SERVICEWARE

Browser configuration

For using Serviceware Knowledge

Version

Version	When	Who	What
2.0.0	10.10.2019	?	Inhaltliche Vorbereitung
2.0.0	16.11.21	Majka Weber	Bearbeitung der Inhalte und Überführung in die Corporate Identity

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1 Einleitung

Serviceware Knowledge is a browser-based software. For this reason, certain functionalities in Serviceware Knowledge – as with "normal" surfing on the Internet – depend on your browser. If Serviceware Knowledge functions present themselves differently at individual workstations, it is very likely that a local setting is the cause. This also includes your browser configuration.

The "right" browser configuration for all users and websites does not exist, as the requirements vary. However, we would like to show you in the following possibilities and recommendations that make your everyday life with Serviceware Knowledge even more comfortable. Furthermore, a uniform configuration of your browsers ensures that undesirable effects in your daily work with Serviceware Knowledge can be largely excluded.

Basically, the following applies:

› Always keep your computer system up to date.
› Use your browser continuously in a current version; Therefore, perform regular updates.
› Make sure that the required plugins or addons are installed.

The notes and instructions described below refer to the currently predominantly used browsers in their current version. If you use a different browser or one of the browsers in a different version, there may be slight deviations from our descriptions. Currently (as of August 2017), Serviceware Knowledge supports the following browsers and versions: Serviceware Knowledge 5:

› Internet Explorer 11
› Firefox in der latest ESR
› Chrome "latest stable"

You can also find an up-to-date status of the browsers and versions supported by Serviceware Knowledge in our Help Center.

2 Settings

In the following, we will introduce you to all the settings that you should make on your browser in order to be able to use Serviceware Knowledge flawlessly and easily for your daily work. These are in detail:

› Definition of the program(s) for opening documents
› Enabling Javascript
› Enabling cookies
› Disable the pop-up blocker

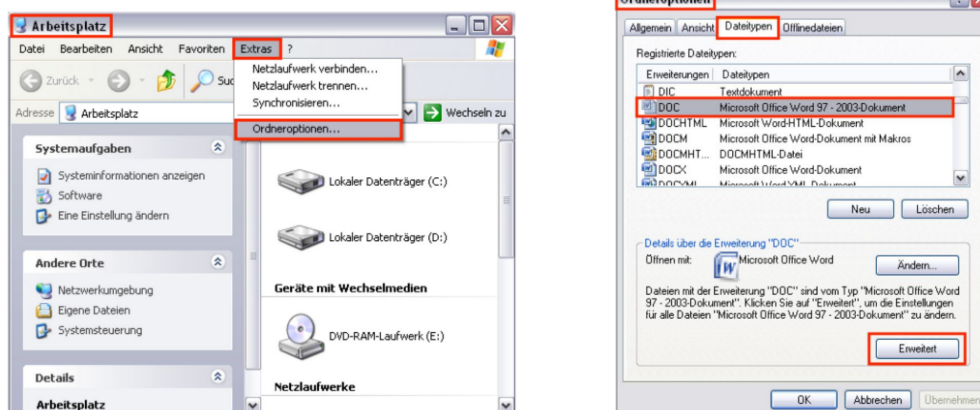All these settings are now described step by step for each browser supported by Serviceware Knowledge.

2.1 Microsoft Internet Explorer

2.1.1 Opening documents

To open PDF documents, you no longer need a special add-on for Internet Explorer; these can be conveniently opened directly in the browser. A click on an HTML link to a Microsoft Office file (e.B. to a Word or Excel document) also opens the file in the default configuration of Internet Explorer directly in the browser and not in the corresponding Office program. To change this, please follow the steps below.

Go to your workplace and navigate as follows:

Tools ➜ Folder Options ➜ "Save as Type" tab

Select the appropriate Office file type (e.B. Microsoft Word) and click "Advanced". The relevant setting here is "Browse in the same window". Depending on whether you enable or disable them, the behavior is as follows:

› Activation: By default, the file type is opened directly in the browser.
› Disable: The file type opens by default in that Office program.

Tip: If you want to search automatically in documents, it is recommended to activate this setting. In this case, the entered search term is highlighted in color within the document (highlighting). If the setting is not activated, a corresponding search can be triggered manually within the application.

