Intelligent Office:
Web Optimisation Guide

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System Requirements:

The following is the set of system requirements to run Intelligent Office:

- One of the following operating systems:
  - Windows Vista SP2 or later (32-bit or 64-bit)
  - Windows 7 SP1 or later (32-bit or 64-bit)
  - Windows 8 (32-bit or 64-bit)
- One of the following browsers:
  - Internet Explorer 9 or above
  - Chrome
  - Firefox
- Adobe Flash Player (required only for enhanced upload functionality)

It is recommended that Windows Update is run regularly to ensure that your computer is always up to date. Be aware that web optimisation settings are likely to change upon updates to your Windows system and therefore it is recommended to check your browser settings regularly.

If you are a in a corporate environment or are a network administrator for your company, it is recommended that all current candidate Windows Updates are always deployed to your workstations.

Other browsers and operating systems may appear to work but are unsupported by Intelliflo.

Introduction

Difficulties Logging on to Intelligent Office (iO)

This guide includes the required steps to optimise users’ computer settings to log on and use Intelligent-office. It covers problems caused by pop-up blockers and Internet Explorer settings as well as Unipass expiration handling.
Users with a **BT Home Hub or Norton Antivirus** should refer to the last page of this document for specific information.

## Optimising Internet Explorer

Internet Explorer has many settings built into its features to help the user to block unwanted pop-ups. This functionality can, however, impact web based solutions like Intelligent Office, which relies on screens that behave like pop-ups. These pop-up blockers can prevent a user from logging in.

1. Select ‘Internet Options’ from the menu shown above (after clicking the cog wheel symbol).
2. This will open a new window, please select the “Security” tab and click on the “Trusted Sites” icon. Click on the “Sites” button.
3. Enter the URL ([https://*.intelligent-office.net](https://*.intelligent-office.net)) for Intelligent Office into the ‘Add this website to the zone’ box and click the Add button.
If using the Exchange for quotes in Intelligent Office the following address also needs to be added: https://*.exchange.uk.com

Click “ADD” followed by “OK”. Clicking the “Ok” button will return to the “Internet Options” window. At the bottom of this window click the “Custom Level” button.

This will open the “Security Settings” dialog box for the trusted sites. These settings are for Trusted Sites only:

All functionality controlled within this list of setting needs to be permitted. This is done in almost all instances by choosing the “enabled” option or the lowest security option of those available. The exception to this is one important setting, about 1/3 of the way down the list and regarding ActiveX on approved domains, which (due to it being worded in reverse of all of the other settings) must be set to “Disable”:

Do not use the ‘Reset custom settings’ options at the bottom of this page as it will undo some of the options even if set to ‘Low’.

Click on the “ok” button, an additional prompt may appear asking ‘Are you sure you want to change the settings for this zone?’ (see below), click ‘Yes’ to return to the “Internet Options” page. Then click on the “Apply” button in the main Internet Options dialogue box.
Browser Settings

On the General Tab within Internet Options, select the ‘Settings’ button under the Browsing History section. This will open a new dialogue box, at the top of the box select the ‘Automatically’ option where it says ‘Check for newer versions of stored page’. Disk space to use should be set to ‘252’.

Regarding the next box image below, dependent on your version of Internet Explorer, you may not have the tick box ‘Reuse windows for launching shortcuts’. If you do not, please ignore.

Proceed to the “Advanced” tab and un-tick the following options:

- Enable third party browser extensions
- Reuse windows for launching shortcuts

Pop-up Blockers

Select the “Pop up Blocker Settings” from the “Tools” menu within the Internet Explorer Window.

A new window will open (see next page), at this stage you will need to add *.intelligent-office.net to the upper white box labelled ‘Address of Web Site to allow’. Then click the ‘Add’ button.

The “Filter Level” needs to be set to “Low”; this can be done by scrolling through the “drop down menu” and selecting “Low”.

