

This guide provides a procedure for initially configuring your Internet Explorer (IE) browser to use Flash Chat.

Note: If you plan to use Chat with cobrowse, you and the patron must use a Windows-based operating system and Internet Explorer 7.0 or higher. While this guide contains references for setting up IE 6, we encourage you to upgrade to a newer version of IE if possible.

You may use other browsers and operating systems with Chat, however, you will not be able to use cobrowse along with Chat.

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Cobrowse System Requirements for librarians and patrons

System Requirements for Chat Librarians wanting to use cobrowse

1. Microsoft Windows XP or higher
2. A web browser with JavaScript enabled: Microsoft Internet Explorer 6 or higher
3. A high speed connection to the internet
4. Adobe Flash Player: Version 9 or higher
5. A Java Virtual Machine

The following combinations of Internet Explorer and Java Virtual Machine have been successfully tested with our cobrowse functionality.

| Browser | Java version |
|---------------------|--------------------------------|
| Internet Explorer 6 | Microsoft Java Virtual Machine |
| Internet Explorer 6 | Oracle Java Version 6 Update 7 |
| Internet Explorer 7 | Microsoft Java Virtual Machine |
| Internet Explorer 7 | Oracle Java Version 6 Update 7 |
| Internet Explorer 8 | Oracle Java Version 6 Update 7 |
| Internet Explorer 9 | Oracle Java Version 6 Update 7 |

Note Oracle Version 6 Update 7 is NOT the latest version of Java available. It is however the most recent version that is compatible with the cobrowse module.

System Requirements for a Patron to use full cobrowse

1. Microsoft Windows XP or higher
2. A web browser with JavaScript enabled: Microsoft Internet Explorer 6 or higher
3. A Java Virtual Machine
4. A connection to the internet (the faster the connection the better the experience)

Installing Adobe Flash Player (All Librarians using chat)

Be sure to install Flash from the Adobe Flash download web page @

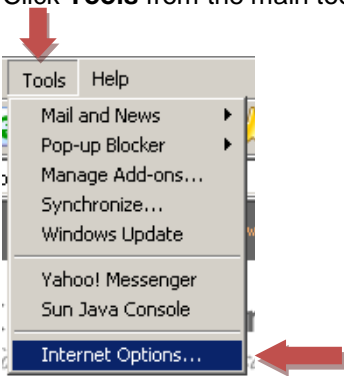
http://www.adobe.com/shockwave/download/triggerpages_mmcom/flash.html

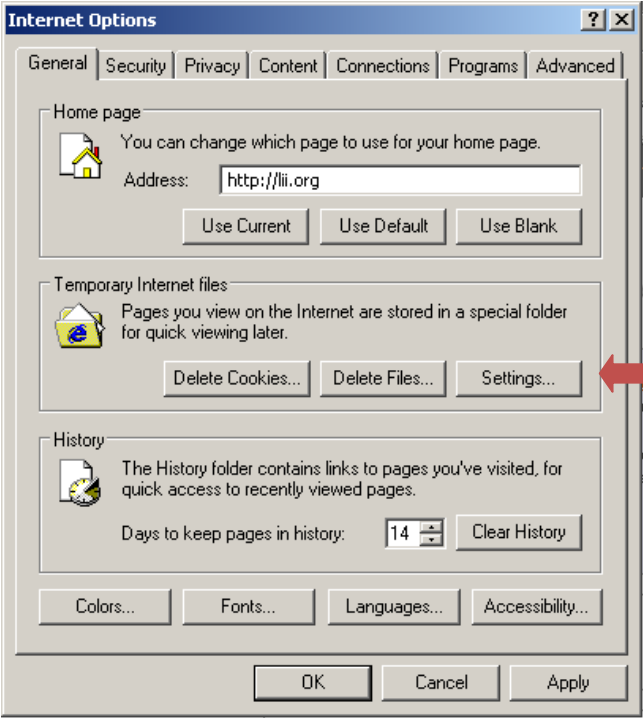
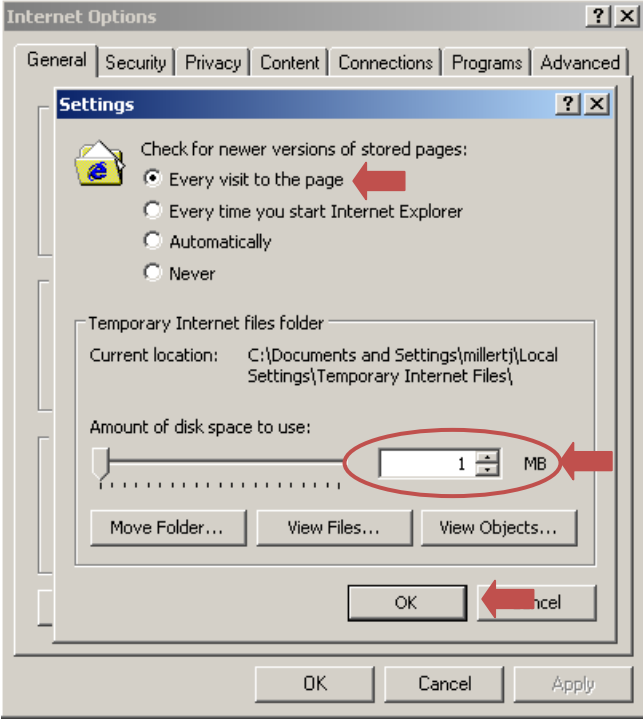
You will need to have ActiveX turned on for this download to install. Many Internet security and antivirus programs will block your ability to install a program using ActiveX. Please follow the directions provided by Adobe but if you are still having problems, contact your system administrator.

Installing Oracle Java Runtime Environment (for Librarians using cobrowse)

Be sure to install the Java Runtime Environment by clicking on the [Oracle Java Runtime Environment \(includes VM\)](#) link on the My QuestionPoint page to download the installer from <http://www.oracle.com/technetwork/java/archive-139210.html>. Select the "Download JRE" link to download the installer.

Configure your IE6 browser for Chat only

| Step | Action |
|------|--|
| 1 | Launch Internet Explorer. |
| 2 | Click Tools from the main toolbar then highlight and Click on Internet Options from the drop-down list.  |

| Step | Action |
|------|--|
| 3 | <p>Click the Settings button on the Internet Options screen.</p>  <p>The screenshot shows the 'Internet Options' dialog box with the 'General' tab selected. The 'Temporary Internet files' section is highlighted with a red arrow pointing to the 'Settings...' button. Other sections include 'Home page' with an address field set to 'http://lii.org', and 'History' with a 'Days to keep pages in history' spinner set to 14.</p> |
| 4 | <p>Click the radio button to the left of Every visit to the page, set the size of the Temporary Internet files folder to 1 MB, and Click OK.</p>  <p>The screenshot shows the 'Settings' sub-dialog box within 'Internet Options'. The 'Check for newer versions of stored pages' section has the 'Every visit to the page' radio button selected and circled in red. The 'Temporary Internet files folder' section shows the 'Amount of disk space to use' spinner set to 1 MB, also circled in red. The 'OK' button at the bottom is also circled in red.</p> |

Step**Action**



- 5 Click the **Privacy** tab in the *Internet Options* window.



Under Pop-up Blocker, remove the check in the box for **Block pop-ups**

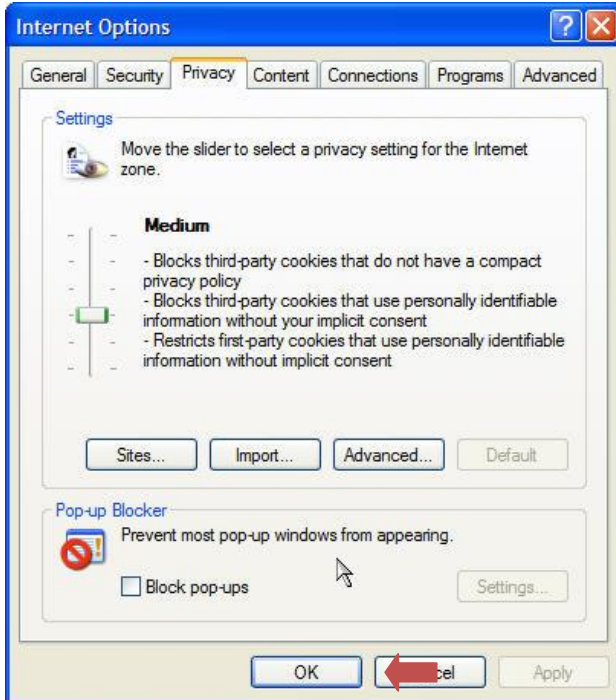
- 6 Click the **Advanced** button



| Step | Action |
|------|--|
| 7 | <p>Under "Advanced Privacy Settings", check "Override automatic cookie handling"</p>  <p>The screenshot shows the 'Advanced Privacy Settings' dialog box. At the top, it says 'You can choose how cookies are handled in the Internet zone. This overrides automatic cookie handling.' Under the 'Cookies' section, the checkbox for 'Override automatic cookie handling' is unchecked. A red arrow points to this checkbox. Below this, there are two columns for 'First-party Cookies' and 'Third-party Cookies', each with radio buttons for 'Accept', 'Block', and 'Prompt'. At the bottom, there is an unchecked checkbox for 'Always allow session cookies'. 'OK' and 'Cancel' buttons are at the bottom right.</p> |
| 8 | <p>Check "Always allow session cookies", and click "OK"</p>  <p>The screenshot shows the 'Advanced Privacy Settings' dialog box. The 'Override automatic cookie handling' checkbox is now checked. The 'Always allow session cookies' checkbox at the bottom is also checked and highlighted with a red arrow. The 'First-party Cookies' and 'Third-party Cookies' settings remain the same. 'OK' and 'Cancel' buttons are at the bottom right.</p> |

