

DESKALERTS DEPLOYMENT PLAN

© 2009 Softomate

www.deskalerts.com

Reproduction of this guide in whole or in part, by any means whatsoever,
is prohibited without the prior written consent of the publisher.

Softomate LLC
104 6th Street, Unit B
Lynden, Washington 98264 USA

CONTENT

CONTENT	2
INTRODUCTION.....	3
1. PRE-REQUIREMENTS FOR INSTALLING DESKALERTS	3
2. SERVER CONFIGURATION	3
2.1. IIS settings	3
2.2. Proxy settings.....	3
3. DESKALERTS SERVER INSTALLATION	4
ACTIVE DIRECTORY SYNCHRONIZATION	10
4. DESKALERTS CLIENT INSTALLATION	11
5. TROUBLESHOOTING.....	12
5.1. Statistics page errors	12
5.2. Errors uploading or downloading large files.....	13
5.3. Difficulties using RSS feeds or sending alerts using SMS	13
5.4. AD synchronization difficulties	13
5.5. How to set permissions to IIS user to access Active Directory	14

INTRODUCTION

This document describes the process of installing DeskAlerts server and client packages. Please follow these instructions carefully to complete the installation.

Basic installation and configuration usually takes several 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).

1. PRE-REQUIREMENTS FOR INSTALLING DESKALERTS

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

- 2GHz CPU or faster
- 1024 MB RAM
- 200 MB free hard drive space
- Windows 2000/2003 Server or Windows XP Professional
- IIS 5.1 or higher (with ASP required)
- MSSQL 2005 or higher

Note : make sure that the security mode of your MSSQL server is SQL and Windows Authentication (or mixed for earlier versions of MSSQL).

2. SERVER CONFIGURATION

2.1. IIS settings

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

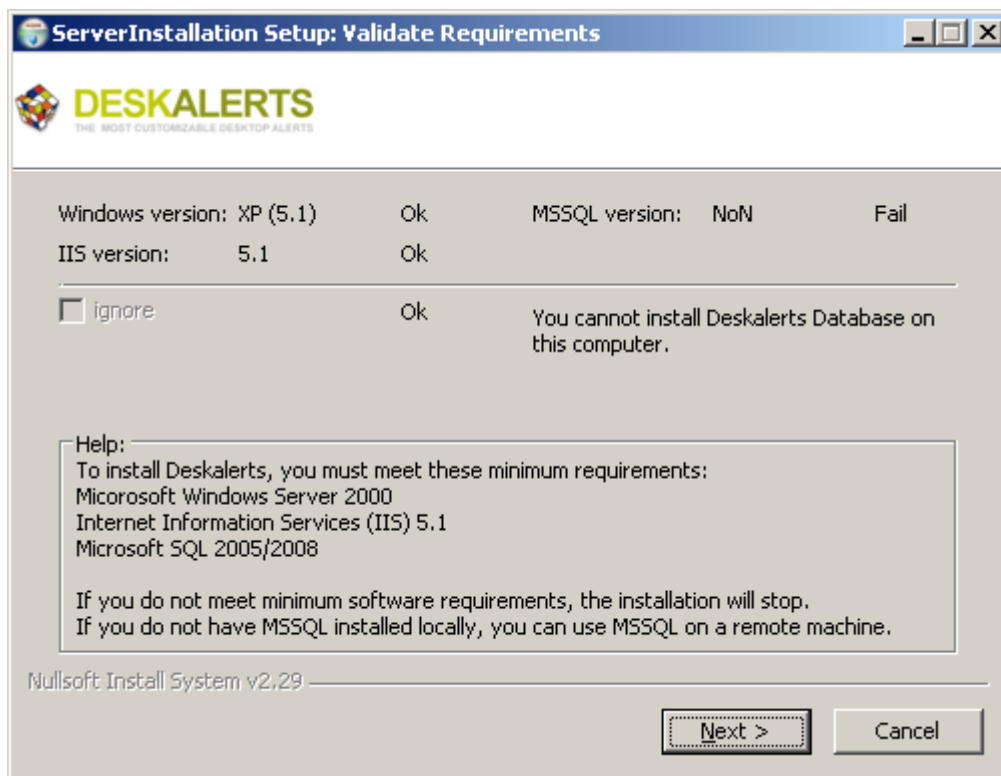
2.1.2. If you have the Active Directory module enabled, you should configure the IIS user permissions properly. It is important to ensure that the user has permission to read Active Directory information, including domains, groups, and users.

2.2. Proxy settings

If you use a proxy server in your environment, it is important that the proxy settings for IIS be correct. See the Troubleshooting section for more information.

