

## Portfolio Online System Guidelines

### System Guidelines and Browser Certification

To ensure a satisfactory experience, Portfolio Online has been certified for use with the following browsers and operating systems. This information is also contained within Portfolio Online Help.

Supported Browser	Supported Operating Systems
IE7.0	Vista
IE6.0	Windows XP
IE7.0	Windows XP
Safari v3.0	Mac OS X v10.5 "Leopard"

### Safari™ Settings

The instructions outline the steps necessary to validate Mac® settings, download/install the Adobe SVG Viewer, and test the viewer prior to entry into the Portfolio Online System.

**Note:** Each client may have their Mac desktop and windows preferences set slightly different and, as such, may need to change them while they follow these installation steps.

**Note:** A button in the upper right-hand corner of a window allows you to toggle between including or not including options such as back and forward arrows, view options for (icon, list, or column) view, a Quicklook button, and an Action button. This button must be selected so that these options are visible or the client will not be able to select the appropriate function.

### Before any applications are open on the desktop:

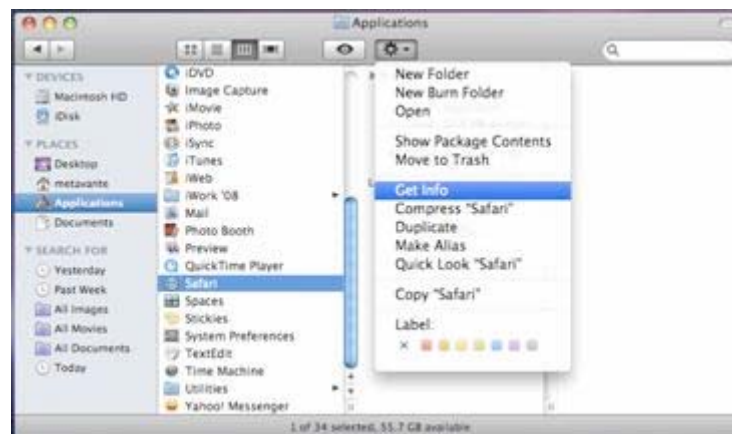
1. Select Go from the top menu.
2. Select Applications from the drop-down window.



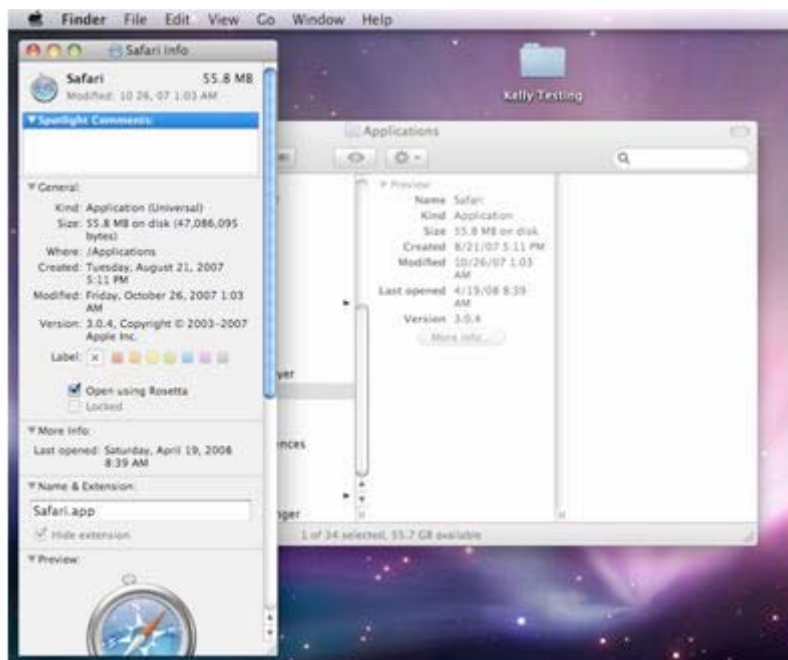
3. Select Safari from the list of applications (single click).  
**Note:** If the user is in an Icon or List view, selecting Safari with a single click will look different.