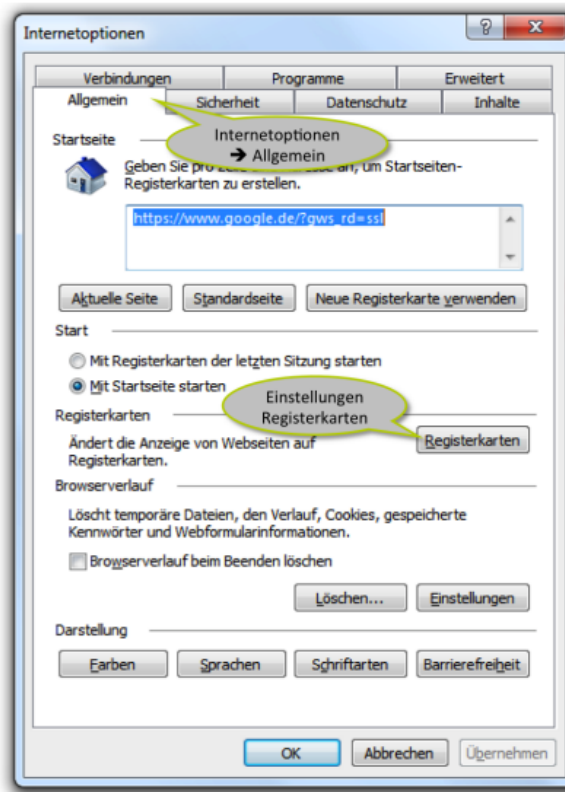# Serviceware Knowledge – Browser configuration

2.1.2   Open in the new window or tab

The majority of users find the automatic opening of a link in a new tab – instead of a new window – more comfortable to use. To define this setting in the default, please follow these steps.
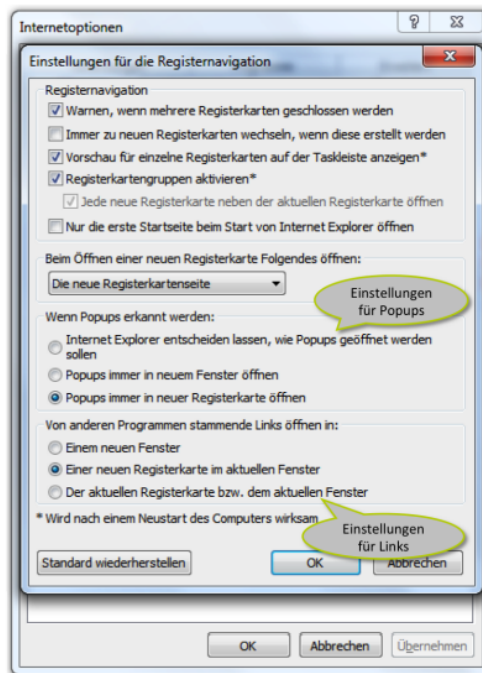
In the navigation, go to the following point:

Tools ➔ Internet Options ➔ General tab

Select "Settings" in the "Tabs" section.

The settings for the tabs open, in which you can make the desired settings and confirm by clicking on "Ok".

2.1.3 Safety

Internet Explorer offers you the possibility to assign the individual websites to "zones" and then make individual security settings for them. In this way, for example, trustworthy sites can be differentiated from those that you consider potentially dangerous.
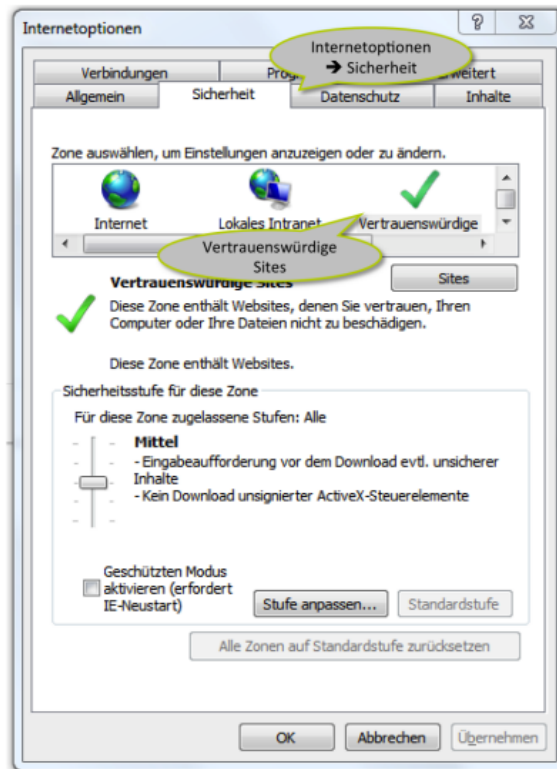To make the appropriate settings, please proceed as follows.