3. DESKALERTS SERVER INSTALLATION

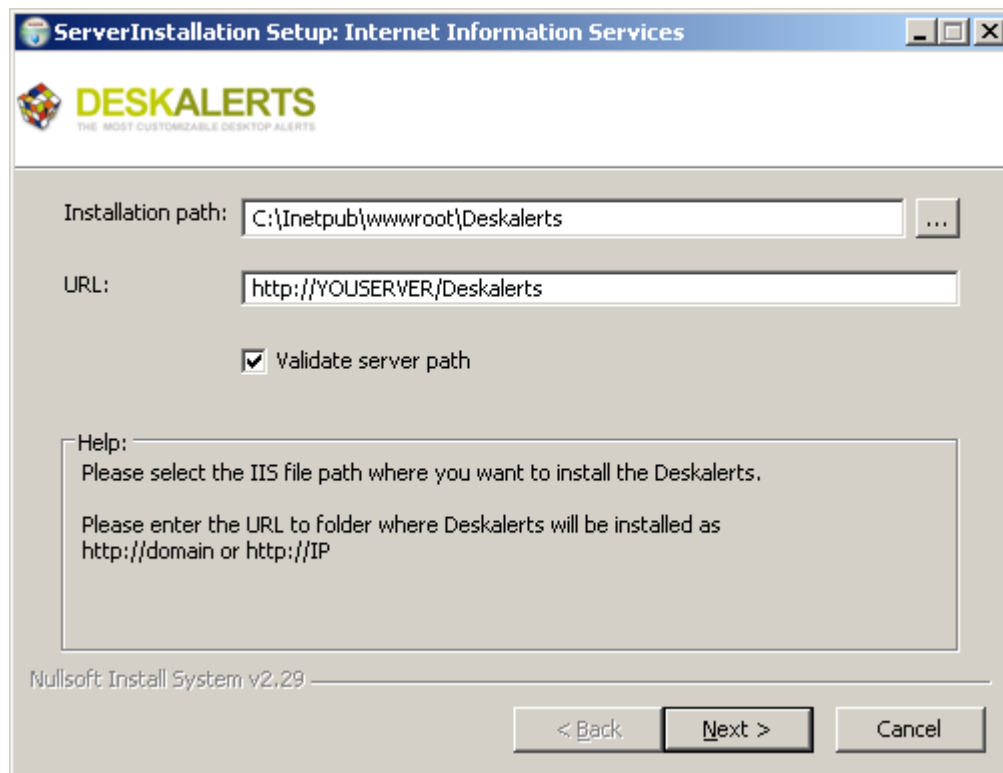
- Unzip the installation package into a folder on the server where you intend to host DeskAlerts.
- Double-click the file called **ServerInstallation.exe**. The setup window will appear.
- The installer will verify that your system meets the minimum requirements for running DeskAlerts and will display 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 MSSQL to run DeskAlerts. If the screen shows that DeskAlerts cannot find MSSQL 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.



Softomate suggests that you accept the suggested installation location. When you are ready, click **Next**.

- The next screen involves the DeskAlerts database. In the **Host** field, enter the IP address of the computer running an MSSQL Server. Accept the default value "alerts" in the **Database** field as well as 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 on the MSSQL Server to create new databases.

ServerInstallation Setup: Setting up the Deskalerts Database

DESKALERTS
THE MOST CUSTOMIZABLE DESKTOP ALERTS

SQL Host: (local)

Database: Deskalerts

Username: sa

Password: ●●●●●●

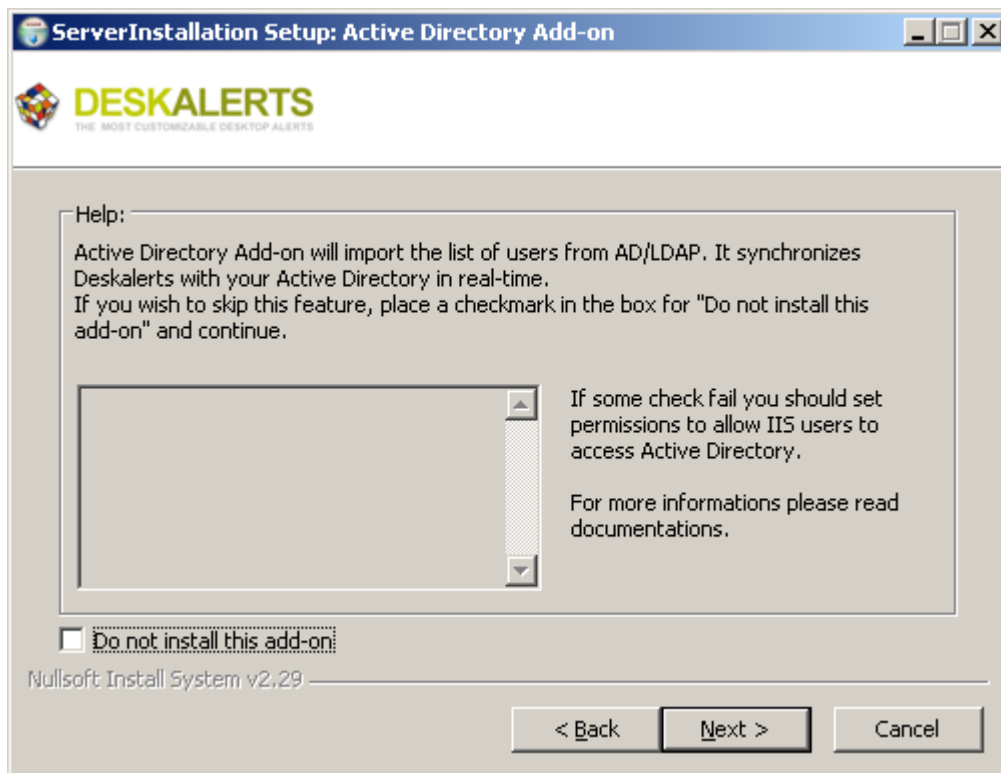
Help:
The information is required for setting up the Deskalerts Database.
Host – is the name or the IP address of the computer where MSSQL is installed.
Database – is the name of the alerts database is automatically created.
Username/Password – the MSSQL user must rights to create new databases.