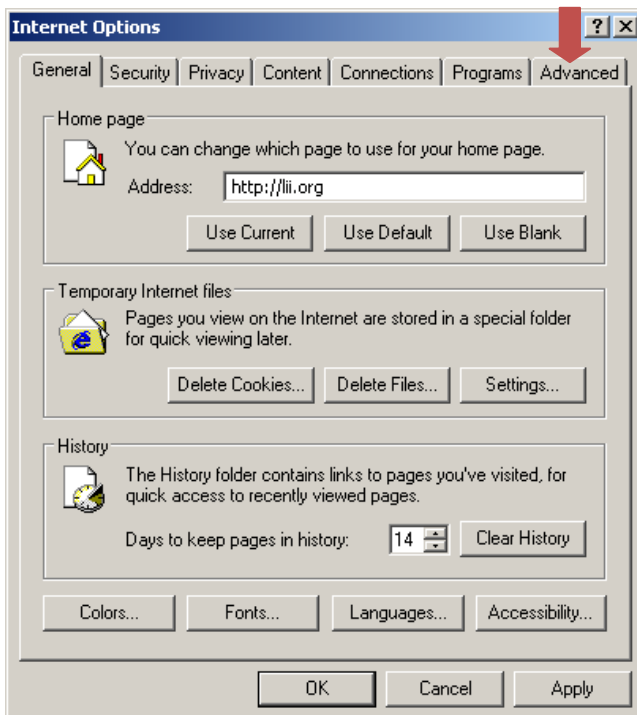
Step**Action**

9 Click "OK"



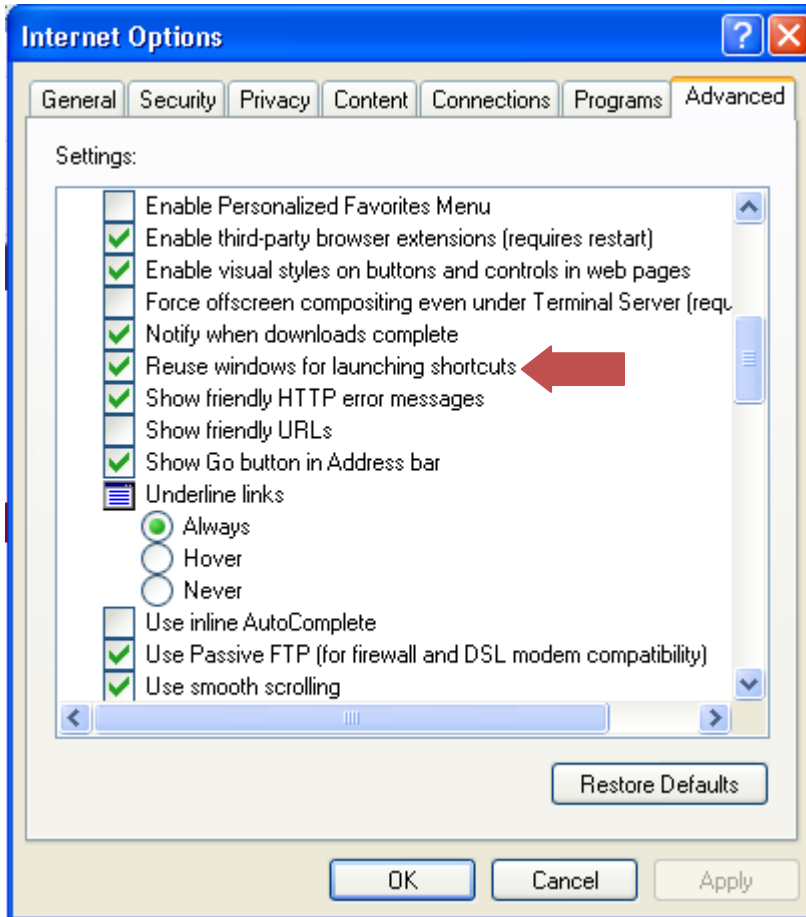
10

Click the **Advanced** tab in the *Internet Options* window.



Step**Action**



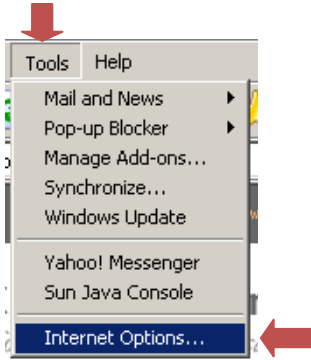
- 11 Scroll until you see look for "Reuse windows for launching shortcuts" and uncheck that option



Your browser is now configured for Chat

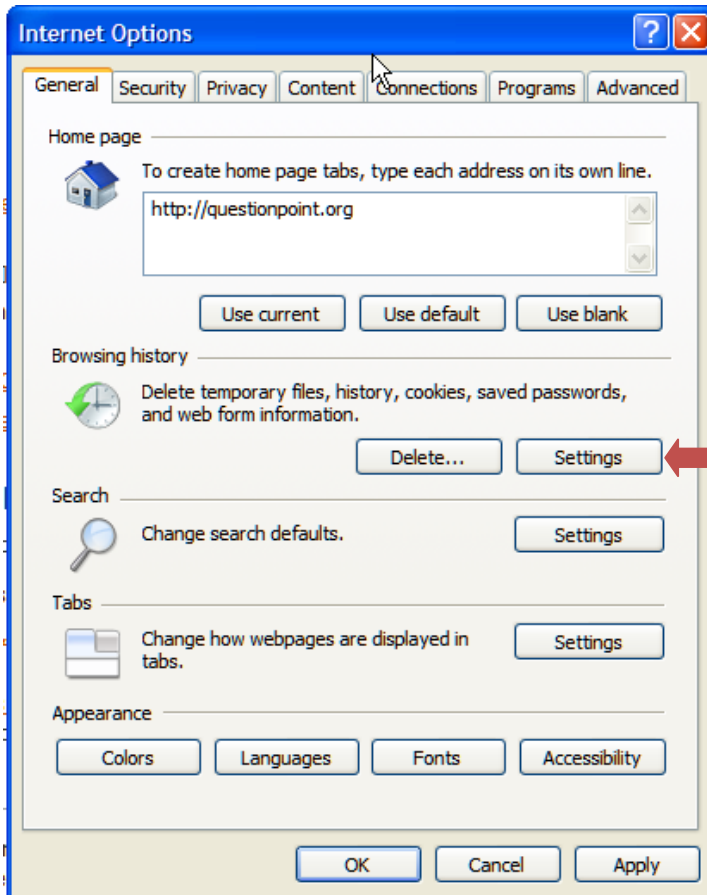
Please see the Best practices section for tips on QuestionPoint Chat

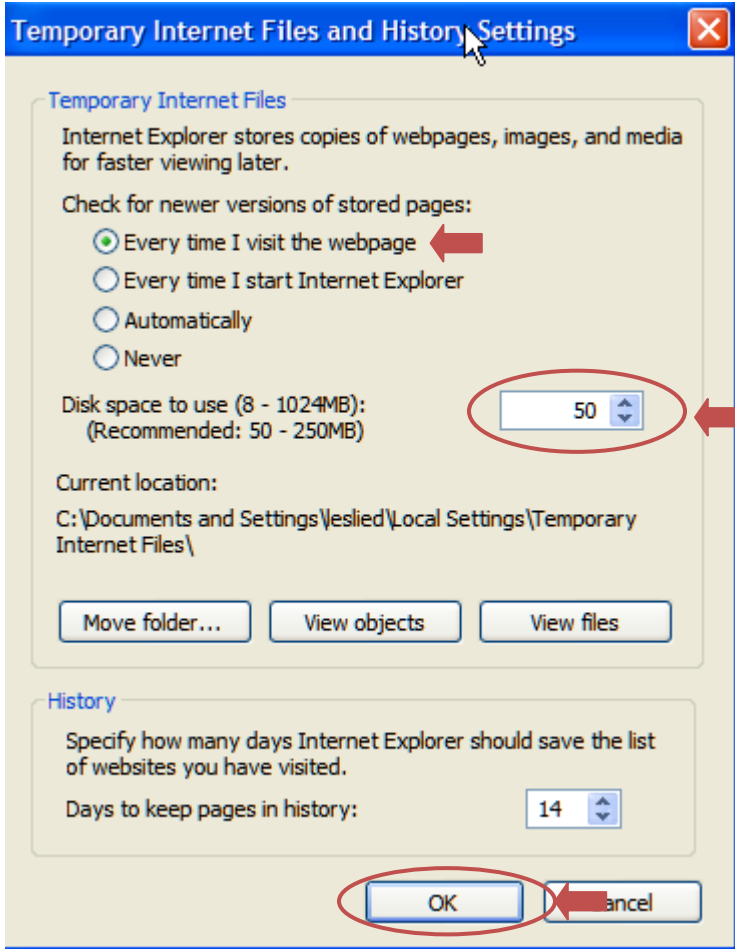
Configure IE7, IE8 and IE 9 for Chat only

| Step | Action |
|------|--|
| 1 | Launch Internet Explorer. |
| 2 | <p>Click the Gear icon  on the right side of the Command bar</p>  <p>If you do not see the command bar, you can hold down the ALT key and type O to open that menu. Click on Internet Options from the drop-down list.</p>  |

