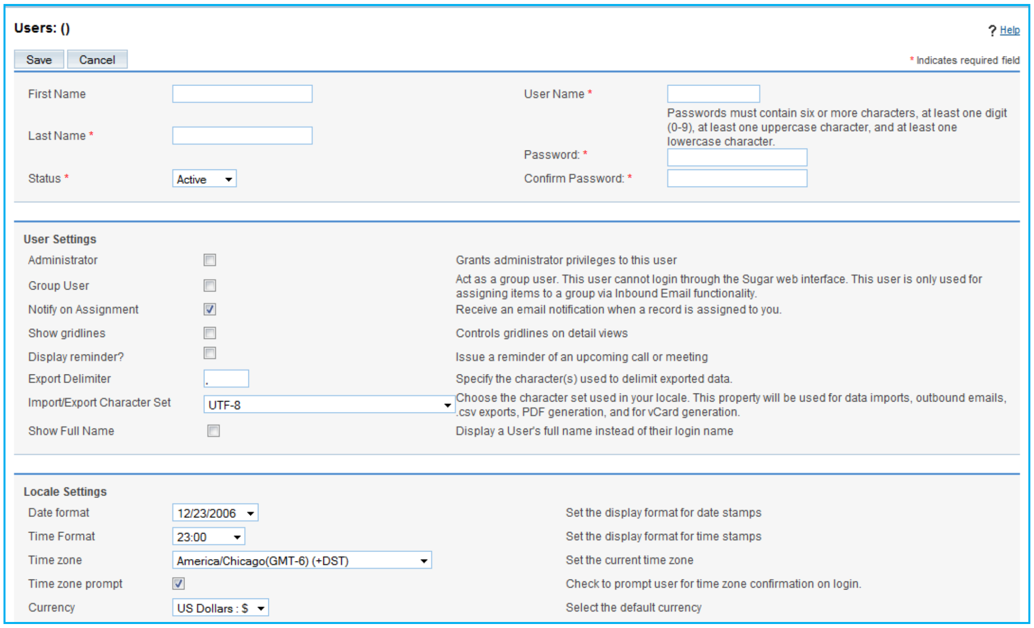
intelecrm Admin Guide

This guide explains how intelecrm can be configured and managed by users with administrative privileges.

Contents

User Management

Use the User management section to create, edit, and manage users.



There are three types of users in the system:

- **Standard End User:** can access modules in the system based on the configurations set by the admin user. Does not have admin privileges.
- **Administrator User:** Admin users have access to all modules and all records in the system. They also have the ability to configure system wide settings, and manage users.
- **Group User:** For use with inbound email. This is not a real user and cannot log into the system.

Create a User

To create a user, click on the 'Create New User' link in the Shortcuts panel. You will need to specify the following:

- Name (First, Last)
- Status
- User Name
- Password

➢ Users cannot be deleted. You can only set their status to de-activated. Once de-activated, the user will no longer be able to log into the system.

In the **User Settings** panel, specify if this user will have Administrator privileges. If you want the user to receive email notifications when a record is assigned to them by another user, make sure the 'Notify on Assignment' is checked.

The **Locale Settings** panel displays the default date and time formats and currency formats for the user. Users can log into their My Account area and modify these settings.

The **User Information** section stores Employee information such as title, department, phone numbers, and IM usernames. Use the **Address Information** section to store the user home address.

In the **Layout Options**, you can limit access to specific modules on a user by user basis. By default, a user has access to all modules in the system. Moving a module from the Display Tabs to the Hide Tabs column will hide the module. If users have the ability to configure tabs, then they can add or remove modules from this column in their My Account area. To permanently remove a module for a specified user, move the module to the Admin Remove Tabs column.

- If you wish to remove a module system-wide, then you should do so in the Configure Tabs area.
- If you wish to limit access to a module for a group of users, then you should do so using Role Management.

Use the **Email Options** section to add an email address for the user. This must be populated in order for the user to receive email alerts from the system.

Manage Existing Users

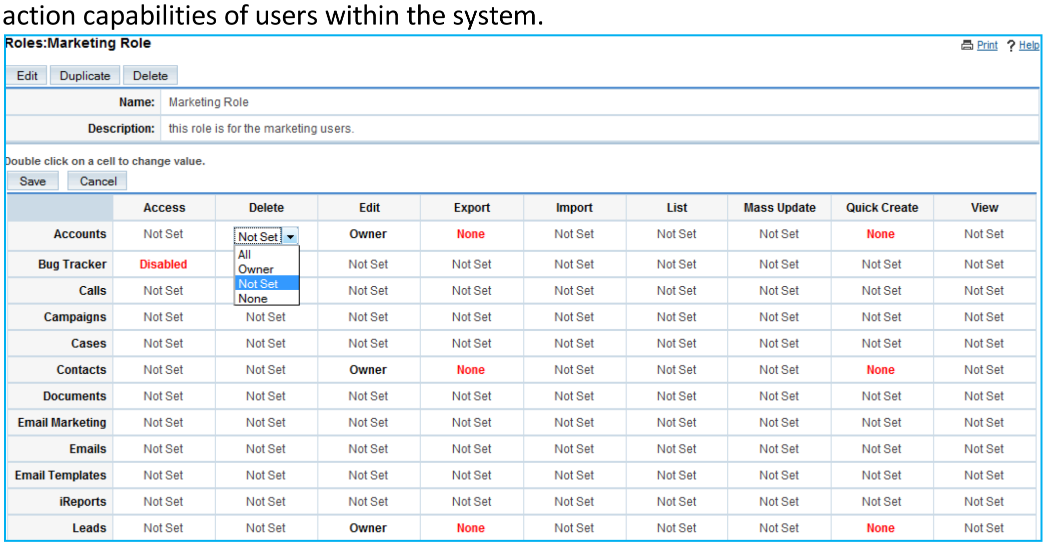
You can view existing user by clicking on the User Management Link. Here you can search and view the users.

- To view a user's information, simply click on the user name in the Listview.
- To modify a user password, click on the Change Password button in the user Detailview
- To modify the user details, click on the edit button.

Once you save the user record, you can attach the user to a Role in the system by clicking the 'Select' button in the Roles subpanel in the User Detailview. A graph will appear which displays the user permissions based on the role settings they are associated with.

Role Management

By default, users can access and modify all records in the system. Roles are used to limit access and action capabilities of users within the system.


Roles:Marketing Role

Print ? Help

Edit | Duplicate | Delete

Name: Marketing Role

Description: this role is for the marketing users.

Double click on a cell to change value.

Save | Cancel

	Access	Delete	Edit	Export	Import	List	Mass Update	Quick Create	View
Accounts	Not Set	Not Set (All / Owner / Not Set / None)	Owner	None	Not Set	Not Set	Not Set	None	Not Set
Bug Tracker	Disabled		Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Calls	Not Set		Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Campaigns	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Cases	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Contacts	Not Set	Not Set	Owner	None	Not Set	Not Set	Not Set	None	Not Set
Documents	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Email Marketing	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Emails	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Email Templates	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
iReports	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Leads	Not Set	Not Set	Owner	None	Not Set	Not Set	Not Set	None	Not Set

You can create roles which restrict certain users from being able to access a module, or to allow them to only view or modify certain records in the system. When you attach a user to a role, that user is bound by the restrictions set in the role.