Nullsoft Install System v2.29

< Back Next > Cancel

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 and password 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.

Note: See "Working with Active Directory" and "Working in Registration Mode" in the DeskAlerts **Administrator's Guide** for more information.

- 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.

ServerInstallation Setup: SMS Add-on

DESKALERTS
THE MOST CUSTOMIZABLE DESKTOP ALERTS

URL:

API ID:

Username:

Password:

Help:
SMS Add-on allows sending SMS messages to mobile phones/devices from the DeskAlerts Control Panel.
SMS Add-on uses Clickatell gateway.
Please visit www.clickatell.com to receive API ID, Username and Password.
If you wish to skip this feature, check the box for "Do not install this add-on" and

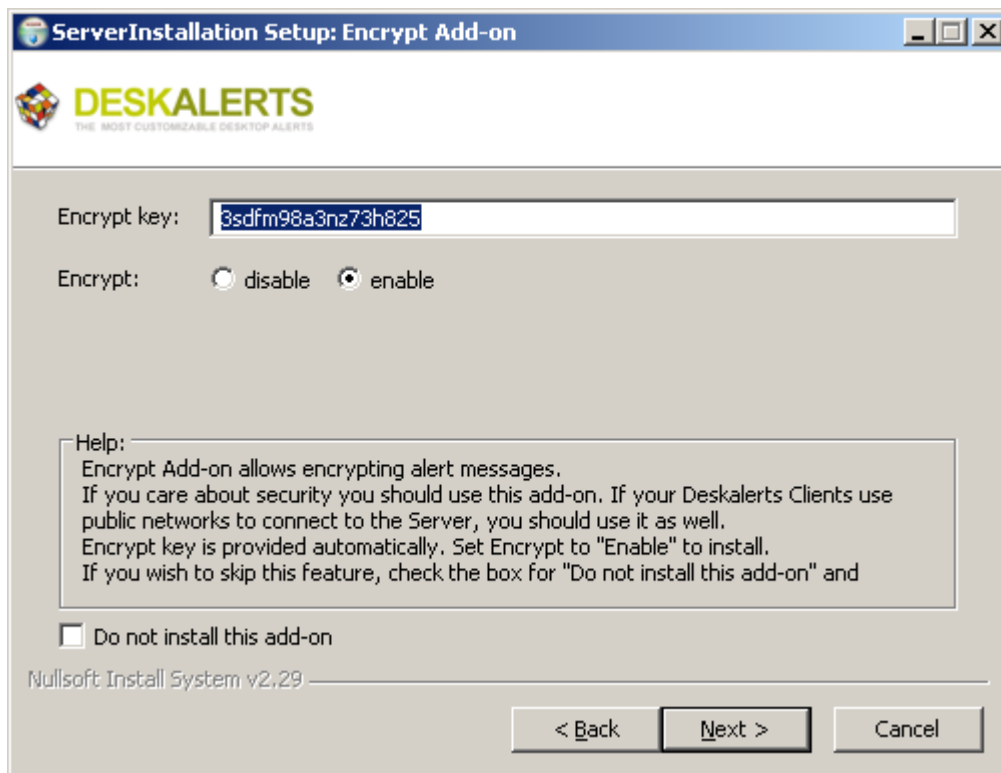
Do not install this add-on

Nullsoft Install System v2.29

< Back Next > Cancel

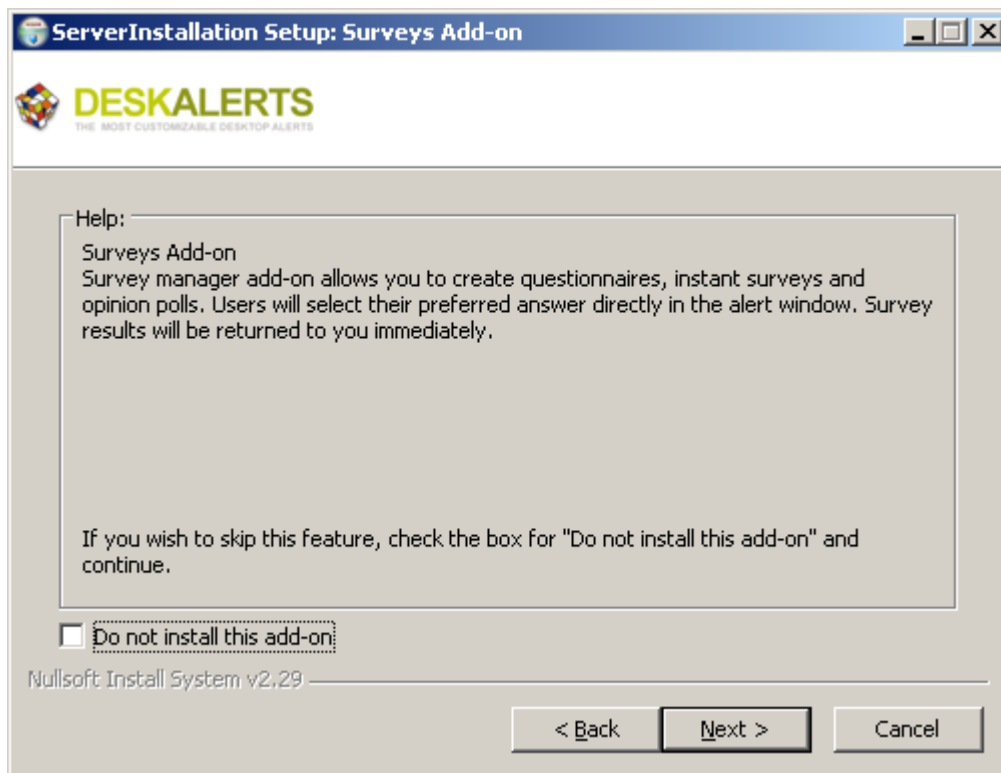
The URL field cannot be edited, and you will need to obtain your **API ID**, **username**, and **password** from the service provider, Clickatell (<http://www.clickatell.com>). Enter this information in the appropriate fields. You can also check the "Do not install this add-on" checkbox if you do not intend to use SMS messaging. When you are ready, click **Next** to proceed.

- DeskAlerts offers an **Encrypt add-on** to provide message security. It is enabled by default.



The Encrypt add-on screen allows you to alter the encryption key or to select the "disable" radio button to turn off encryption. 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.



When click **Next**, and you are satisfied with your configuration choices, click **Install** to start the installation process.

- When the installation is complete, you will see a confirmation screen. Click **Finish** to complete the process. You can now log in to DeskAlerts.

ACTIVE DIRECTORY SYNCHRONIZATION

After installation and running Control Panel, please go the Users or Groups tabs. When you click the 'Refresh' button, you will see the following form to choose domains and groups accordingly.

AD Synchronizing

Please select domains and groups from Active Directory for synchronizing with DeskAlerts.

Note: if you can't see domains and groups below, your IIS user doesn't have all required permissions to watch AD structure. Please contact your technical specialist to set required permissions.

-
- DOMAIN
 Synchronize all groups
 Synchronize selected groups

-
- MYNEWTTESTDOMAIN
 Synchronize all groups
 Synchronize selected groups

-
- NONE
 Synchronize all groups
 Synchronize selected groups

-
- SOFTOMATE