In the navigation, go to the following point:
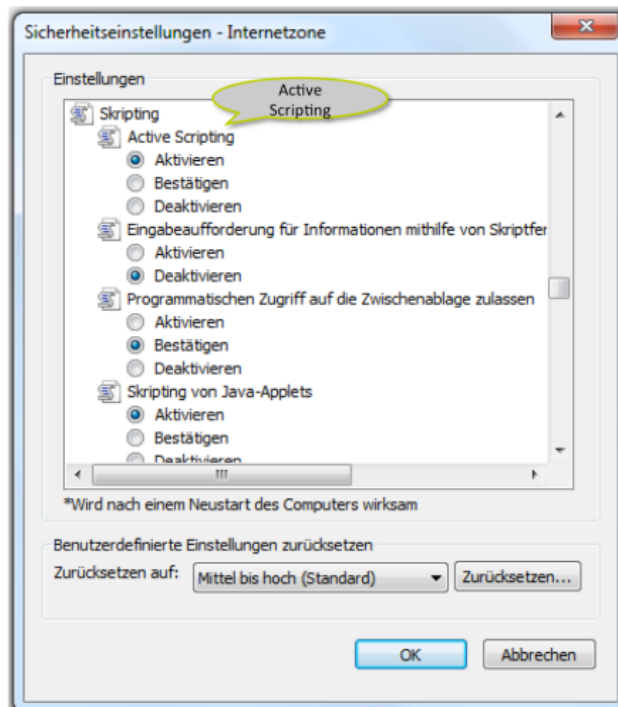
Tools ➔ Internet Options ➔ Security tab

Select the "Trusted Sites" zone here and add the Serviceware KnowledgeURL by clicking on the "Sites"button.

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Tip: Under the item "Adjust level" you can define your own settings for the respective security level.

Then go to the "Internet" zone and make the desired settings in the "Security level of this zone" section.
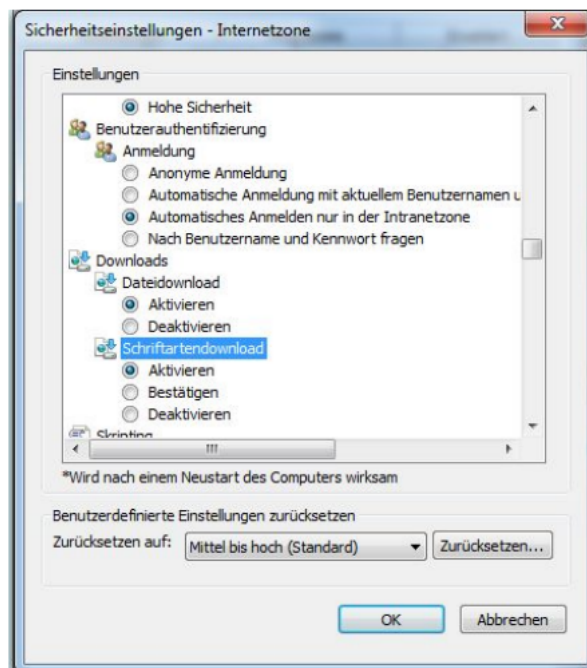

We recommend the following settings here:
› Enabling Active Scripting

Please note: The setting "High" under "Custom Settings" disables not only scripting, but also Java and Active X.