- A user with admin rights has full access and rights to the system, and will not be bound by the restrictions of a role, even if they are attached to a role.

To create a Role, click the 'Create Role' link in the shortcuts. Give you role a name that will help you identify it, and a description.

For each module in the system, you can double click into a cell to set the following:

- **Access**: whether or not the user can view the module
    - **Enabled** – the user can access the module
    - **Not Set** – leaves the setting unchanged (by default, the users have access)
    - **Disabled** – the user cannot access the module

- Action Options:
    - **Delete** – can the user delete records from the module?
    - **Edit** – can the user edit records in the module? If set to None, then the Mass Update panel is disabled as well.
    - **Export** – can the user export data from a module?
    - **Import** – can the user import data into a module?
    - **List** – Does the user have access to the list view of a module?
    - **Mass Update** – display the Mass Update panel in the List View?
    - **Quick Create** – display the Quick Create form in the Shortcuts?
    - **View** – Does the user have access to the Detail View of a record?

- For each of the above items you can set the following permissions:
    - **All** – all users from the role can perform this action
    - **Owner** – only the Assign To user can perform the action. If the assign to field is not populated, this defaults to the Created By user
    - **Not Set** – leaves the setting unchanged (by default, the users can perform this action)
    - **None** – none of the users can perform this action

- Changes made to a role will take effect the next time a user from that role logs into the system, so it is best to make changes when all users are logged out (if a user is already logged in, the change will not affect them until they log out and back in again).

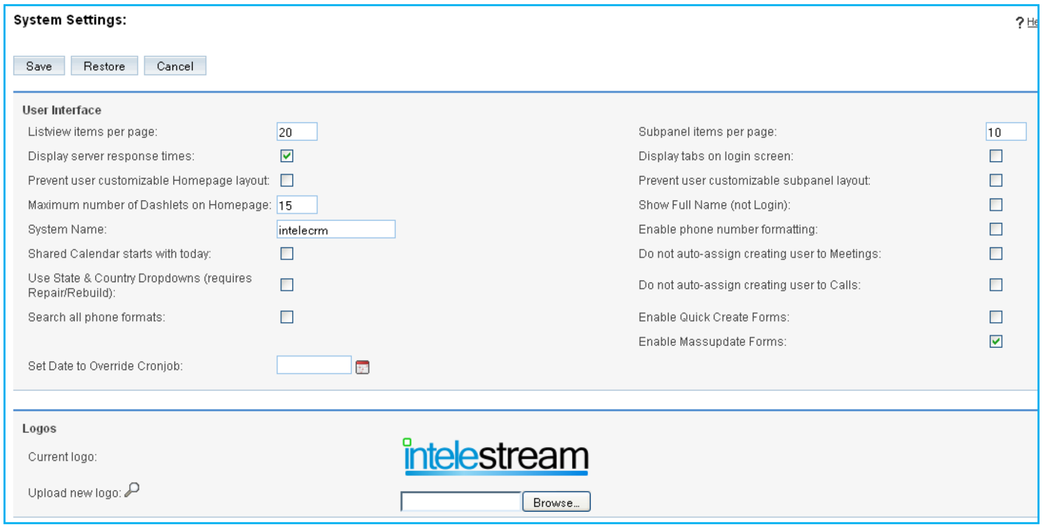
- A user can belong to more than one role. In this case, the role with the most restrictive permissions will prevail
    - EX: A user belongs to Role A, which allows them to delete any record in the Accounts module. This user also belongs to Role B, which is set to only allow them to delete records that are assigned to the user. In this scenario, the user will only be able to delete records that are assigned to him/her.

You can assign a user to a Role one of two ways:

- Go to the Role Detail View and scroll down to the Users subpanel. Click the 'Select' button to search for and bind the User to the Role.
- Go to the User Detail View and scroll down to the Roles subpanel. Click the 'Select' button to search for and bind the User to the Role.

System Settings

This section is used to configure system wide settings.



In the **User Interface**, you can configure several aspects of the user interface such as the number of records listed in the listview or subpanels, whether users have the ability to customize their homepage or subpanels, whether to enable mass update, and several other system wide settings.

In the **Logo** area, you can upload your company logo that will display in the top left hand corner of the application. The recommended logo size is 212x40 px, and should be a .png or .jpg file.

If you use **LDAP** or Active Directory authentication, you can enable LDAP within intelecrm. When your users try to log into intelecrm, the application authenticates them against your LDAP directory or Active Directory. If authentication is successful, the user is allowed to log into the system. If you are using LDAP with SOAP, you will need to specify the encryption key for the system and forward the key to your users.

If your users are using the Plug-in for Microsoft Outlook, they will need to enter this key number in Outlook. The Plug-in for Microsoft Outlook uses this key to encrypt user passwords before forwarding them to the CRM for authentication. intelecrm decrypts the password with the same key and forwards the user names and passwords to the LDAP server for authentication. If authentication is successful, the users are allowed to access intelecrm through the Plug-in for Microsoft Outlook.

The next section configures your server for the use of a **proxy server**. When selected, this option allows the administrator to enter the proxy server's host name and port number, with optional user name and password for authentication.

Check **SkypeOut** to allow users to click phone numbers within the system and call via Skype.

The **Export** section allows you to set the system default export and import settings for all users. The default Export Delimiter is a comma, and the Default Export Character Set is UTF-8. However, users have the ability to modify their personal export settings via their My Account settings.

Here, you can also check off whether you wish to **Disable export** system wide for all users, or allow **Admin export only**.

- If you wish to limit import/export for a specified group of users, then you should do so using Role Management.

Locale Settings

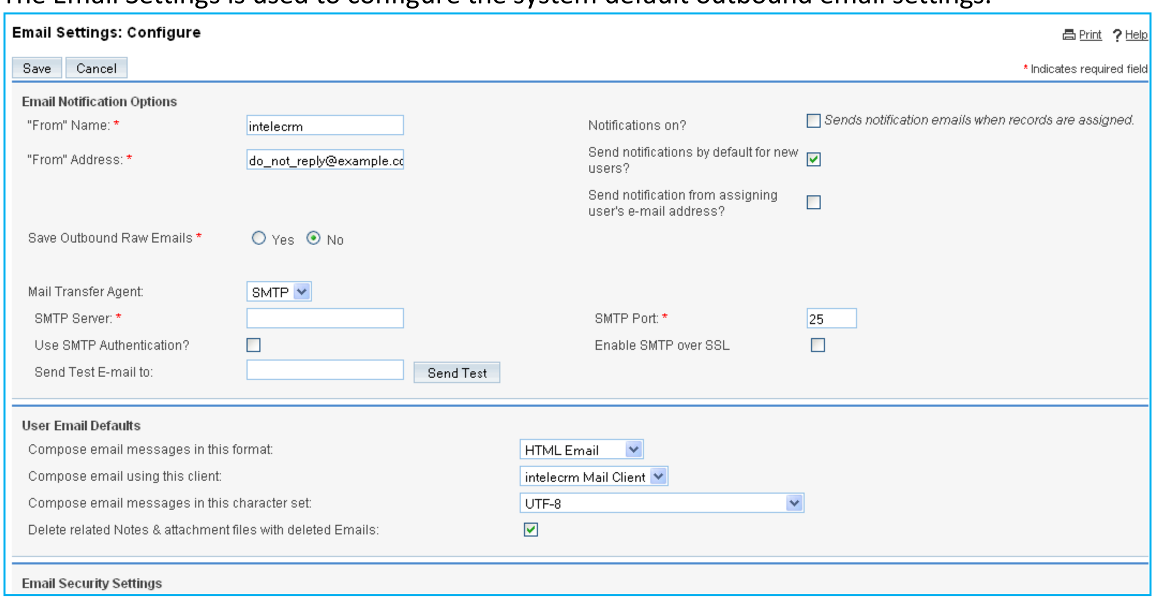
Use Locale Settings to set system-wide default formats for date, time, language, name format and currency.
The **User Interface** section allows you to configure the system default date and time formats, language, and salutation name format. Users can modify these within their My Account page.

