DESKALERTS ADMINISTRATOR'S GUIDE

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NEW IN V7.0

- Personalized user experience
- One-click emergency communications
- Re-thinked unobrtusive mod
- Mobile devices support
- Easier interface for beginners
- Notifications outside the box
- Custom implemetations service
- improved interaction of API and statistics
- added feature to choose editor's start page

DESKALERTS ROLES

There are three user types in DeskAlerts:

- **Administrator:** install, configure, and maintain the main application on the server, create and support user and publisher accounts, and manage your customized extensions of DeskAlerts.
- **Publishers:** manage user groups that will receive messages; design the message templates; create, send and track alerts and surveys. Publisher's Guide describes the work with DeskAlerts Control Panel.
- **Users:** receive alerts and surveys on their computers through a lightweight DeskAlerts Client, and can adjust certain settings through a convenient interface. User's Guide describes the work with DeskAlerts Client.

1. PRE-REQUIREMENTS FOR INSTALLING DESKALERTS

To deploy the DeskAlerts application, please ensure that you meet the following minimum hardware and software requirements:

For the DeskAlerts servers:

- Windows 2003/2008/2012 Server or Windows XP Professional
- Microsoft IIS 5.1 or higher (ASP must be enabled) - for Web Server
- Microsoft SQL Server 2005 or higher - for Database Server
- Using the Mobile Alerts with push notifications requires .NET Framework 4 or higher

Exact hardware requirements for DeskAlerts servers depend on the total number of DeskAlerts users and can be found here

For the DeskAlerts client:

- Windows XP/ Vista/ 7 / 8 (non Metro Mode) or Mac with OSX 10.6.4 or higher
- 256MB RAM at least

You can see detailed system requirements on the special page or look in our FAQ.

Note: don't forget to set **"case insensitive"** parameter as default sorting value when installing MS SQL Server - for optimal performance of Search function on Users, Groups, etc.

Read MS SQL installation and configuration Manual available in .pdf format.

2. SERVER CONFIGURATION

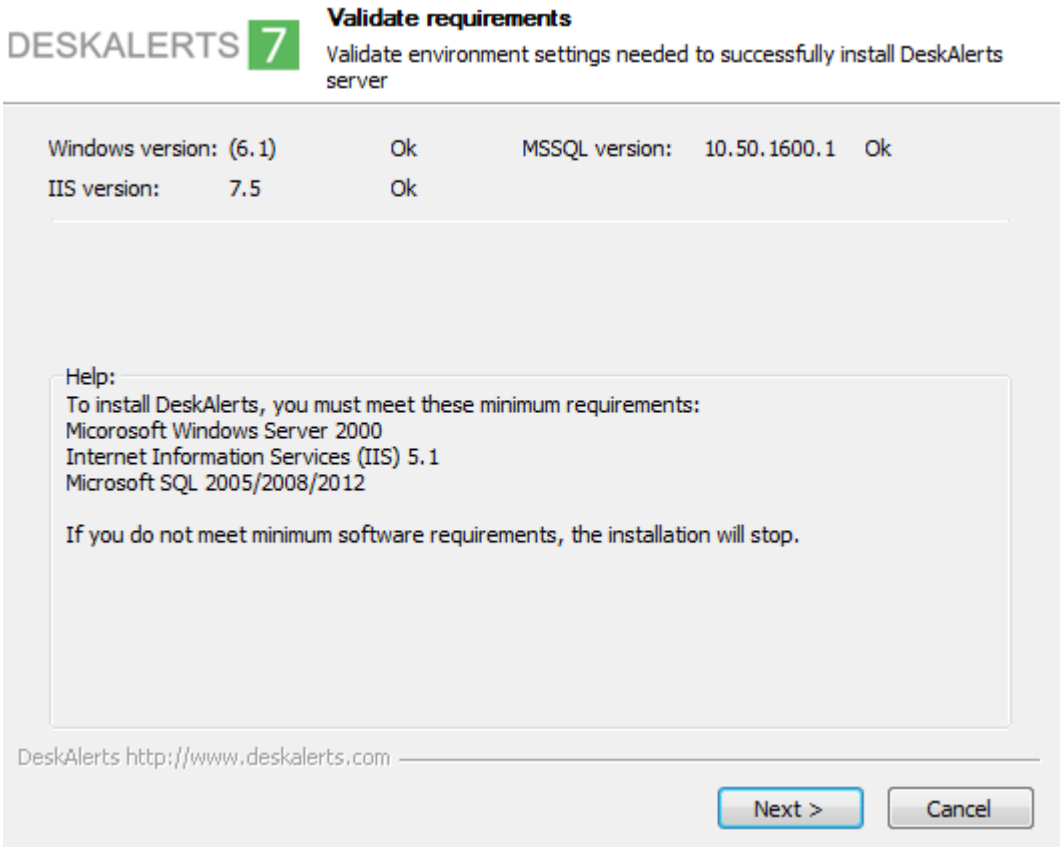
Basic installation and configuration usually takes a few hours. In some cases, this time may be increased because of specific server or environment configurations (such as the use of proxies, firewalls, Active Directory police, or too many users in the Active Directory).

2.1. IIS settings

To insert large files into alerts (such as Flash animations, pictures, or video), you should appropriately set the size limit for the attached files. See the Troubleshooting section for more information.

3. DESKALERTS SERVER INSTALLATION

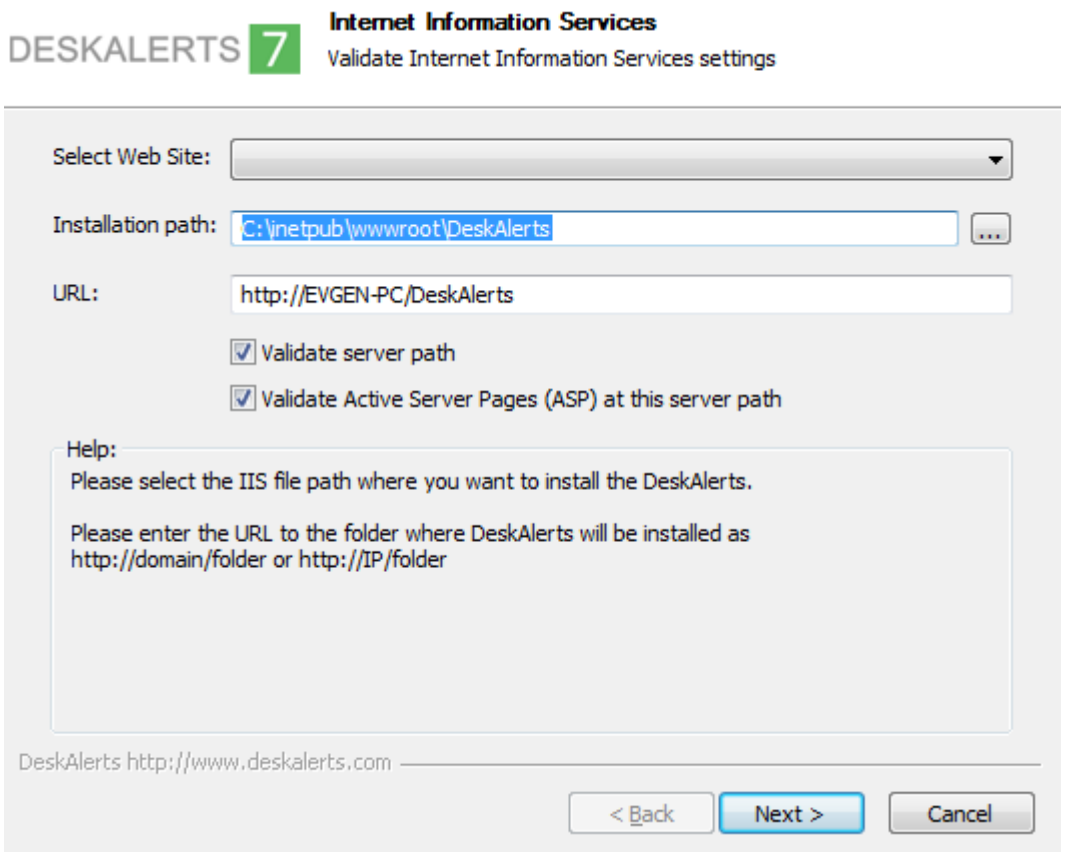
- Unzip the installation package into a folder on the server where you intend to host DeskAlerts.
- Double-click the file called **ServerInstallation.exe**. The setup window will appear.
- The installer will verify that your system meets the minimum requirements for running DeskAlerts and will display a confirmation window:



If your system meets the minimum requirements, **OK** will appear beside each requirement, and the **Next** button at the bottom of the window will be active. If the system does not meet the minimum requirements, you will not be able to continue with the installation.

Note: You can link to a remote copy of MS SQL to run DeskAlerts. If the screen shows that DeskAlerts cannot find MS SQL locally and you intend to use a remote copy, you can simply continue the installation.

- When you have made the appropriate selections and have clicked the **Next** button, the installer will unpack the installation files into a temporary folder. On the next screen, the installer will suggest a location for installing DeskAlerts and will ask you to provide the URL for that folder.**Write this URL down and keep it in a safe place** so that you can easily find the login screen for the DeskAlerts Control Panel when the installation process is complete.



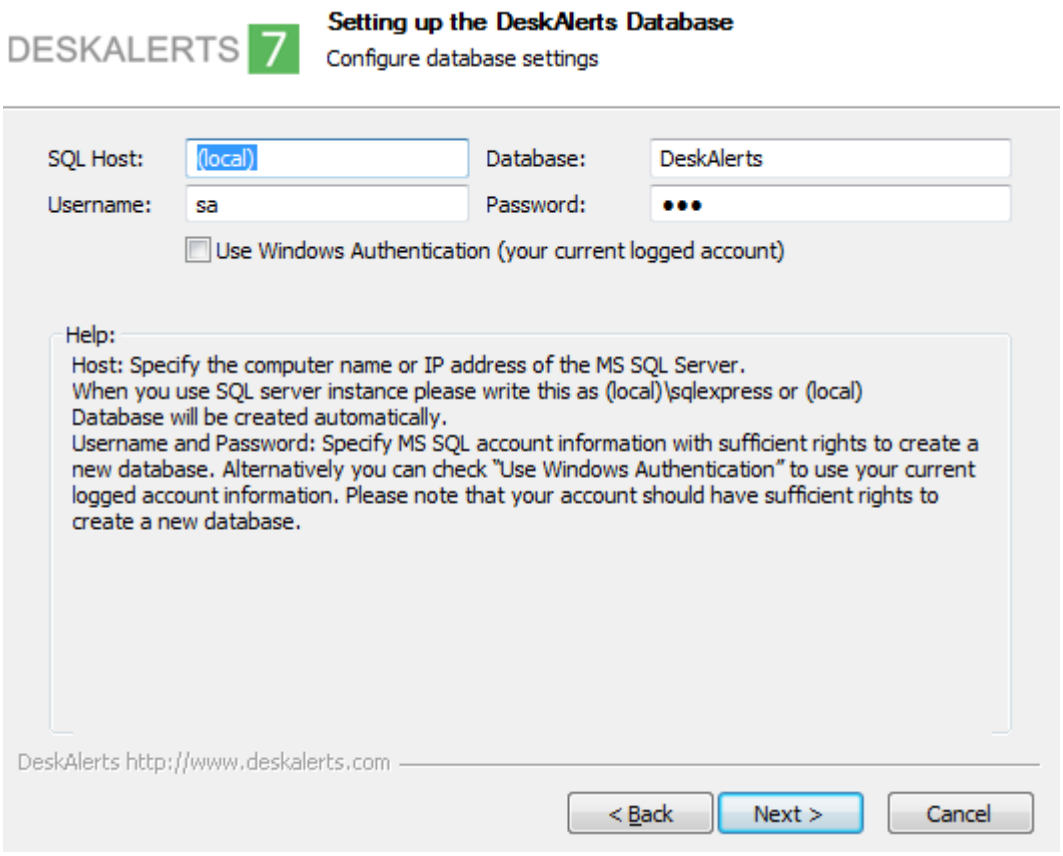
The suggestion is to accept the default installation location. Click **Next** when you are ready to proceed.

Configure IIS after DeskAlerts folder was created on your server.

Once IIS has been configured you have to set up the proper credentials for IIS anonymous user (AU).

Please, go to IIS Manager and properly set up the correct authentication (user name and password) for AU.

- After clicking **Next** you will see the following screen to set up your Database:



In the **Host** field, enter the IP address of the computer running an MS SQL Server. Accept the default user name "SA" (meaning "System Administrator") in the **Username** field. Provide a password for the SA user.

Note: Make sure the SA user has permission and **db_owner** rights on the MS SQL Server to create new databases.

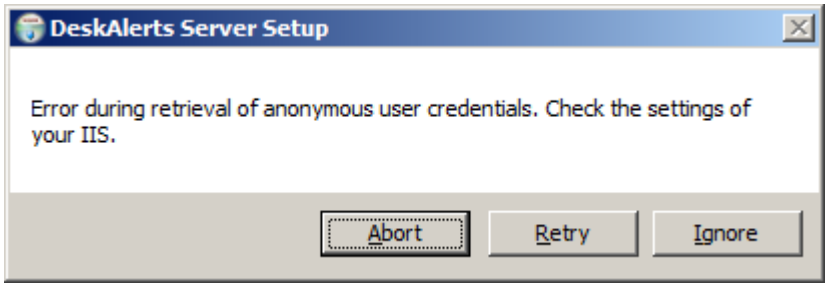
When "Use Windows Authentication" check-box is unchecked, these two IIS fields will be grayed out and installation scenario will be the same. If this check-box is checked a new installation scenario is going to have a place.

Make sure that this user is registered as logon user at your MSSQL server and has rigts to create DB. If such logon user doesn't exist or hasn't enough permissions to create DB, the installation process will stop at this step.

Note 1: If you have changed the SA password for your SQL server later, DeskAlerts may stop working. To change the SA password for DeskAlerts, you would need to change the authentication info for DeskAlerts, which can be achieved by re-running the installation.

Note 2 After installation **db_datareader** and **db_datawriter** rights for the database will be enough to use DeskAlerts.

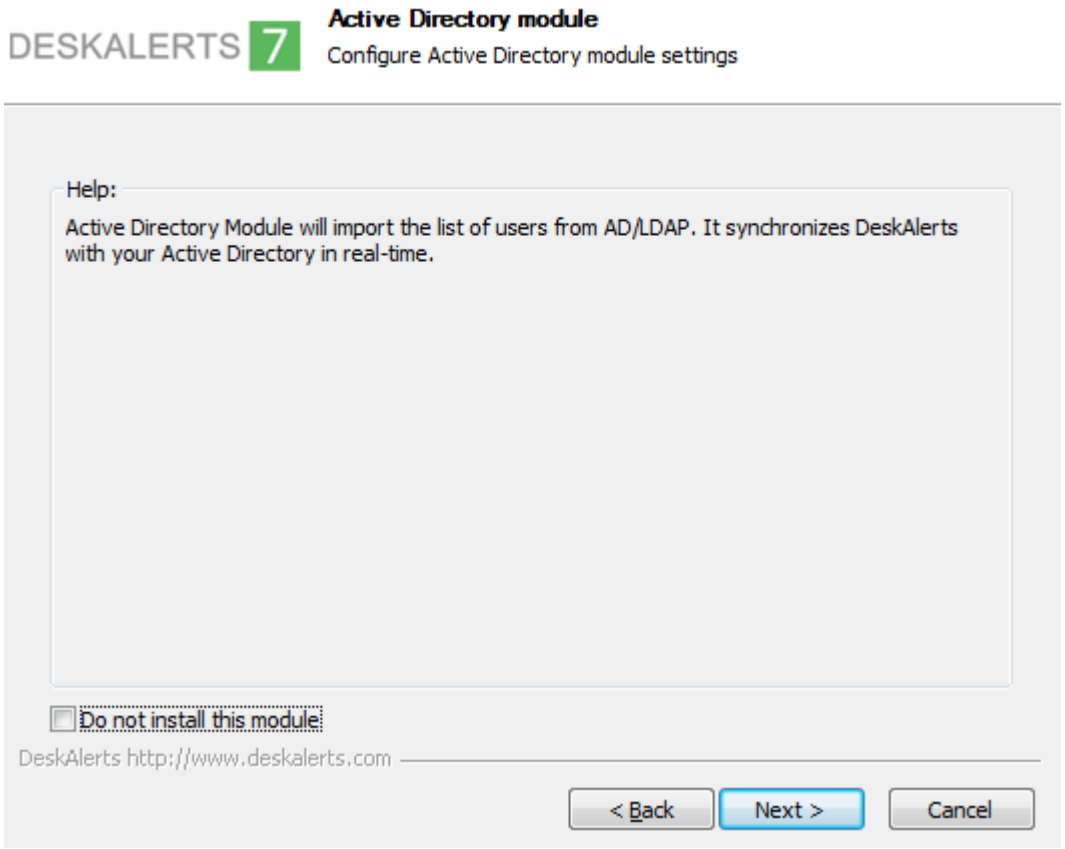
Note 3: If you have received an error as shown on the picture below:



Just click "Ignore" to move forward.

Click **Next** when you are ready to proceed.

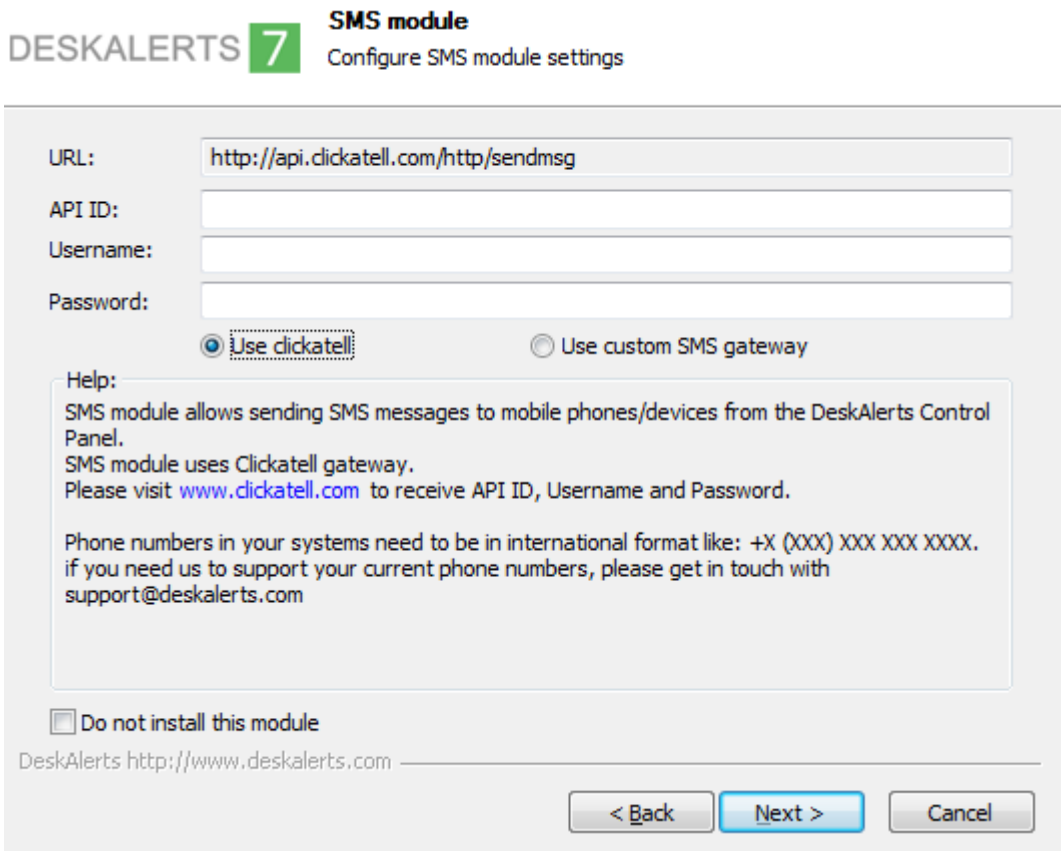
- The next screen gives you the option of installing the **Active Directory (AD) add-on**. If you choose this option, DeskAlerts will operate in **AD Mode** and will automatically retrieve your username from your AD-enabled domain whenever you log in.
- If you do not use this option, DeskAlerts will function in **Registration Mode (RM)** which is similar to **AD mode**, but is more suitable for sending notifications to Web-based users and customers outside the corporate network.



You can also check the **Do not install this add-on** checkbox if you do not want to install the AD feature. When you are ready, click **Next** to proceed.

- You then have the option of installing the **SMS** (Short Message Service) add-on, which lets you send DeskAlerts as text messages to users' cell phones.

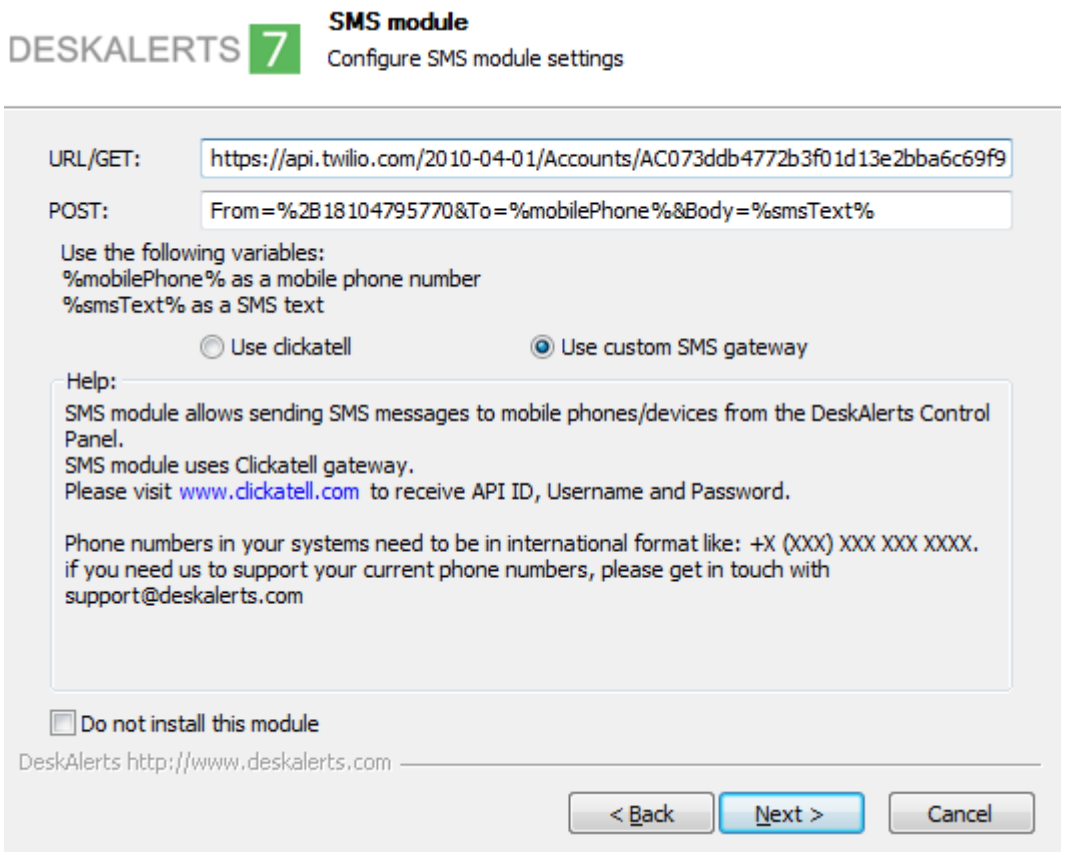
Default service provider is Clickatell (http://www.clickatel.com) but you can use your own custom gateway if available.