4. After Safari is selected, select Get Info from the action drop-down.



5. Make sure the box next to Open using Rosetta is checked. If not, check it.



6. Close all open panes.
7. Repeat steps 1 - 6 again and verify that the box next to Open using Rosetta is checked.
8. Close all open panes.
9. Open Safari.
10. Select Preferences under the Safari Tab at the top.
11. A pane with several options opens. Select the Security tab.
12. Under the Security settings, verify the following are selected:
  - Web Content:
    - Enable plug-ins
    - Enable Java
    - Enable JavaScript
  - Accept Cookies:
    - Always or Only from sites you navigate to

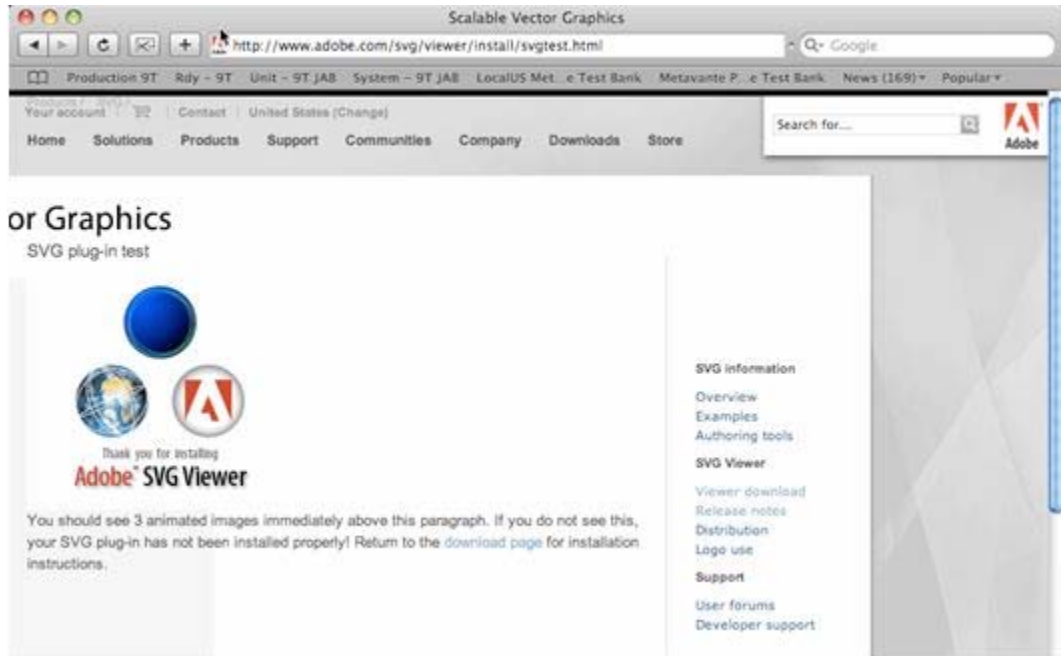


13. You must re-boot the computer.

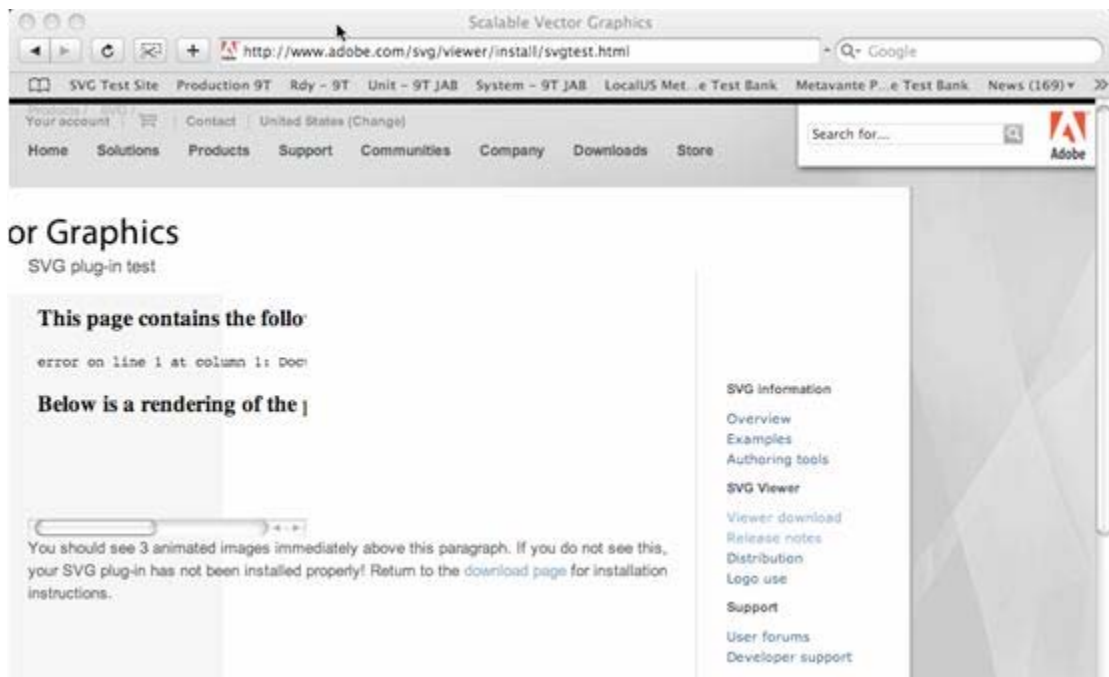
## Steps for Downloading and Installing the SVG Viewer