Use the **Default Currency** area to set the default currency settings. Users can also modify this within their My Account page.

The **Database Collation** panel is used to select the database collation order. The default is utf8_general_ci.

Email Settings

The Email Settings is used to configure the system default outbound email settings.



Email Notification Options

Use this section to define the username and email address from which system emails will be sent, and specify the mail transfer agent SMTP settings. To enable system notifications, you will want to make sure the 'Notifications on?' is checked.

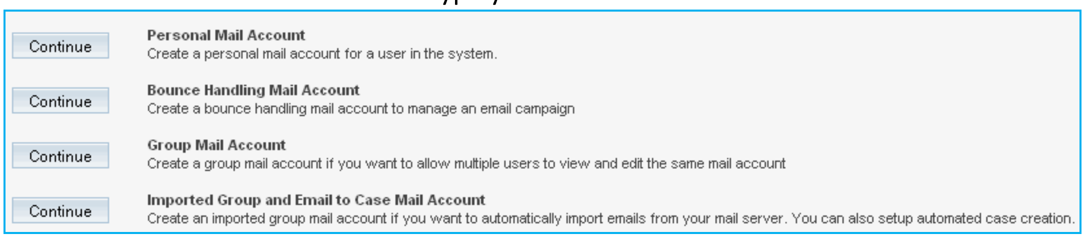
The **User Email Defaults** section is used to set the default email format (HTML or text), email client (intelecrm or external ie:Outlook) and character set.

Email Security Settings are used to control the system's actions as inbound email is received.

Inbound Email

The inbound email area allows you to manage and set up your inbound email accounts.

To create a new inbound email account, click the 'Monitor New Mail Account' link in the Shortcuts. You will need to select the mail account type you wish to create:



Continue **Personal Mail Account**
Create a personal mail account for a user in the system.

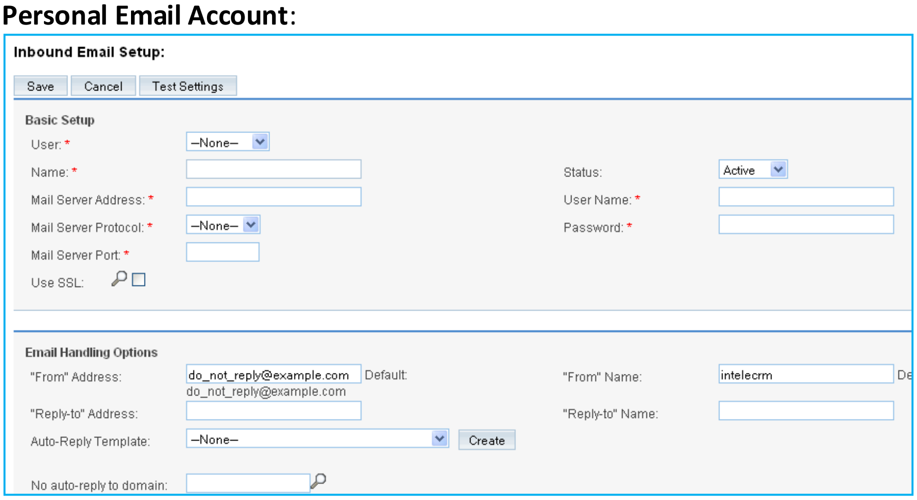
Continue **Bounce Handling Mail Account**
Create a bounce handling mail account to manage an email campaign

Continue **Group Mail Account**
Create a group mail account if you want to allow multiple users to view and edit the same mail account

Continue **Imported Group and Email to Case Mail Account**
Create an imported group mail account if you want to automatically import emails from your mail server. You can also setup automated case creation.

- **Personal Mail Account**: a personal user mail account to receive their email within the system. The emails are not stored in the CRM, but reside on the email server.
- **Bounce Handling Mail Account**: for use with Email Campaigns.
- **Group Mail Account**: a mailbox where multiple users can see the emails. The emails reside on the email server, not within the CRM. You can manually download the email into the CRM.
- **Imported Group and Email to Case Mail Account:** a folder within the Emails module. Emails are auto downloaded into the CRM, so all the emails reside within the CRM. Also for use with automated case creation (Email to Case).

Personal Email Account:



Inbound Email Setup:

Save | Cancel | Test Settings

Basic Setup

User: * –None–
Name: *
Mail Server Address: *
Mail Server Protocol: * –None–
Mail Server Port: *
Use SSL:
Status: Active
User Name: *
Password: *

Email Handling Options

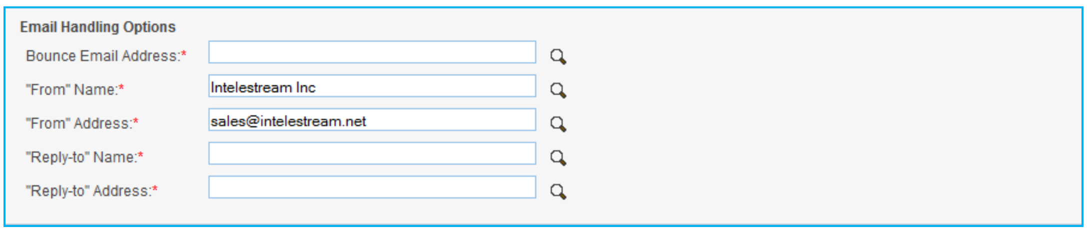
"From" Address: do_not_reply@example.com Default: do_not_reply@example.com
"Reply-to" Address:
Auto-Reply Template: –None– Create
No auto-reply to domain:
"From" Name: intelecrm De
"Reply-to" Name:

The personal user mail account allows users to receive their email within the system. The emails are not stored in the CRM, but reside on the email server. You will need to fill out the appropriate mail server settings in the Basic Setup section.

Under the Email Handling Options, fill out the appropriate from and reply to addresses and names. You also have the option to create and select and Auto-Reply Template, or exclude a particular domain from receiving the auto email response (if enabled). When you are done, click the 'Test Settings' button to test the settings and ensure they are correct.

- If a user creates an Inbound email account under their personal Email settings, it will appear in this section.