› Allow font download

Please note: The setting "High" under "Custom Settings" disables not only scripting, but also Java and Active X.
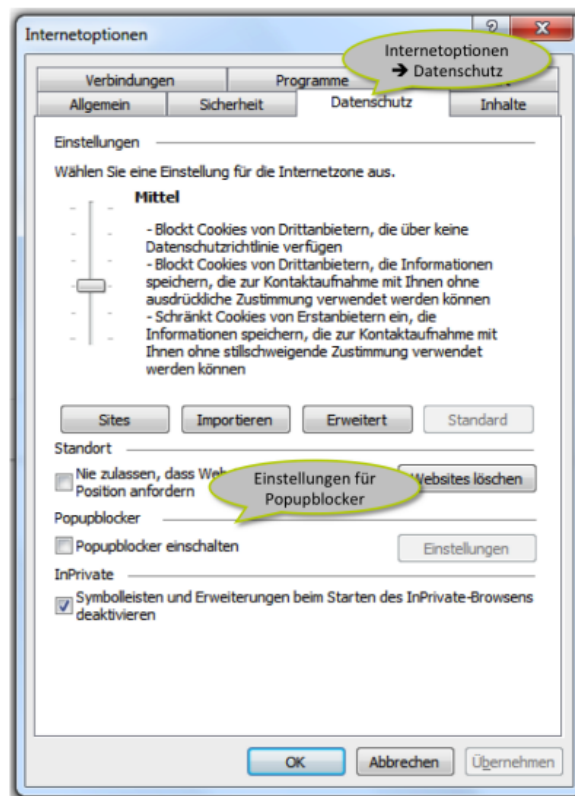
2.1.4   Privacy

Many websites store information in small text files – so-called "cookies" – on your computer. If you do not want to allow this or only to a limited extent, you can change the security level for these cookies. The bandwidth ranges from "Accept all cookies" to "Block all cookies". However, selecting the latter option will mean that you will no longer be able to access some web pages.

To adjust the relevant settings, please navigate as follows:

Tools ➜ Internet Options ➜ "Privacy" tab

In the first step, select the desired security level for cookies via the slider. In the second step, you can then define individual pages by clicking on the "Sites" button, which are excluded from the previously defined security level. Add the Serviceware KnowledgeURL hereand confirm it via the "Allow" button. Then disable the pop-up blocker.
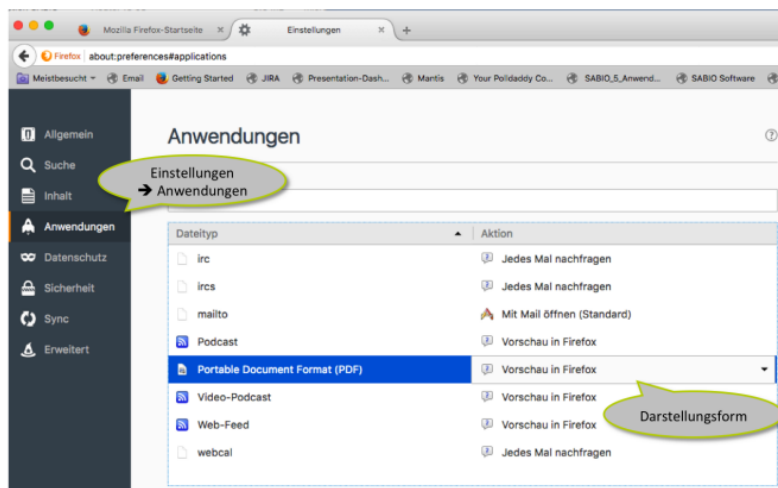
2.2   Mozilla Firefox

2.2.1   Opening documents

To open PDF documents, you no longer need a special add-on for Internet Explorer; these can be conveniently opened directly in the browser. This option is not available for opening other documents in the Office family. These are opened in the appropriate Office program. To change the settings for PDFs, please follow the steps below.

Go to the settings of the browser and navigate as follows:

