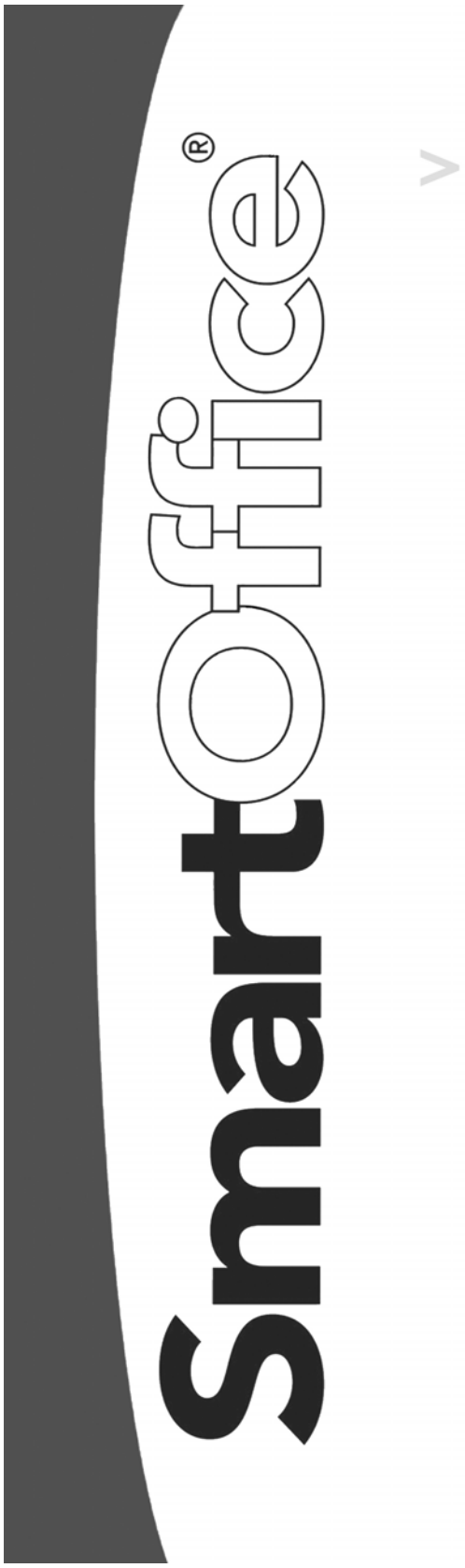

SmartOffice Configuration Guide for Microsoft® Windows XP® Service Pack 2

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SmartOffice Configuration Guide for Microsoft® Windows XP® Service Pack 2

Set the standard Internet Explorer security settings to Medium

Change the Security Settings to the default level. From Internet Explorer, select **Internet Options** from the **Tools** menu to open the Internet Options dialog box. Click the **Security** tab and then click the **Default Level** button to restore the security to the **Medium** setting.

- This provides a reasonable amount of security while enabling enough flexibility to run applications. This also provides a standard starting point for configuring SmartOffice to work correctly.

Issue: None of the SmartOffice pop-up dialog boxes display

Set the Pop-up Blocker to always allow the applicable SmartOffice URL. To allow the SmartOffice URL, select **Pop-up Blocker** from the **Tools** menu. Select **Pop-up Blocker Settings** from the expanded menu to open the Pop-up Blocker Settings dialog box. In the Address of Web Site to Allow section, enter the applicable SmartOffice URL (e.g., www.mysmartoffice.com) and then click the **Add** button.

Issue: All of the pop-up dialog boxes are incorrectly sized and the OK and Cancel buttons are not visible

Set the Internet Options to allow script initiated windows without size or position constraints. From Internet Explorer, select **Internet Options** from the **Tools** menu to open the Internet Options dialog box. Click the **Security** tab and with **Internet** selected, click the **Custom Level** button. Scroll toward the bottom of the list and then select the **Enable** option in the Allow Script Initiated Windows without Size or Position Constraints section.