 Synchronize all groups
 Synchronize selected groups

-
- WORKGROUP
 Synchronize all groups
 Synchronize selected groups
-

Please note that the synchronizing process may take some time (up to several hours) depending on the number of groups selected and number of users in domains.

START SYNCHRONIZING

To refresh Users or Groups, press the 'Refresh' button manually each time.

4. DESKALERTS CLIENT INSTALLATION

4.1. Unzip the client.zip file from the DeskAlerts package to a location on the server that you can find easily. You do not need to install it: it is now ready for use.

4.2. To customize the DeskAlerts Client, follow these steps:

- Modify the conf.xml and version.txt files, both located in client | data | version (please see details in the DeskAlerts User's Guide).

- Run the DeskAlerts Client Installer to create new files for distribution, or use a command window to run the build_alerts.bat utility, which is located in client | data | version.

The DeskAlerts Client configuration file is called conf.xml. You will find it in the client | data | version section of the client installation package that you received from Softomate. There you will also find logo.bmp, history.html, and other files. These files can be changed as needed.

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

4.4. Provide valid paths and settings in the builder utility (such as the DeskAlerts server path). Do not forget to check the "Use Active Directory" checkbox if you have an Active Directory module.

4.5. At the completion of this process, the installer files will be located in the "Release" folder. Now you can set up DeskAlerts on client computers.

5. TROUBLESHOOTING

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

5.1. Statistics page errors

When an administrator or editor tries to view detailed statistics for alerts, surveys or user activity, errors can appear on the screen.

This difficulty may be caused by date format differences between IIS and MSSQL Server. To resolve this issue, log out of DeskAlerts, open the **config.inc** file from the admin folder in a text editor, and locate these strings:

```
Dim date_format(4)
```

```
date_format(1)="m"
```

```
date_format(2)="d"
```

```
date_format(3)="y"
```

These settings tell DeskAlerts to display dates as month/day/year. Try changing the strings so they read:

```
date_format(1)="d"
```

```
date_format(2)="m"
```

```
date_format(3)="y"
```

This tells DeskAlerts to display dates as day/month/year. Save the config.inc file, log in to DeskAlerts again, attempt to view the detailed statistics, and verify whether the onscreen error messages reappear.