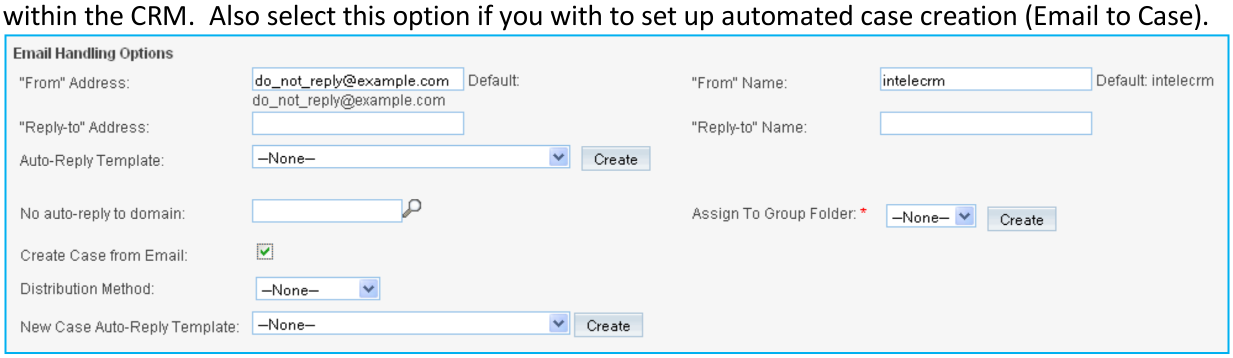
Bounce Handling Mail Account:
To create a bounce mail account for use with campaigns, click the 'Bounce Handling Mail Account' option. The Basic Setup section is the same as above. In the Email Handling Options, you will need to specify the Bounce Email Address, From and Reply to names and addresses:



When you are done, click the 'Test Settings' button to test the settings and ensure they are correct.

Group Mail Account:
The group mail account settings are the same as the personal mail account settings. However, the mailbox is viewable by more than one user. Once a group mail account is set up, it is accessible under each users' Email setup area for selection. The emails reside on the email server, not within the CRM, but can be manually downloaded into the CRM.

Imported Group and Email to Case Mail Account:
Use this option to create a mail account where emails are auto downloaded into the CRM and reside within the CRM. Also select this option if you with to set up automated case creation (Email to Case).



Populate the Basic Setup with the appropriate settings. Under the Email Handling Options, fill out the appropriate from and reply to addresses and names. You also have the option to create/select and Auto-Reply Template, or exclude a particular domain from receiving the auto email response (if enabled). Assign the incoming email to an email Group Folder. This group folder will appear as a new folder within the emails module. If no group folder exists, click the 'Create' button to create one.

If you wish to set up case creation, check off the 'Create Case from Email' checkbox. New options will appear. You will need to specify the 'Distribution Method':

- Direct Assign: create case assigned to the specified user.
- Round Robin: create case assigned evenly between users in the specified role
- Least Busy: create case assigned to a user in the specified role who has the shortest queue of assigned open cases.

When you are done, click the 'Test Settings' button to test the settings and ensure they are correct.

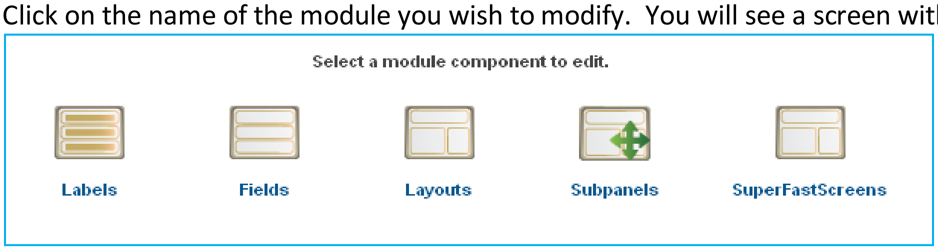
Manage Email Queue

The Manage Email Queue area displays all campaign emails waiting to be sent out. These emails will only be sent once the date and time specified in the email marketing section of the campaign passes. You can select and delete items if you no longer wish to send them out, or you can force them out at once by clicking 'Send Queued Campaign Emails'.

Studio

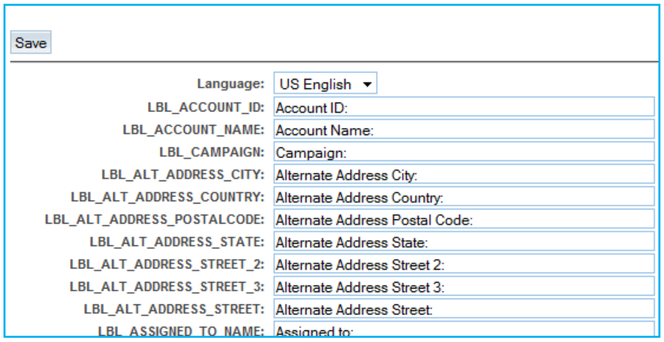
Use Studio to customize your page layouts and create and edit existing fields.

Click on the name of the module you wish to modify. You will see a screen with the following options:



Labels

The display names for the labels of all the fields in this module will be listed. You can click into a label to modify the name and click Save.

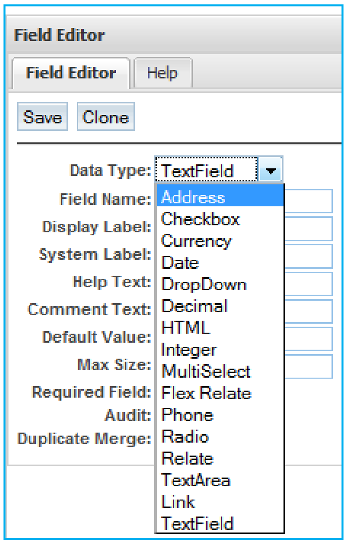


Fields

The Fields section allows you to create a new field or view existing field properties.

Custom fields will appear in the top panel. Custom fields created in Studio are appended with a '_c' at the end. Out of the box fields will appear in the bottom panel.

To create a new field, click the 'Add Field' button. You can create any of the following field types:



Address	5 fields for address, city, state, postalcode and country.
Checkbox	a checkbox.
Currency	a field to enter currency.
Date	a date field with a calendar icon.
DropDown	a field with a dropdown list of values. Only one value can be selected by the end user.
Decimal	a decimal field. You can specify the decimal precision.
HTML	an HTML field where you can enter HTML snippets.
Integer	an integer (whole number) field.
MultiSelect	a field with a range of values. Any number of values can be selected by the end user.
Flex Relate	a lookup field to a record from a module selected in the dropdown. This will appear as a click through link when populated, but does not appear in the subpanels. You are only allowed to create one custom flex relate field.
Phone	a field for phone number
Radio	a series of radio button values. Only one value can be selected by the end user.
Relate	a lookup field to a record with a specific module. This will appear as a click through link when populated, but does not appear in the subpanels.
TextArea	a text area box for unlimited free text.
Link	a web link field. Automatically adds the http
TextField	a text field.