1. If you have not already re-booted the computer, do so now.
2. Validate that you do not have a working viewer by going to the Adobe test site:  
[www.adobe.com/svg/viewer/install/svgtest.html](http://www.adobe.com/svg/viewer/install/svgtest.html)

If the viewer is installed correctly, you will see the following:

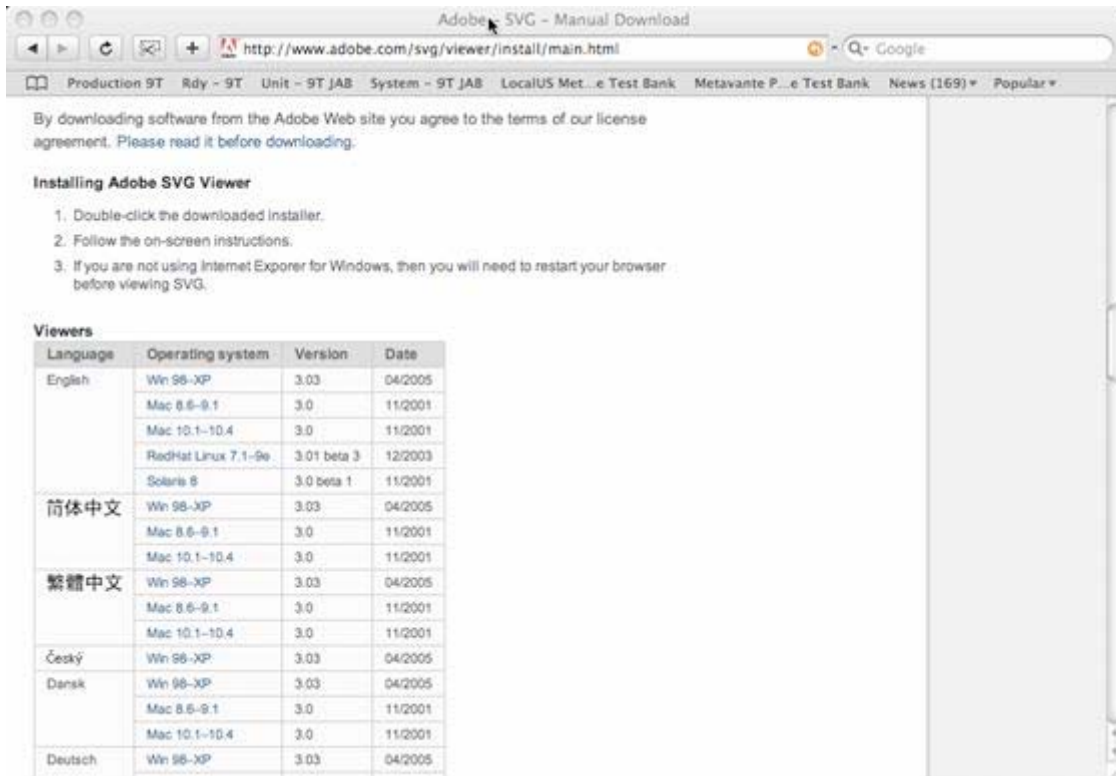


If the viewer is not installed, you will see the following:



3. Go to the link below to download the viewer. From the top of the page, scroll down to the section titled Viewers.

[www.adobe.com/svg/viewer/install/main.html](http://www.adobe.com/svg/viewer/install/main.html)



By downloading software from the Adobe Web site you agree to the terms of our license agreement. Please read it before downloading.