If you use Clickatell SMS gateway the URL field cannot be edited. You will need to obtain your**API ID**, **username**, and **password** from Clickatell. Enter this information in the appropriate fields.

If you want to use any other SMS gateway, you should check **Use custom SMS gateway checkbox** and specify **URL** for your provider.

You can also check the **Do not install this add-on** checkbox if you do not intend to use SMS messaging. When you are ready, click **Next** to proceed.

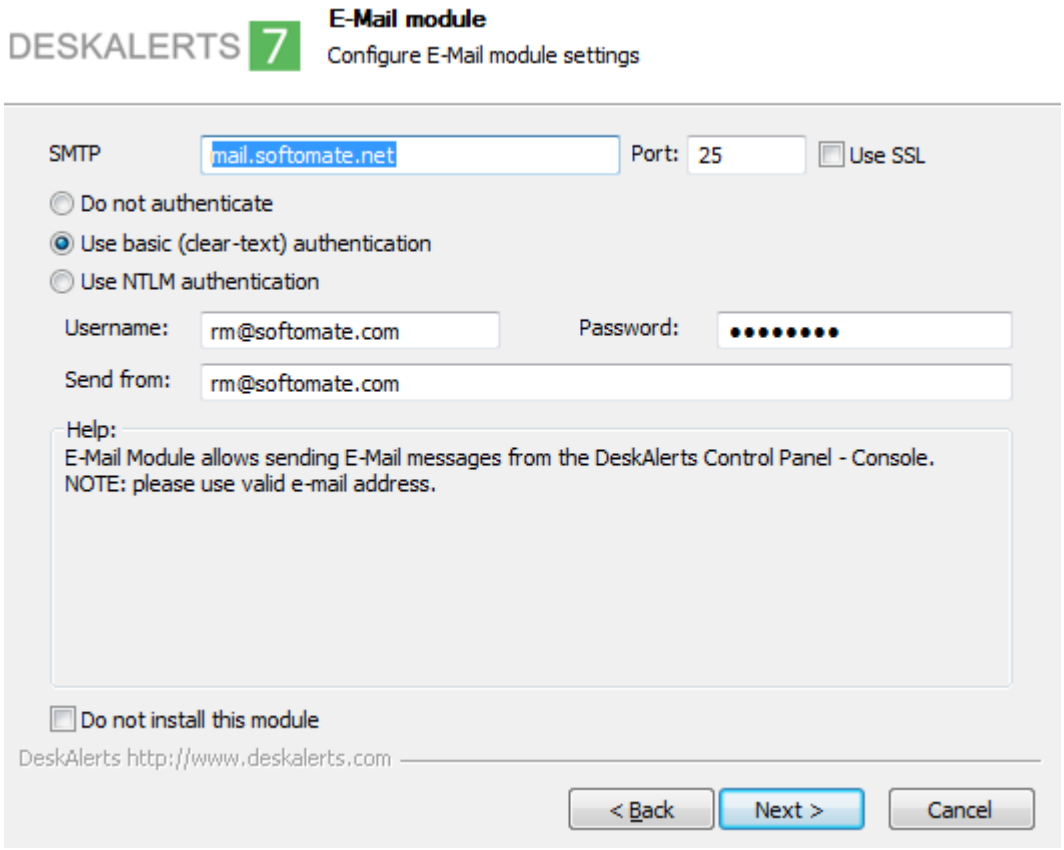


If your SMS gateway uses GET requests you should provide all parameters in "URL/GET" field.

Please note that you should enter %mobilePhone% as a value of your mobile phone parameter and %smsText% as a value of your SMS text parameter.

If your SMS gateway uses POST requests you should provide all parameters in "POST" field. Otherwise leave this field empty.

- **Email add-on.**



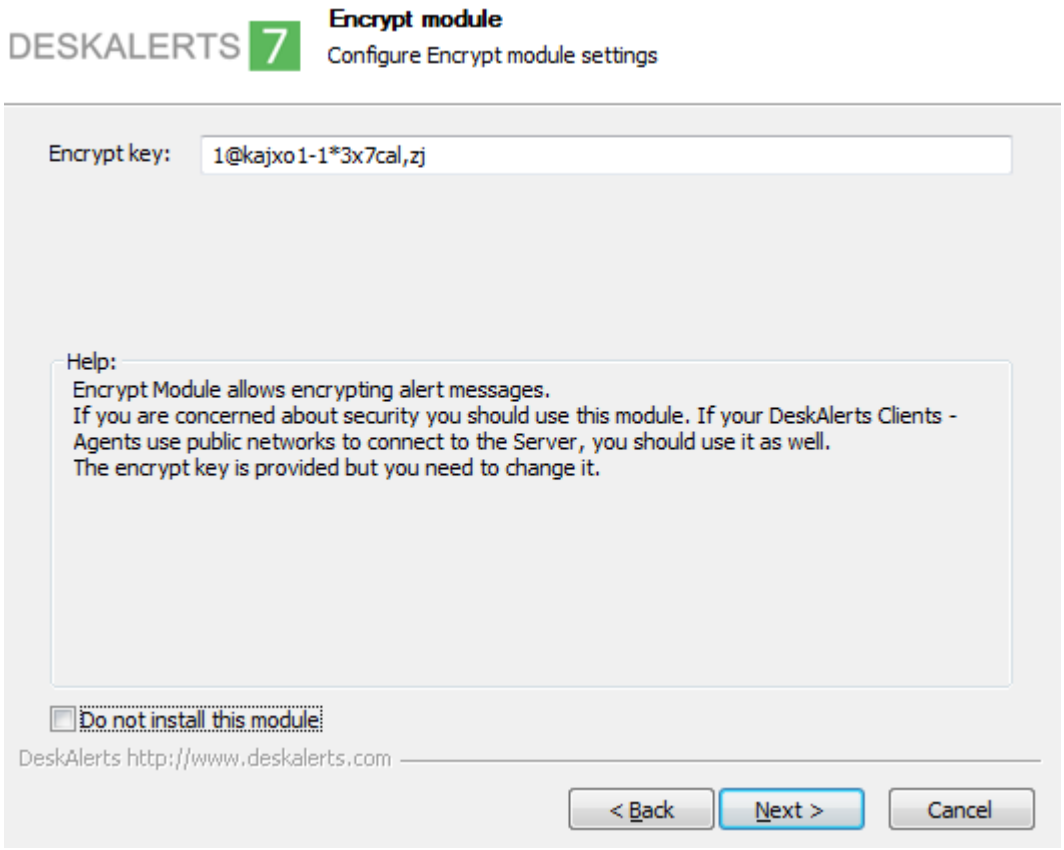
You should specify SMTP server that will be used for Email sending and it's port. If your server uses SSL you should check "Use SSL" checkbox.

Also you can select authentication type:

- no authentication
- clear-text
- NTLM

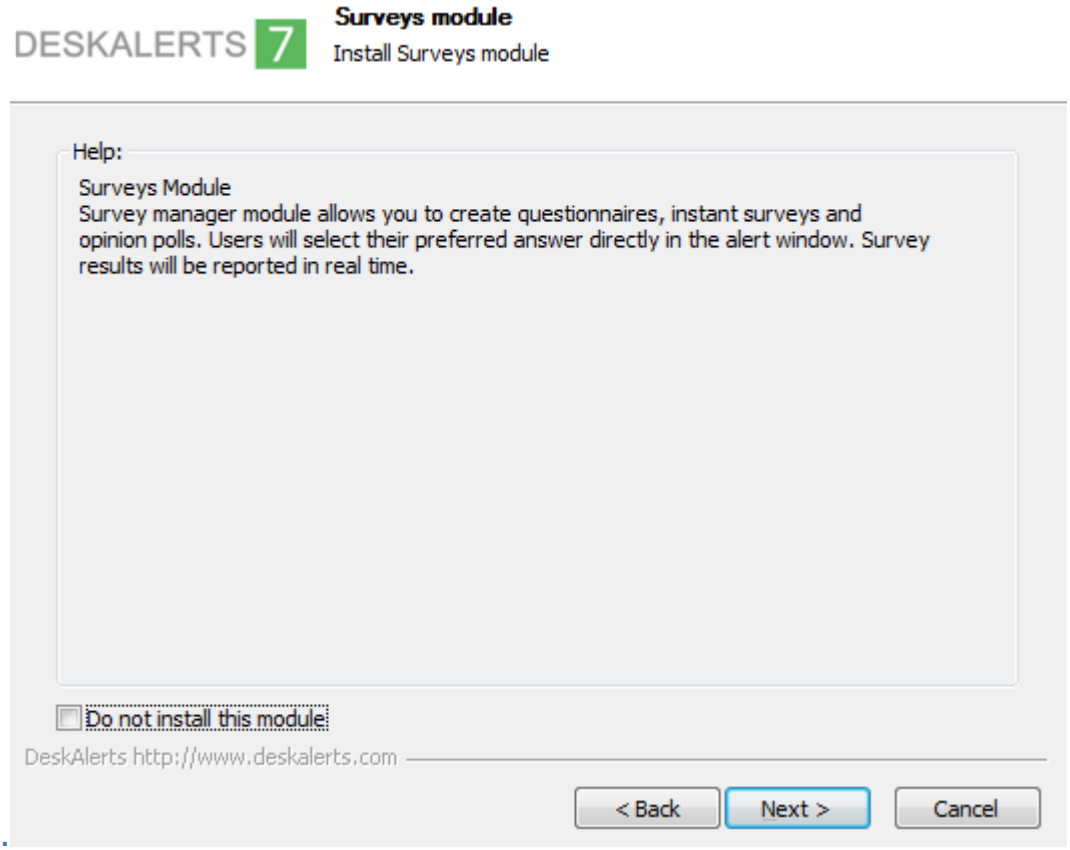
For the last two types you should enter username and password that will be used during authentication process by Email add-on.

- DeskAlerts offers an **Encryption add-on** to provide message security. It is not available in Trial version.



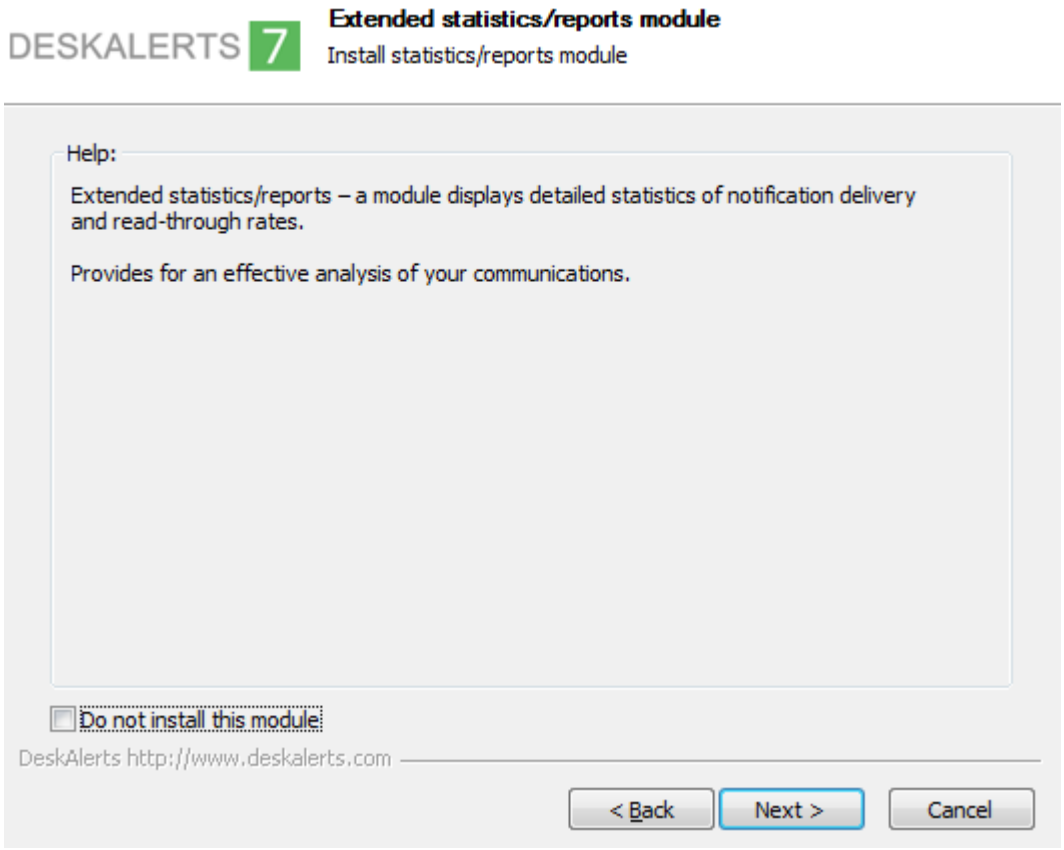
You can also check the "Do not install this add-on" checkbox if you do not intend to use encryption for DeskAlerts messages. When you are ready, click **Next** to proceed.

- A key feature of DeskAlerts is the ability to send **surveys** to users and to compile their responses. Surveys appear in the same popup window that alerts use, but they allow readers to respond. The survey feature will be installed automatically unless the "Do not install this add-on" checkbox is checked.

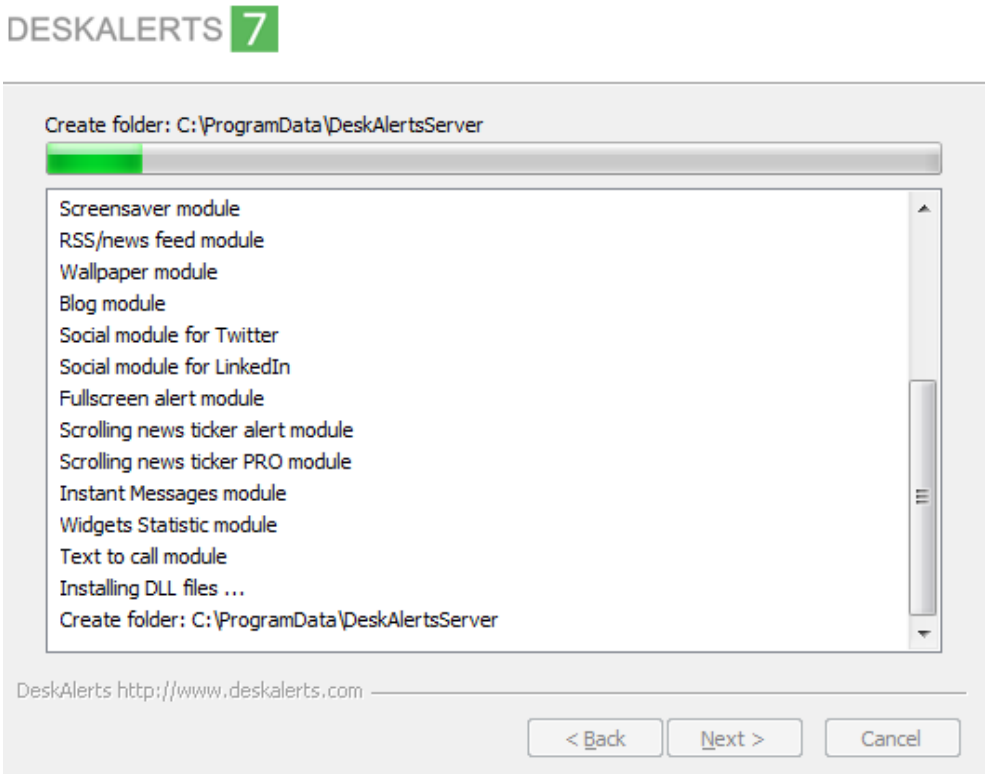


Click **Next.**

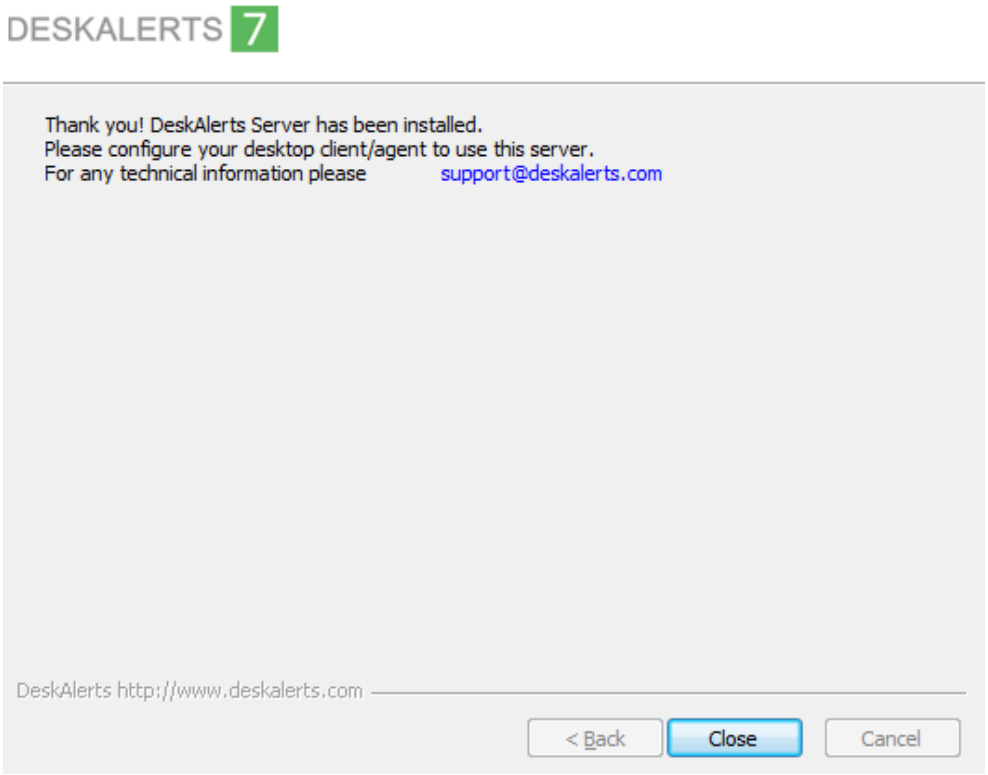
- DeskAlerts offers extended statistics to track alerts, users and surveys results.



- You will get a separate installer page for every DeskAlerts module you've ordered. These pages contain the short description of a module's functionality and allow you to disable the module if you're not planning to use it yet.
- If you are satisfied with your configuration choices, click **Install** to start the installation process.



- When the installation is complete click **Next**, and you will see a confirmation screen. Click **Close**to complete the process:



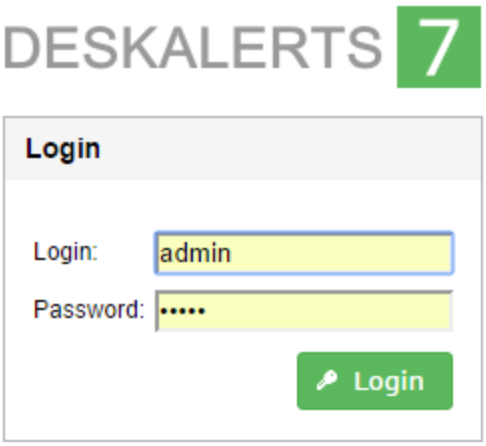
You can now log in to DeskAlerts.

3.1 Running the DeskAlerts Server

To run the DeskAlerts Server:

1. Open your browser, then enter the URL path you entered during setup of the Server. This will open the DeskAlerts Server's Control Panel's login page.

   The exact path in the example provided, as shown in next image, is http://localhost/deskalerts/admin/index.asp. Note that this may vary, depending on the parameters you entered during installation.

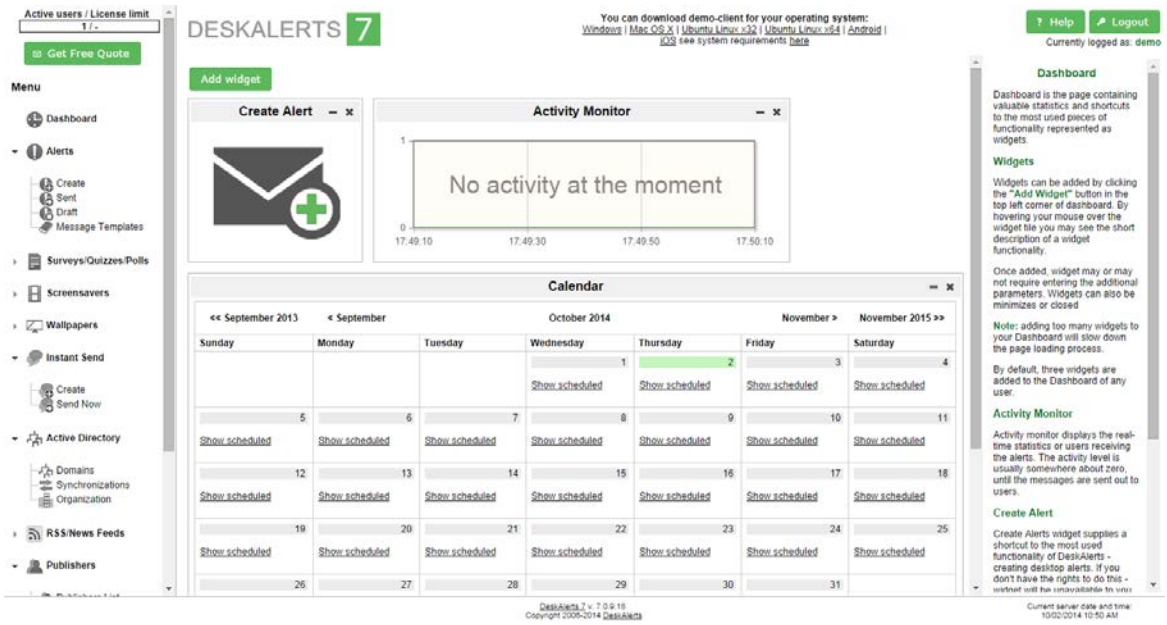


2. Enter your logon credentials. The default username is admin and the default password is admin. You can change the password later under the Control Panel's Settings menu.