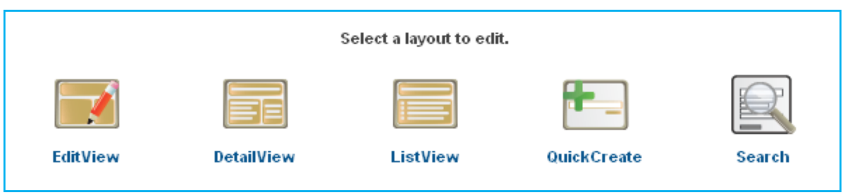
Depending on the field type you select, you may need to provide the following information:

Field Name	The database name of the field.
Display Label	This is the label as it will appear in the user interface. You can overwrite this.
System Label	Based on the database name, the system will auto populate the system label.
Help Text	You can enter a description of the field which will appear when a user hovers their mouse over the field name in the edit view.
Comment Text	Notes about the field. This only appears in studio.

Default Value	If populated, a default value will appear in the edit/detail views.
Max Size	Maximum number of characters that can be entered for this field.
Required Field	Check this box if you want the field to appear as a required field.
Audit	Check this box to add the field to the View Change Log.
Duplicate Merge	If enabled, this field will appear as a filter when merging records
Mass Update	Adds the field to the mass update section in the listview. Only appears for fields of data type date, dropdown, radio, multiselect.
Drop Down List	For dropdown, multiselect and radio fields. Select from the list the available the dropdown values that will correspond to this field.
Precision	For the decimal field. Specifies the number of digits after the decimal point.
HTML	For use with the HTML field
Min Value	For the Integer field. You can set the minimum value that can be entered.
Max Value	For the Integer field. You can set the maximum value that can be entered.
Module	For use with the Relate field. Select the related module.

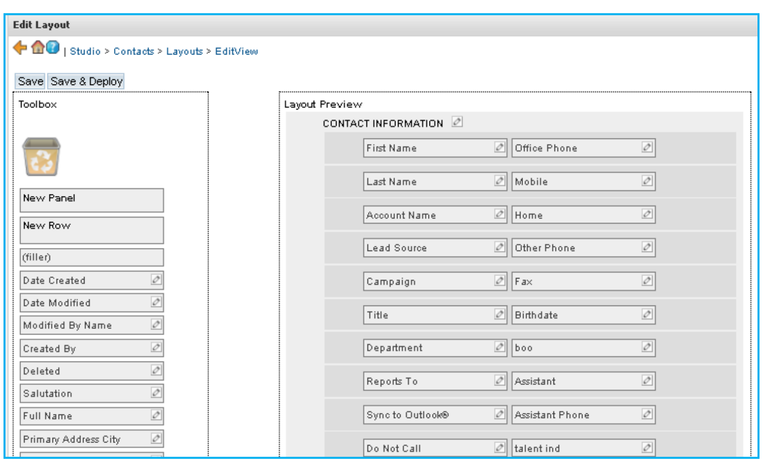
- When creating a DropDown or MultiSelect field, it is a best practice to create the dropdown values before creating the field.
- When creating a DropDown or MultiSelect field, it is always a good idea to create a blank value as the default.

Layouts



EditView

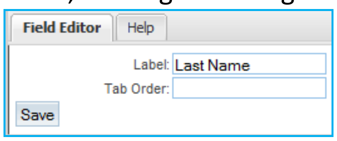
Clicking on the EditView will bring you to the layout screen of the module editview. Here you can remove fields currently displayed, add new fields to the view, or re-arrange the layout.



You can click and drag fields listed in the Toolbox panel into the view, or click and drag fields within the layout. You also have the option to add a new panel or new row. To remove a field from the view, click and drag it to the recycle bin. The field will then be listed under the Toolbox panel.

Empty cells within the layout are denoted by a box labeled (filler). Some fields will extend over two cells. You can minimize it by clicking the [-].

You also have the option to edit a field name and tab order by clicking the pencil icon. A panel will appear on the right hand side where you can populate the label and modify the tab order. By default, tabbing goes from top left column to bottom, then top right column to bottom. If you populate the tab order, tabbing will first go from left to right through all the 1s, then all the 2s, etc.



When you are done making you changes, you can either click the ‘Save’ button or the ‘Save and Deploy’. Clicking the ‘Save’ button will only save your changes within studio. You must click ‘Save and Deploy’ to deploy your changes to the user interface.

DetailView

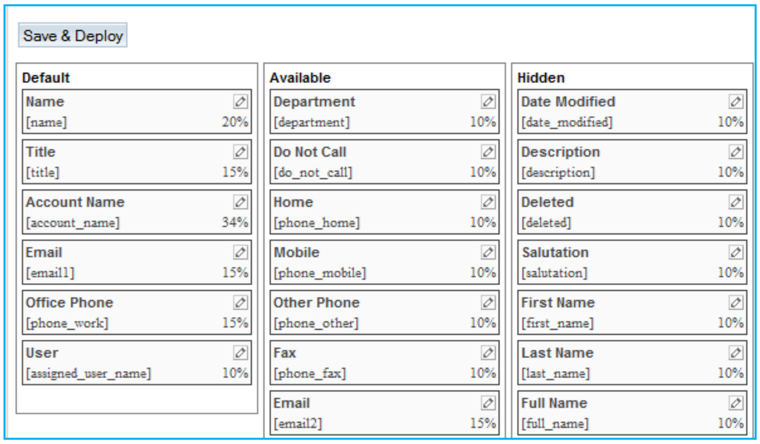
Clicking on the DetialView will bring you to the layout screen of the module detailview. Here you can remove fields currently displayed, add new fields to the view, or re-arrange the layout. You can click and drag fields listed in the Toolbox panel into the view, or click and drag fields within the layout. You also have the option to add a new panel or new row. To remove a field from the view, click and drag it to the recycle bin. The field will then be listed under the Toolbox panel.

Empty cells within the layout are denoted by a box labeled (filler). Some fields will extend over two cells. You can minimize it by clicking the [-].

- ➢ The DetailView and EditView layouts are two different layouts. Changes made in one layout will also need to be made in the other layout if you want them to match. Keep in mind that the DetailView contains extra fields like ‘Date Created’ and ‘Date Modified’, which are detailview items only

ListView

The ListView area allows you to select the fields that appear in the module list view. You will see three columns:



Default	Fields displayed in the module ListView by default for all users.
Available	Fields that users can pull into the ListView via Advanced/Saved Search.
Hidden	Fields that users cannot pull into the ListView.

You can click and drag the fields into the desired column and click Save & Deploy.

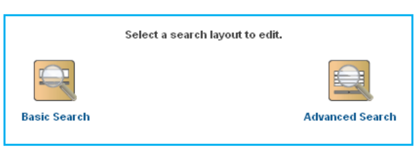
Field widths for each individual field are displayed beneath the pencil icon. You have the option to modify the column width for a specific field by clicking the pencil icon. The Width field displays the current field width. Enter the new width and click Save. Then click the Save & Deploy button.