Toolbars (Improving Browser Performance)

Toolbars tend to slow down the browser in many ways. Some toolbars simply take up precious computer memory, while others consume bandwidth by sending and receiving data in the background. The more toolbars you have, the slower your browser will run. Some of those toolbars might seem essential, but in order to optimize browser performance, it may be worth shutting them down for the speed you will gain.
To check for additional toolbars which may have built in pop up blockers Right Click the mouse in the grey area at the top of the Internet Explorer window, see below.

This will produce a list of all the buttons and bars, which are used within the Internet Explorer window. If Google or Yahoo toolbars are listed and are ticked, it is important to un-tick them. This can be done by left clicking over the name (Google) in the list, this will un-tick the option. These toolbars are sometimes downloaded without a user’s knowledge and can affect the efficiency of Intelligent Office.

**Desktop Agent Configuration**

The IntelliFlo desktop agent is required for the following pieces of functionality:

- Glogogy
- Invu document management (link to DMS)
- Mortgage Brain
- TriGold

This is supported on all systems in the system requirements section of this document. In addition to the basic requirements of Intelligent Office, the following updates need to be installed on the client computer:

  - This may already be installed via Windows Update
- Windows Vista Platform Update
  - This is only required for Windows Vista
  - This must be installed *via Windows Update*
Internet Explorer 9 specific information

Due to a bug in Internet Explorer 9 you must apply a registry fix to enable download prompting or the desktop agent will not launch. You can obtain this by navigating to the ‘Trigold’ or ‘Mortgage Brain’ pages of the User Guide and clicking the link at the bottom.

Active X Components

The following is a list of ActiveX components used in iO (32-bit components).

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Adobe Flash Player is required for multiple file uploads. If you do not have Flash enabled, single file uploads will be possible still. It is recommended that you download and install the latest version, following the provided instructions from the following address:

http://get2.adobe.com/flashplayer/ *
*FOR SECURITY REASONS DO NOT DOWNLOAD FLASH FROM ANY OTHER SOURCE

If you are using Windows 8, Adobe Flash Player is already provided and maintained with the operating system so you do not need to download or update it.

Problems with Active X Components Already Installed (IE9)

For example; when uploading documents a red X is seen but the Persits component has already been installed. This may be due to an Internet Explorer 9 setting that allows control of which Active X components will work on individual websites.

This also covers problems with the MeadCo component for downloading reports.
Steps to resolve:

- Click tools
Select Manage add-ons
Select “downloaded Controls” from the “show:” drop down box (which is positioned at the bottom left of Manage add-on screen)
Highlight the Persits Active x Control (Or MeadCo as appropriate)
Click on “more information” title (as shown)

You will need to click on “Allow on all sites”, this will then put a * in the white box which will solve the error (see below)

Click Close

Once all these changes have been made close all Internet Explorer windows and open a new Internet Explorer window and try and log into Intelligent Office.
Setting the correct Time & Date

To check the correct date and time zone have been configured on your PC please follow the following steps.

- Double click on the time in the bottom right hand corner of the screen
- A Date and Time Properties box will appear.
- Set the correct date in the Date & Time tab

Select ‘GMT Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London’ in the Time Zone tab this will automatically adjust the time in the Date & Time tab.
Increasing Browser Window Space

Additional screen space can be made available to Intelligent Office by pressing the F11 key on the computer keyboard.

This Browser based function switches the browser between Full-Screen mode and the standard mode.

In Full screen mode the usual browser menus such as File and Edit, along with the address bar and all toolbars are hidden from view. The address bar, toolbars and browser tabs can be temporarily displayed by moving the mouse pointer to the top of the screen, or restored completely by pressing F11 again.

General Anti-Virus Settings

If you are still unable to log on there may be a pop blocker setting within the Anti-Virus software installed on the PC. This will prevent Intelligent Office from loading. Please check the settings for the Anti-Virus and ensure that pop-ups are enabled for the Intelligent Office website, *.intelligent-office.net.