   Attention! DeskAlerts Control Panel requires JavaScript to function properly. Please turn on JavaScript in your browser. Contact your technical assistance if required.

   Make sure that you're not using the Internet Explorer with Compatibility mode turned on, as this may lead to some browser scripts malfunctioning, resulting in part of DeskAlerts console functionality becoming unavailable.

3. Click **Login** or press **Enter** to open the page as shown on the next image. You will then be taken to the Control Panel itself. Here, you will see a navigation menu on the left. Clicking a menu item will display that menu's corresponding page on the left.



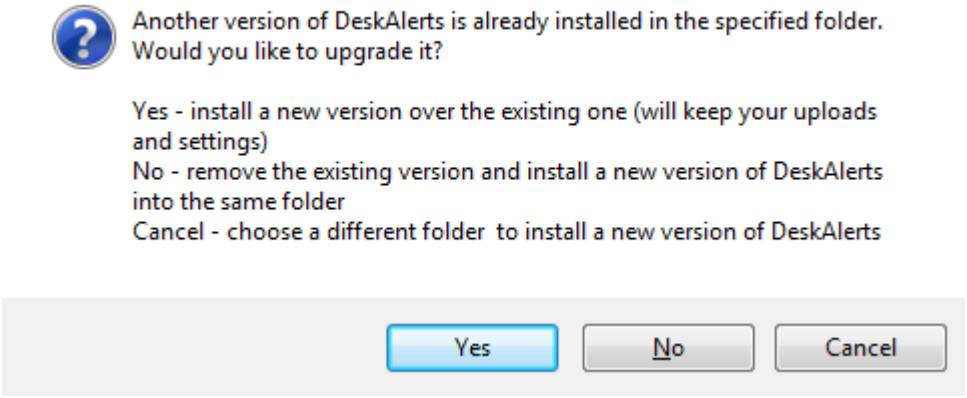
The DeskAlerts Server's Control Panel is where you create and send alerts and surveys, add, edit, delete users, groups, computers and IP addresses, create templates, view statistics, change your password and settings.

Note: If after installation of DeskAlerts Server it's impossible to manage it, because any URL gives **Page Not Found**, check the following settings in IIS. By default ASP (NOT ASP.NET) is disabled in IIS. DeskAlerts Server uses ASP. Follow the instructions below:

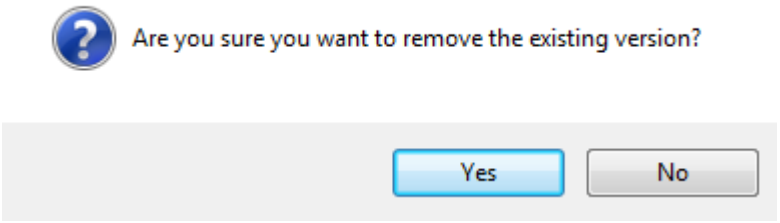
1. Go to Microsoft Information Services Manager
2. Choose Web Service Extensions
3. Set Allow for Active Server Pages

DeskAlerts Server Update

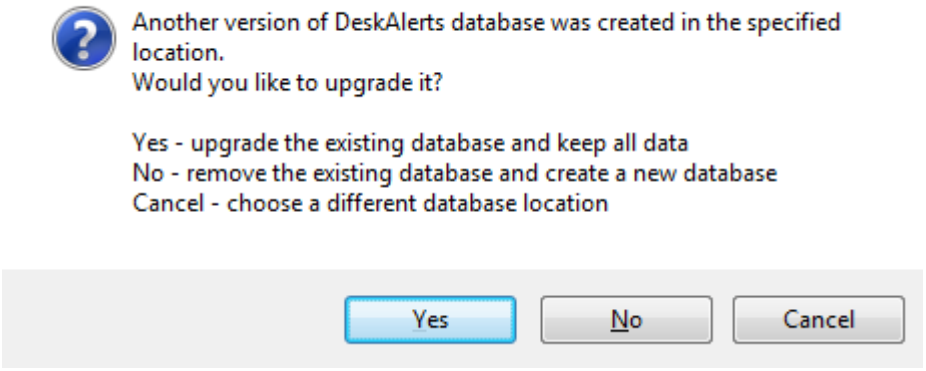
If there's such an installation path you will have 3 possibilities:



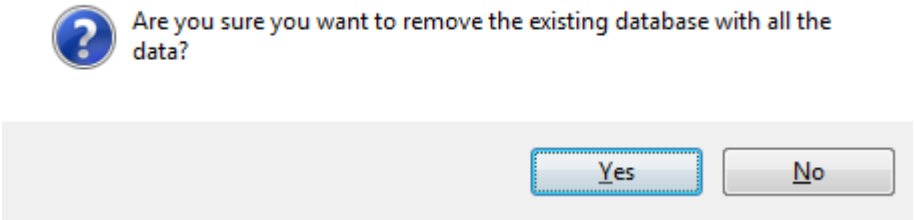
Note: if you choose No current DeskAlerts version will be removed. Confirm your choice then:



If the entered MS SQL database is already in use you will have 3 possibilities:



Note:if you choose No current DeskAlerts database will be removed. Confirm your choice then:

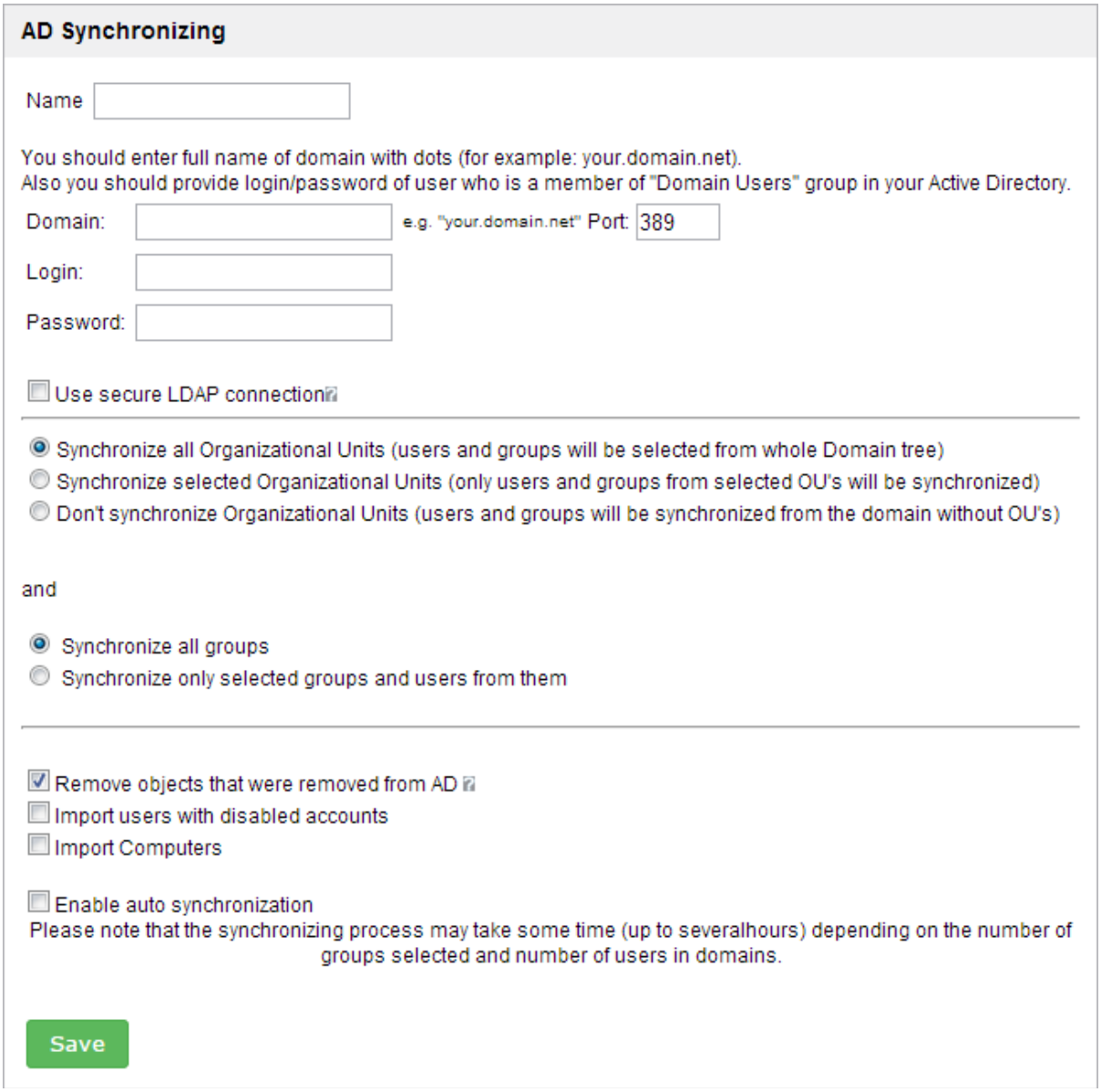


Note: When updating DeskAlerts your should have **db_owner** rights for the tables and stored procedures. After that you can use Control Panel in usual mode (having **db_datareader** and **db_datawriter** rights).

4. ACTIVE DIRECTORY SYNCHRONIZATION

After installation and running Control Panel, please click **Domains** link in the left-side menu. Then move to **Synchronizations** list and click **Add new synchronization** button to open **Active Directory Synchronization** form.

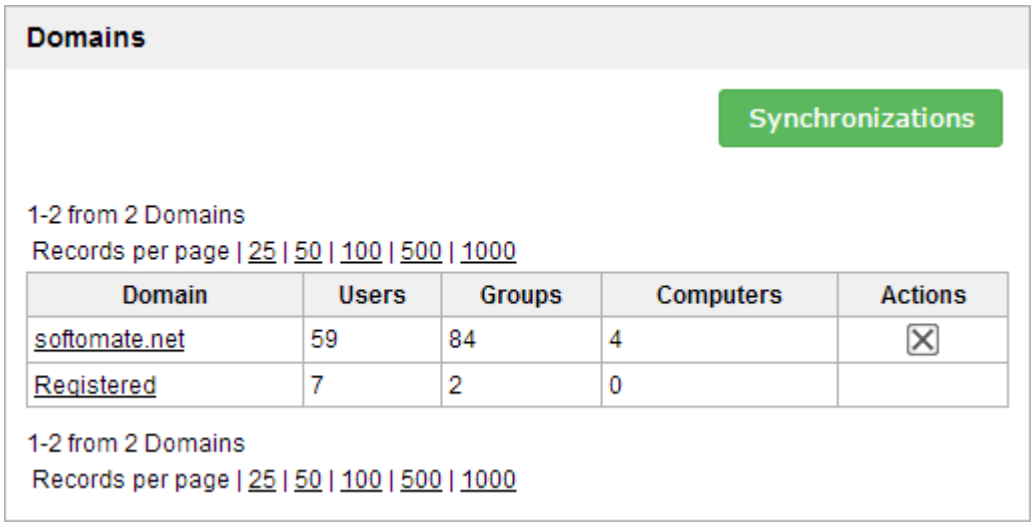
Enter domain name (with dots, e.g. your.domain.net), username of user that is in Domain Users group and his password. After that you can click **Start synchronizing** button:



- **Use secure LDAP connection** allows you to use secure LDAP connection during AD synchronization.
- **Synchronize Organizational Units** allows to select/synchronize OUs from a tree.
- **Import Computers** allows you to import computers as well. There will be separate groups for users and computers created. You can now send alerts both to users and computers.
- With **Enable auto synchronization** option you can set schedule for synchronization task, which will run automatically.

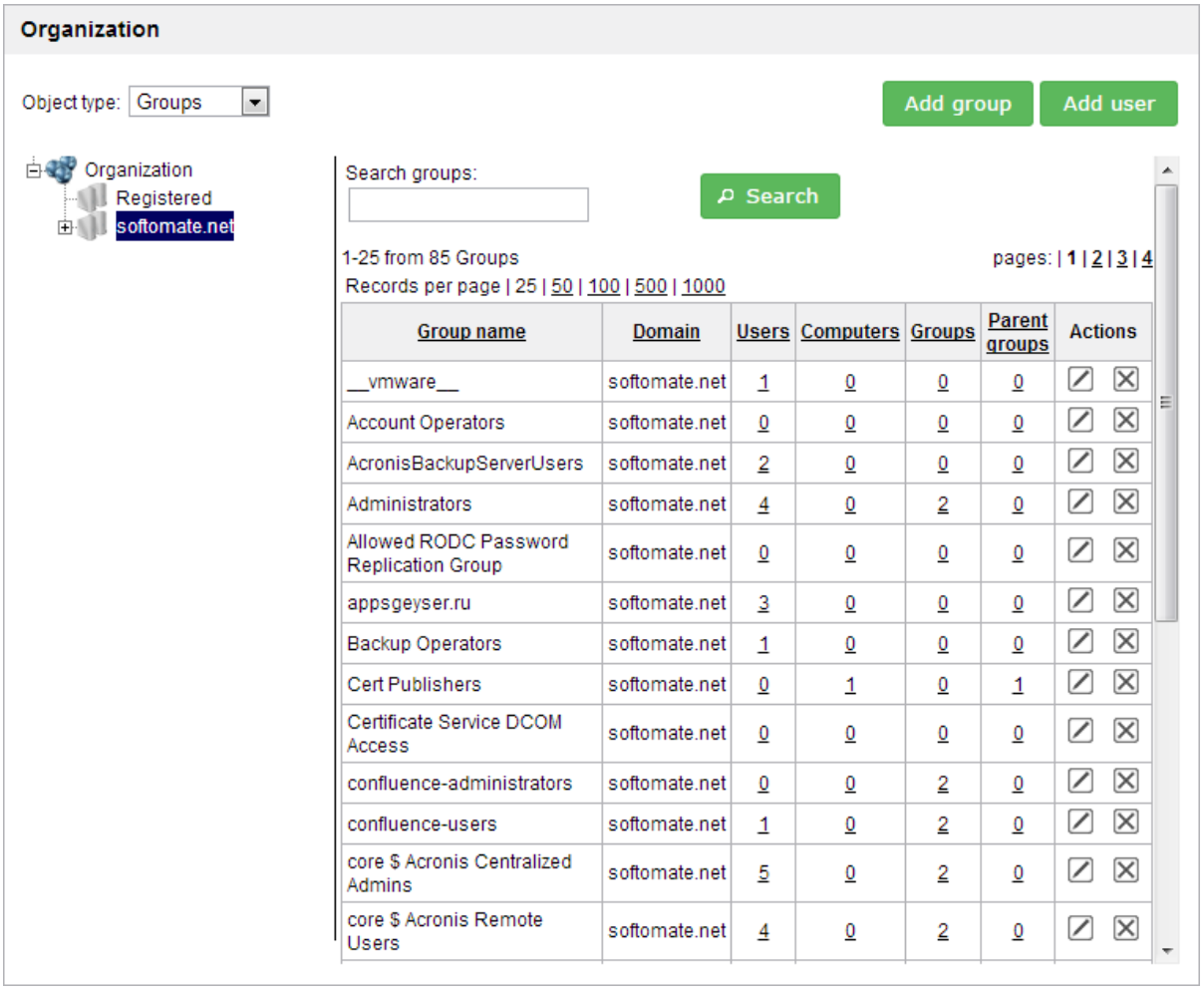
Click **Save** to return to synchronizations list, then you can use **start synchronizations** button from Actions table cell to begin.

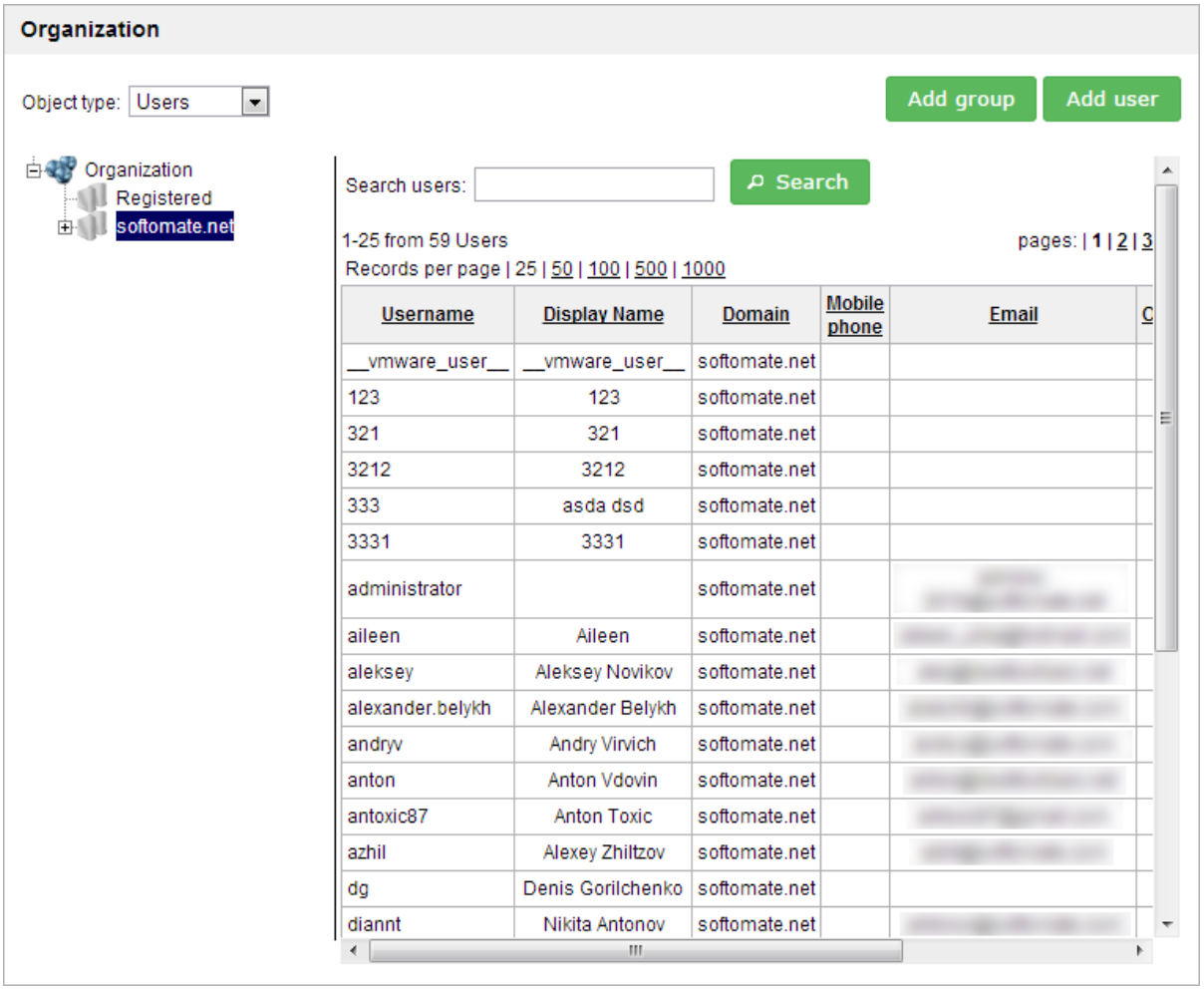
After synchronization is finished, you will be redirected back to **Domains** page and should see your LDAP server under **Domain name**:



You can see a tree-structure of synchronized OUs for your Active Directory by clicking Organization tab.

Select object type from drop-down menu to view users, groups or computers in the selected OU


Organization
Object type: Groups
Add group
Add user
Organization
Registered
softomate.net
Search groups:
Search
1-25 from 85 Groups
pages: | 1 | 2 | 3 | 4
Records per page | 25 | 50 | 100 | 500 | 1000
Group name
Domain
Users
Computers
Groups
Parent groups
Actions
__vmware__ softomate.net 1 0 0 0
Account Operators softomate.net 0 0 0 0
AcronisBackupServerUsers softomate.net 2 0 0 0
Administrators softomate.net 4 0 2 0
Allowed RODC Password Replication Group softomate.net 0 0 0 0
appsgeyser.ru softomate.net 3 0 0 0
Backup Operators softomate.net 1 0 0 0
Cert Publishers softomate.net 0 1 0 1
Certificate Service DCOM Access softomate.net 0 0 0 0
confluence-administrators softomate.net 0 0 2 0
confluence-users softomate.net 1 0 2 0
core $ Acronis Centralized Admins softomate.net 5 0 2 0
core $ Acronis Remote Users softomate.net 4 0 2 0

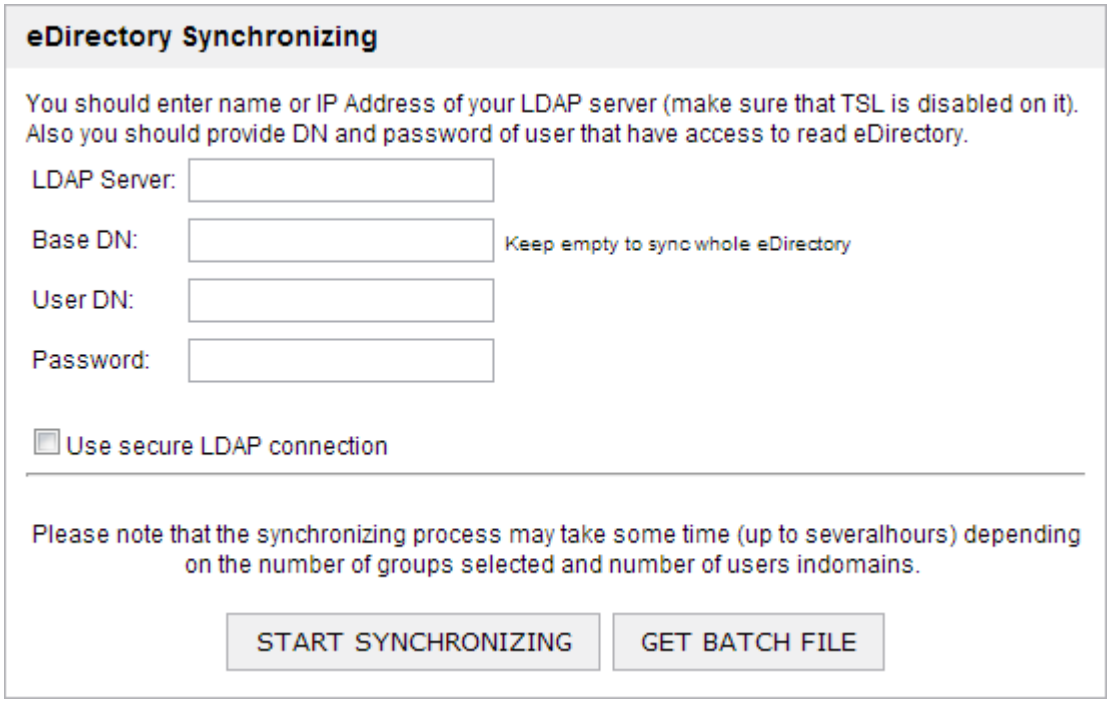


5. NOVELL EDIRECTORY SYNCHRONIZATION

After installation and running Control Panel, please disable TLS for eDirectory synchronization as follows:

1. In Novell iManager, click the **Roles and Tasks** button
2. Click LDAP > LDAP Overview > View LDAP Groups.
3. Click the LDAP Group object, and then click **Information** on General tab.
4. Uncheck *Require TLS for Simple Binds with Password*.
5. Click **Apply**, and then click **OK**.