QuickCreate

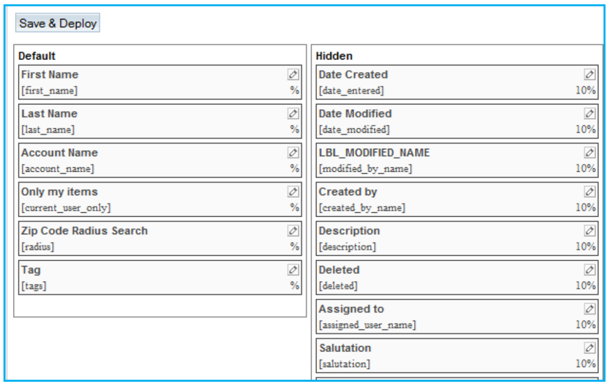
The QuickCreate form allows you to quickly create a new related record from a module subpanel in the DetailView. In Studio, you can add/remove the fields that appear in a module subpanel quickcreate form.

To add a new panel, row, or field, simply click and drag it from the Toolbox column into the layout. To remove a field from the layout, click and drag it to the recycle bin. Click 'Save & Deploy' when you are done.

Search



There are 2 items under Search: Basic and Advanced. These correspond to the Basic Search panel and the Advanced Search panel.
When you click into either one, you will see two columns named Default and Hidden:



Default	Fields displayed in the Search panel
Hidden	Fields not displayed in the Search panel.

You can click and drag the fields into the desired column and click Save & Deploy.

- ➢ The order in which fields appear in the Default column going down corresponds to the order in which the fields appear in the search panel going across.

Field widths for each individual field are displayed beneath the pencil icon. You have the option to modify the column width for a specific field by clicking the pencil icon. The Width field displays the current field width. Enter the new width and click Save. Then click the Save & Deploy button.

Subpanels

The Subpanels section lists some of the module's subpanels that appear in the module DetailView. You can modify the fields that are displayed within those subpanels.

Click into the subpanel you want to modify. Similar to the List and Search panels, there are two columns:

Default	Fields to display in the subpanel.
Hidden	Fields not displayed in the Search panel.

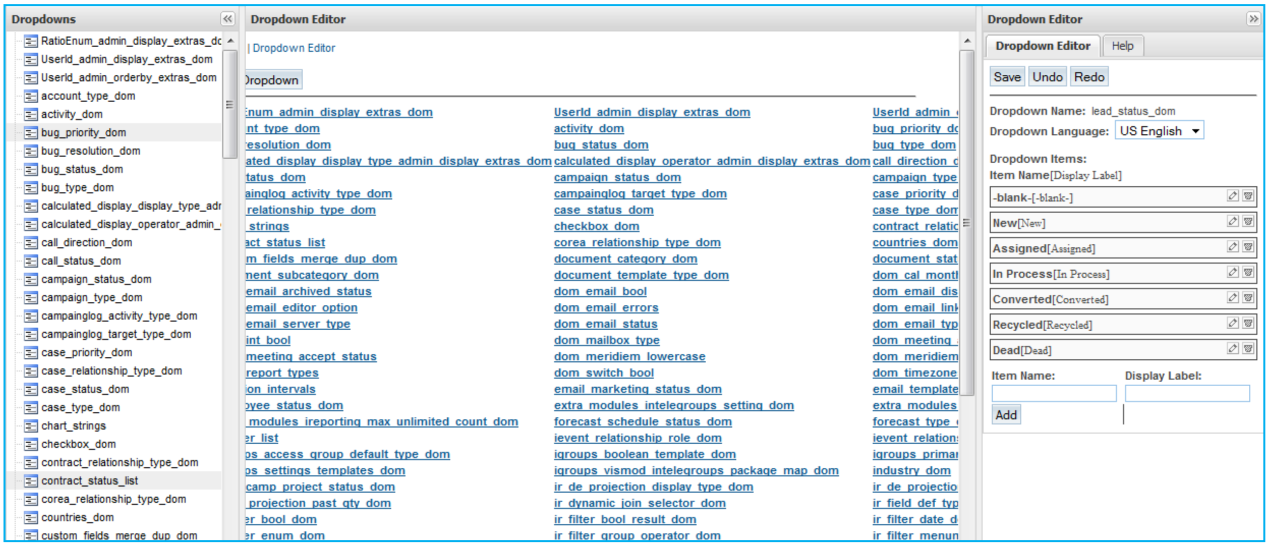
You can click and drag the fields into the desired column and click Save & Deploy.

- ➢ The order in which fields appear in the Default column going down corresponds to the order in which the fields appear in the subpanel going across.

Field widths for each individual field are displayed beneath the pencil icon. You have the option to modify the column width for a specific field by clicking the pencil icon. The Width field displays the current field width. Enter the new width and click Save. Then click the Save & Deploy button.

Dropdown Editor

The dropdown edit is where you can create new dropdowns and modify existing dropdown items for fields of type dropdown, multiselect, and radio.



You will see three panels in the Dropdown Editor. All available dropdown items are listed in the left hand panel, as well as in the middle section. To modify an existing dropdown, click on the name of the dropdown, and the items will appear on the right hand panel. To create a new dropdown, click the 'Add Dropdown button'.

Item Name	The database value. Do not use any special characters or spaces.
Display Label	The value as it appears in the dropdown. You can use special characters or spaces.

- Don't forget to add a blank value to your drodown when needed.

You can rearrange the order of the items in the dropdown by dragging the value to the desired order. You can edit the display label of an existing value. You cannot edit the item name (database value) of an existing value.

You can delete a value from the dropdown by clicking the trashcan icon. This will strike out the value. When you click Save, the value will be removed. Keep in mind that if there are any records that were populated with this value, the data will be deleted.

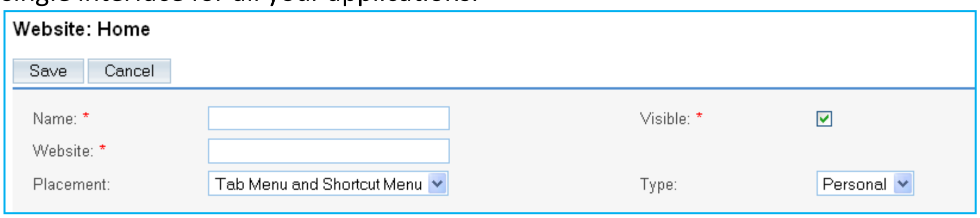
- Be Careful. Some dropdown values have special hard coded functionality and can have adverse effects if you delete them. You do not want to delete the following:

Sales Stage	Closed Won
Lead Status	Converted

Call Status	Held, Not Held (these statuses move the record from the Activity panel to the History panel)
Meeting Status	Held, Not Held (these statuses move the record from the Activity panel to the History panel)
Task Status	Completed, Deferred (these statuses move the record from the Activity panel to the History panel)

Websites

The Website link will bring you to the My Website module, which provides a shortcut to any websites and web based applications you set up. These shortcuts open within the intelecrm system, providing a single interface for all your applications.