5.2. 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 DeskAlert, 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\inetsrv.
- 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."

5.3. Difficulties using RSS feeds or sending alerts using SMS

Occasionally, when an RSS URL is set in the Control Panel, users may not receive alerts through RSS, or they may not receive SMS alerts sent through the server.

This difficulty may be caused by the proxy server settings preventing IIS from accessing external URLs called from a script. To resolve this, use proxycfg.exe to adjust the proxy server settings:

- Open the command window.
- Enter **proxycfg.exe -d -p yourproxy:port**, using the correct proxy port value in place of yourproxy:port, and hit the enter key.
- Restart IIS and check to see if the problem is resolved.

5.4. AD synchronization difficulties

When attempting to synchronize with Active Directory, it may be the case that no new users/groups appear in DeskAlerts Control Panel.

This issue may be caused by your IIS user permissions. You should set permissions to allow IIS users to access Active Directory, then restart IIS and attempt synchronization once again. Please read **5.5** on how to set permissions to IIS users.

Troubleshooting: When you have set all permissions for your IIS user, you should try to run AD-test scripts. Upload the scripts to your server and run them.

First, run the `ad_test_domains.asp` script, which shows you all available domains in your network.

Select one of domains from the list and insert it into the other scripts (`ad_test_groups.asp`, `ad_test_members.asp` and `ad_test_users.asp`).

Also, make appropriate changes to the following string:

```
domain_name="SOFTOMATE"
```

Change "SOFTOMATE" to your domain name, then run the scripts.

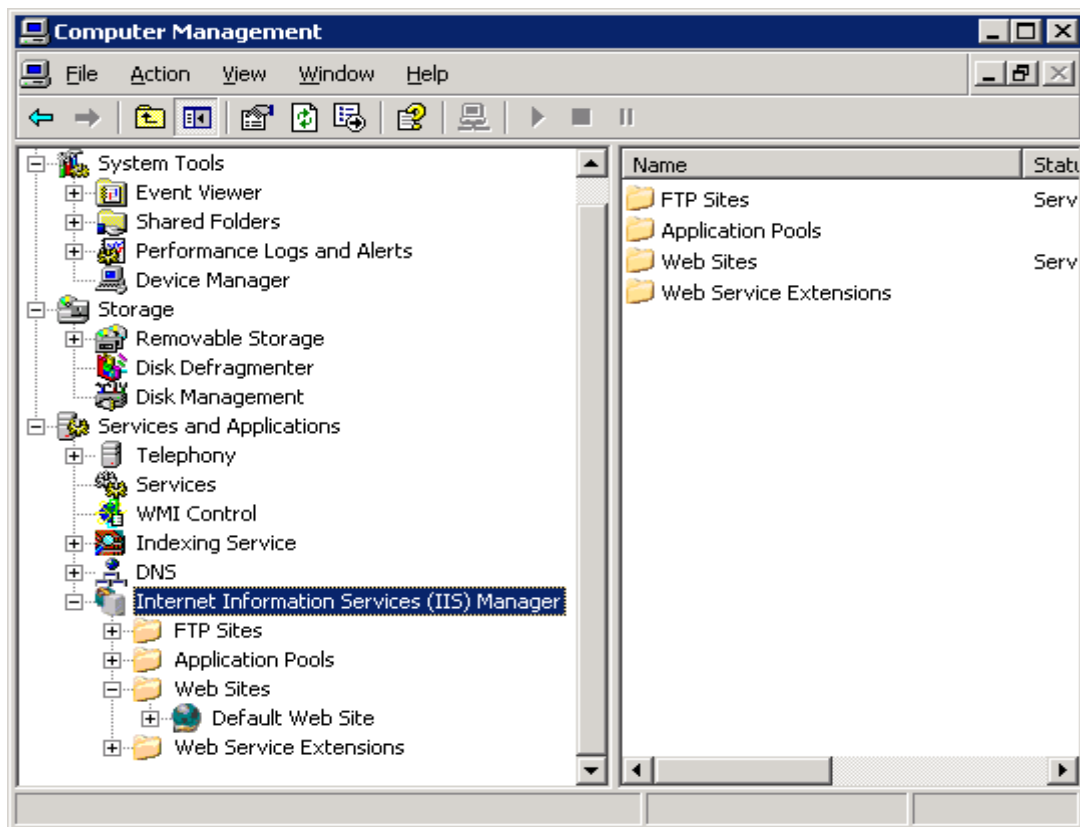
If any of the scripts do not return results, make sure that:

- 1) your IIS server is located in one of your domain computers (the best location is the domain controller);
- 2) IIS users have appropriate permissions to access the Active Directory.