Open DeskAlerts Control Panel in browser and then click **Groups** link in the left-side menu. To add a new domain just click **Add domain** button. And you will see the following form:

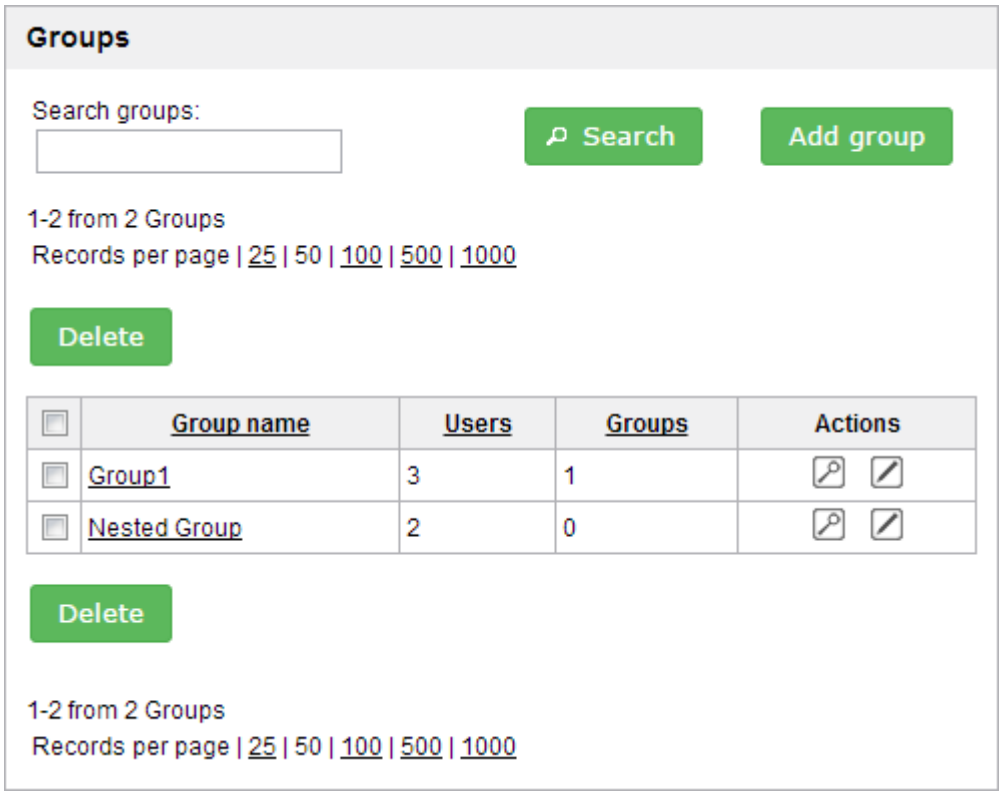


Click **Organization** tab in main menu. It will open a tree-structure.

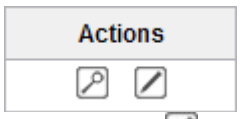
6. MANAGING GROUPS: REGISTRATION MODE

You can create groups of users in DeskAlerts to simplify the task of sending out the right alerts to the right people. You can have as many groups as you like, and users can belong to more than one group. You could, for instance have a "Development" group and a "QA" group, and your QA testers could belong to both groups.

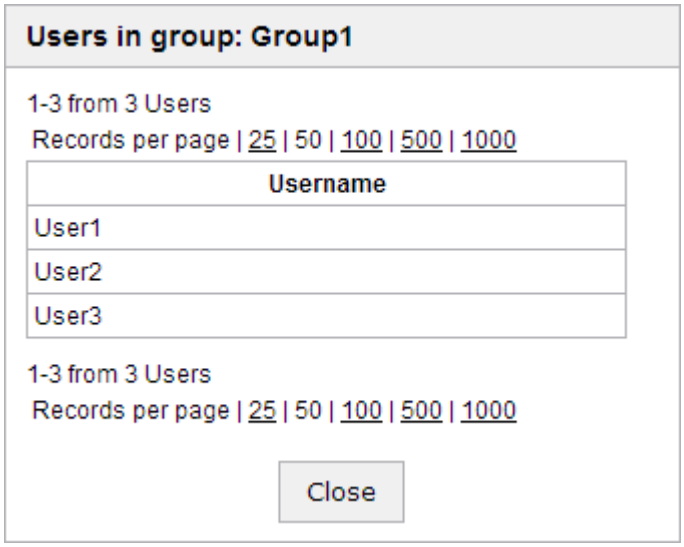
Select the **Groups** link from the left-side menu. The list of all existing groups will display. You can see how many users and sub-groups are in each group.



To the right of each list there are action icons:



- Click button to edit a group
- Click button or Group name to view users in specific Group, as shown on the next image



You can also delete group by checking the checkbox and then click **delete** button.

To create a new group, click the **Add Group button** at the top right.

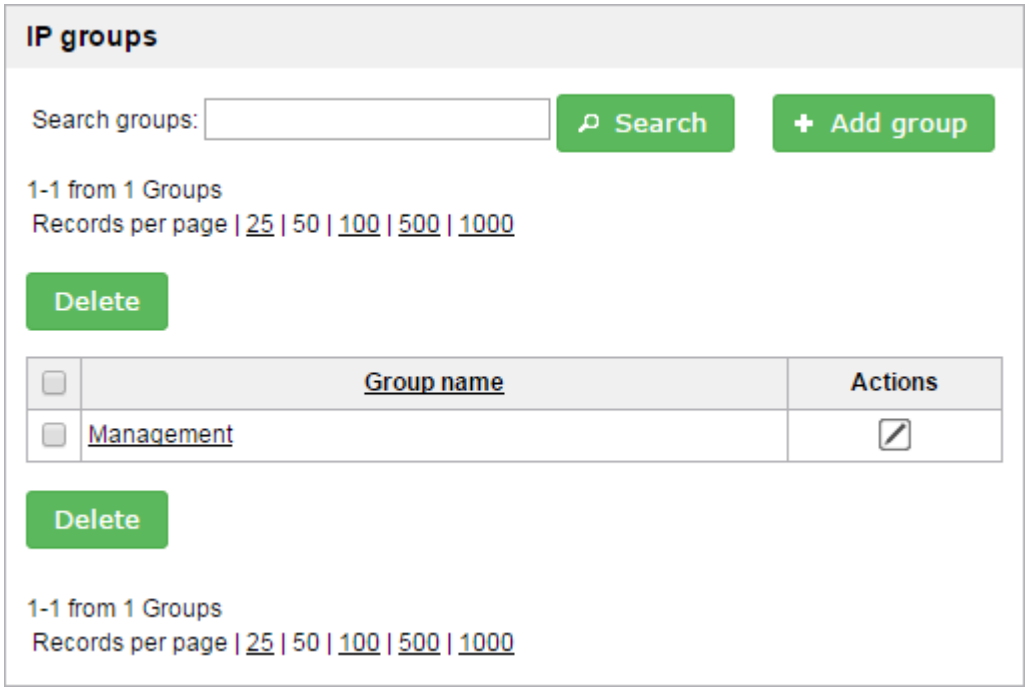
- DeskAlerts will ask you to name the group. When you have given it a useful name, click the **Add**button.
- On the next screen you will see a display of all available users. Check the checkboxes beside the names of those you wish to include in this group, and then click the **Save** button.
- The new group will appear on the groups list.

6.1 Managing IP Groups

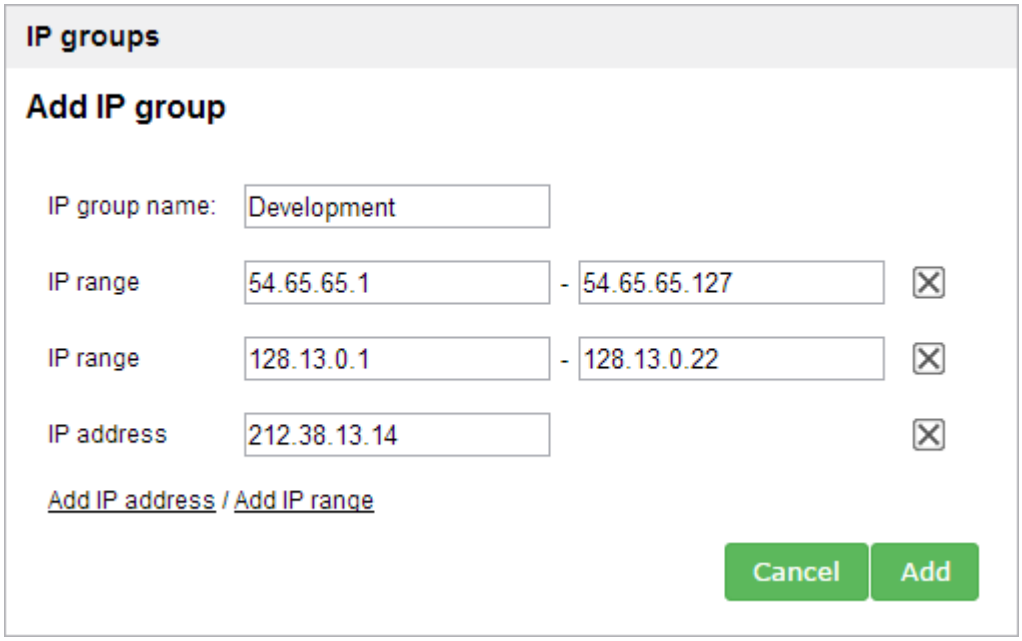
It is now possible to create **IP address groups** to send alerts to (both in Active Directory and Registration modes). You may combine both separate IP or create a range.

When sending alerts you will see **'IP groups'** option, where you can select IP groups created. This way, the computer with an IP address falling into this range will get an alert (in case DeskAlerts Client has been installed on it before).

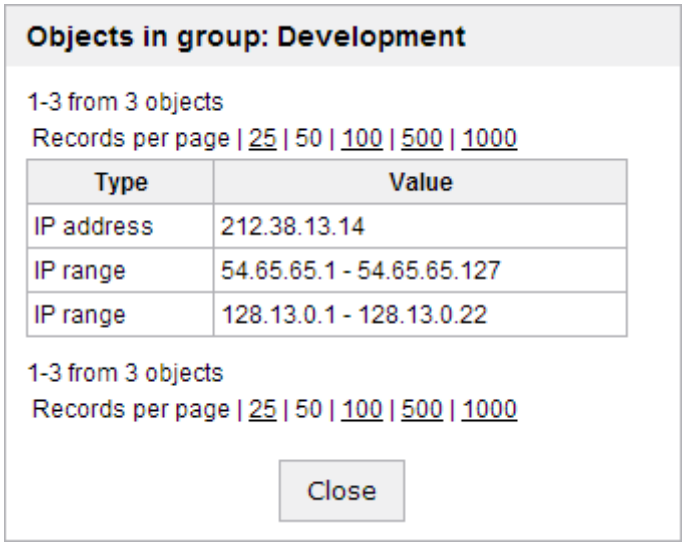
When clicking on 'IP Groups' on the left-side menu of Control Panel you will see the following screen :



By clicking "Add Group" button you may create IP groups and ranges :



To see all IP objects that were included into some IP Group you can click on IP Group name:

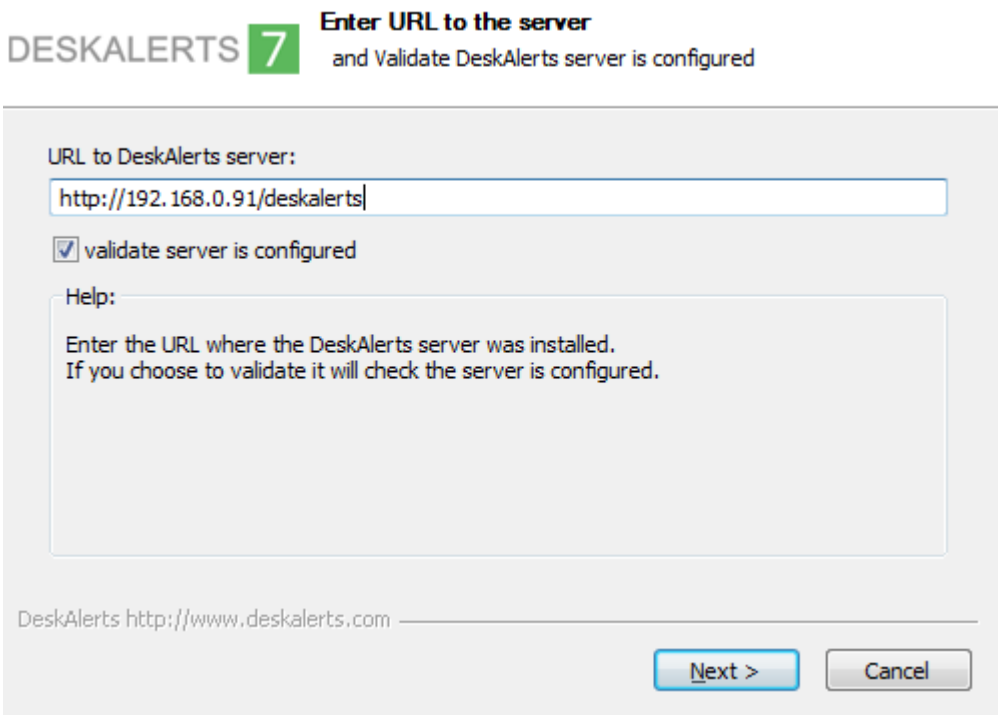


7. DESKALERTS CLIENT INSTALLATION

Unzip the DeskAlerts.Client.vX.X.X.X.zip file from the DeskAlerts package to any folder.

1. Launch **ClientInstallation.exe** to build the installer for the client portion of DeskAlerts.

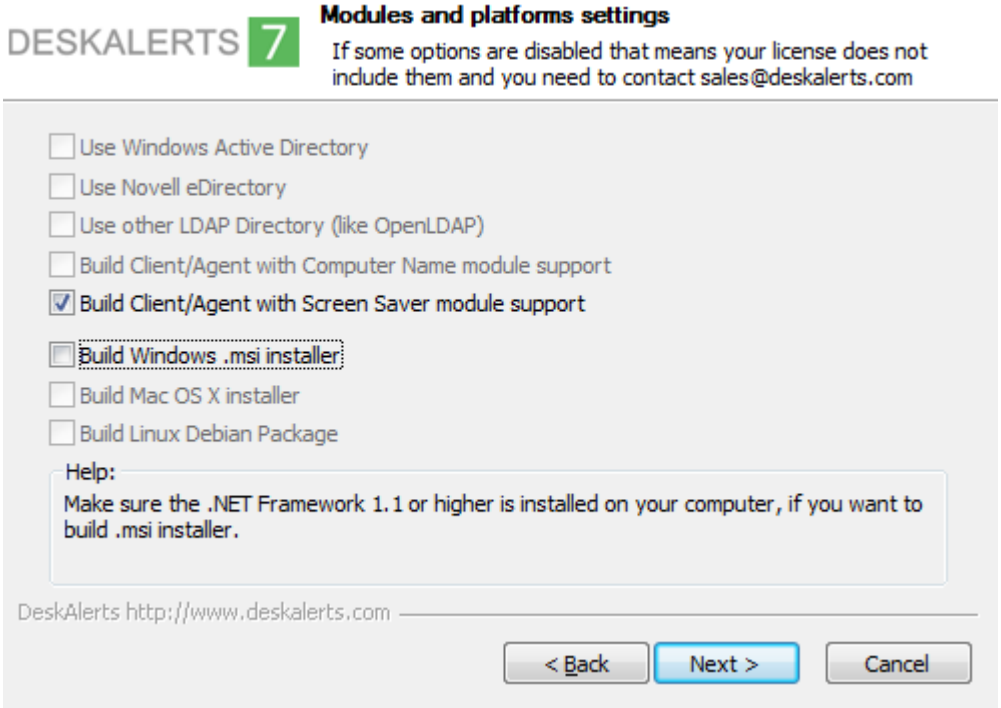
   Provide valid HTTP/HTTPS path to your Deskalerts Server folder:



To validate the path mark **validate server path** checkbox.

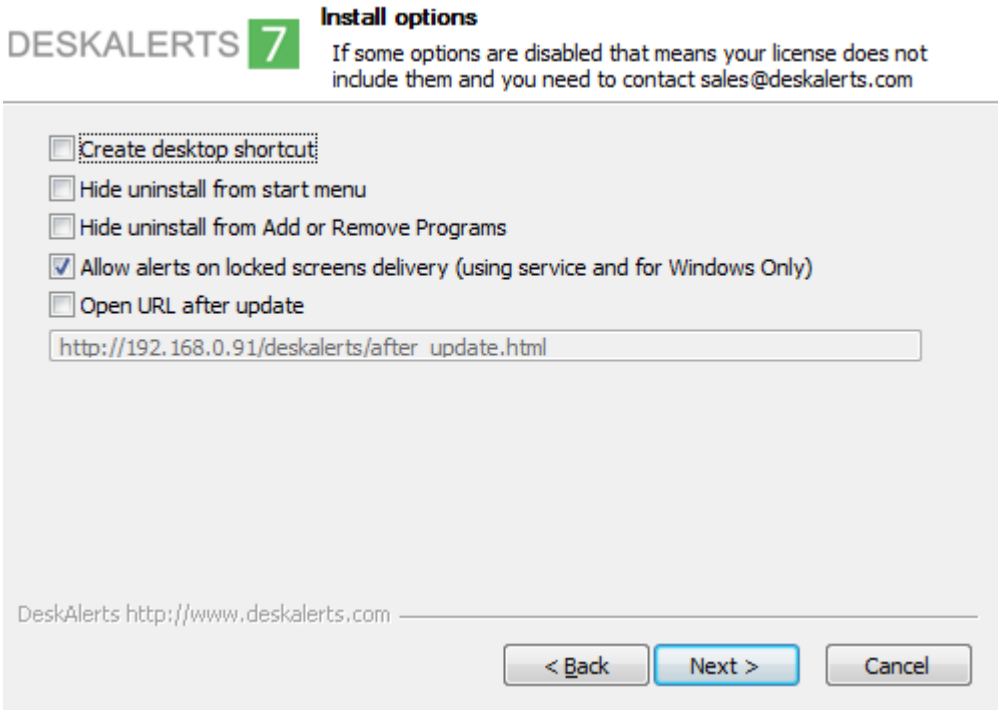
2. On the second step you will see additional options to Use Windows Active Directory/LDAP, Use Novell eDirectory support in case you are using one of these modules.

   If you check Build.msi installer an additional .msi installer package will be created.



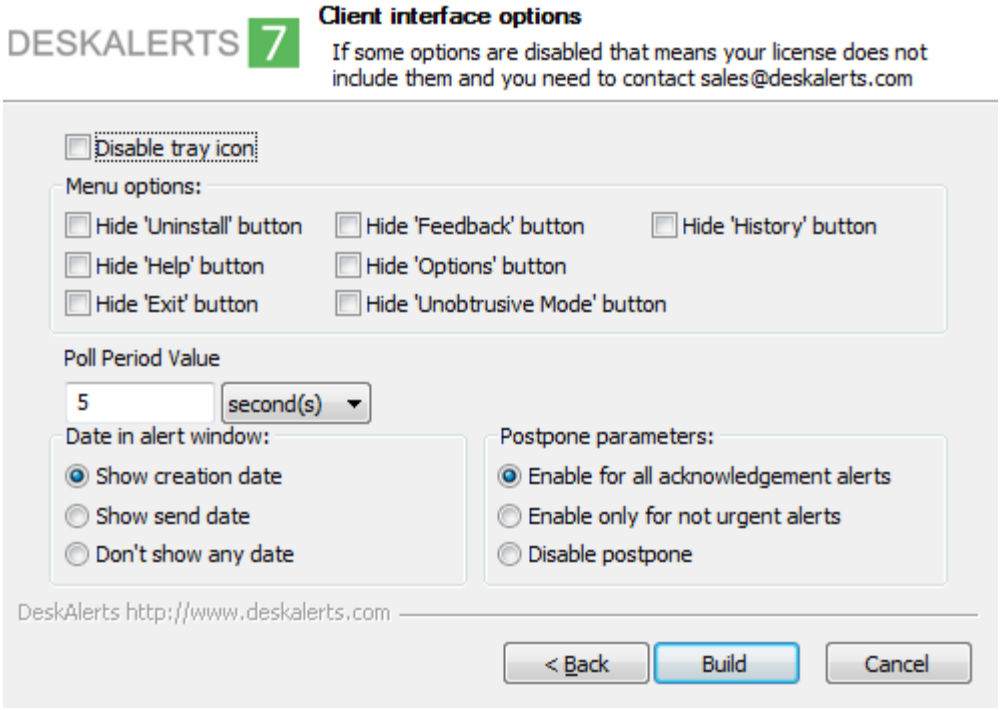
Click **Next** when you are ready to proceed.