Settings ➔ Applications

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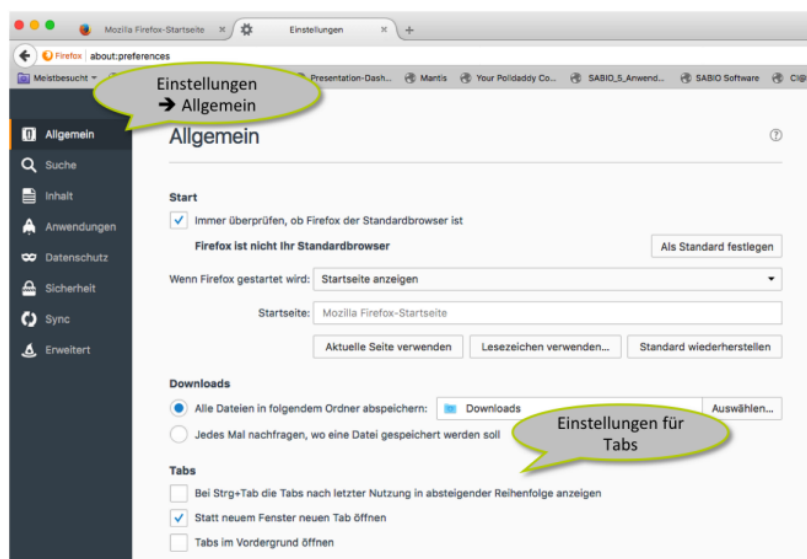Select the corresponding file type (e.B.PDF) and select the desired display form.

Tip: If you want to search automatically in documents, it is recommended to choose the option "Preview in Firefox". In this case, the entered search term is highlighted in color within the document (highlighting). If the setting is not activated, a corresponding search can be triggered manually within the application.

2.2.2   Open in the new window or tab

The majority of users find the automatic opening of a link in a new tab – instead of a new window – more comfortable to use. To define this setting in the default, please follow these steps.

In the navigation, go to the following point:

Settings ➔ General ➔ Tabs section

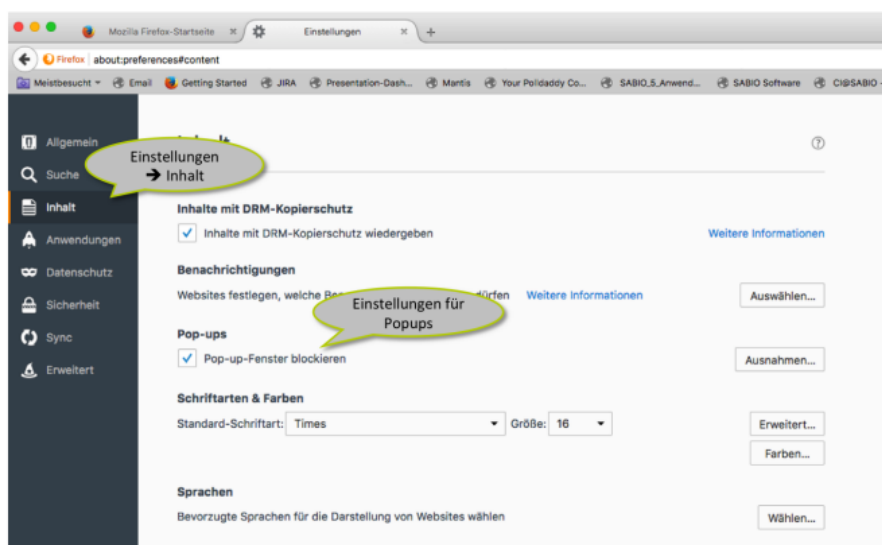Select the behavior you want here; the selected setting is automatically saved.

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2.2.3   Display of content

JavaScript is used to display content in Serviceware Knowledge. JavaScript is a standard programming language that can be integrated into web pages to offer features such as menus, sounds, and other interactive features. JavaScript is enabled by default in Firefox, so there is no need for additional installation or activation. Some Serviceware Knowledgefeatures, such as print preview, open a new window or pop-up to display the corresponding content. In order to be able to use these functions, you should therefore deactivate the pop-up blocker of the browser. If you do not want this, you can add an exception to the default setting for Serviceware Knowledge. To do this, please follow these steps.
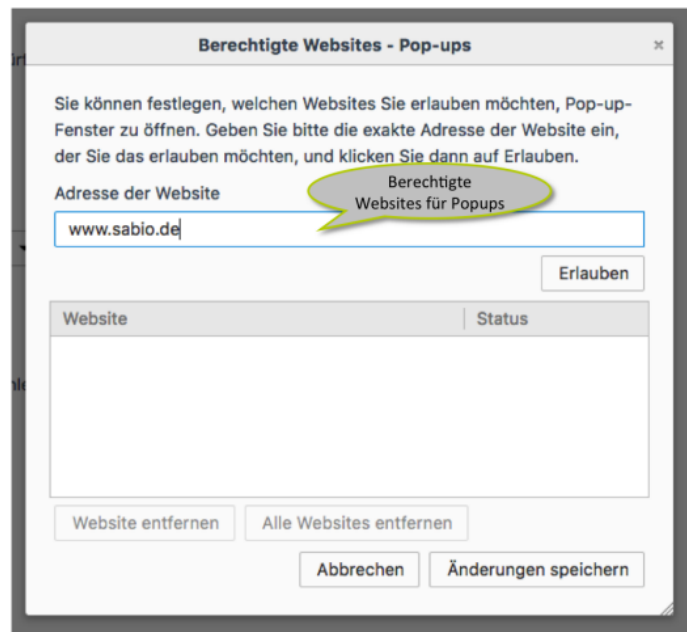
In the navigation, go to the following point:

Settings ➜ Content ➜ Pop-ups section

Deactivate the checkbox "Block pop-up windows" or add the Serviceware KnowledgeURL via the "Exceptions" buttonand confirm this entry by clicking on "Save changes".
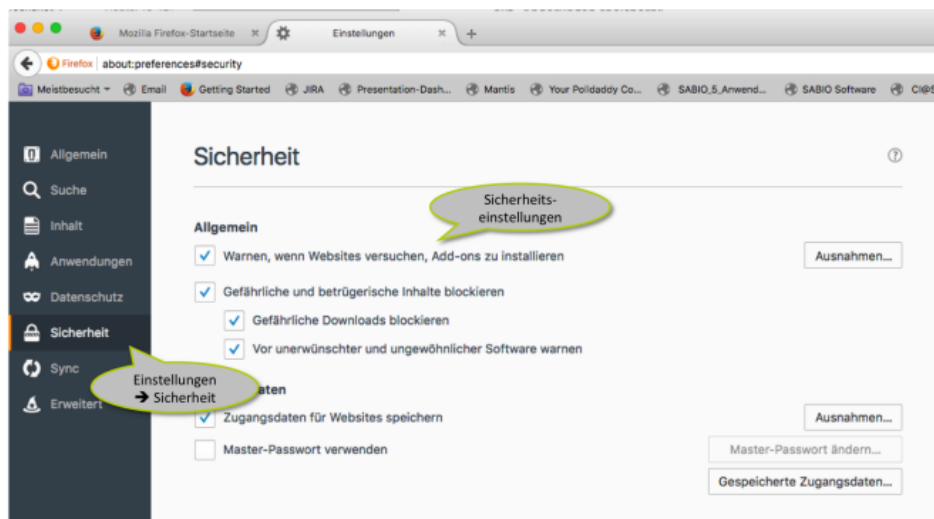
2.2.4   Safety

Firefox offers you the possibility to display warning messages if, for example, encrypted or unencrypted websites are opened. Since access to Serviceware Knowledge is encrypted, no warning messages shouldbe displayed in the standard when calling Serviceware Knowledge. If this is the case, you can adjust the relevant settings as follows:

In the navigation, go to the following point: Settings ➜ Security

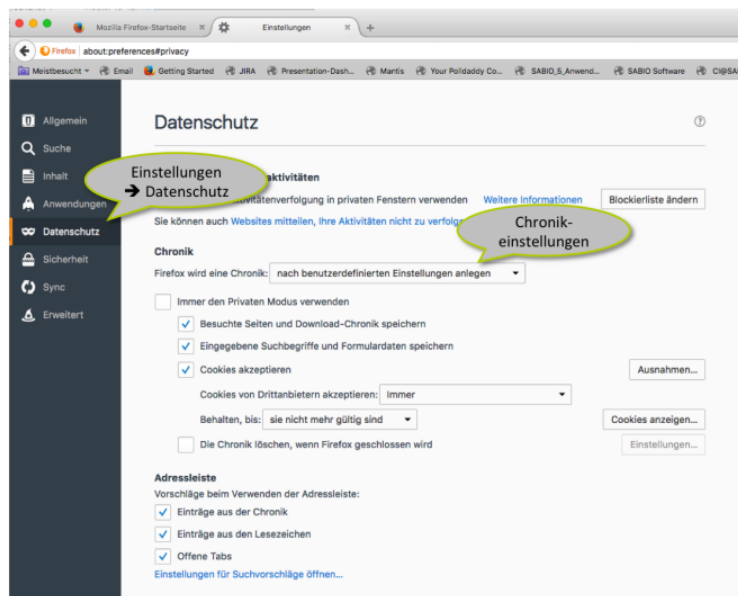Check the settings here and – if necessary – make appropriate adjustments.