**Installing Adobe SVG Viewer**

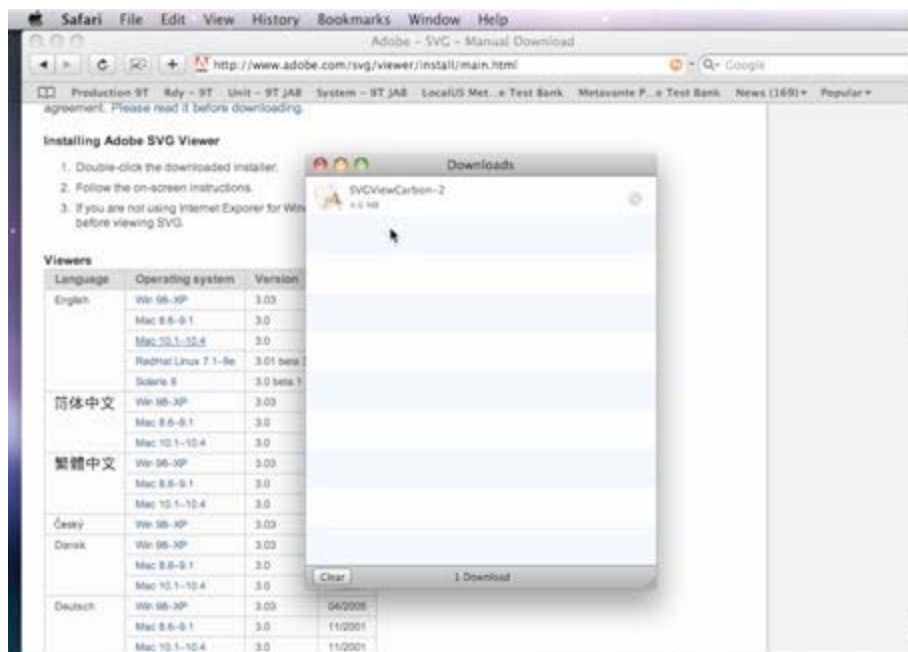
1. Double-click the downloaded installer.
2. Follow the on-screen instructions.
3. If you are not using Internet Explorer for Windows, then you will need to restart your browser before viewing SVG.

**Viewers**

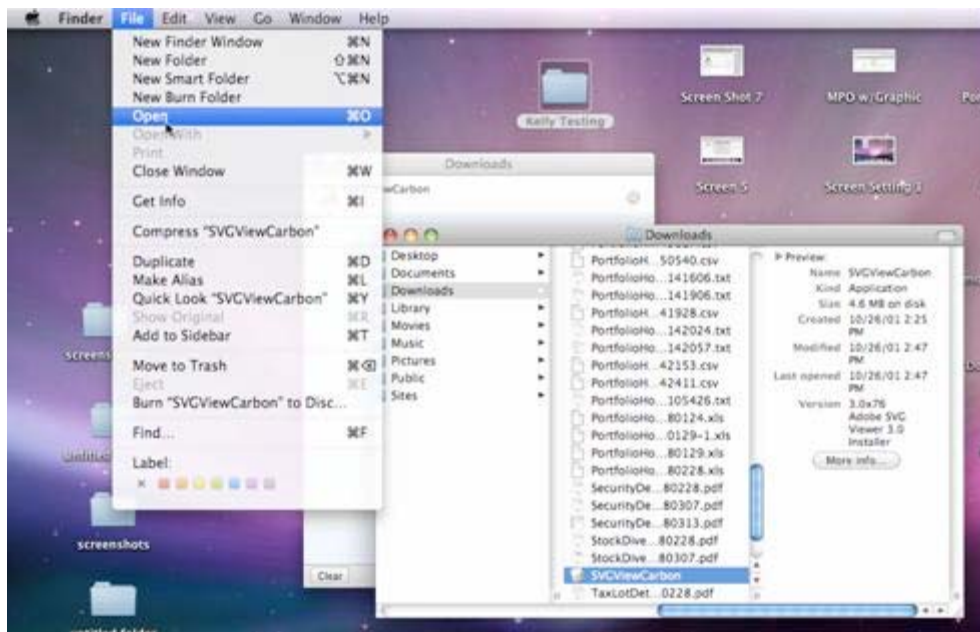
Language	Operating system	Version	Date
English	Win 98-XP	3.03	04/2005
	Mac 8.6-9.1	3.0	11/2001
	Mac 10.1-10.4	3.0	11/2001
	RedHat Linux 7.1-9e	3.01 beta 3	12/2003
	Solaris 8	3.0 beta 1	11/2001
简体中文	Win 98-XP	3.03	04/2005
	Mac 8.6-9.1	3.0	11/2001
	Mac 10.1-10.4	3.0	11/2001
繁體中文	Win 98-XP	3.03	04/2005
	Mac 8.6-9.1	3.0	11/2001
	Mac 10.1-10.4	3.0	11/2001
Český	Win 98-XP	3.03	04/2005
Dansk	Win 98-XP	3.03	04/2005
	Mac 8.6-9.1	3.0	11/2001
	Mac 10.1-10.4	3.0	11/2001
Deutsch	Win 98-XP	3.03	04/2005

4. Double click on the Mac 10.1 – 10.4 link.
5. A pop-up window **MAY** pop-up displaying SVGView Carbon.aap is an application. Are you sure you want to download the application? Click Download.