3. On the next screen you will be offered to customize Deskalerts client install options:



4. On the next screen you will be offered to customize menu items available for user, date to show in alert and whether user can postpone acknowledgement alerts.

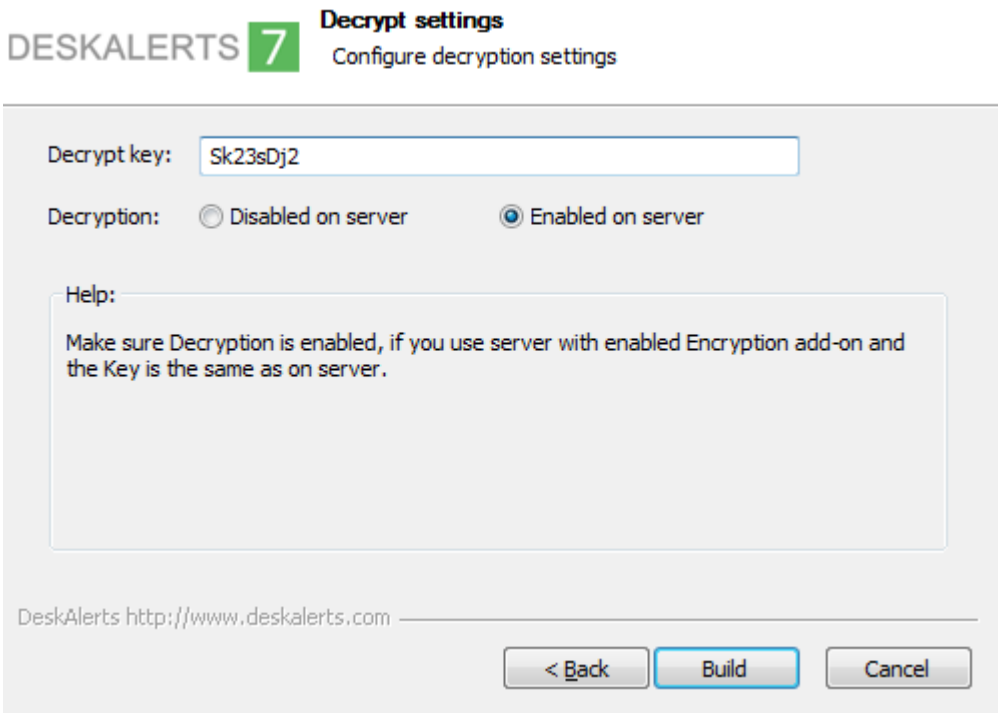
   Pull period is a value specifying how often DeskAlerts client will send requests to server. If you have issues with server loads, this value should be increased



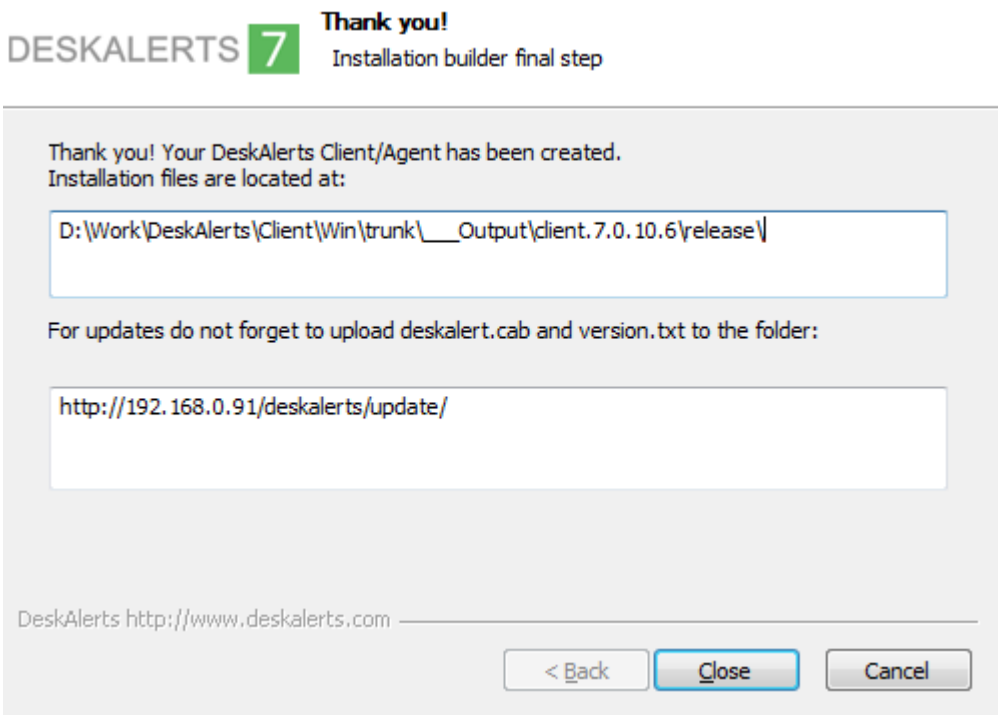
Checkboxes on the top allow you to disable some features on the agent's menu. For instance, you may want to remove the "Exit" button so user won't be able to reject incoming notifications or remove "Uninstall" option by the same reason.

"Help" item is used to give your employees some more information about the software - if you want to share some manuals for your employees - leave this option enabled and put the documents into [deskalerts server root folder]/documentation/

5. If you are using a **Full version** with Encryption add-on the following screen will appear to set **Decrypt key** (should be the same as **Encrypt key** on the server) and enable/disable decryption for the client:

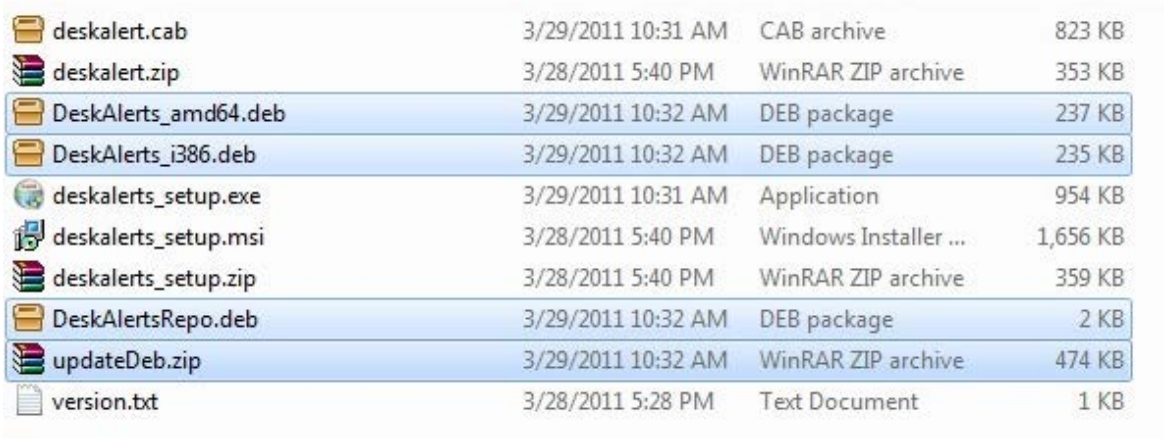


6. On the last screen you will see where to find installer files and which folder to use for Client updates



- **Release** folder now contains:
- deskalerts_setup.exe
- deskalerts_setup.msi (if you have **Build .msi installer** checkbox marked)
- Update files for a new version of the client to upload on your server :
- deskalert.cab
- version.txt

For Linux OS /release folder will contain the following files :



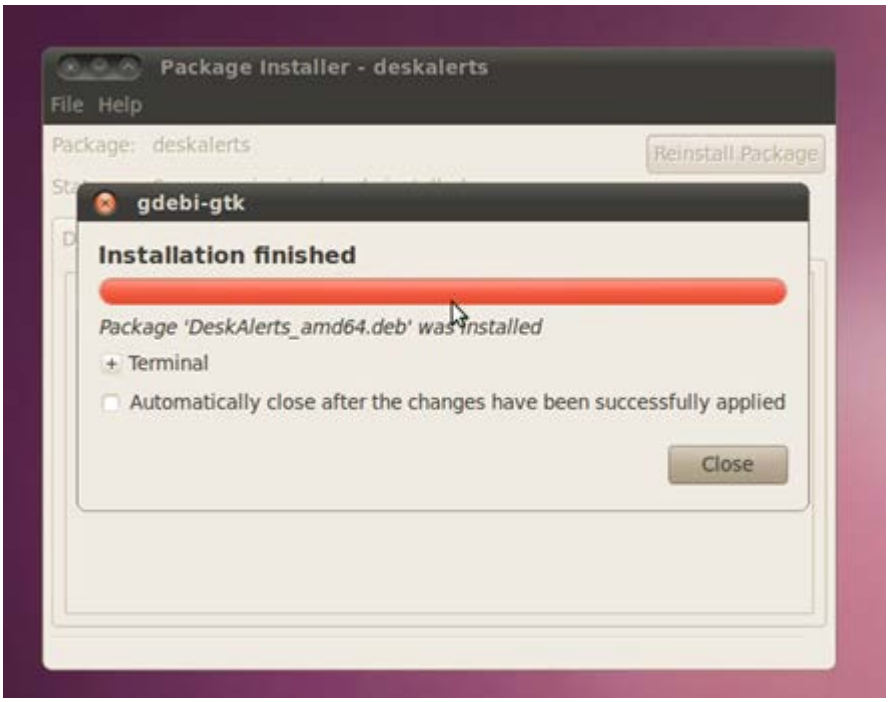
DeskAlerts_amd64.deb and Deskalerts_i386.deb â€“ are Client installation packages for Linux Debian.

for x32 system you should choose Deskalerts_i386.deb

for x64 system you should choose DeskAlerts_amd64.deb

Copy DeskAlerts_amd64.deb or Deskalerts_i386.deb and DeskAlertsRepo.deb into Linux

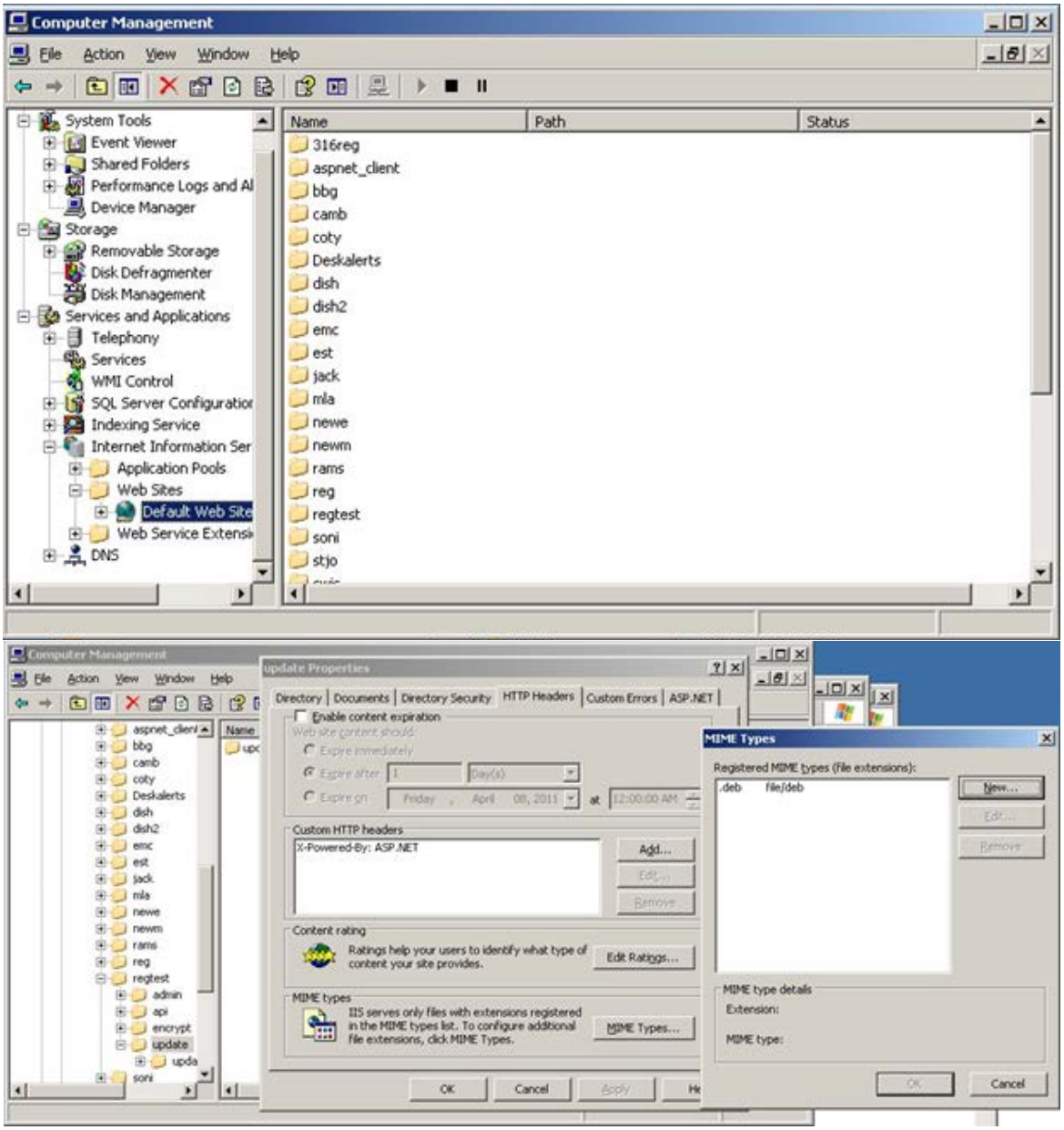
Install DeskAlerts_amd64.deb or Deskalerts_i386.deb, then install DeskAlertsRepo.deb



Now the Client is ready for Updates. When a newer version is available, you only need to copy updateDeb.zip to the server and unzip it to /update folder of your DeskAlerts Server.

If the configuration of your server doesn't include the possibility to transfer files with *.deb extensions, do the following :

Create MIME-type (.deb file/deb) for your /Update folder as shown on the screenshot :



After a newer version of the Client was uploaded to the Server, you can open the menu of the Client and click "Update". Or it is also possible to make updates with the help of special Linux Package Management tools.

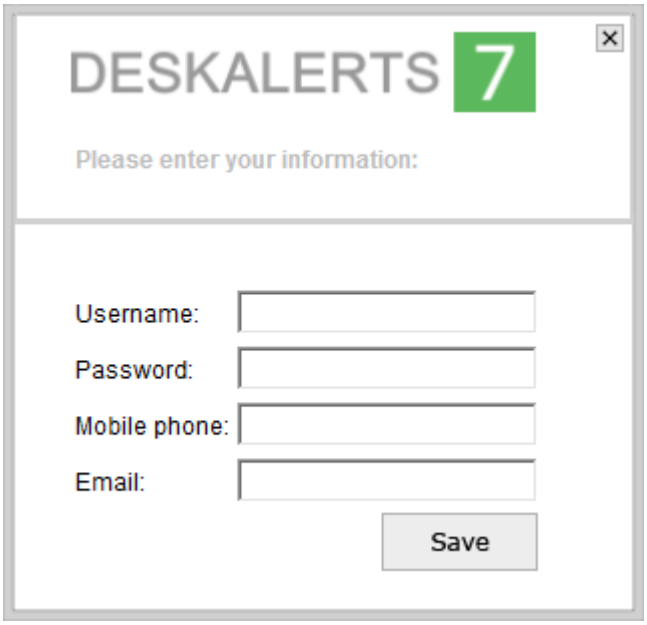
7. To customize DeskAlerts Client manually please take a look at the Customizing DeskAlerts Client manually section.

7.1. Running DeskAlerts Client

Depending on the authentication mode for your DeskAlerts Server, you are either required to register as a DeskAlerts user or AD/eDirectory user information will be used. Registering your DeskAlerts client is required if your DeskAlerts Server is running in **Registration Mode**. However, if your DeskAlerts Server is running in **Active Directory Mode (or eDirectory mode)**, the DeskAlerts client runs automatically upon installation, without prompting you to enter a username and password combination.

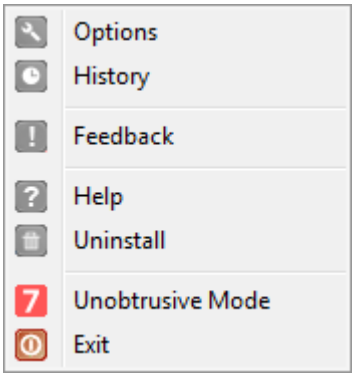
If your server is in **Registration Mode**, you need to follow the steps below to run DeskAlerts client:

1. Enter a **User Name** and **Password**:



   You may be also prompted for e-mail address and mobile phone number if server has corresponding add-ons installed

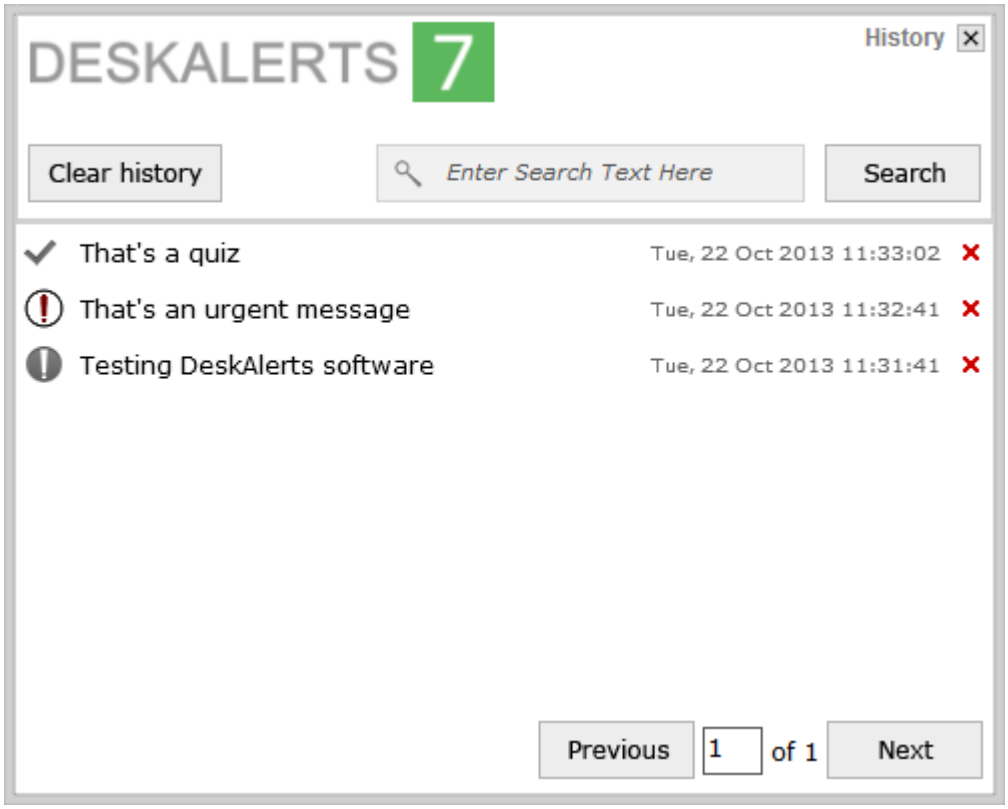
2. Click **Save**
3. A message informing you that **User Name** and **Password** has been saved.
4. Click **Close**. The DeskAlerts tray icon appears on your system tray.
5. Right-click the tray icon to bring up a context menu:



Since DeskAlerts Client can be customized, the appearance of a DeskAlerts client deployed by one company may be different from the client of another company.

User Name is possible to change in client **Options** if needed when using **Registration mode**.

From the History you can see alerts received by this client.



For more information on the functions you can perform as a DeskAlerts Client user, refer to theDeskAlerts User's Guide.

8. CUSTOMIZING DESKALERTS CLIENT MANUALLY

To make DeskAlerts look and work the way you want it to, you can:

- brand DeskAlerts with your corporate colors and logo.
- add buttons, images, and menus to support behaviour your workflow requires.
- present different content and options to different users dynamically, as they log in.
- localize all text strings using Unicode characters to support most major languages.
- extend DeskAlerts' behaviour with JavaScript and AJAX.
- allow automatic upgrades of the DeskAlerts Clients as new versions become available.

To customize the DeskAlerts Client you will need to follow these steps:

- Unzip the **DeskAlerts Client distribution package** that you received into a working directory.

- Modify the data\blank**conf.xml** and data\version**version.txt** files as explained in the following sections.
- Run the **DeskAlerts Client Installer** to create new files for distribution.

Make the necessary files (the .CAB or .EXE file, plus HTML files, as explained later) available on your Intranet or Internet, or to users for download.

8.1 The conf.xml file

The DeskAlerts Client configuration file is called **conf.xml**. It is available in client data\blank in the client installation package that you received from supplier. This file is distributed with the DeskAlerts Client installation and governs much of the way the application looks and functions.

It is important to know, however, that XML is a tag-based language, with content appearing between pairs of tags that have the general form <tag1>...</tag1> or <tag1 attribute="value" />.

An XML file must be well-formed and valid to operate properly, so using an XML editor may save you some frustration. The conf.xml file has this minimal structure:

```
<?xml version="1.0" encoding="utf-8"?>
<ALERTS icons="icons.bmp" hot_icons="icons.bmp">
<COMMANDS>
<!-- Commands goes here. -->
</COMMANDS>
<SETTINGS>
<!-- Settings goes here -->
<PROPERTY id="server" default="http://yoursite.com/" />
</SETTINGS>
<VIEWS>
<SYSMENU>
<!-- Menu items goes here -->
</SYSMENU>
<!-- Visual elements goes here -->
<WINDOW name="minibwindow"... />
</VIEWS>
</ALERTS>
```

8.1.1conf.xml ALERTS tag

The **ALERTS** tag is the outermost wrapper for the conf.xml file, and all other tags must nest within it. It has the following format:

```
<ALERTS icons="icons.bmp">...</ALERTS>
```

Attributes **icons** is the name of the bitmap file that provides images for the application. The file must be in this format:

DeskAlerts supports 16x16 icons.

8.1.2 conf.xml COMMANDS tag

The **COMMANDS** tag is a container within which you define DeskAlerts Client commands.

