUser: Enable this option to restrict users to only having one open session at any given time. When enabled, if the same user from an office should log into SmartOffice, the previously opened session will terminate. It is recommended that this setting be enabled for security reasons.

sosync

can-delete-record: Select this option to enable users to coordinate deletions when syncing with Outlook or Lotus Notes.