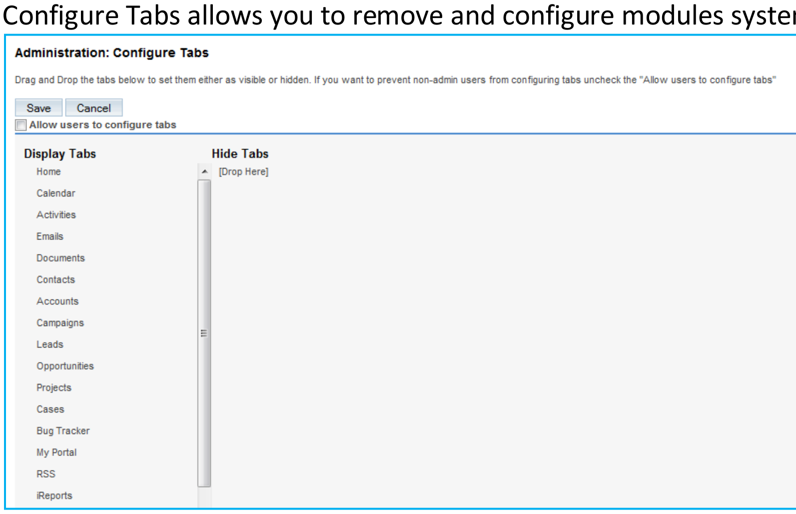


To create a website item, simply enter a Name and the website URL. Non admin users only have the option to create a personal Website item, with the option to place the website as a Shortcut link in their shortcuts panel.

As an Administrator, you have the option to create a Website item that appears as a module tab (Placement = Tab Menu) and is visible by all users (Type = Global). Make sure the Visible checkbox is checked. Otherwise, admins can create a personal website item by setting Type=Personal.

Configure Tabs

Configure Tabs allows you to remove and configure modules system wide for all users.

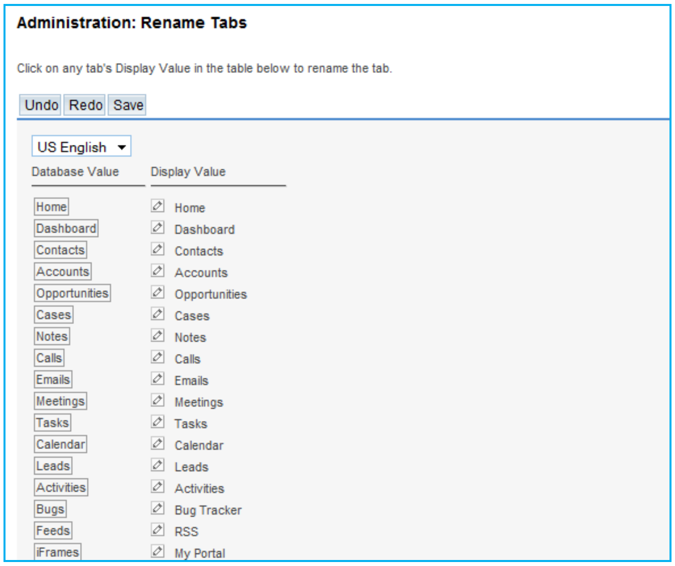


To remove a module system wide, simply click and drag it from the 'Display Tabs' column to the 'Hide Tabs' column and click Save. You can also reorganize the default tab order in which the modules will appear by dragging them in the desired order within the 'Display Tabs' column.

- Users have the ability to change the module order or hide modules within their My Account area unless the 'Allow users to configure tabs' checkbox is checked off.

Rename Tabs

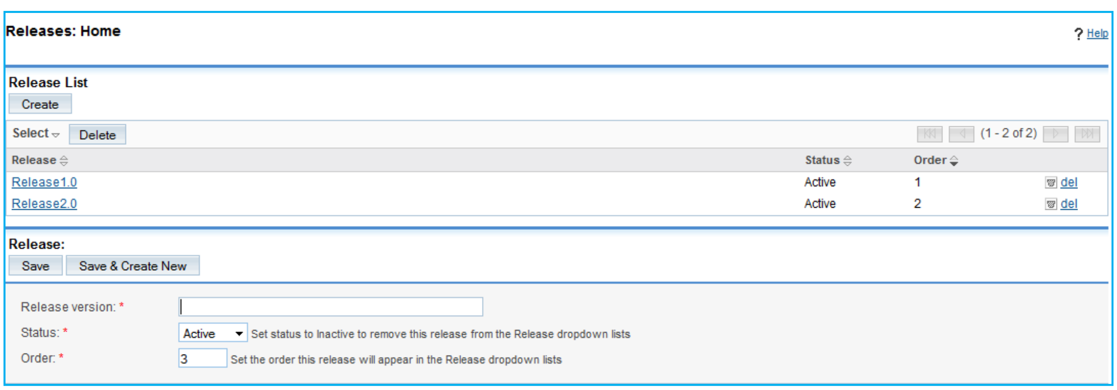
Use Rename tabs to change the tab name of a module.



Click on the pencil icon or Display Value name to edit. Click Save when you are done.

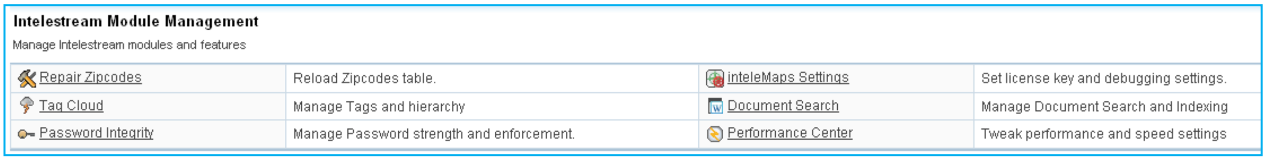
- This will only update the Tab name, and will not update all references of the module throughout the system.

Bug Tracker: Releases



The Bug Tracker link allows you to manage the values that appear in the 'Found in Release' and 'Fixed in Release' dropdowns within the Bug Tracker module. To create a value, click the Create button and enter the value (Release Version), Status, and Order.

Intelestream Module Management



Intelestream Module Management
Manage Intelestream modules and features

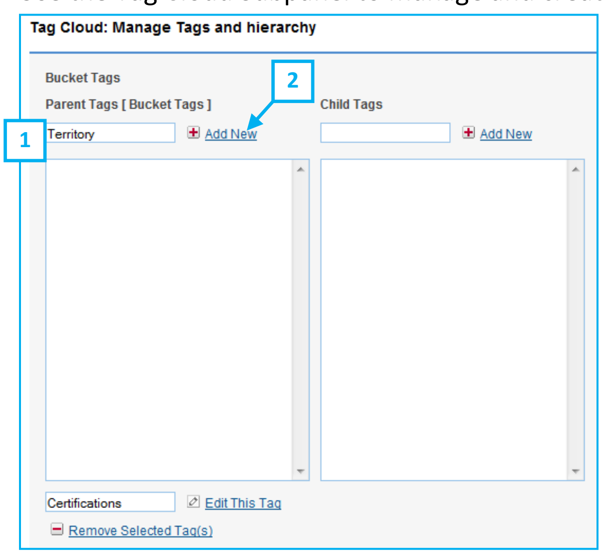
Repair Zipcodes	Reload Zipcodes table.	inteleMaps Settings	Set license key and debugging settings.
Tag Cloud	Manage Tags and hierarchy	Document Search	Manage Document Search and Indexing
Password Integrity	Manage Password strength and enforcement.	Performance Center	Tweak performance and speed settings