There are four commands that are normally defined this way:

```
<UNINSTALL name="uninstall"/>
<UPDATE name="update"/>
<DISABLE name="disable" alert="alert"/>
<BROWSERJUMP name="browser" filename="%firstURL%"/>
<MINIBROWSERJAMP name="minibrowser" window="minibrowserwindow" filename="%firstURL%"/>
<OPTION name="option" window="optionwindow1" filename="%root_path%\options.html"/>
<HISTORY name="history" window="historywindow1" filename="%user_path%\history.html"/>
<ALERT name="alert" history="history" window="alertwindow1" filename="%alert_url%"
expire="5"/>
<STANDBY name="standby" expire="5"/>
<EXIT name="exit"/>
```

These commands provide basic functions that are evident based on their names.

You can also define multiple **BROWSERJAMP** and **MINIBROWSERJAMP** commands here. This command has the following basic syntax:

```
<BROWSERJUMP name="browser" filename="%URL%"/>
```

This command opens URL in the new browser window. It also supports sending variables by the HTTP POST request (submitting a form), like this:

```
<BROWSERJUMP name="newcommand1" post="var1=%user_name%&amp;var2=%deskalerts_id%" />
<MINIBROWSERJUMP name="newcommand1" filename="http://yoursite/somepage.html
newbrowserwindow="false" window="minibrowserwindow"/>
```

This command opens the URL in a new custom window defined below.

Invoking the commands

Once you have defined a command within the **COMMANDS** tag in the **conf.xml** file, you can invoke it in the DeskAlerts Client in many ways:

```
<ITEM caption="Option" img="" command="newcommand1" /> (see "conf.xml ITEM tag");
```

8.1.3 conf.xml SETTINGS tag

This section of the **conf.xml** file allows you to specify alert texts and error messages, startup behavior, default colors, and many other look-and-feel attributes.

A typical **SETTINGS** tag might look like this:

```
<!-- scope is the time in hours the application waits before checking for updates, in auto-update mode. A setting of 168 would tell the application to check for updates once a week. See note below about autoupdate -->
<SETTINGS>
<!-- Messages that will be needed for various alert windows -->
<PROPERTY id="corruptedMsg" default="One of the XML files is corrupted or invalid. Press OK to uninstall." const="1"/>
<PROPERTY id="uninstallMsg" default="This will remove Deskalerts from your computer! Are you sure?" const="1"/>
<PROPERTY id="updateMsg" default="This will try to update Deskalerts from the server. Continue?" const="1"/>
<PROPERTY id="autoUpdateMsg" default="New version of Deskalerts is available. Would you like to download and install it?" const="1"/>
<PROPERTY id="uninstallMsg" default="This will remove DeskAlerts from your computer! Are you sure?" const="1"/>
<PROPERTY id="versionError" default="Can not find current version information." const="1"/>
<PROPERTY id="updateFailMsg" default="Unable to update DeskAlerts." const="1"/> <PROPERTY id="noUpdateMsg" default="There are no update."/>
<PROPERTY id="noUpdateMsg" default="There are no updates." const="1"/>
<PROPERTY id="connectionError" default="Can't establish a connection." const="1"/>
<PROPERTY id="lastVersionMsg" default="You have the latest version of Deskalerts." const="1"/>
<PROPERTY id="delete_history" default="Are you sure you want to clear history?" const="1"/>
<PROPERTY id="unreadedMsg" default="You have %count unreaded alerts" const="1"/>
<PROPERTY id="delete_alert" default="Are you sure you want to delete current alert from history?" const="1"/>
<PROPERTY id="minibrowser_header" default="Please enter your information:" const="1"/>
<PROPERTY id="alert_header" default="New Alert!"/>
<PROPERTY id="history_header" default="History"/>
<PROPERTY id="debug_mode" default="0"/>
<!-- locations of key URLs. See notes to each URL -->
<PROPERTY id="server" default="http://yoursite.com/" />
<!-- This tag identifies a page, perhaps a welcome message, that will display in a window beside the application the first time the user starts DeskAlerts -->
<PROPERTY id="firstURL"
default="%server%/after_install.asp?deskbar_id=%deskalerts_id%&amp;client_id=3"/>
<!-- this URL is the path to the folder where the application installation files are stored. This folder must have the .cab file that contains the application package and the version.txt file. -->
<PROPERTY id="serverpath" default="%server%/update/"/>
<!-- This update will only happen if the version.txt file on the server contains a version number greater than that in the version.txt file on the client computer -->
<PROPERTY id="updateUrl" default="%server%/update/deskalert.cab"/>
<PROPERTY id="silentUpdate" default="0"/>
<!-- A landing page after the application is updated -->
<PROPERTY id="urlAfterUpdate" default="%server%/after_update.html"/>
<!-- Confirmation URL is called when a message is read -->
<PROPERTY id="confirmationUrl" default="%server%/get_alert.asp"/>
```

```
<!-- An URL for checking for new alerts -->
<PROPERTY id="alert_url"
default="%server%/get_xml.asp?uname=%user_name%&amp;cnt=%cont%&amp;desk_id=%deskalerts_id%"/>
<!-- Sound which plays on new aler -->
<PROPERTY id="sound_file" default="%root_path%\notify.wav"/>
<PROPERTY id="update_automatically" default="1"/>
<PROPERTY id="play_sound" default="1"/>
<!-- An interval for checking for client updates -->
<PROPERTY id="update_expire" default="20"/> <!-- min -->
<!-- Controls how many alert windows the user can see at one time on the desktop. -->
<PROPERTY id="cont" default="1"/>
<!-- Defines the time between checks for new alerts when in normal mode (minutes). -->
<PROPERTY id="normal_expire" default="1" /> <!-- min -->
<!-- Defines the time between checks for new alerts when in standby mode (in minutes). -->
<PROPERTY id="standby_expire" default="0" /> <!-- min -->
<!--Defines the maximum time period of inactivity before DeskAlerts goes to standby mode (in
minutes) -->
<PROPERTY id="normaltostandbyexpire" default="5" /> <!-- min -->
<!-- Defines the time to store alert in history (in minutes). (0 mean keeps it forever) -->
<PROPERTY id="history_expire" default="0" /> <!-- day -->
<PROPERTY id="datetime_format" default="%Y-%m-%d %H:%M:%S" const="1" />
</SETTINGS>
```

8.1.4 Autoupdate

The Autoupdate feature was considered unsafe and is deprecated as of version 7.0

8.1.5 conf.xml SYSMENU tag

DeskAlerts allows only one button with a pop-up menu, but you can modify the menu by adding new items or submenus. The **SYSMENU** tag in the **conf.xml** file is as follows:

```
<SYSMENU name="sysmenu" img="0" standby_img="1" disable_img="2" unreaded_img="3"
offline_img="4">
<ITEM caption="Options" command="option" img="11"/>
<ITEM caption="History" command="history" img="13"/>
<SEPARATOR/>
<ITEM caption="Update" command="update" img="10"/>
<ITEM caption="Uninstall" command="uninstall" img="5"/>
<SEPARATOR/>
<ITEM caption="Disable Alerts" pressed_caption="Enable Alerts" pressed_img="0" img="2"
command="disable"/>
<ITEM caption="Exit" command="exit" img="14"/>
</SYSMENU>
```

New items or submenus can be added to the button by following the pattern given above.

The numbers in the **img** attribute refer to the particular icons in the .bmp file that you have specified as the source for icons in the bitmap attribute of the **ALERTS** tag. For example, the**deskalertsmenu** button is represented by the first icon.

The command attribute of a button can refer to any command you have specified in the**COMMANDS** tag of **conf.xml**. For example, you could define a **BROWSERJUMP** command as

```
<BROWSERJUMP name="search1" filename="http://www.google.com/" />
```

and reference it in an item:

```
<ITEM caption="Google Search" command="search1" img="12"/>
```

When a user clicks that button he or she will be redirected to the Google search page.

Image notes:

- If you do not specify an image for a button you can sometimes get an awkward display. You can avoid this by specifying img="-1" for any button for which you want no image.
- The image you specify should by 16x16 pixels. The pixel in the upper left corner of the image is considered to be the transparency color for the image.

8.1.6 conf.xml ITEM tag

Use the **ITEM** tag to populate a **SYSMENU** tag with options.

The tag format is:

```
<ITEM id="itm_26" caption="The Alphabet" img="10" command="command_name" />
```

Submenus

To create a submenu, nest **ITEM** tags inside an **ITEM** tag in the main menu. This example creates a submenu of book categories in a main menu item called "Books", which has no HTML associated with itself:

```
<ITEM caption="Order" img="18" command="command1">
<MENU>
<ITEM caption="Books" img="1" hint="" command="command2">
<ITEM caption="History" img="29" hint="History books" command="command3" />
<ITEM caption="Science" img="30" hint="Science books" command="command4" />
<ITEM caption="Poetry" img="31" hint="Poetry books" command="command5" />
</MENU>
</ITEM>
```

You can add an unlimited number of levels to a **MENU**, and an unlimited number of **ITEMs** to each level.

Invoking alerts

To configure the alert function you must have an **ALERT** tag within the **COMMANDS** tag in conf.xml. The tag will look something like this:

```
<ALERT name="alert" history="history" window="alertwindow1" filename="%alert_url%"/>
```

The attributes:

- **history** is the name of the command for storing history;
- **window** is the name of the window where alert will placed;
- **filename** is the URL of the alerts server script;

To configure the look of the alert window, add this line in the **VIEWS** tag:

```
<WINDOW name="alertwindow1" captionhref="%root_path%\alertcaption.html" width="500"
height="400" leftmargin="5" topmargin="28" rightmargin="5" bottommargin="13" confirmation="1"
position="right-bottom" transparency="230" transp_color="00F0FF"
customjs="%root_path%\file.js"/>
```

- **captionhref** is the html page that represents the border of the alert window where the logo, close button and other elements can be placed;
- **width, height** specify size of the window;
- **leftmargin, topmargin, rightmargin, bottommargin** specify margins for the inplace window where the alert or other html will be open;
- **transparency** is a value of transparency for the window; 0 - transparent, 255 - non-transparent;
- **transp_color** is a hex RGB value of color which will be absolute transparent (can be used for round corners);
- **customjs** will upload file.js to the message body and call function Initial().

8.2 Available variables

When you are passing variables to a URL, there are some convenient built-in variables to simplify your task. You can pass any of these:

- **%deskalerts_id%**. This is a unique application ID, which stays the same even when the DeskAlerts application is updated or reinstalled.
- **%user_name%**. Once you set this variable using JavaScript, you could pass it on for processing through a button URL or other redirect.

8.3 Using Unicode for non-latin text

Conf.xml file should be saved in UTF-8.

If you can't save it in UTF-8, please do the following: non-Latin text and special characters should be written using their Unicode equivalents. In Unicode, for example, if 00E4 is the code for "a", then you would specify that character as &#x00E4.

A list of Unicode symbol codes is available at Unicode site charts.

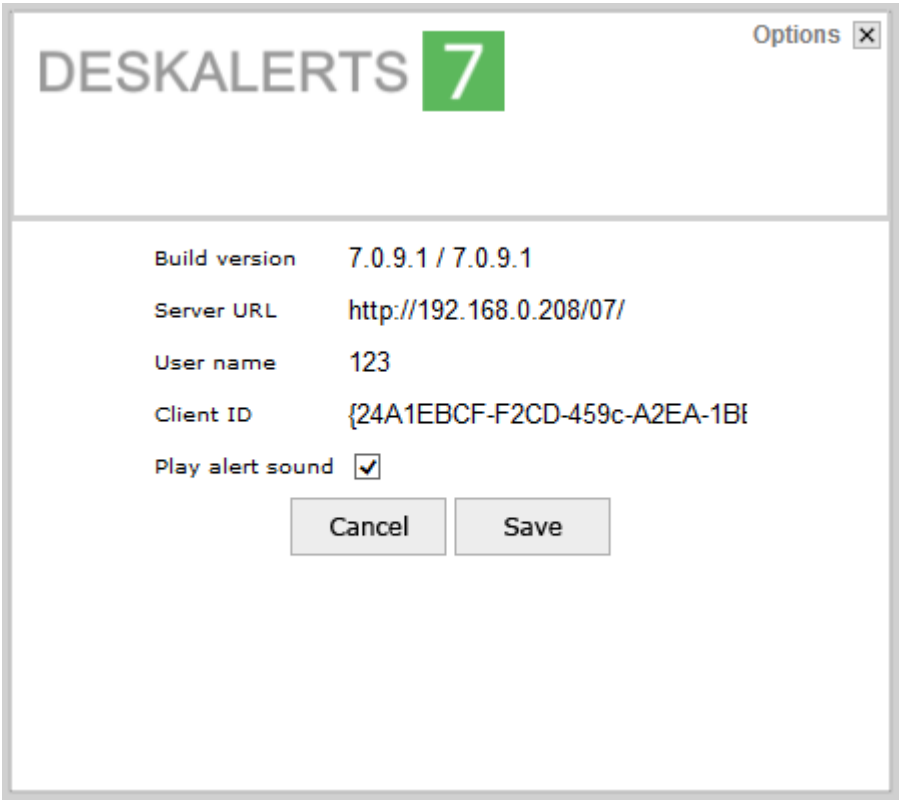
8.4 The version.txt file

The version.txt file contains one line of code, something like: DeskAlerts v6.0.0.0

Be sure to update the number of version in this file when you are preparing a new version of DeskAlerts for release, so the autoupdate function can recognize the new release and install it.

8.5 Configuring OPTIONS page

DeskAlerts Client **Options** page is data\version\options.html. In its default form it yields an options page that looks something like this:



Declare the window in the **conf.xml** file something like this:

```
<OPTION name="option" window="optionwindow1" filename="%root_path%\options.html"/>
...
<WINDOW name="optionwindow1" captionhref="%root_path%\defcaption.html" caption="Options"
width="400" height="300" leftmargin="5" topmargin="28" rightmargin="5" bottommargin="13"
position="right-bottom" transparency="220" transp_color="00F0FF" />
```

Provide access to the options page by binding it to the menu item.

If there are options you do not want to expose to users, simply remove them from the HTML page.

Note: You can post your **options.html** file anywhere on the server and set the **href** attribute to call it from there.

8.6 Standby mode

The standby mode can be set up in DeskAlerts to allow the software to go idle following a specified period of inactivity. Once the user has failed to move the mouse or hit a key on the keyboard for a sufficiently long period of time, DeskAlerts temporarily ceases to check messages, or uses an alternate specified time period between message checks. When the user resumes activity using the mouse or keyboard, DeskAlerts leaves standby mode and likewise resumes its normal activity.

To incorporate standby mode in DeskAlerts, simply make a few easy modifications to the**conf.xml** file.

- Open the **conf.xml** file using a text or XML editor.
- Modify the **normaltostandbyexpire** property to toggle the use of standby mode. Use 0 to disallow standby mode, and use the positive value to allow DeskAlerts to go into standby mode.

```
<PROPERTY id="normaltostandbyexpire" default="5" />
```

indicates that the use of standby mode has been enabled and DeskAlerts switch to standby mode after 5 minutes of user inactivity.

- Set the frequency of message checks in standby mode by modifying the **standby_expire**property. If you want DeskAlerts to not completely cease checking messages when in standby mode, enter the number 0. Otherwise, you can specify the standby message checking period in minutes:

```
<PROPERTY id="standby_expire" default="30" />.
```

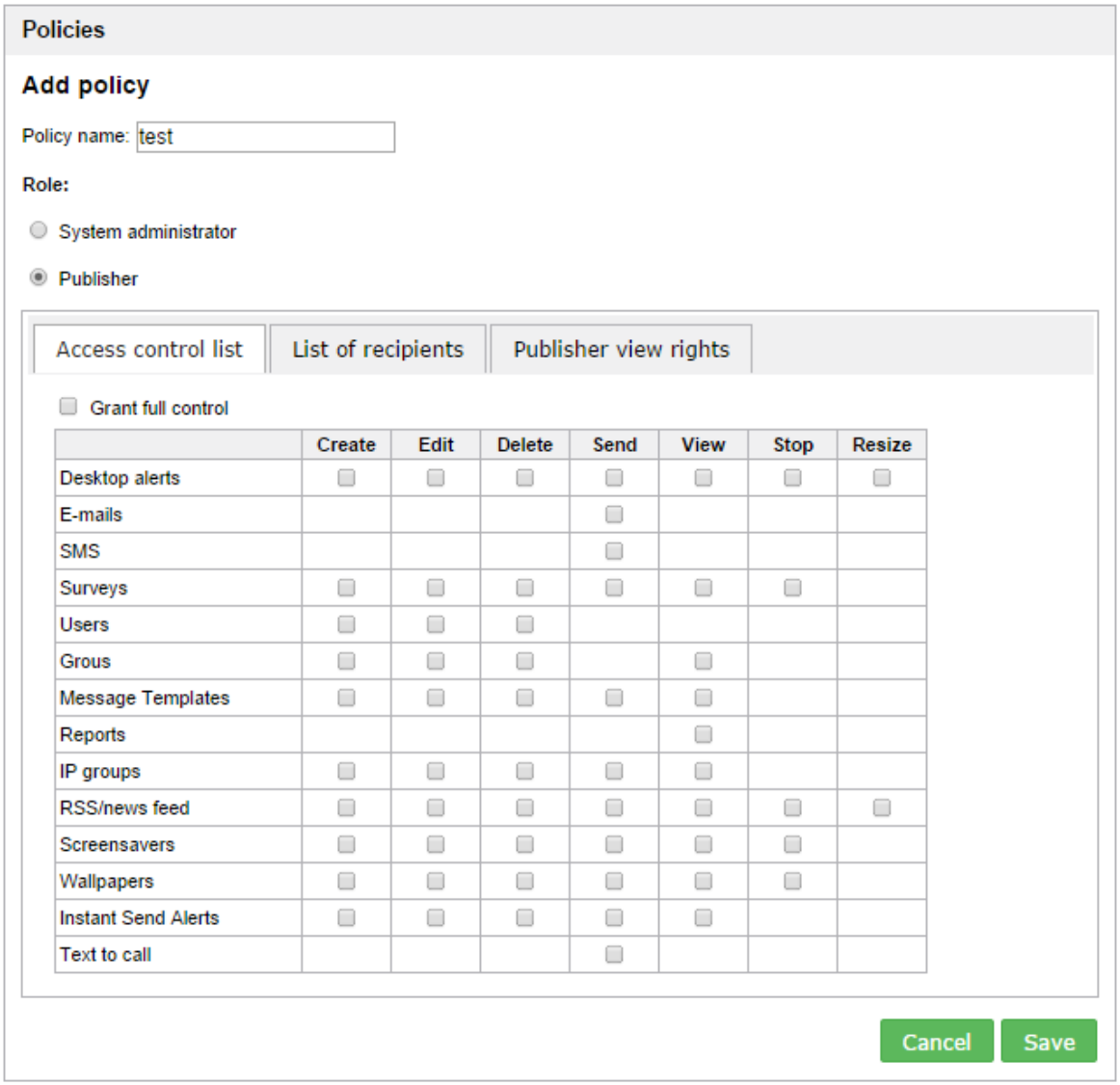
In this example, when in standby mode, DeskAlerts will check messages every 30 minutes (half hour).

9. MANAGING EDITORS AND POLICIES

Editors have the task of creating and sending out alerts and surveys to individual users, groups, OUs and Computers that are combined in a Policy and viewing their statistics. Before creating an Editor you should define a Policy (scope of activity) first.

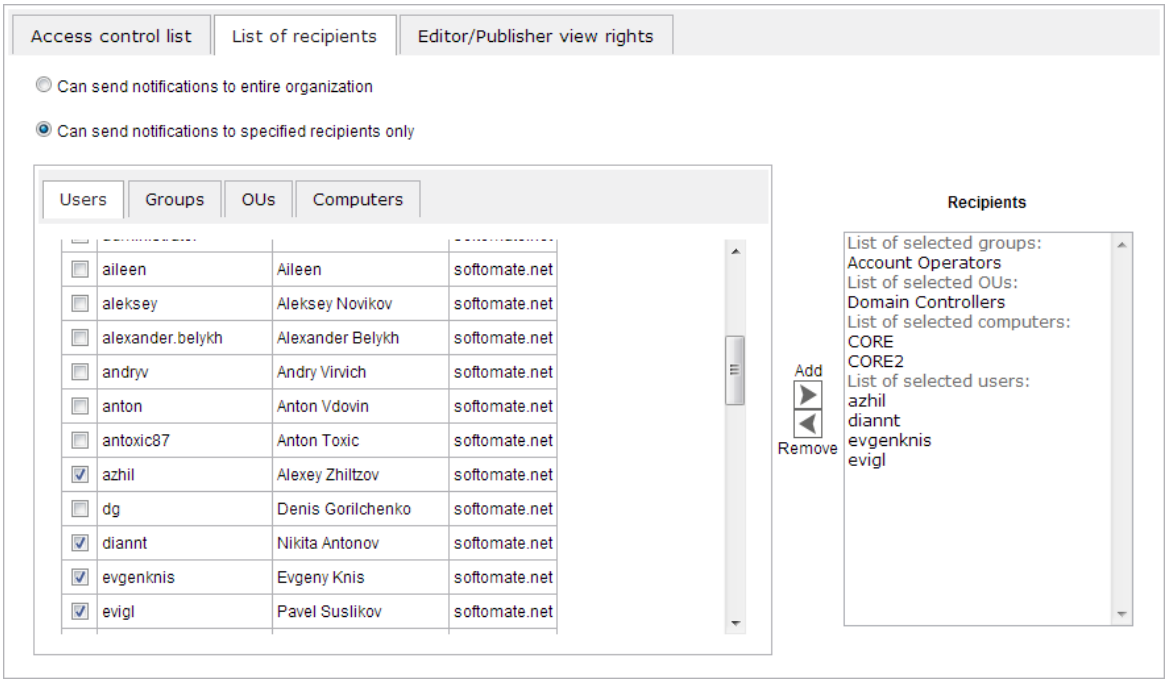
Creating a policy

- Click **Policies** link in the left-side menu;
- Click **Add** button to see the following screen :



System Administrator will have the Full rights as Admin by default. You may define an unlimited number of Administrators for one Control Panel.