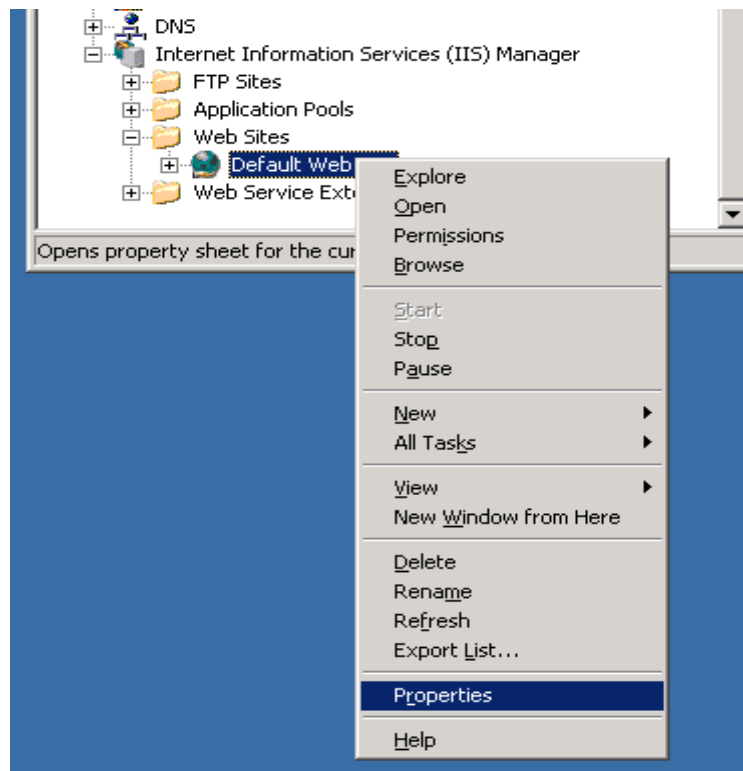
After you have made any necessary changes, run the scripts once again.

5.5. How to set permissions to IIS user to access Active Directory

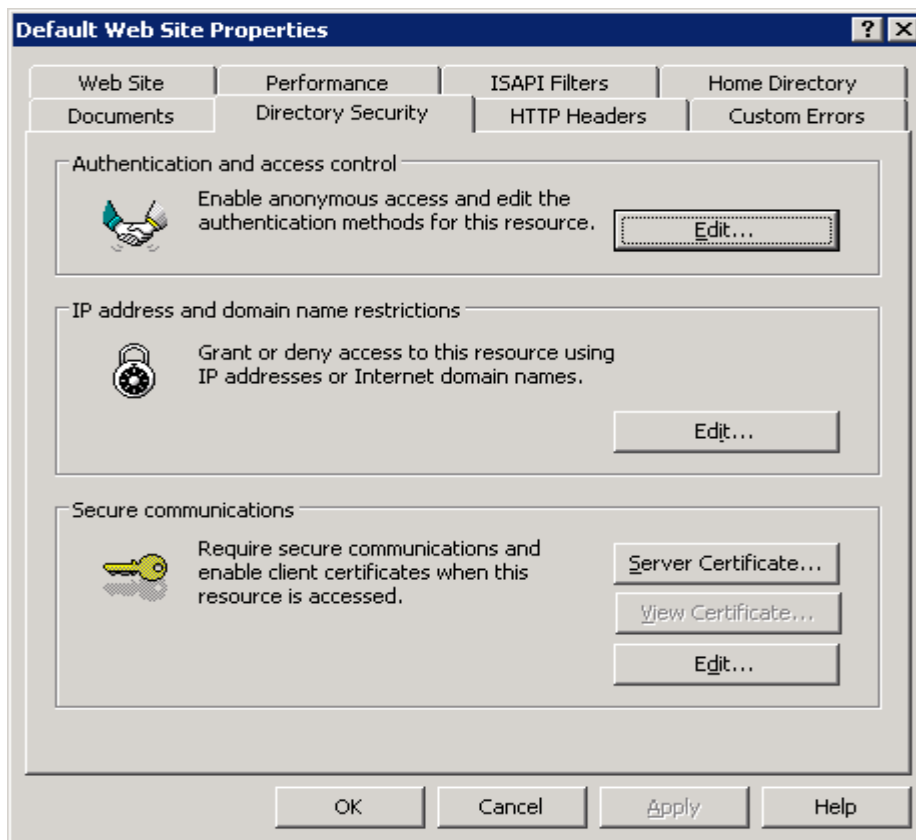
- 1) Open your computer management window and locate IIS manager (see picture):