Step**Action**

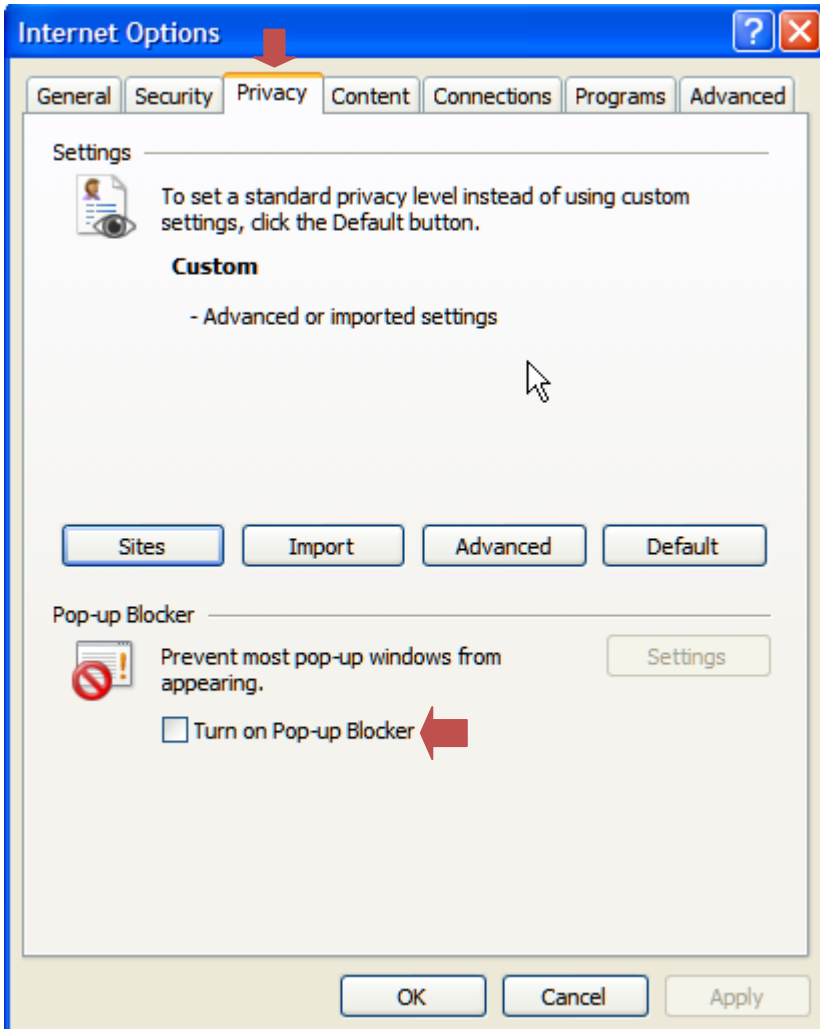
- 3 Click the **Settings** button on the Internet Options screen.



| Step | Action |
|------|--|
| 4 | <p>Click the radio button to the left of Every visit to the page, set the size of the Temporary Internet files folder to 50 MB*, and Click OK.</p>  <p>* This is different than the settings for Internet Explorer 6 due to the way temporary Internet files are handled by Internet Explorer 7 and Internet Explorer 8.</p> |

Step**Action**

- 5 Click the **Privacy** tab in the *Internet Options* window.

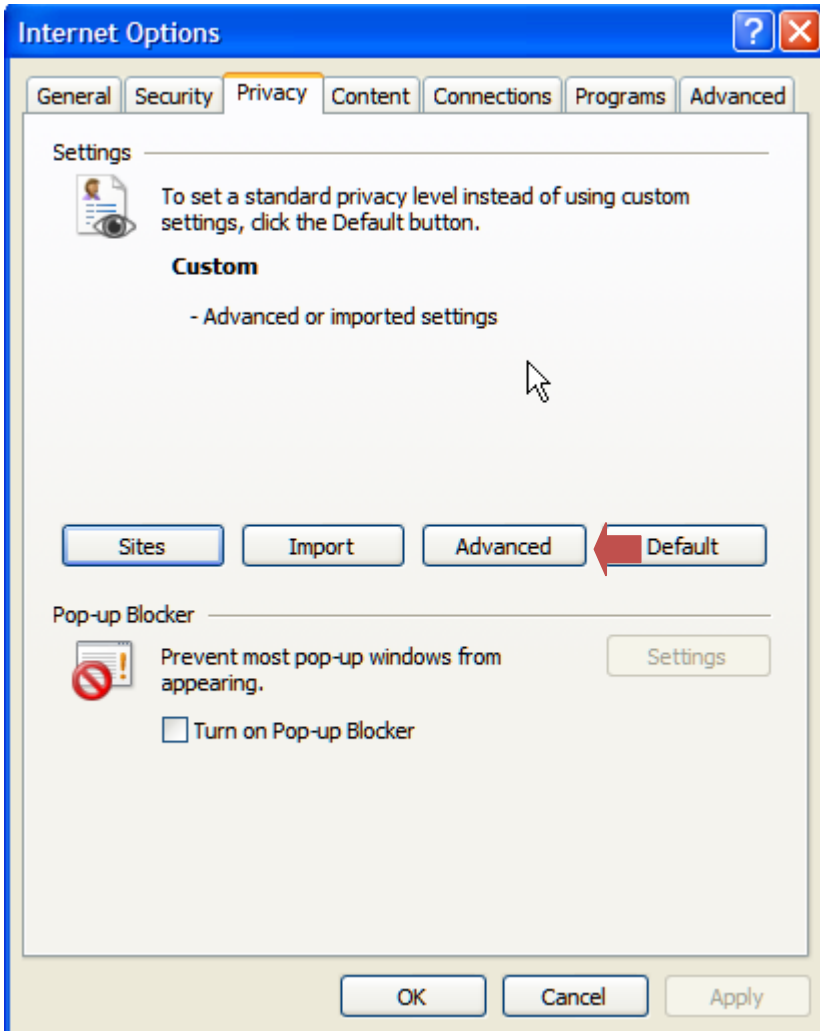


Under Pop-up Blocker, remove the check in the box for **Turn on Pop-up Blocker**

Step

Action

6 Click on **Advanced**



7 Under "**Advanced Privacy Settings**", check "**Override automatic cookie handling**"

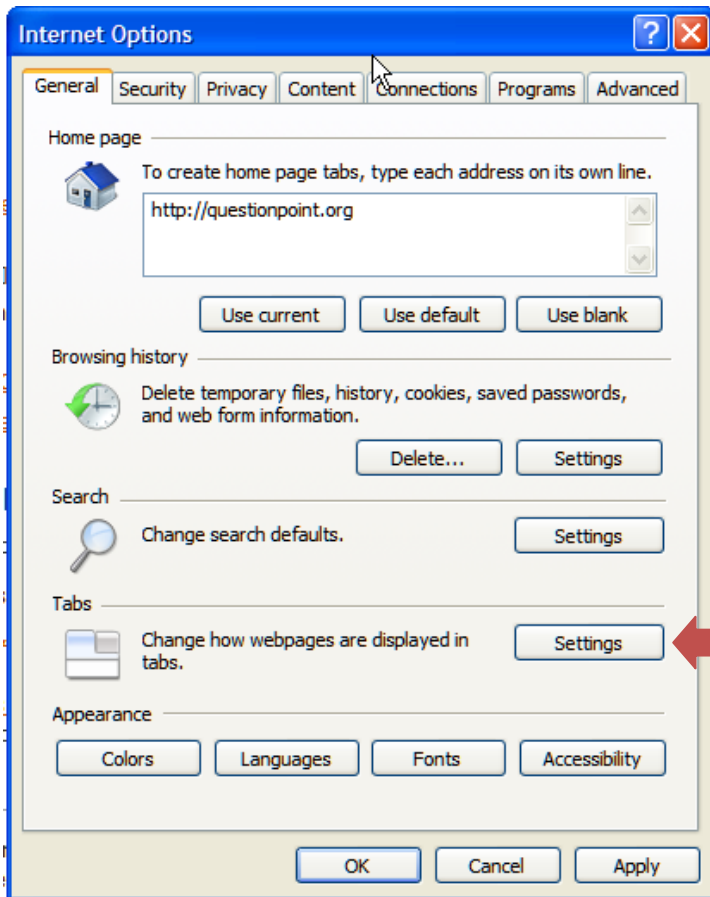


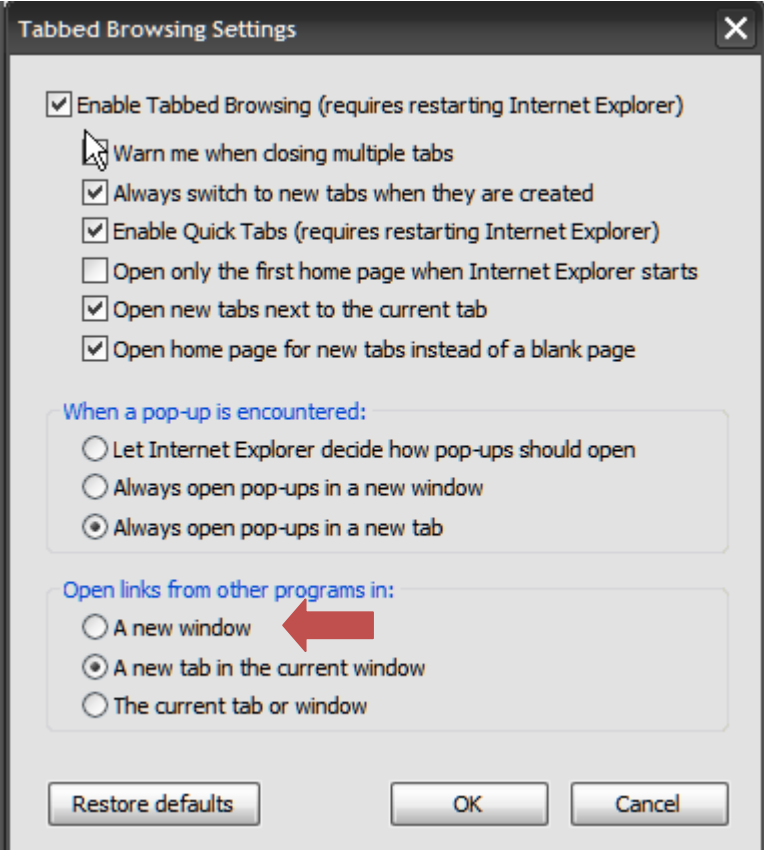
| Step | Action |
|------|--------|
|------|--------|