Regular Editor will have a limited scope of activity as defined by Administrator by using checkboxes and list of users added (see the screen below) :

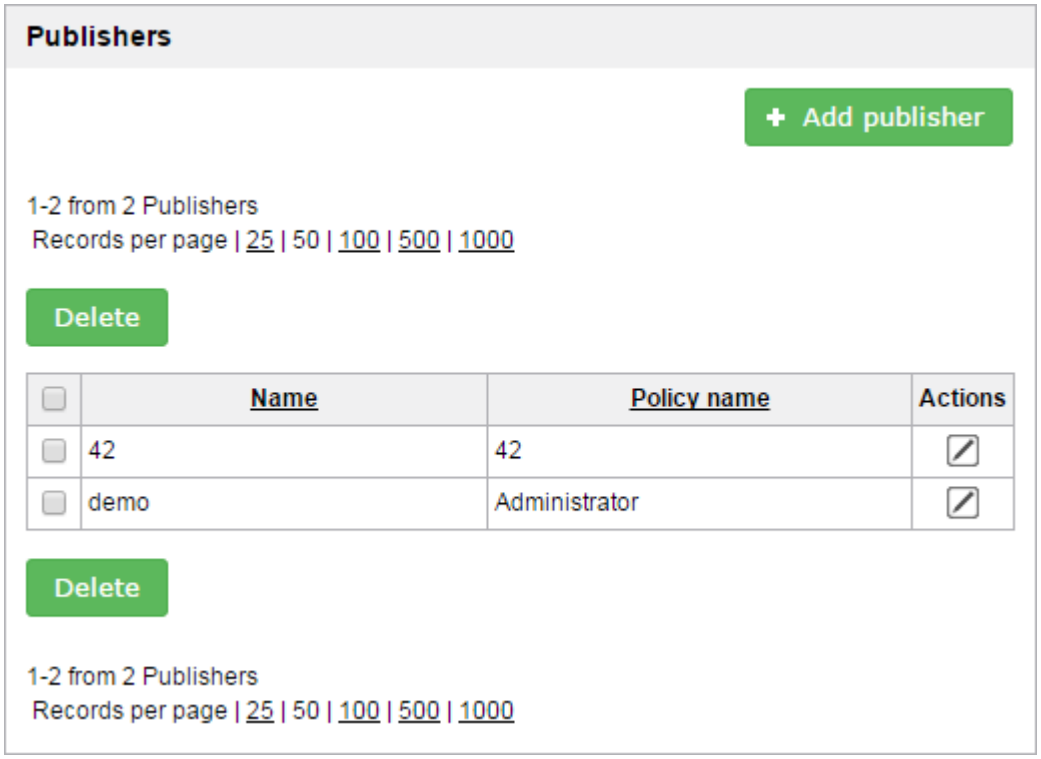


- On the left side you see the list of available Users, Groups, OUs and Computers; (the last 2 are available in **Active Directory** mode only)
- Choose a specific group/OU/user/computer and add it to the **Recipients** list by clicking **Add**button;
- To remove recipients, just choose the user/group/OU from the right side (**Recipients**) and click**Remove** button.

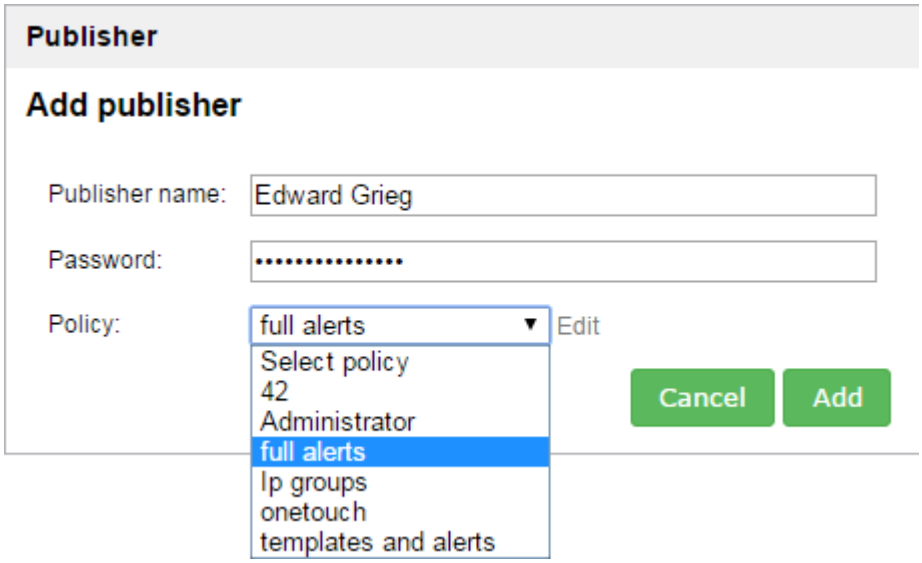
When you are satisfied with your entries, click **Save** button.

Creating an Editor

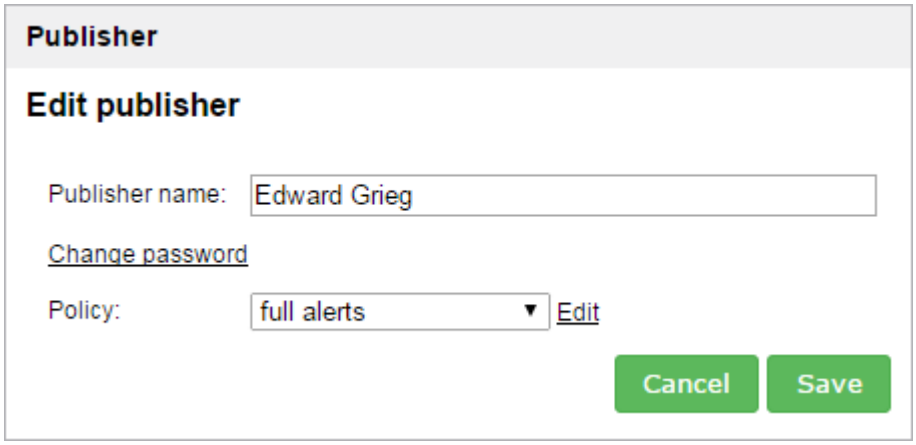
To view the list of existing editors, click the **Editors** link in the left-side menu of Control Panel:



To add a new editor just click **Add editor / publisher** button at the top right corner to see the following screen:



Type the Name/Password for a new Editor and choose the Policy (previously defined) from a drop-down menu. Click icon on the main screen to view and/or edit editor's details as follows :

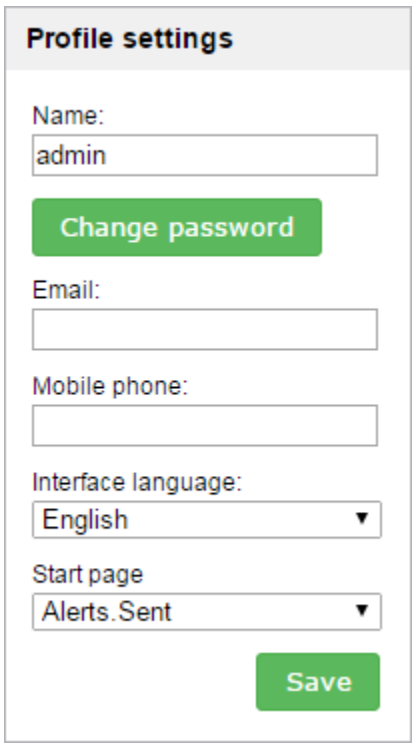


The editor will now be active. Give him/her the URL to DeskAlerts Control Panel, including username and password for logging in.

10. SETTINGS

10.1 Profile Settings

Click the **Settings->Profile settings** link in the left-menu bar. In profile settings you can update your password for the DeskAlerts Control Panel by clicking the button "Change password" and update your email and mobile phone (if you have DEskAlerts Email/SMS module installed).

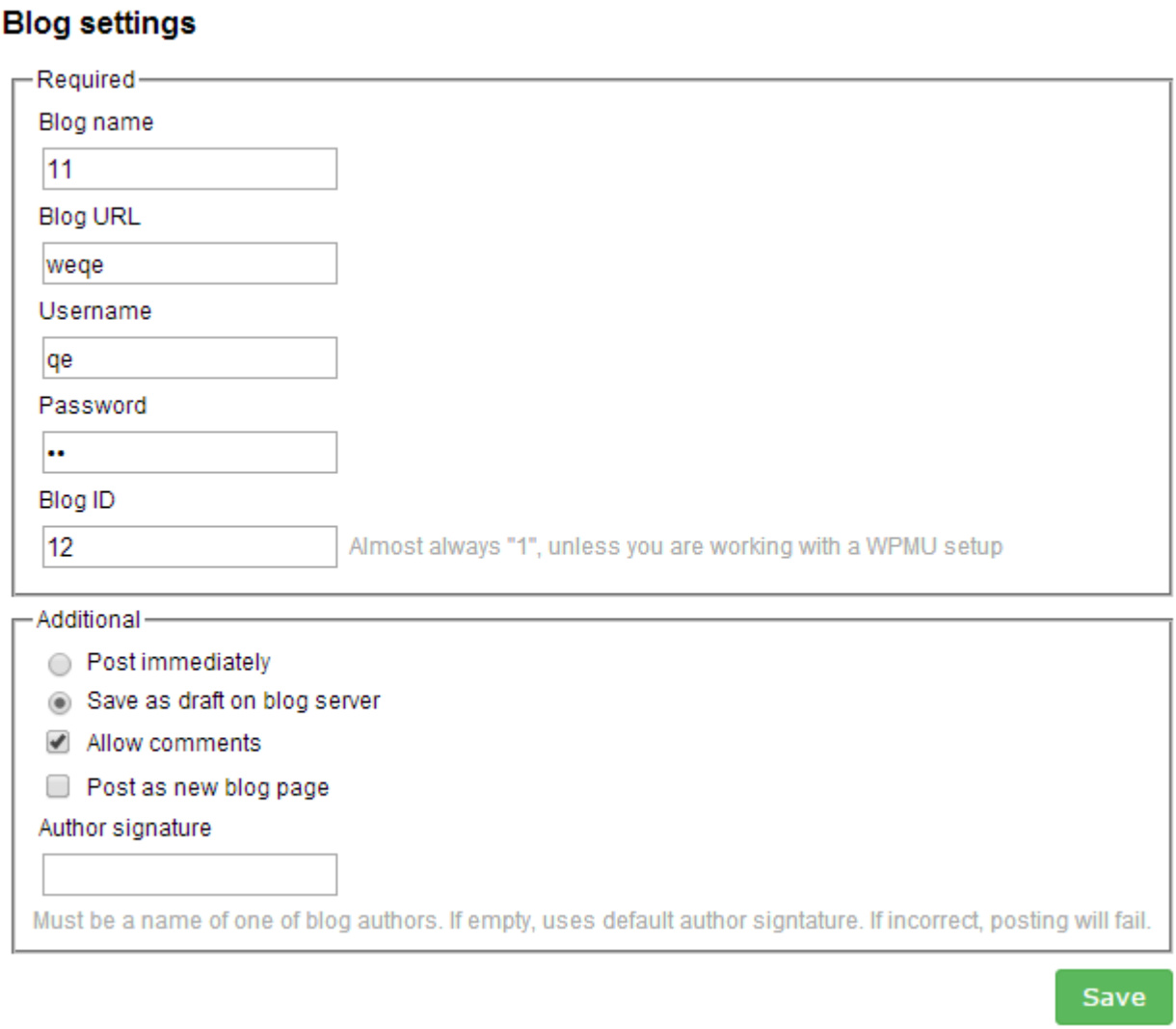


10.2 Social module Settings

Blog module settings

Blog module allows you to post alert messages on your WordPress-powered blogs. You must specify some obligatory options like:

- Blog name - choose whatever you want, it is used only for blog differentiation
- Blog URL - address of your blog, something like "deskalerts.wordpress.com"
- Username - a name you usually use to log into your blog dashboard
- Password - password fitting your login
- Blog ID - usually it equals 1, if not, you can fing it in the blog dashboard



Also this module supports multiple additional options, such as:

- Option to save message as draft
- Option to disable comments on posts sent to this blog
- Option to post alert as a whole new page of your blog

- Option to sign post as one of blog authors. Note: if this string is not a valid blog author name, publish attempt will fail

Note to publishers

Some WordPress blogs can override alert styles (font color, size, table decorations etc), so double-checking your posting results may be a good idea.

Twitter Settings

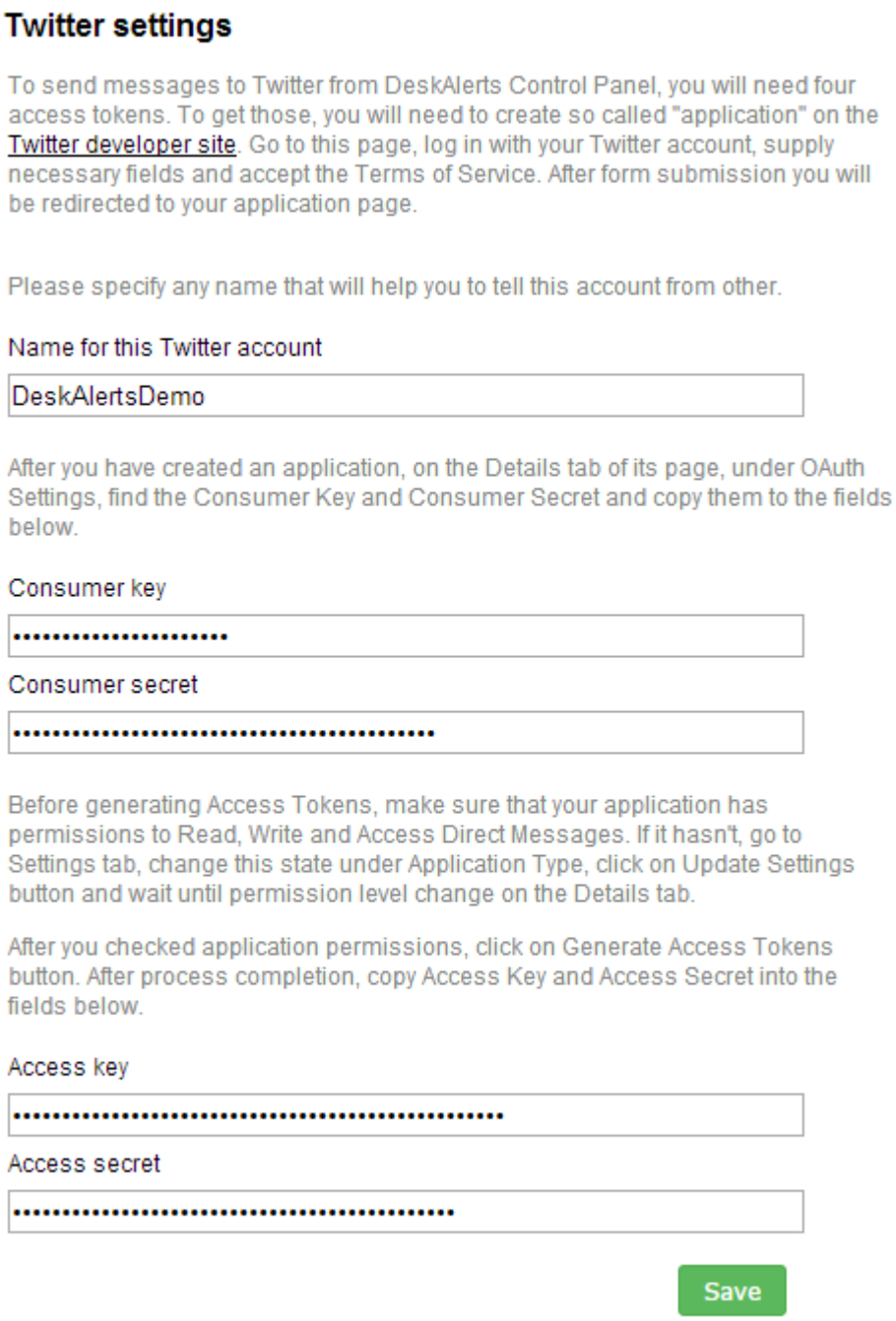
DeskAlerts uses Twitter API to post messages to Twitter.

To start tweeting with DeskAlerts, you should specify any name for this Twitter instance and provide four access tokens.

Getting Consumer Key and Consumer Secret

To obtain any Twitter access tokens, you should create an application. This can be done easily with following steps:

- Go to Twitter developer site and log in, if necessary.
- Supply the necessary required fields, accept the TOS, and solve the CAPTCHA.
- Submit the form
- Copy the consumer key (API key) and consumer secret from the screen into corresponding fields at DeskAlerts Control Panel



Getting Access tokens

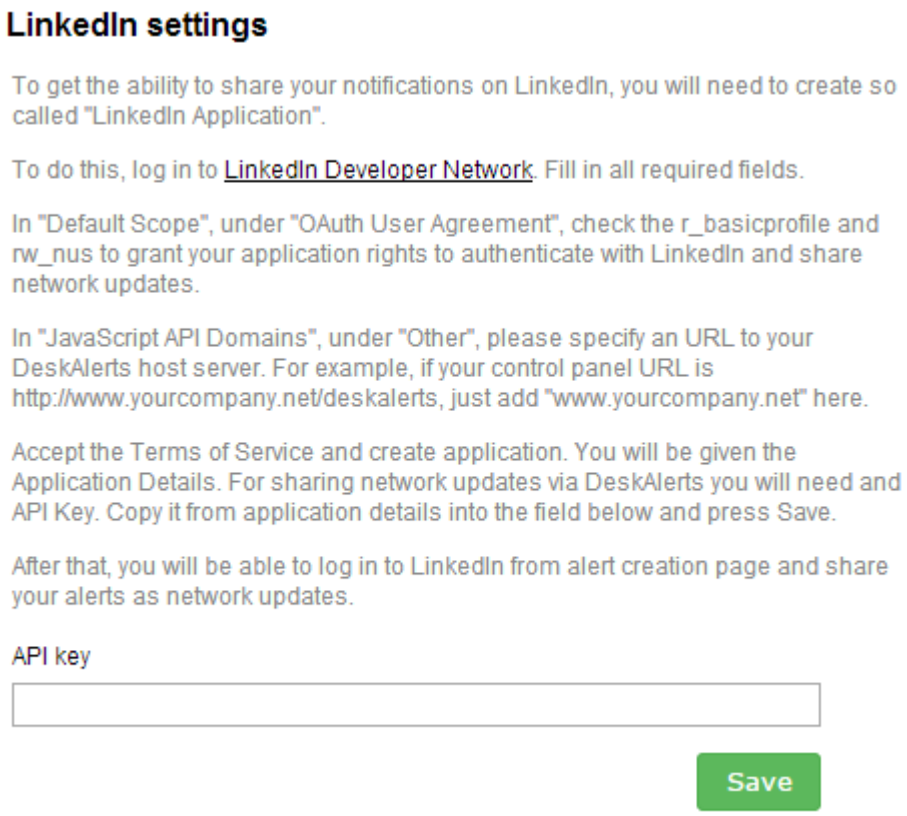
Now, from your app settings, you can obtain OAuth tokens:

- Ensure that your application is configured correctly with the permission level you need (read-only, read-write, read-write-with-direct messages).
- On the application's detail page, invoke the "Your access token" feature to automatically negotiate the access token at the permission level you need.
- Copy the indicated access token and access token secret from the screen into your DeskAlerts Control Panel/Console

LinkedIn Settings

LinkedIn network updates posting feature requires some preparation.Basic steps are following:

- Log In to LinkedIn Developers Network
- Create a new application with the right settings
- Copy and API Key to this page and save the settings



Sharing alerts on LinkedIn

When you're done with the settings, go to alert creation page and look below the skin thumbnail. If you are already logged to LinkedIn, there would be "Share on LinkedIn" button. Pressing this will check if you've saved the alert and then send it to LinkedIn. If you're not logged yet, there would be login button.

LinkedIn Application Live Status

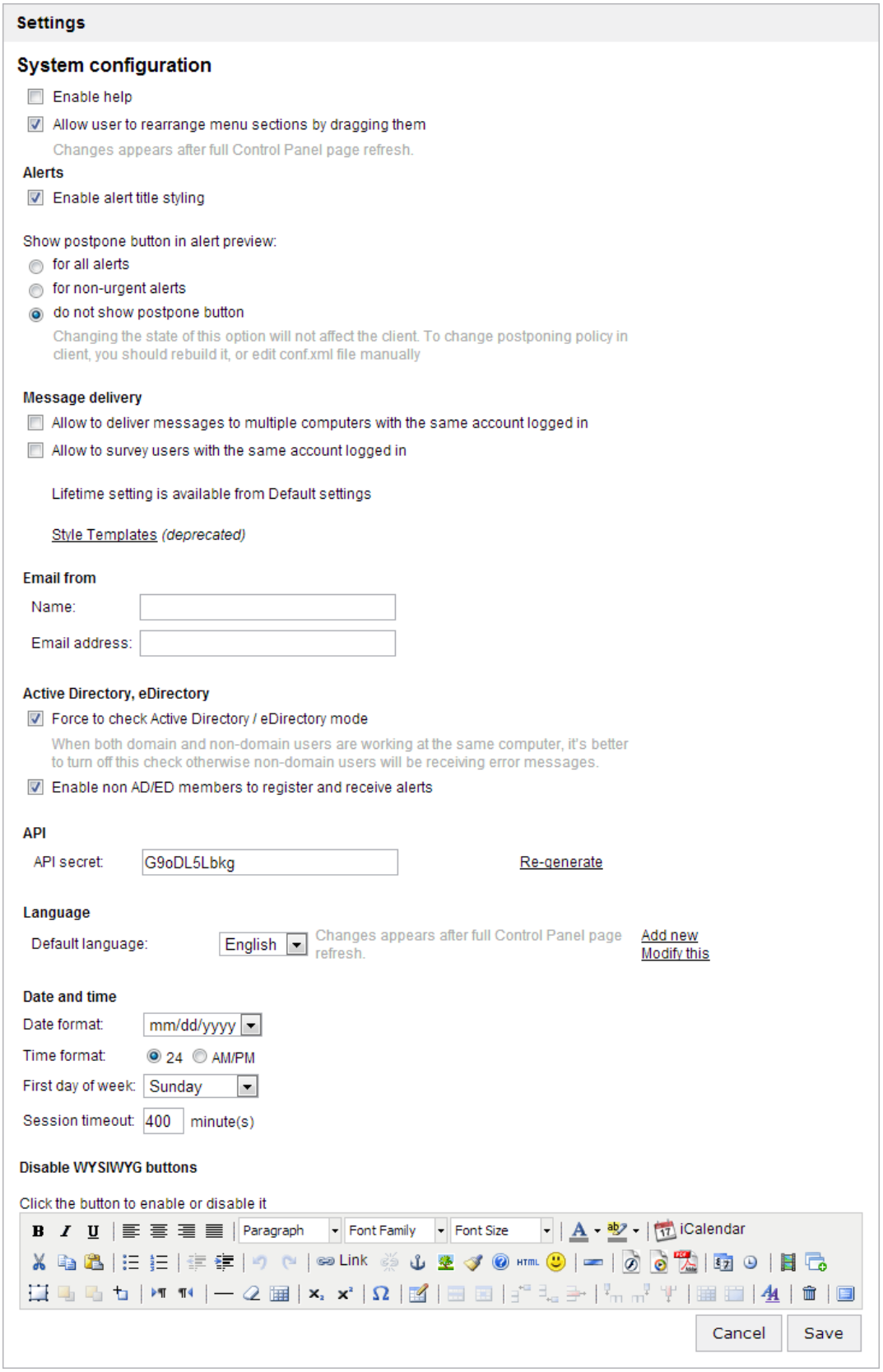
If you want to check this functionality without your LinkedIn Network noticing, set the application Live Status to Development so the updates will be visible only for this Application's list of developers.