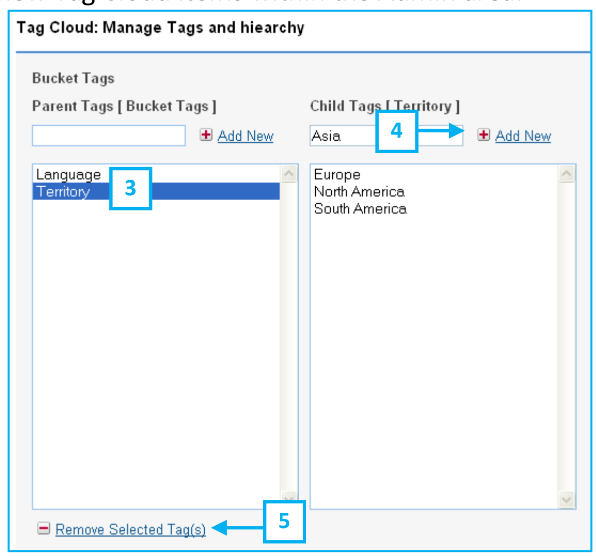
Repair Zipcodes

Clicking this link will reload the zipcodes table that is used for the Zipcode Radius search.

Tag Cloud

Use the Tag Cloud Subpanel to manage and create new Tag Cloud items within the Admin area.





Create a main Parent tag by typing in the Parent name [1] and click the 'Add New' link [2]. To add child tags, simply highlight the Parent Tag you want to populate [3], and enter the children under the 'Child Tags' field [4]. Click the 'Add New' link to add the child.

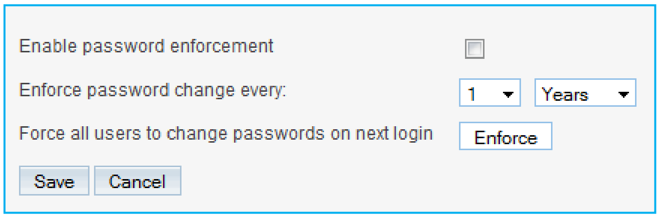
You can add any number of sub-relationships. IE: you can add children to the children. Click the child you wish to populate. It will move to the Parent column. Then add the children within the child column.

To remove a tag, simply highlight the tag(s) you want to remove [5] and click the 'Remove Selected Tag(s) link.

- Removing a parent Tag which contains children will remove all the related children.

Password Integrity

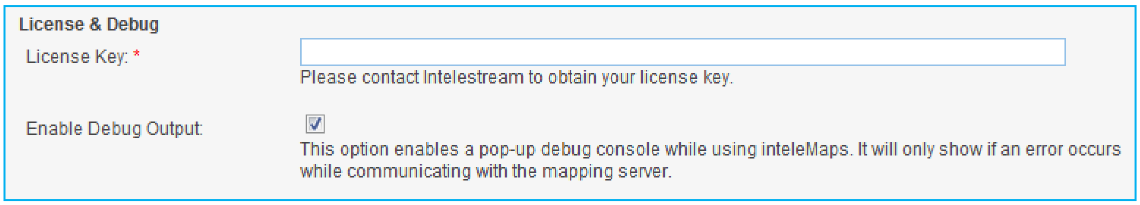
This section allows you to manage Password strength and integrity



To enable a password change every time interval, check off the ‘Enable password enforcement’ checkbox and select the frequency in the ‘Enforce password change every’ dropdowns. Click Save.

To force all users to change their password on the next login, click the Enforce button.

inteleMaps Settings



A license key will need to be populated in order to activate inteleMaps. This can be obtained by logging a support ticket through the Intelestream support portal.

To enable a pop up debug console, you can check off the ‘Enable Debug Output’. If there are any plotting errors on the map, they will appear here.

Document Search

Document Search lets you to search words that exist in documents you attach as Notes within intelecrm.

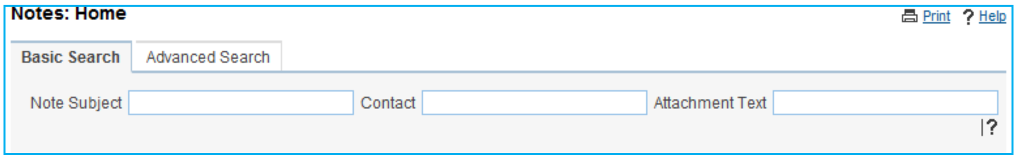
Docment Indexing Status	
Current Server Environment:	Windows
Microsoft Word Indexer:	Word 2003 INSTALLED AND FUNCTIONING 2003 Test Word document successfully read Word 2007 NOT INSTALLED AND/OR NOT FUNCTIONING 2007 Test Word document failed. ZipArchive PHP function not available. Requires php 5.2 and greater.
RTF Indexer:	RTF NOT INSTALLED AND/OR NOT FUNCTIONING RTF Documents are not supported under the Windows operating system
TXT Indexer:	TXT INSTALLED AND FUNCTIONING 2003 Test TXT document successfully read
PDF Indexer:	PDF INSTALLED AND FUNCTIONING 2003 Test PDF document successfully read
XLS Indexer:	XLS NOT INSTALLED AND/OR NOT FUNCTIONING XLS Documents are not supported under the Windows operating system
PPT Indexer:	PPT NOT INSTALLED AND/OR NOT FUNCTIONING PPT Documents are not supported under the Windows operating system
Notes Module Indexing Information:	Total Notes with Attachments: 2 Total Notes with Attachments that are not Indexable: 1 Total Notes with Attachments Indexed: 1 Total Notes with Attachments to Index: 0

The following document types can be searched:

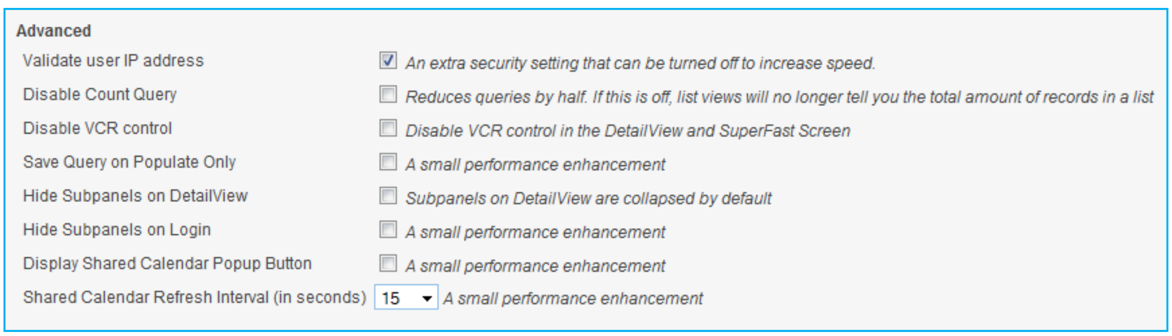
- Word

- RTF
- TXT
- PDF
- XLS
- PPT

Click the ‘Manage Indexes’ link in the Shortcuts panel to index words that can be searched within the ‘Attachment Text’ field in the Notes Search panel:



Performance Center



This section allows you to regulate performance and speed settings.