- A program SVGViewCarbon will be downloaded to your Mac in the Download folder: The -2 listed below or another number does not matter.



- Select the hourglass next to the SVGViewCarbon item.
- Select the File option from the menu at the top of the screen and select open from the drop-down menu:
  - A window may open stating that SVGViewCarbon is an application which was downloaded from the internet. Are you sure you want to open it. Select Open.
  - A window may open asking if you want to delete another SVG viewer from you system. Select Yes.



9. A small window briefly displays with a status bar indicating the SVGViewCarbon is copying to the computer.

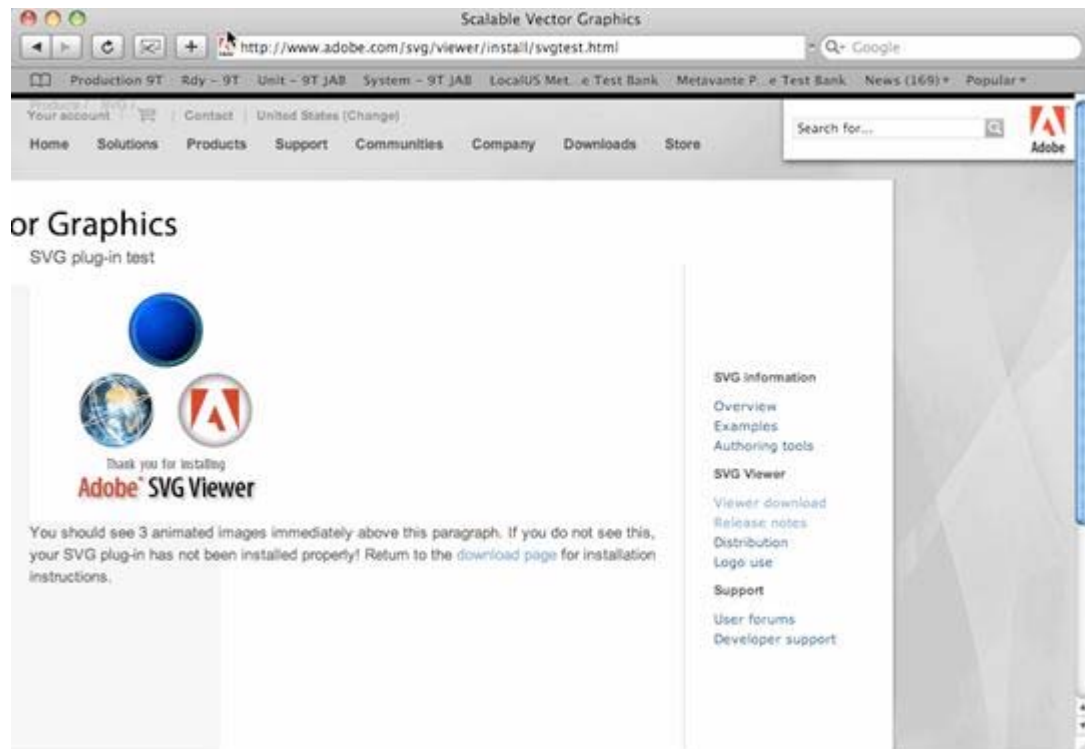
**10. You must re-boot the computer.**

11. Return to the test site and validate the viewer was installed correctly:

[www.adobe.com/svg/viewer/install/svgtest.html](http://www.adobe.com/svg/viewer/install/svgtest.html)

**Note:** You may be asked to accept a license agreement when you return to the Adobe test site. Please Accept.

If the viewer is installed correctly, you will see the following:



12. Once the viewer is loaded and tested successfully, the client can proceed to Portfolio Online and access their account.

Please note that on certain links, the Mac is more sensitive than windows-based machines. Specifically in Portfolio Online, the links under the drop-down menus are very sensitive on a Mac. Generally, if the client moves from the bottom of the link to the top until the pointer arrow changes to hand, the links will work.

## XSP Technical Guidelines

To ensure a satisfactory experience, there are two technical requirements to run XSP:

- The PC that houses the toolbar must run Microsoft .NET framework version 2.0 or higher.
- Your institution must have an SNS connection to Metavante.