See the end of this document for help on Norton Antivirus.
Unipass Expiration

1. Cannot Log in to Intelligent Office with Unipass?
   - Using your usual machine?
     - No: UNIPASS Log in will only work on the machine that holds the certificate.
     - Yes: Log in from other machines must use Username and Password (Identities via UNIPASS still work)
   - UNIPASS expired?
     - No: UNIPASS certificate may be corrupted
     - Yes: Visit www.unipass.co.uk and use the “Test my UNIPASS” function. Reinstall if necessary
   - Yes UNIPASS Certificate already received?
     - No: Visit www.unipass.co.uk to re-install UNIPASS Certificate
     - Yes: Log in to Intelligent Office with Username and Password

2. Remove old certificate association. Navigate to My Setup > Personal Contact > Edit your tax details, and click “Remove Unipass”
Unipass certificates expire every 12 months. When this happens it will no longer be possible to log on to Intelligent Office using the “Unipass Login” button on the main holding page; you will see a message stating that no valid certificate was found.

It will be necessary to log in using the conventional Username and Password method in order to sever the connection between the old Unipass certificate and Intelligent Office, and associate the new certificate.

(A password reminder for a given username can be requested by completing the username field (leaving the password field blank) and then clicking on “Forgotten your password?” This link will send a reminder of the password for the given account to the e-mail address recorded on the system).
Once logged in with the username and password, instructions on how to associate the new Unipass certificate to the user ID can be found in the help file.

HTTP 403 Error
Error When Associating Unipass

Sometimes when associating your Unipass you may encounter an HTTP 403 error. This error usually happens due to the TLS 1.2 checkbox being ticked in the Internet Options Advanced Settings. If you click on Tools > Internet Options > Advanced > scroll through the list of checkboxes until you find TLS 1.2 and untick the box. This doesn’t always resolve the error, if you have completed this guide and are still receiving this error please call Support on 0845 230 3700.

BT Home-hub

BT has identified an issue with faulty Address tables within certain versions of their BT Home-hub that may cause erratic behaviour when accessing Intelligent Office.

The solution is to perform a hard-reset of the hub as outlined below depending on the Hub version. **Resetting the hub will temporarily disconnect any user connected to it.**

**BT Home-hub (Original Version)**

- Locate the wireless association button on the Hub’s back panel
- Press and hold this button for at least 15 seconds to start the reset process which may take several minutes.
- The Hub is reset and ready for normal use when its Broadband and Internet lights are glowing steady green.

**BT Home-hub (New Version – Button on Side)**

- Locate the recessed ‘Reset to Defaults’ button on the side of your Hub
- Press and hold the button for 2-3 seconds until your Hub lights go out
- Release the button and wait for the Hub’s Broadband light to glow green. This may take several minutes

More detailed instructions for these and other versions of BT routers can be found on the BT web site: [www.bt.com](http://www.bt.com)
Navigate to:

At Home > Support & advice > Broadband & Internet > BT Broadband > Connection > Modems & routers

**Norton Anti-Virus**

The Norton Anti-Virus software suite includes a Phishing* filter. This has been found to conflict with the Phishing filter built into Internet Explorer, causing access problems to some areas of Intelligent Office. This particularly affects the production/export of MI Reports.

**Resolution:**

Within Internet Explorer, open Internet Options and click on the Advanced tab. Restore the default settings by selecting ‘Restore advanced settings’. Under the ‘Browsing’ heading in the list of settings, ensure that the following items are NOT ticked:

- Enable third party browser extensions
- Reuse windows for launching shortcuts

Click Apply to save the settings. Cookies and temporary internet files should also be deleted.

Internet explorer should then be shut down and a fresh browser window opened. If it is still not possible to export the reports, it may be necessary to make the following changes to the settings within Norton AntiVirus:

Within the main screen of Norton anti-virus is a setting called 'Identity Secure: Phishing Protection' which needs to be set to Ignore.

Once these two changes have been made close down Internet Explorer, delete the cookies and temporary internet files.

*Phishing is the criminally fraudulent process of attempting to acquire sensitive information such as usernames, passwords and credit card details by masquerading as a trustworthy entity.
For further details please contact us on:

Tel: 0845 230 3700
Email: iosupport@intelliflo.com
Web: www.intelliflo.com