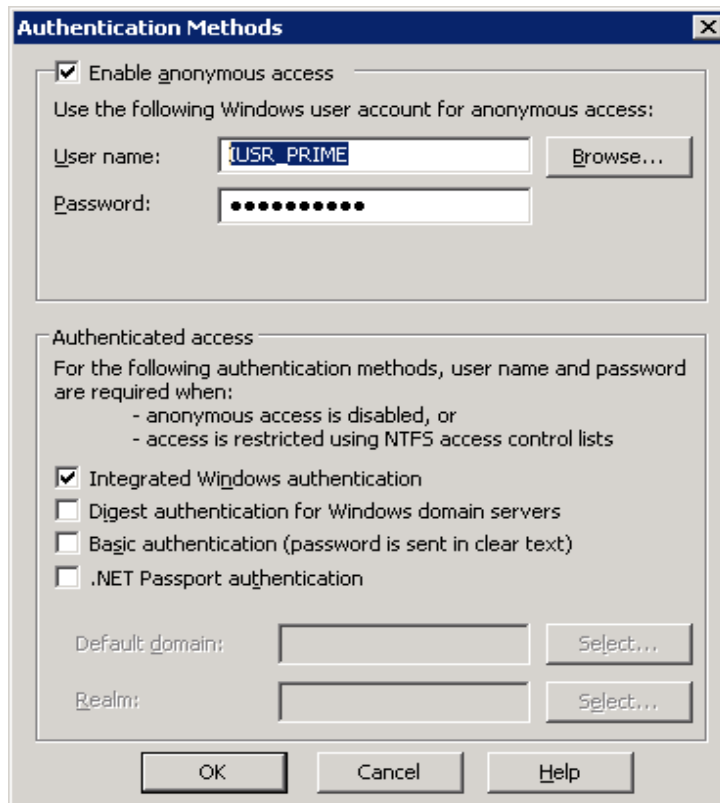
2) Select your website where Deskalerts Control Panel is located (on the picture it's «Default Web Site»), right-click on it and select «Properties» from the drop-down menu.



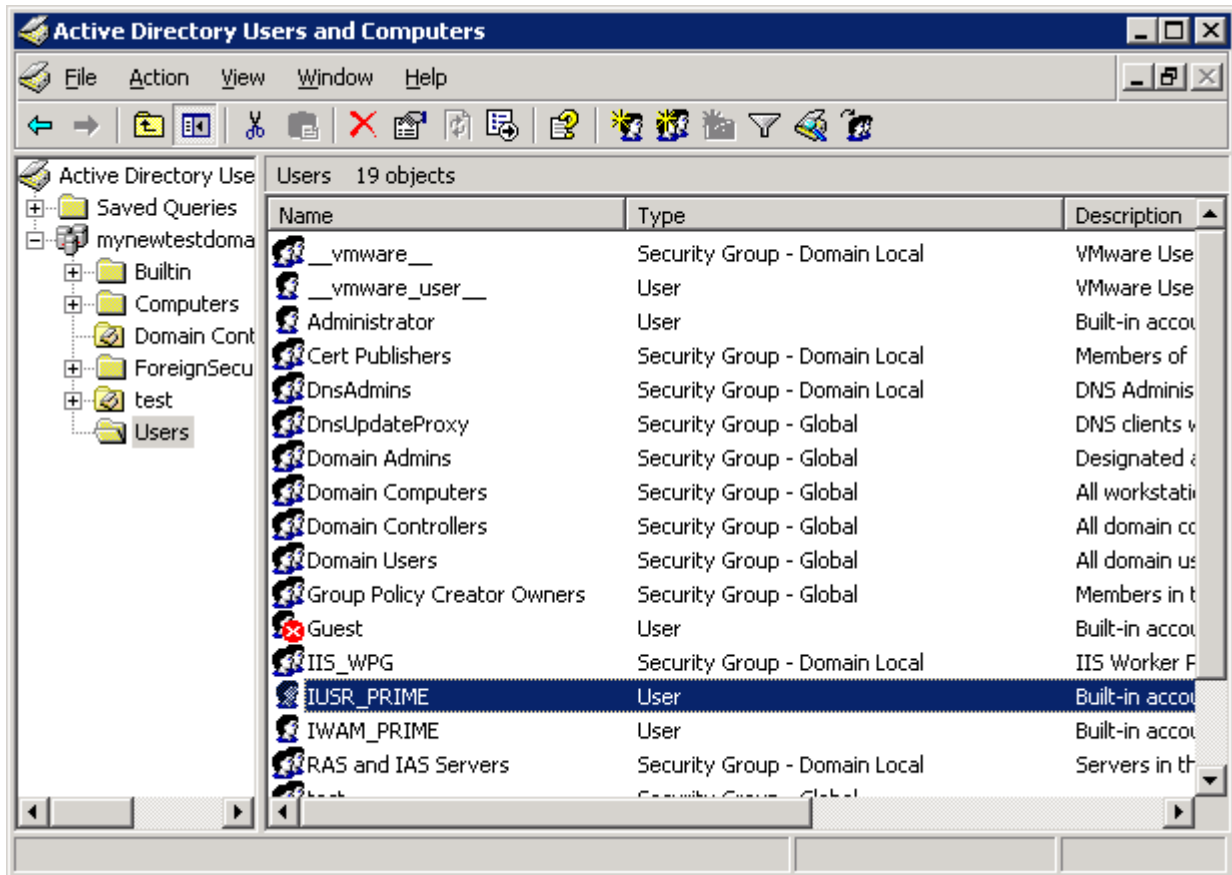
- 3) Select «Directory Security» tab in the Properties window and click on «Edit» button on «Authentication and access control» section.