8 Check "Always allow session cookies", and click "OK"



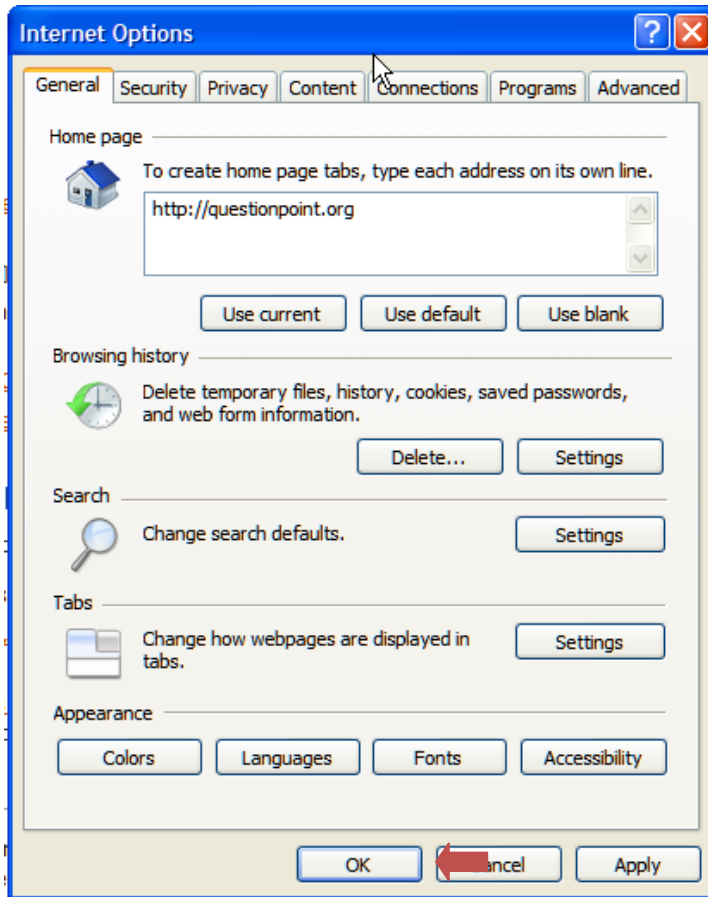
9 Click the **Setting** button in the Tabs section



| Step | Action |
|------|--|
| 10 | <p>Look for the "Open Links from other programs in:" section and select A new window</p>  |

Step**Action**

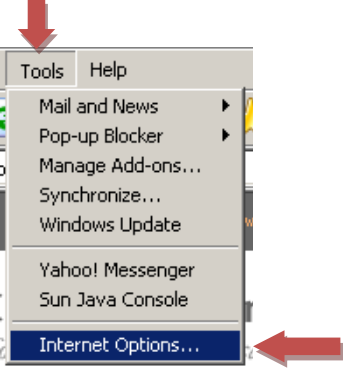
11 Click "OK"



Your browser is now configured for Chat
Please see the Best practices section for tips on QuestionPoint Chat

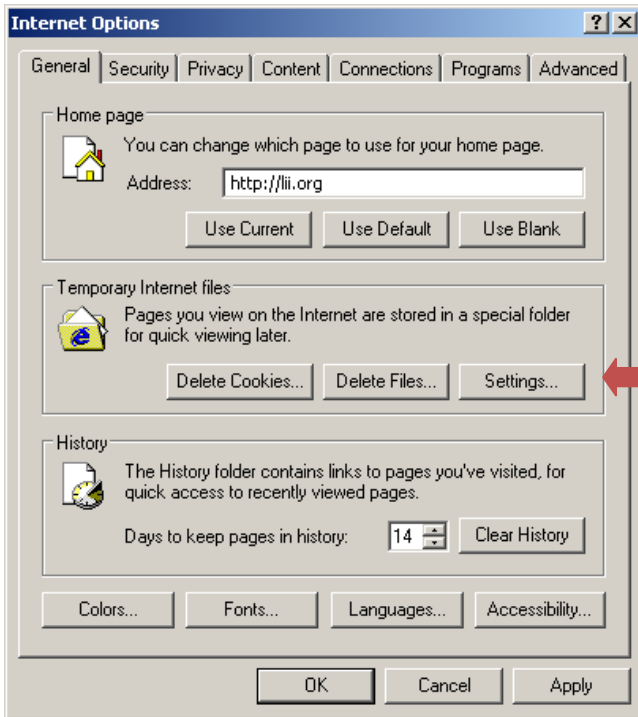
Configure your IE6 browser for Chat with cobrowse

Use the procedure below to configure your IE6 browser to use QuestionPoint Chat with cobrowse on the librarian side.

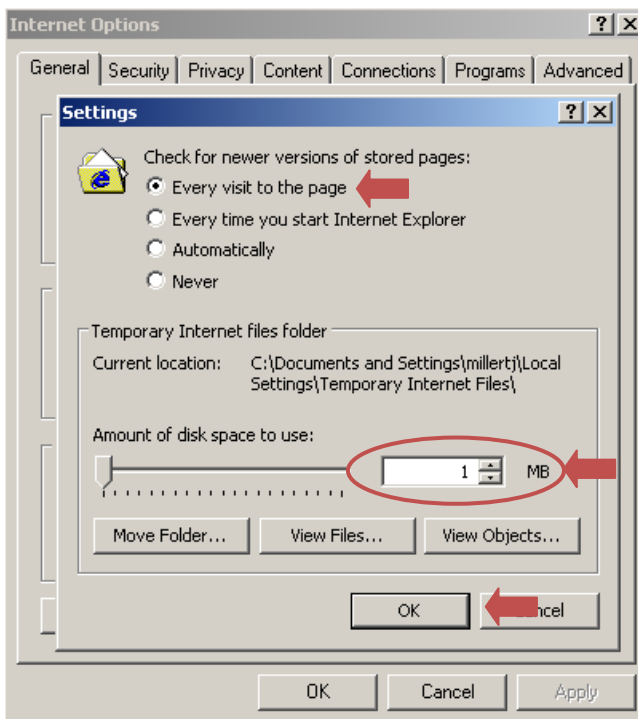
| Step | Action |
|------|---|
| 1 | Launch Internet Explorer. |
| 2 | <p>Click Tools from the main toolbar then highlight and Click on Internet Options from the drop-down list.</p>  <p>The screenshot shows the 'Tools' menu in Internet Explorer. The menu items are: Tools, Help, Mail and News, Pop-up Blocker, Manage Add-ons..., Synchronize..., Windows Update, Yahoo! Messenger, Sun Java Console, and Internet Options... The 'Internet Options...' item is highlighted in blue. A red arrow points to the 'Tools' menu header, and another red arrow points to the 'Internet Options...' menu item.</p> |

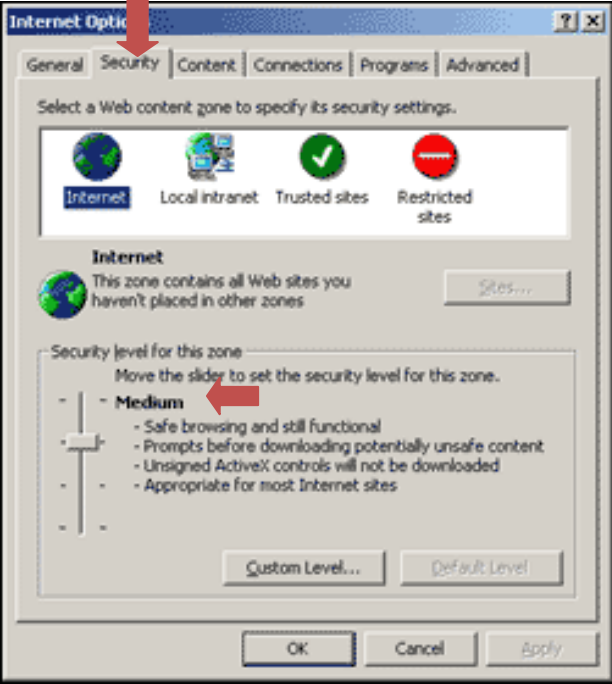
| Step | Action |
|------|--------|
|------|--------|

3 Click the **Settings** button on the Internet Options screen.



4 Click the radio button to the left of **Every visit to the page**, set the size of the **Temporary Internet files folder** to 1 MB, and Click **OK**.



| Step | Action |
|----------|--|
| <p>5</p> | <p>Click on the Security Tab With the Internet Globe highlighted, change the slider bar to Medium*</p>  <p>The screenshot shows the Internet Options dialog box with the Security tab selected. Under the 'Internet' zone, the security level is set to 'Medium'. A red arrow points to the 'Security' tab, and another red arrow points to the 'Medium' label on the slider. The 'Medium' level is described as: 'Safe browsing and still functional', 'Prompts before downloading potentially unsafe content', 'Unsigned ActiveX controls will not be downloaded', and 'Appropriate for most Internet sites'.</p> <p>*If your administrator will not allow you to adjust this setting please see Appendix B of this document for the custom level settings they will need to apply to your browser.</p> |

Step**Action**



- 6 Click the **Privacy** tab in the *Internet Options* window.