10.3 Common Settings

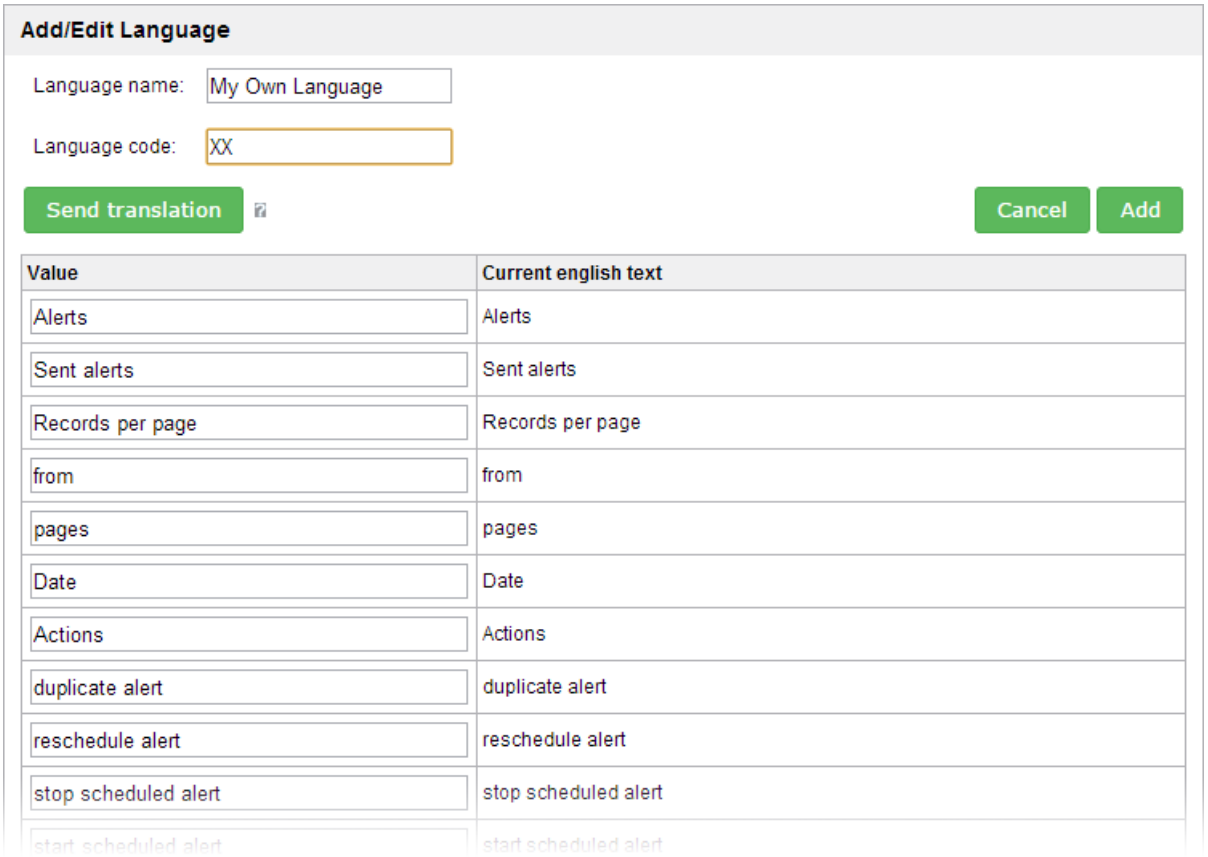
Common Settings include **System Configuration**, **Data Archiving**, **Default Settings**.

System Configuration

Make global settings to manage alert delivery to different accounts, AD and non-AD users and also provide localization of DeskAlerts Control Panel to:

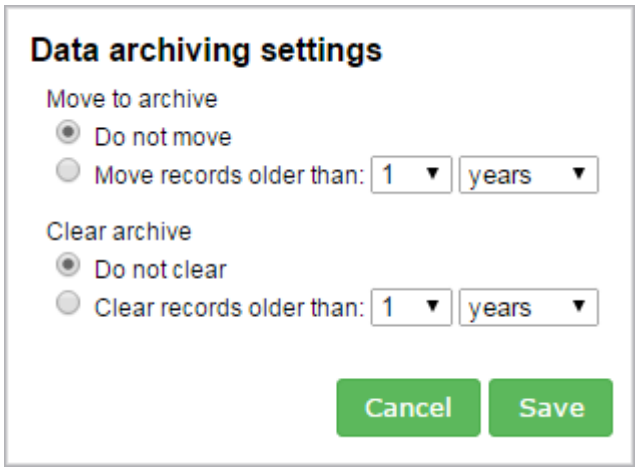


You can now switch the default language of Control Panel, add new language and modify the current one. After making any changes please **Refresh** the whole page of Control Panel to see the changes.



Data Archiving

In order to decrease the load on your servers, this feature has been implemented to clear or store old alerts from SQL databases in archives. Click **Settings-> Data Archiving** link on Control Menu to see the following screen:



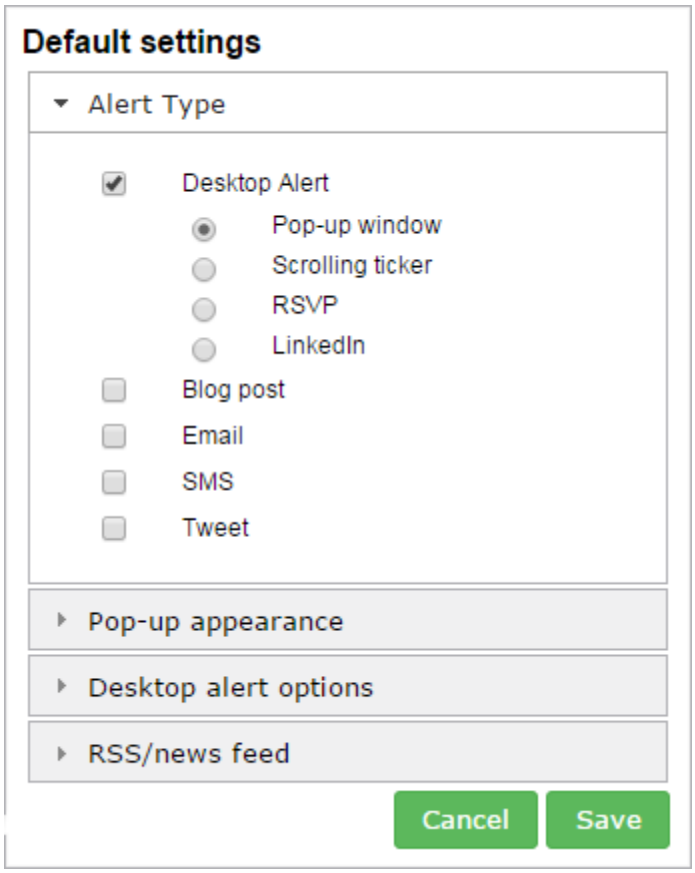
Set the time range for the actions as required, then go **/inetpub/AdminScripts/** where you will find DeskAlerts_archive.vbs file (to be generated upon installation of DeskAlerts Server).

This file is responsible for date checks and clearing or moving alerts to archive tables when needed. Using this file you have to create a task in Windows Scheduler to run the script once a day or week as you wish.

Archived alerts will be excluded from Send/Receive process on the server, but still can be seen in Sent folder and Statistics tab of Control Panel.

Default Settings

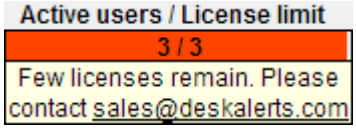
Click Settings-> Default Settings link to save your preferences for sending alerts by marking appropriate checkboxes :



This settings will be default when alerts, tickers, RSS are created.

11. Count of License Limit and Active Clients Allowed

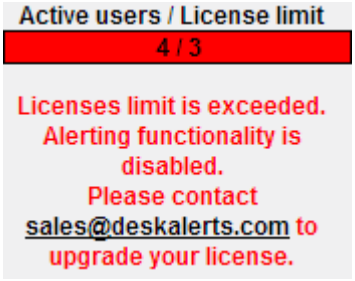
You can now see the number of DeskAlerts Clients installed and allowed by the license purchased on top of the Control Panel:



This bar shows that number of active clients is 3 and the number of the purchased licenses is also 3. It means you cannot install more clients.

Active clients means users are online during last 24 hours period. That number is updated every hour.

When the number of clients will exceed the limit defined by the license, you will see the following warning:



Those users won't receive alerts and you should upgrade the license for a larger number of users.

12. UNINSTALL DESKALERTS

To delete DeskAlerts go to **Start / Control Panel / Add or remove Programs / DeskAlerts Server** and then click **Remove** button.

13. TROUBLESHOOTING

Some known issues occasionally arise when running DeskAlerts. These issues, including the following, can be addressed by the administrator.

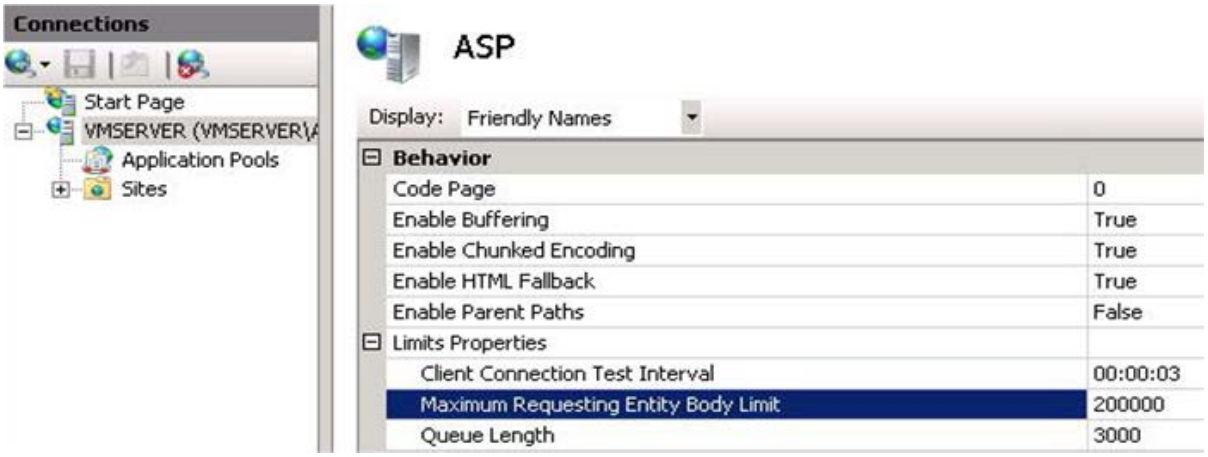
13.1. Errors uploading or downloading large files

When an administrator or editor is trying to upload large images, videos, or flash movie files to include in a DeskAlerts, the upload page may report an error, the upload may never finish, or a blank screen may appear. DeskAlerts Client users may report trouble seeing images or playing movies included with alerts.

This issue may be caused by the current IIS settings being too small for the intended file uploads or downloads. For example, the Windows 2003 server has a default file size limit of about 200 KB for uploads. You can change the size limit by editing the IIS **metabase.xml** file.

- In IIS, right click on the server name and select **Properties**. Check "Enable Direct Metabase Edit." This will allow you to edit the file.
- Open the **metabase.xml** file in a text or XML editor. The file is located in C:\windows\system32\inetserv.
- Find the **AspMaxRequestEntityAllowed** field. The default value is about 200 KB (204800). Increasing the value to 1000000 will allow you to upload files of up to one 1 MB in size.
- Find the **AspbufferingLimit** field. The default download limit is 4 MB. If you need to include larger movies, images or other files in alerts, you can increase this download limit.
- **Save** and close the file.
- In IIS, right click again on the server name, select Properties, and deselect "Enable Direct Metabase Edit."

Note: For IIS 7 that comes with Windows 2008 Server make the following: IIS -> choose your server -> Features View -> ASP -> expand "Limits Properties" -> set value for "Maximum Requesting Entity Body Limit" in bytes:



13.2. IIS settings for Encryption add-on.

If you are using "Integrated Windows Authentication" setting in your IIS, you will find that some users in your network are not receiving alerts. This caused by write permissions on deskalerts/encrypt folder on your deskalerts server machine. Some users will have write permission for it , so IIS can write encrypted alerts files there. The rest users will never receive alerts you sent.

To resolve this issue you have 2 ways:

1. Don't use "Integrated Windows Authentication" setting in your IIS (default IIS user should have permissions to write into deskalerts/encryption folder).
2. Set "write" permissions to deskalerts/encryption folder for all users in your network, that you want to receive alerts.

13.3. If users don’t receive any alert.

First, check your IIS settings again. In ASP settings, "Enable Buffering" option should be set to "True" for DeskAlerts folder.

If you have correct settings for IIS and client installer, but some users don't receive an alert you sent:

1. Please, check if the DeskAlerts client is enabled. When client is disabled, only **Urgent alerts** will be delivered to users.
2. Please, check if you have **Encryption add-on** installed.
3. If you deleted a message in the Sent box BEFORE users go on-line, it would never be delivered to users. No matter if it was **Scheduled / Nonscheduled** one.
4. In other cases, please , provide us with a log file to be created in the following way :
    a. Close the client
    b. Find the following file: C:\Program Files\DeskAlerts\conf.xml
    c. Replace next the line:

    ```
    <PROPERTY id="debug_mode" default="0"/>
    ```

    With the following line:

    ```
    <PROPERTY id="debug_mode" default="1" const="1"/>
    ```

    d. Run DeskAlerts client
    e. Send a message from DeskAlerts Control Panel to this client
    f. Wait for several minutes (till the moment the client should have received an alert)
    g. Send us %APPDATA%\deskalerts.log file

13.4. How to configure your browser proxy to send SMS alerts.

We use WinHTTP API for sending SMS Alert requests to SMS Gateway and WinHTTP uses self proxy setting which can be configured by **proxycfg** as described at MSDN manual

You need an option: proxycfg -u

13.5. No rights to access database. Error with the anonymous account in Internet Information Server (IIS).

In case when you have IIS and MS SQL servers on different machines please try the following procedure:

1. Create or use a special user in the domain or on your server with IIS and DB.
2. Grant that user access to DeskAlerts database (you can make it db_owner for the database).
3. Open IIS configuration, select the web site where DeskIAlert server is installed, open Authentication properties for that web site.
4. Edit "Anonymous Authentication" settings and set it to the "Specific user". Specify the user that you created in step #1.

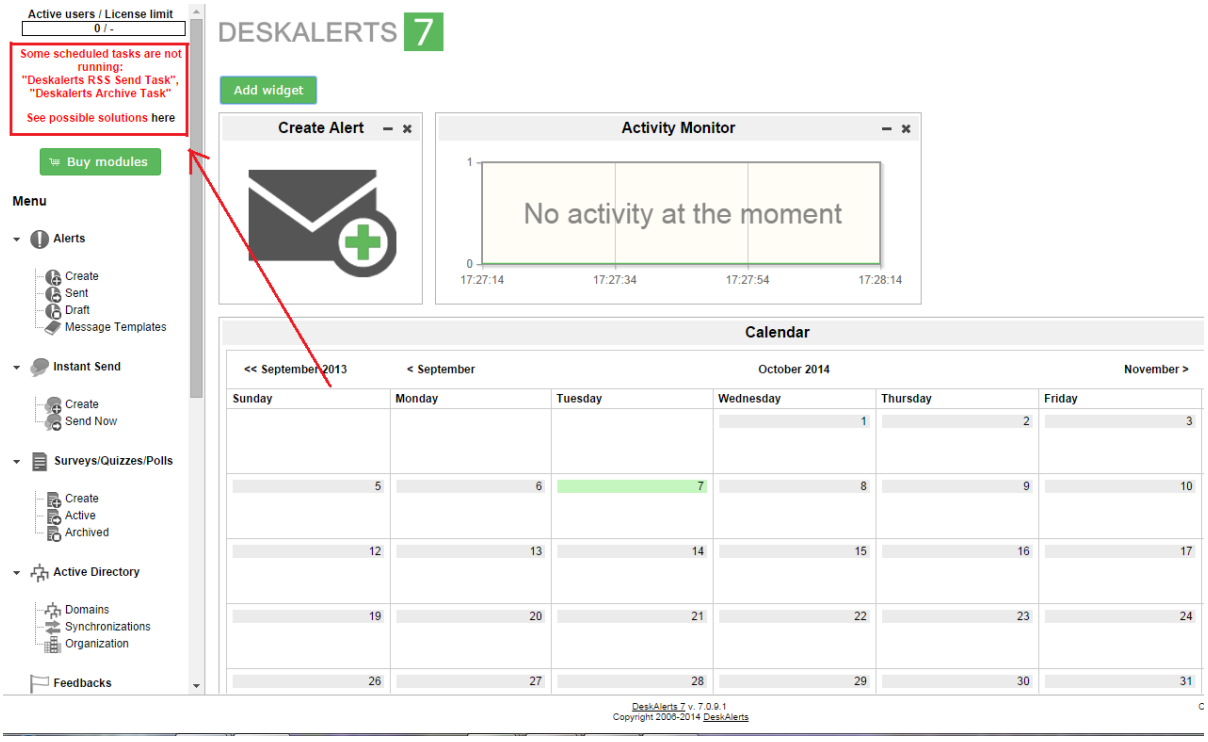
After this procedure DeskAlerts server should be able to connect to the database using Windows authentication (which we believe was configured during setup).

13.6. Some scheduled tasks are not running – possible sources of the problem.

DeskAlerts Server is using Windows Scheduled Tasks to maintain some of its functions. These tasks are responsible:

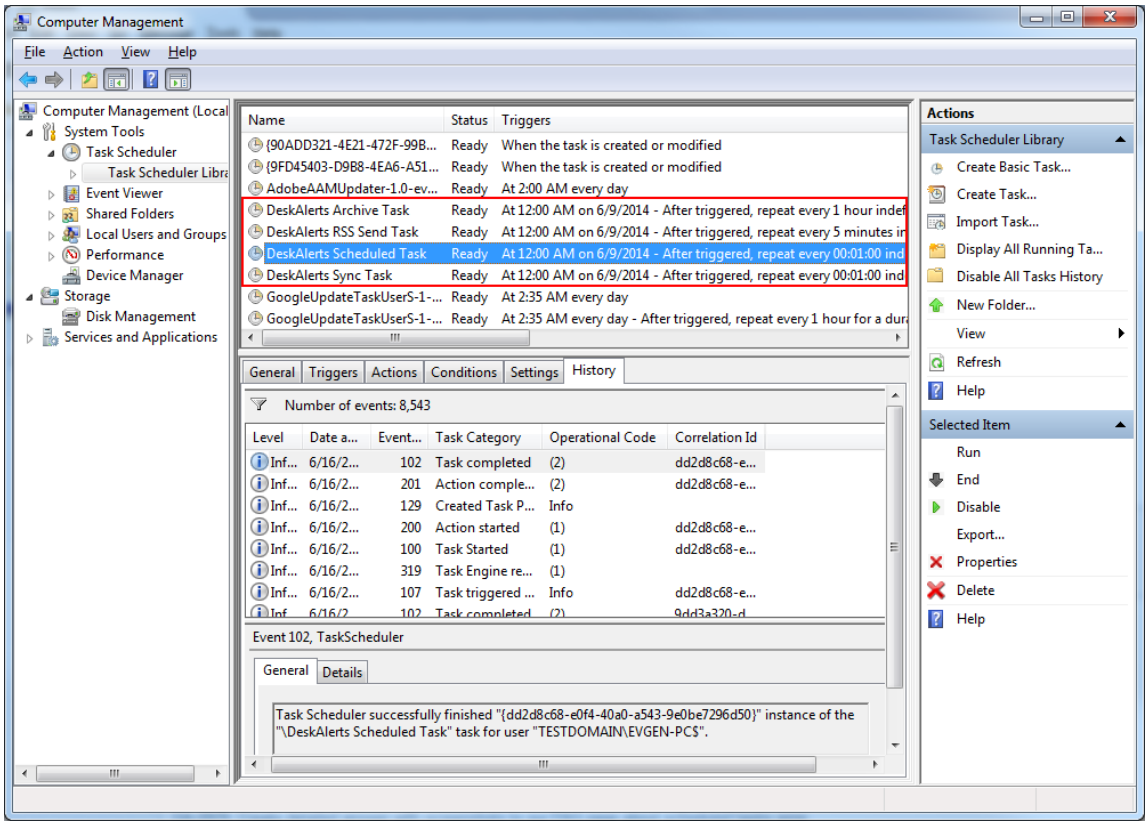
- For sending of all scheduled content
- For obtaining content from RSS-enabled sources
- For performing scheduled (automatic) Active Directory synchronizations
- For content archiving purposes

If you see a notification about some of these tasks failing - the big part of DeskAlerts functionality is inactive.



There are few steps to take before contacting DeskAlerts support:

1. Access the Windows Task Scheduler, find the DeskAlerts tasks and check the task History for any error messages:



2. For every task that is failing, in the Action tab of task properties, find the script which is being executed by the task. Check its existence in inetpub/AdminScripts folder.
3. If the .vbs file is in place, open it and find the line which contains the address of some server .asp file. Check the existence of this file in the given folder.
4. If anything of the above is not in order (Task History contains error messages/Some of the files are not in place), you should run your server installation once again, over the existing one.
5. If reinstalling the server over existing one isn't helping - contact DeskAlerts support.