Issue: None of the integration components (Word interface, Crystal Reports, Excel interface, PDF printing, etc.) can be installed

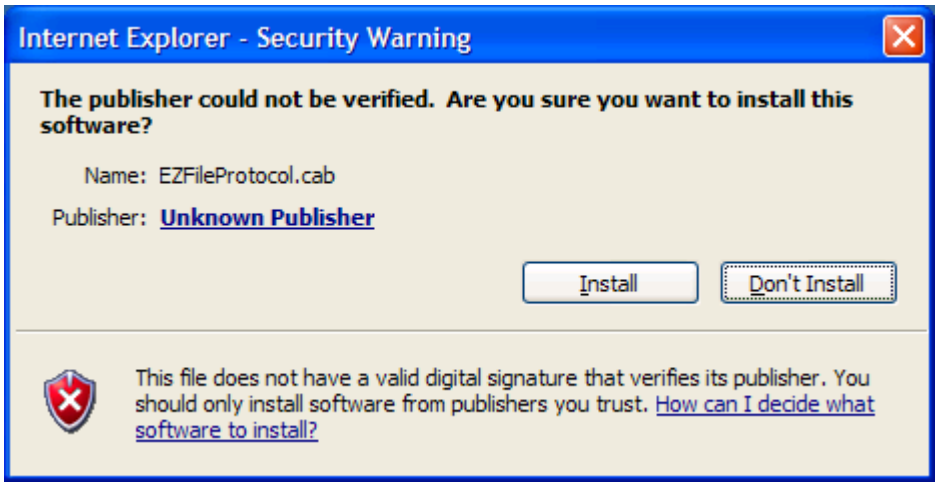
Enable ActiveX Controls. From Internet Explorer, select **Internet Options** from the **Tools** menu to open the Internet Options dialog box. Click the **Security** tab and with **Internet** selected, click the **Custom Level** button. In the ActiveX Controls and Plug-ins section, select either **Enable** or **Prompt** in both the Download Signed ActiveX Controls and Download Unsigned ActiveX Controls sections.

Please be aware that E-Z Data is currently making certain that all ActiveX components are signed but this has not been the case in the past. Until all installations are updated to the latest version of SmartOffice there is the possibility that some required ActiveX components are unsigned.

- For unsigned ActiveX Controls, **Enable** is a very low security setting and care should be taken when selecting this option.
- For unsigned ActiveX Controls, **Prompt** is a much safer security setting; however, this setting will cause additional dialog boxes to be displayed during installation of these components. Please see the dialog boxes below.
- For unsigned ActiveX Controls, **Disable** is the safest setting; however, none of the required integrations will work with this setting. Please see the dialog box below that displays when Disable is selected.

The following Security Warning will display when accessing a function that requires ActiveX with ActiveX set to **Disable**.

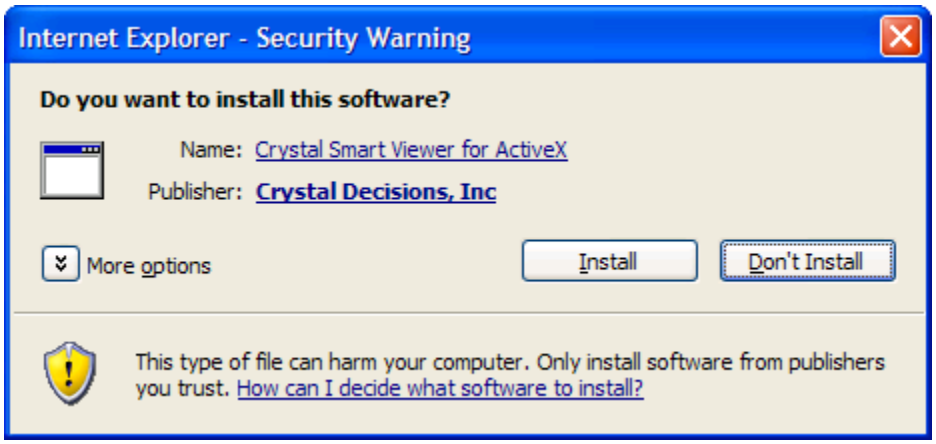
With ActiveX set to **Prompt** rather than Enable, the following Security Warning will display.



Click **Install** to install the ActiveX Control.

After changing the ActiveX control settings (above), the user will be able to successfully install all applications such as ExcelBinder (SmartLink for Excel), WordBinder (SmartLink for Word), SmartScanner, SmartLink for Spreadsheet Export, SmartDialer, SmartLink for Outlook E-mail, SmartLink for Outlook Synchronization, etc.

To install the Crystal Reports viewer:



1 Click **Install** to open a prompt to reboot the computer.

2 Reboot the computer to complete installation.

Known Issue

- Internet Explorer is unable to save Login information (e.g., User Name and Password) when the **Save Password** option is selected.