Under Pop-up Blocker, remove the check in the box for **Block pop-ups**

- 7 Click the **Advanced** button



| Step | Action |
|------|--|
| 8 | <p>Under "Advanced Privacy Settings", check "Override automatic cookie handling"</p>  <p>The screenshot shows the 'Advanced Privacy Settings' dialog box. At the top, it says 'You can choose how cookies are handled in the Internet zone. This overrides automatic cookie handling.' Below this, there is a 'Cookies' section with a checkbox for 'Override automatic cookie handling' which is currently unchecked. A red arrow points to this checkbox. Underneath, there are two columns for 'First-party Cookies' and 'Third-party Cookies', each with radio buttons for 'Accept', 'Block', and 'Prompt'. At the bottom, there is a checkbox for 'Always allow session cookies' which is also unchecked. 'OK' and 'Cancel' buttons are at the bottom right.</p> |
| 9 | <p>Check "Always allow session cookies", and click "OK"</p>  <p>The screenshot shows the 'Advanced Privacy Settings' dialog box. The 'Override automatic cookie handling' checkbox is now checked. The 'Always allow session cookies' checkbox at the bottom is also checked, with a red arrow pointing to it. The other settings, including the 'Accept', 'Block', and 'Prompt' radio buttons for both first and third-party cookies, remain the same as in the previous screenshot. 'OK' and 'Cancel' buttons are at the bottom right.</p> |

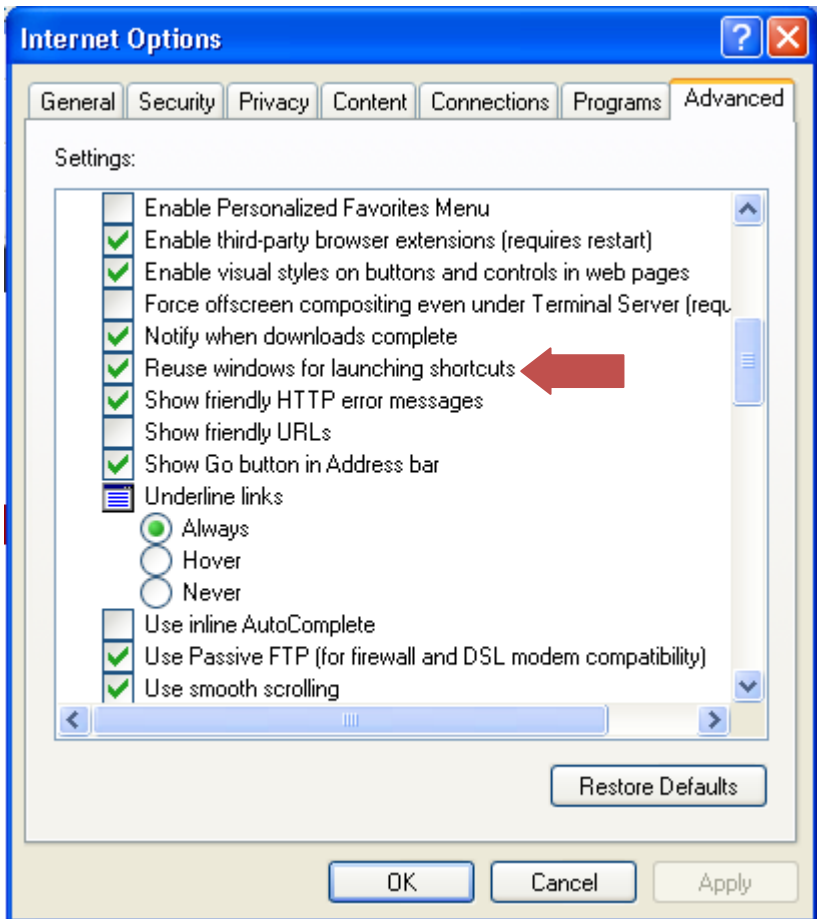
| Step | Action |
|------|--------|
|------|--------|

10 Click the **Advanced** tab in the *Internet Options* window.



Step**Action**

- 11 Scroll until you see look for "Reuse windows for launching shortcuts" and uncheck that option

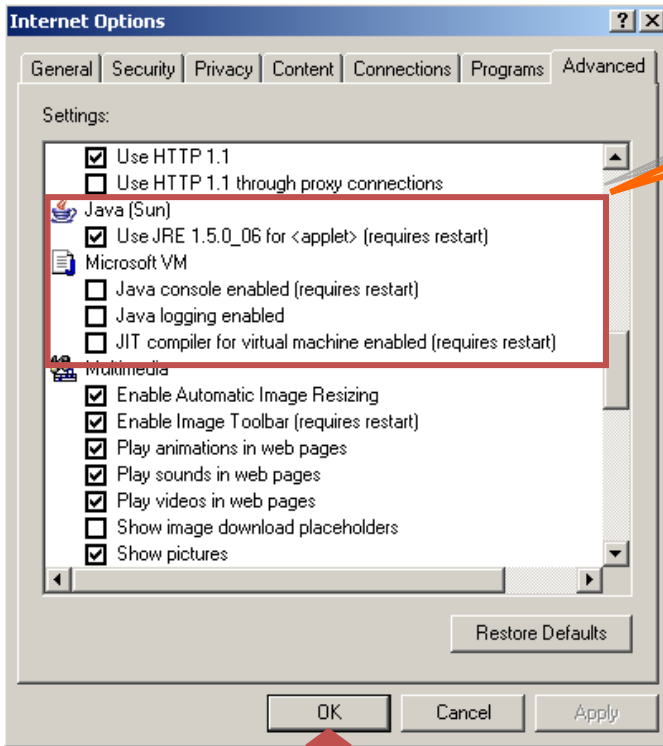


- 12 Scroll until you see your options for HTTP 1.1 Settings
Make sure that you have just one selected. If your library uses a proxy server between your workstation and the internet, then select **Use HTTP 1.1 though proxy connections**. If not, then select **Use HTTP 1.1**



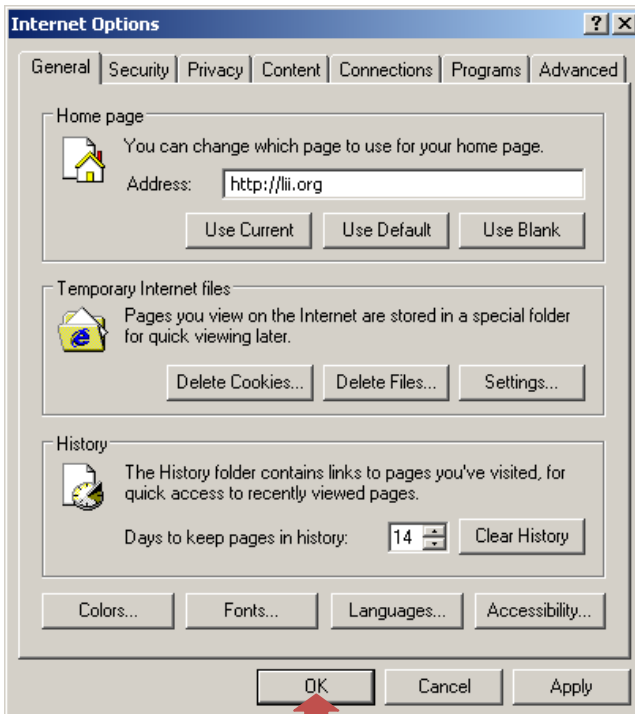
Step**Action**

13 Scroll until you see your options for using Java applications.

**To activate Java (Sun):**

1. Click to put a checkmark in the box next to the setting, **Use JRE . . .**
2. Click **OK**.


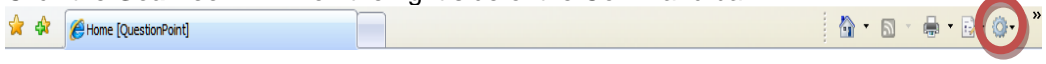
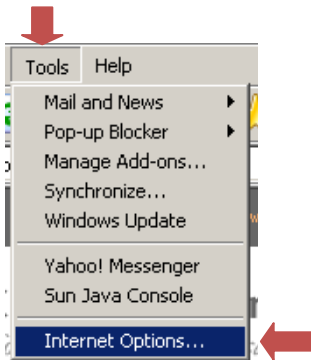
14 Click on OK to close the Internet Options window



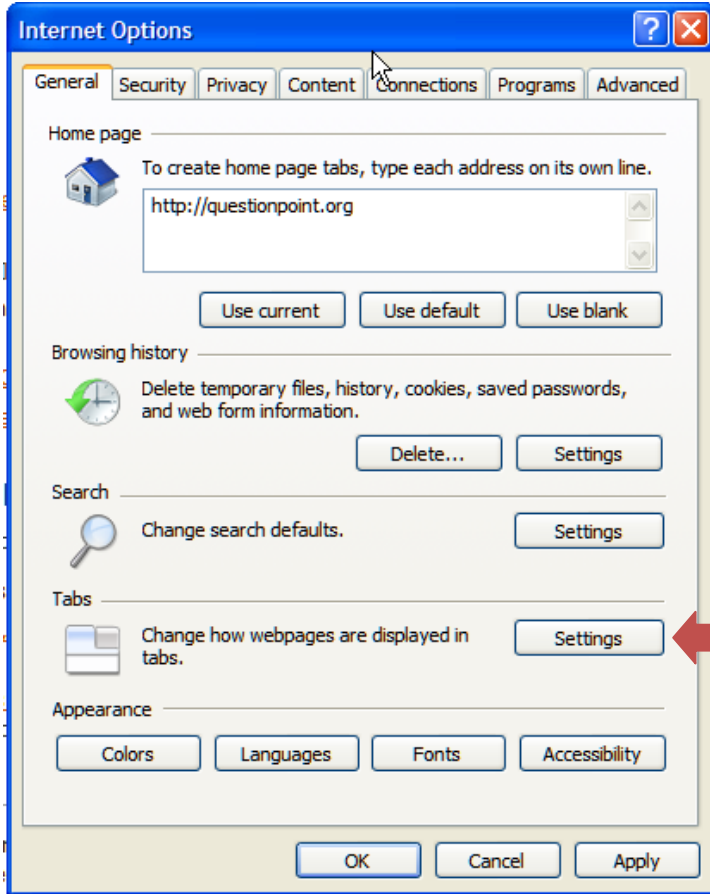
| Step | Action |
|--|--------|
| <p><u>Your browser is now configured for Chat with cobrowse</u> <u>Please see the Best practices section for tips on QuestionPoint Chat</u></p> | |