2.2.5   Privacy

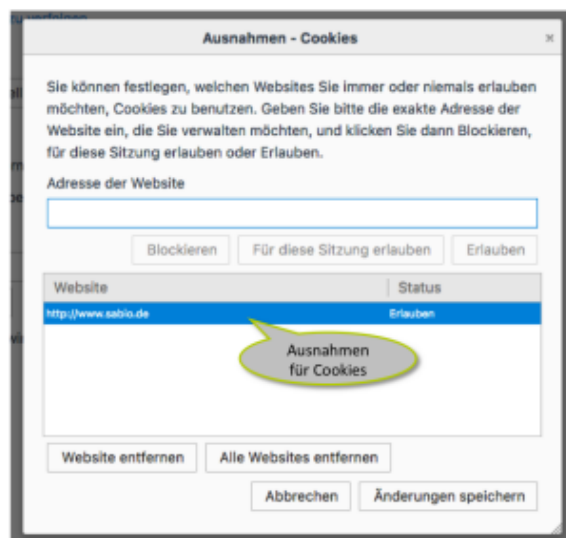Firefox stores some of your data by default to make browsing more convenient for you. Examples include:

› The display of already visited pages in the address bar.
› The storage of visited pages on your computer in order to reduce the required loading time when accessed again.

In order to be able to save the login data for Serviceware Knowledge, it is important to allow the storage of these small text files – the so-called "cookies". To do this, please set the following settings:

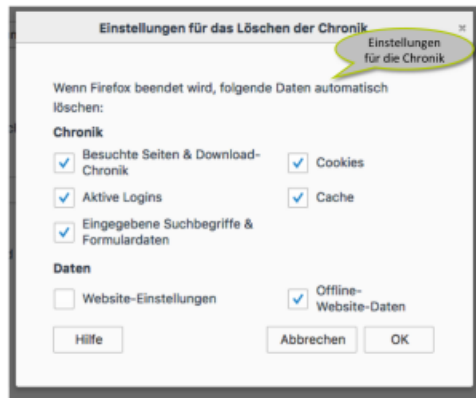In the navigation, go to the following point: Settings ➜ Privacy

Select here under the item "History" the option Firefox will create a history "according to user-defined settings" to display the settings. If the checkbox "Accept cookies" is not activated, select it. If you do not want cookies to be allowed in general, add the Serviceware Knowledge URL via the "Exceptions" item, select the "Allow" option and confirm your entry via the "Save changes" button.

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We also recommend the following settings:

› Enable the "Clear history when Firefox closes" option.
› In the corresponding settings, activate the option "Offline website data"

Do you have any questions about the featured settings? For more support, visit Firefox Help. You can access this either via the "F1" key.

2.3 Google Chrome

By default, Google Chrome is configured in such a way that no adjustments have to be made in the settings. If you work with Google Chrome, the above steps are therefore omitted.

2.4 Microsoft Edge

By default, Microsoft Edge is configured in such a way that no adjustments have to be made in the settings. If you work with Microsoft Edge, the above steps are therefore omitted.

3 Proxy Server

Basically, the use of a local proxy server is possible without any problems. However, the settings of such a server can greatly influence the work with Serviceware Knowledge. If a standard web proxy is used, it remembers certain content for a defined period of time, which is not to be evaluated as critical per se. However, if the server prevents certain accesses, this may result in restrictions on working with Serviceware Knowledge. If your IT infrastructure allows this, it may make sense to bypass the local proxy server. To do this, configure an exception rule in your browser as follows:

In the navigation, go to the following point:

Internet Options ➜ Connections ➜ LAN Settings

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If the option "Use proxy server for LAN" is activated under "Proxy server", click on "Advanced" and add your Serviceware KnowledgeURL as an exception.