Configure your IE7, IE8 and IE9 browser for Chat with cobrowse

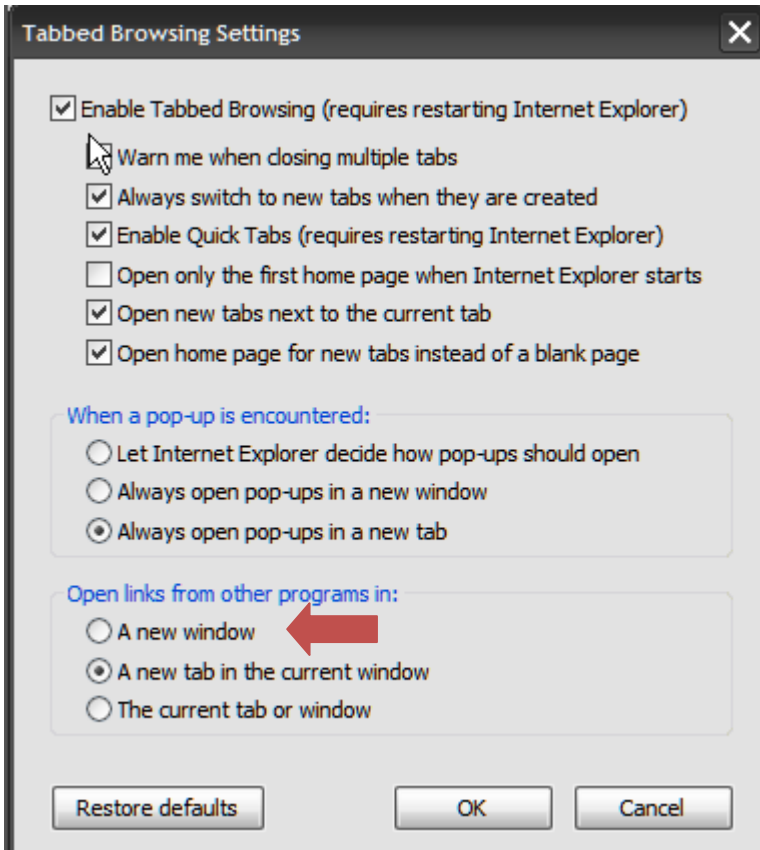
Use the procedure below to configure your IE7 or IE8 browser to use QuestionPoint Chat with cobrowse on the librarian side.

| Step | Action |
|------|--|
| 1 | Launch Internet Explorer. |
| 2 | <p>Click the Gear icon  on the right side of the Command bar</p>  <p>If you do not see the command bar, you can hold down the ALT key and type O to open that menu. Click on Internet Options from the drop-down list.</p>  |

3 Click the **Setting** button in the Tabs section

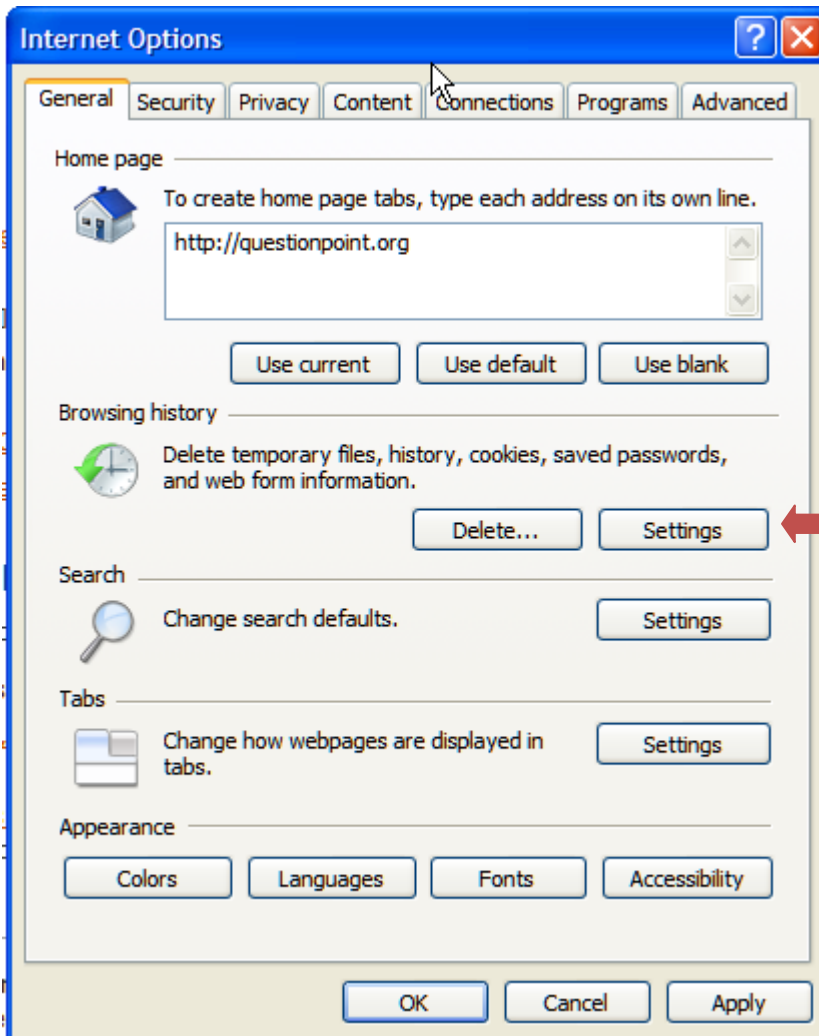


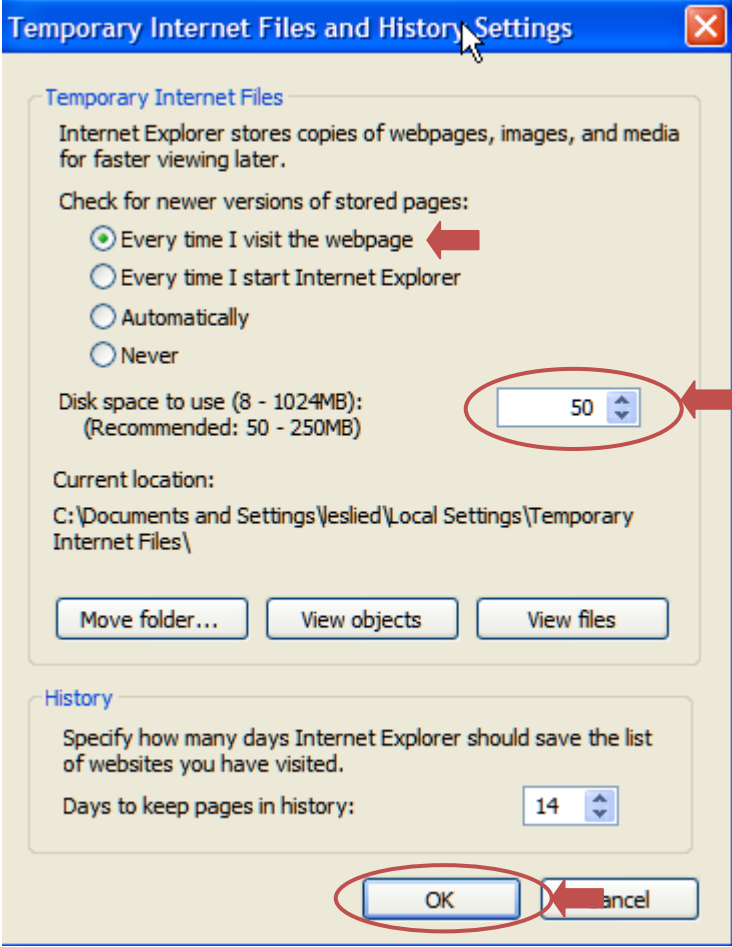
- 4 Look for the "Open Links from other programs in:" section and select **A new window**



Step**Action**

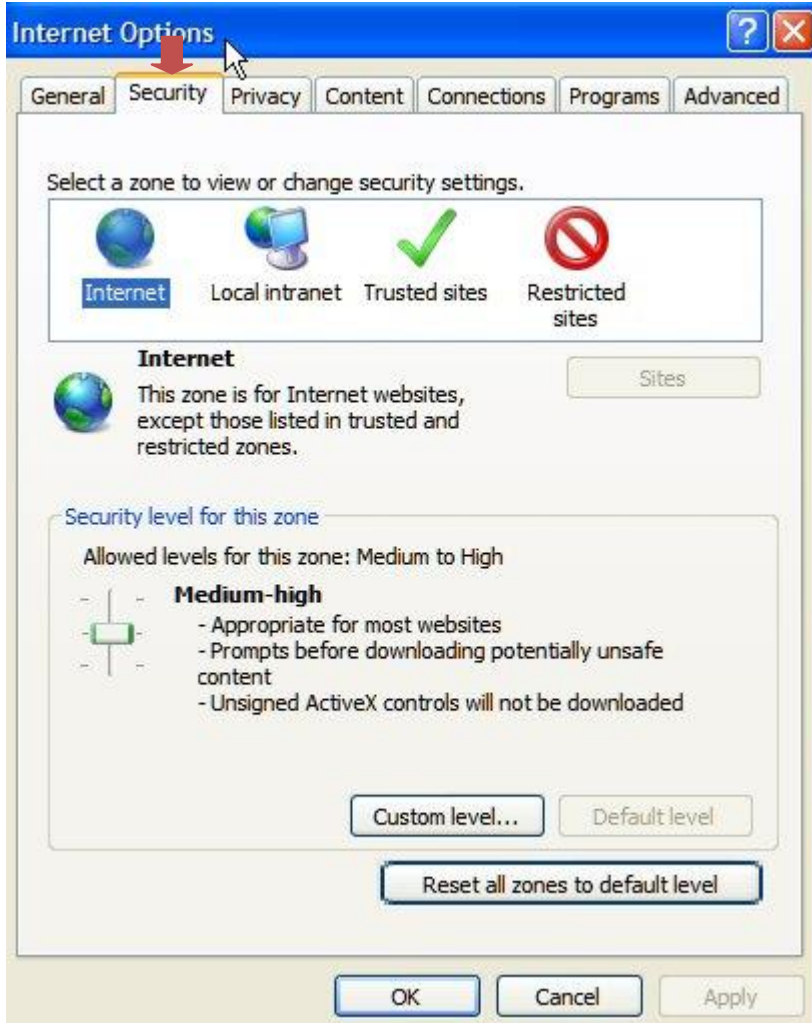
- 5 Click the **Settings** button on the Internet Options screen.


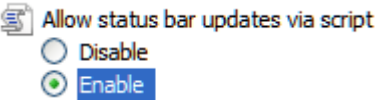


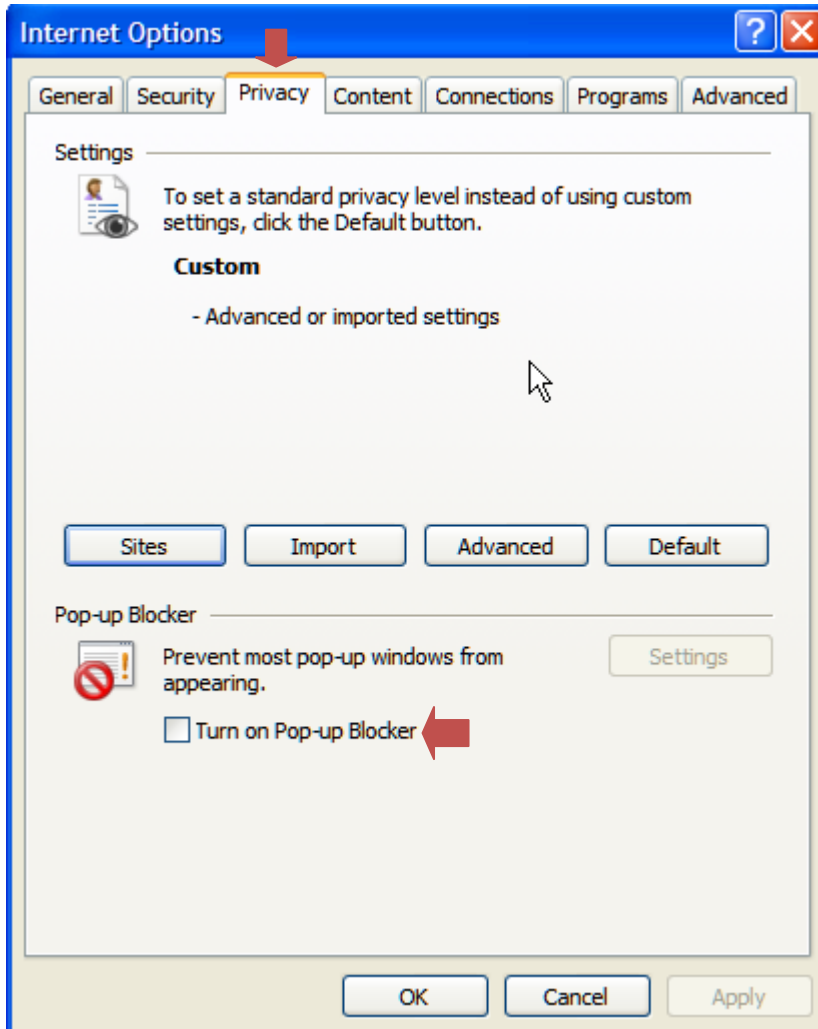
| Step | Action |
|------|--|
| 6 | <p>Click the radio button to the left of Every visit to the page, set the size of the Temporary Internet files folder to 50 MB*, and Click OK.</p>  <p>* This is different than the settings for Internet Explorer 6 due to the way temporary Internet files are handled by the newer versions of IE.</p> |

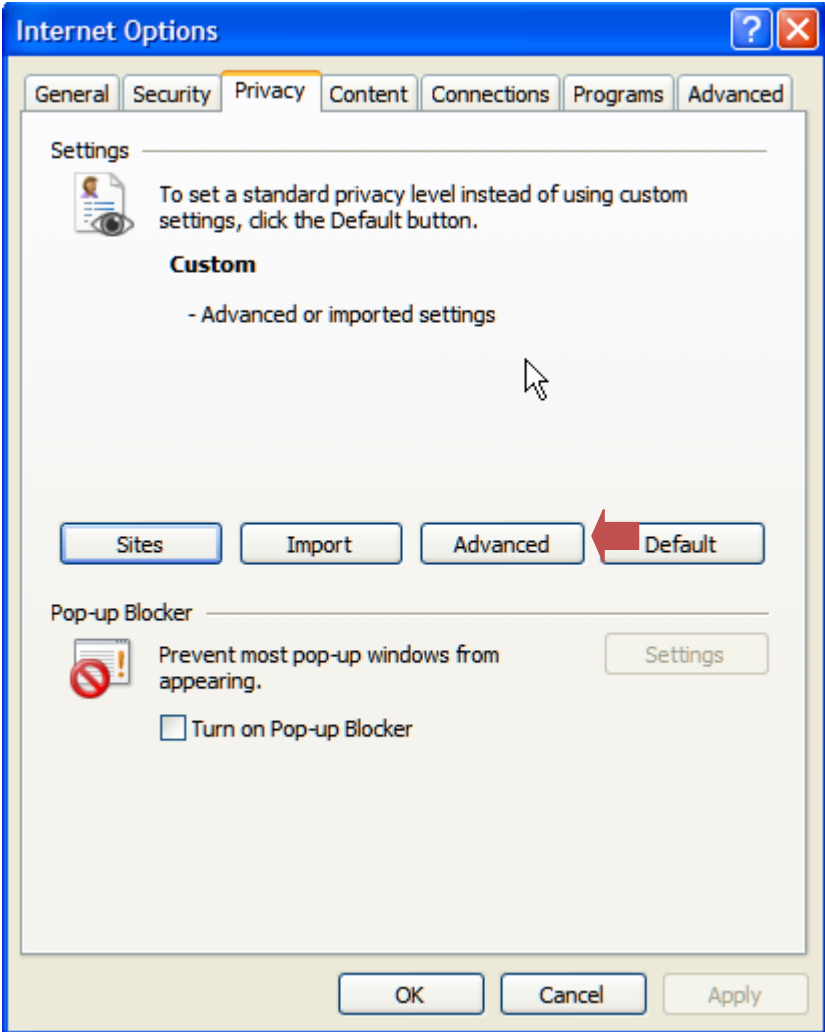

Step**Action**


7 Click the **Security** tab in the *Internet Options* window.

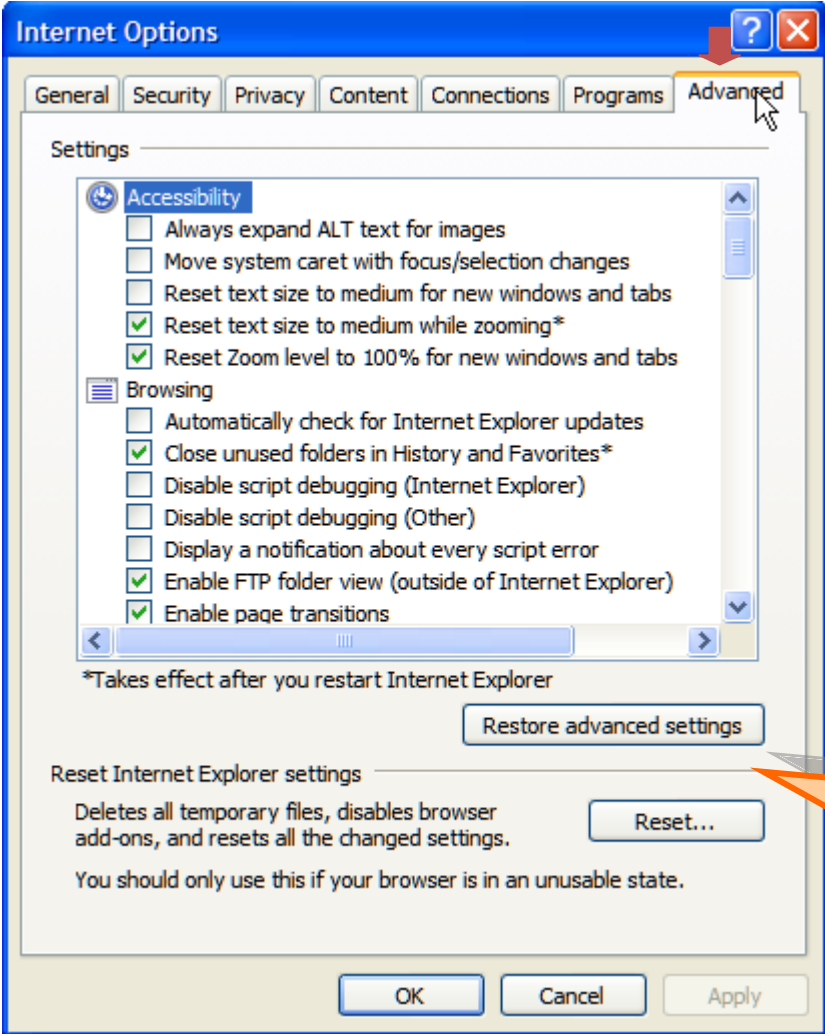
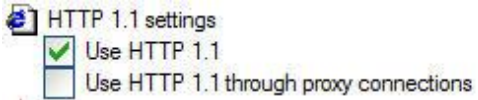


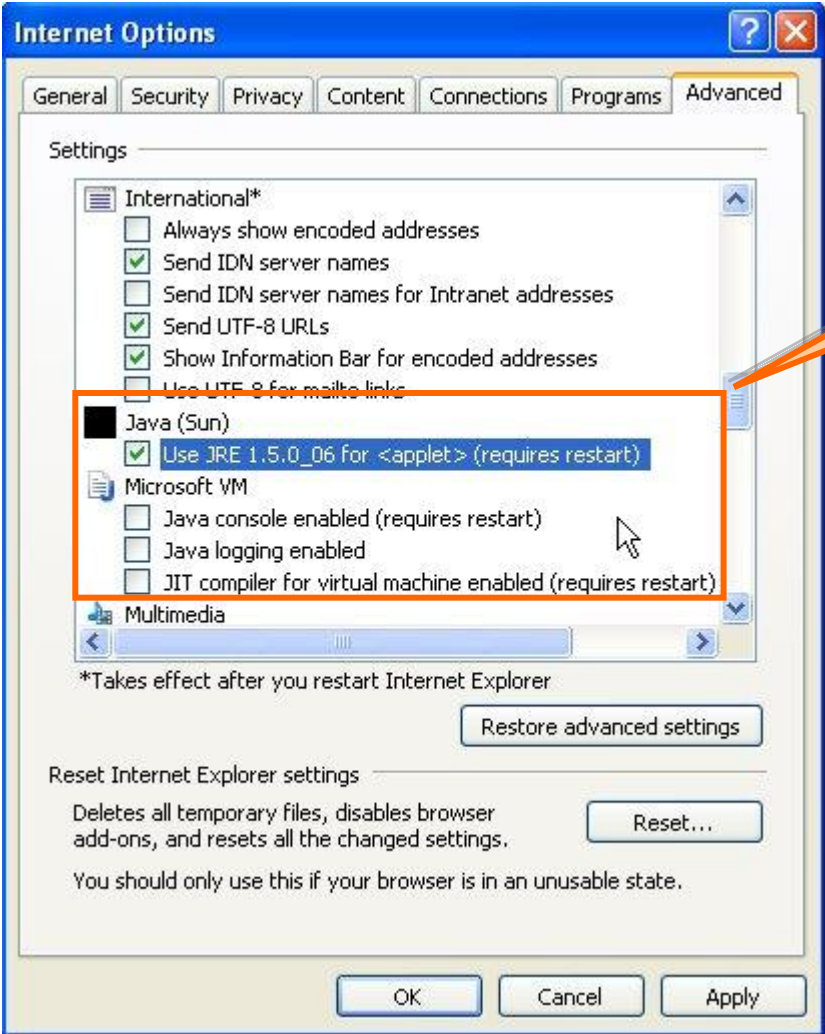
| Step | Action |
|----------|--|
| <p>8</p> | <p>With the Internet Globe highlighted, set the security slider to Medium-high*.</p> <p>Then click on the Custom Level... button</p>  <p>*If your administrator will not allow you to adjust this setting please see Appendix B of this document for the custom level settings they will need to apply to your browser. Skip the rest of this step along with step 7</p> |
| <p>9</p> | <p>If you would like to see the timeout clock in your browser's status bar you MUST enable the option for “Allow status bar updates via script”.</p>  |

Step**Action****10**Click the **Privacy** tab in the *Internet Options* window.Under Pop-up Blocker, remove the check in the box for **Turn on Pop-up Blocker**

| Step | Action |
|------|--|
| 11 | <p>Click on Advanced</p>  <p>The screenshot shows the 'Internet Options' dialog box with the 'Privacy' tab selected. Under the 'Custom' settings section, there are four buttons: 'Sites', 'Import', 'Advanced', and 'Default'. A red arrow points to the 'Advanced' button. Below this, the 'Pop-up Blocker' section is visible with a checkbox for 'Turn on Pop-up Blocker' which is currently unchecked. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.</p> |
| 12 | <p>Under "Advanced Privacy Settings", check "Override automatic cookie handling"</p>  <p>The screenshot shows the 'Advanced Privacy Settings' dialog box. At the top, it says 'You can choose how cookies are handled in the Internet zone. This overrides automatic cookie handling.' Under the 'Cookies' section, there is a checkbox labeled 'Override automatic cookie handling' which is checked. A red arrow points to this checkbox. Below this, there are two columns of radio button options for 'First-party Cookies' and 'Third-party Cookies', each with 'Accept', 'Block', and 'Prompt' options. At the bottom, there is an 'Always allow session cookies' checkbox which is unchecked, and 'OK' and 'Cancel' buttons.</p> |

| Step | Action |
|------|---|
| 13 | <p>Check "Always allow session cookies", and click "OK"</p>  |

| Step | Action |
|-----------|---|
| <p>14</p> | <p>Click the Advanced tab in the <i>Internet Options</i> window.</p>  |
| <p>15</p> | <p>Scroll until you see your options for HTTP 1.1 Settings Make sure that you have just one selected. If your library uses a proxy server between your workstation and the internet, then select Use HTTP 1.1 though proxy connections. If not, then select Use HTTP 1.1</p>  |

| Step | Action |
|--|---|
| 16 | <p>Scroll until you see your options for using Java applications.</p>  <p>To activate Java (Sun):</p> <ol style="list-style-type: none"> 1. Click to put a checkmark in the box next to the setting, Use JRE . . . 2. Click OK. |
| <p><u>Your browser is now configured for Chat with cobrowse</u> <u>Please see the Best practices section for tips on QuestionPoint Chat</u></p> | |

Appendix A: Best practices

Always restart your computer before your shift

For a Windows XP computer, simply do these steps before each shift:

1. Click Start
2. Click Turn off Computer
3. Click Restart

Limit the number of other programs running on your computer

When monitoring chat, it is critical to only run those programs that are essential

Properly end your chat sessions

Always end your patron chat sessions when they are done. Chat session that have been ended but not closed create unnecessary strain on QuestionPoint

Properly end your shift

Always use the Log Out link in the chat monitor when ending your shift

Appendix B: Internet Explorer 6 Advanced Security Settings for the Internet Zone

Below are the advance security settings for the Internet Zone. This information is to be used by system administrators to configure the security settings if they have disabled them on your computer.

.NET Framework – reliant components

| Option | Setting |
|---|---------|
| Run components not signed with Authenticode | Disable |
| Allow Scriptlets | Disable |

ActiveX controls and plug-ins

| Option | Setting |
|---|---------|
| Automatic Prompting for ActiveX controls | Disable |
| Binary and script behaviors | Enable |
| Download signed ActiveX controls | Prompt |
| Download unsigned ActiveX controls | Disable |
| Initialize script and ActiveX controls not marked as safe for scripting | Disable |
| Run ActiveX controls and plug-ins | Enable |
| Script ActiveX controls marked safe for scripting | Enable |

Downloads

| Option | Setting |
|--|---------|
| Automatic prompting for file downloads | Disable |
| File download | Enable |
| Font download | Enable |

Microsoft VM (if installed)

| Option | Setting |
|------------------|------------|
| Java Permissions | Low Safety |

Miscellaneous

| Option | Setting |
|--|---------------|
| Access data sources across domains | Disable |
| Allow META REFRESH | Enable |
| Allow scripting of Internet Explorer web browser control | Disable |
| Allow script-initiated windows without size or position constraints | Disable |
| Allow webpages to use restricted protocols for active content | Prompt |
| Display mixed content | Prompt |
| Don't prompt for client certificate selection when no certificate or only one certificate exists | Disable |
| Drag and drop or copy and paste files | Enable |
| Installation of desktop items | Prompt |
| Launching programs and files in an IFAME | Prompt |
| Navigate sub-frames across different domains | Disable |
| Open files based on content, not file extension | Enable |
| Software channel permissions | Medium Safety |
| Submit non-encrypted form data | Enable |
| Use Pop-up Blocker | Enable |
| Usedata persistence | Enable |
| Websites in less privileged web content zones can navigate into this zone | Enable |

Scripting

| Option | Setting |
|-----------------------------------|---------|
| Active Scripting | Enable |
| Allow paste operations via script | Prompt |
| Scripting of Java applets | Enable |

User Authentication

| Option | Setting |
|--------|---|
| Logon | Automatic logon only in the Intranet zone |

Appendix C: Internet Explorer 7 and Internet Explorer 8 Advanced Security Settings for the Internet Zone

Below are the advance security settings for the Internet Zone. This information is to be used by system administrators to configure the security settings if they have disabled them on your computer.

.NET Framework

| Option | Setting |
|---------------------------|---------|
| Loose XAML | Enable |
| XAML browser applications | Enable |
| XPS documents | Enable |

.NET Framework – reliant components

| Option | Setting |
|---|---------|
| Run components not signed with Authenticode | Disable |
| Allow Scriptlets | Disable |

ActiveX controls and plug-ins

| Option | Setting |
|--|---------|
| Allow previously unused ActiveX controls to run without prompt | Enable |
| Allow Scriptlets | Disable |
| Automatic Prompting for ActiveX controls | Disable |
| Binary and script behaviors | Enable |
| Display video and animation on a webpage that does not use external media player | Disable |
| Download signed ActiveX controls | Prompt |
| Download unsigned ActiveX controls | Disable |
| Initialize script and ActiveX controls not marked as safe for scripting | Disable |
| Run ActiveX controls and plug-ins | Enable |
| Script ActiveX controls marked safe for scripting | Enable |

Downloads

| Option | Setting |
|--|---------|
| Automatic prompting for file downloads | Disable |
| File download | Enable |
| Font download | Enable |

Enable .NET Framework Setup

| Option | Setting |
|-----------------------------|---------|
| Enable .NET Framework Setup | Enable |

Miscellaneous

| Option | Setting |
|--|---------------|
| Access data sources across domains | Disable |
| Allow META REFRESH | Enable |
| Allow scripting of Internet Explorer web browser control | Disable |
| Allow script-initiated windows without size or position constraints | Disable |
| Allow webpages to use restricted protocols for active content | Prompt |
| Allow websites to open windows without address or status bars | Disable |
| Display mixed content | Prompt |
| Don't prompt for client certificate selection when no certificate or only one certificate exists | Disable |
| Drag and drop or copy and paste files | Enable |
| Include local directory path when uploading path when uploading files to a server | Enable |
| Installation of desktop items | Prompt |
| Launching application and unsafe files | Prompt |
| Launching programs and files in an IFAME | Prompt |
| Navigate sub-frames across different domains | Disable |
| Open files based on content, not file extension | Enable |
| Software channel permissions | Medium Safety |
| Submit non-encrypted form data | Enable |
| Use Phishing Filter | Enable |
| Use Pop-up Blocker | Enable |
| Usedata persistence | Enable |
| Websites in less privileged web content zones can navigate into this zone | Enable |

Scripting

| Option | Setting |
|---|---------|
| Active Scripting | Enable |
| Allow Programmatic Clipboard access | Prompt |
| Allow status bar updates via script | Enable |
| Allow websites to prompt for information using scripted windows | Disable |
| Scripting of Java applets | Enable |

User Authentication

| Option | Setting |
|--------|---|
| Logon | Automatic logon only in the Intranet zone |