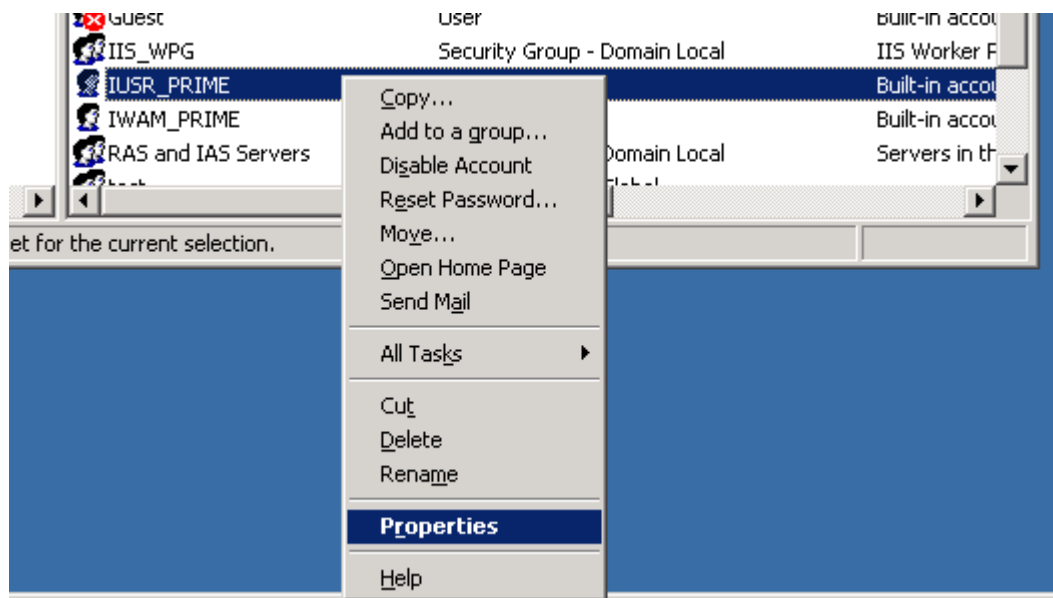
4) You will see «User name» of your IIS user.



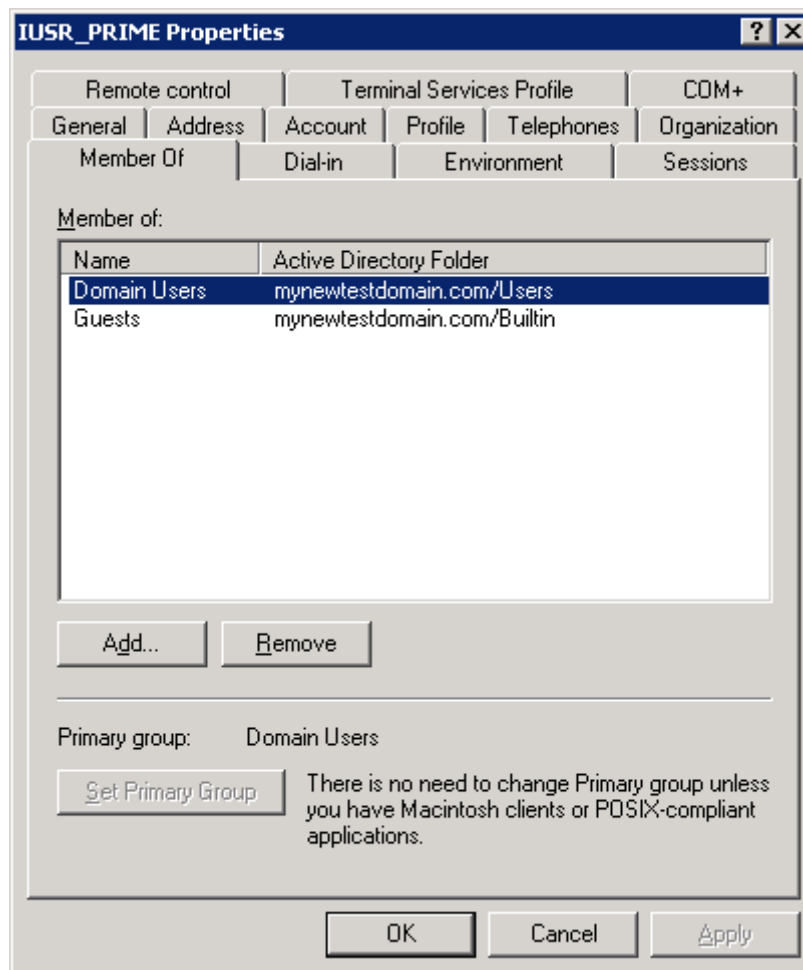
- Open your «Active Directory Users and Computers» window, select the «Users» folder in your domain and find the IIS user in the list.



- Right-click on IIS user and select «Properties» from the menu.



- 7) Select « Member Of » tab in properties window and you will see what groups your IIS user belongs to.



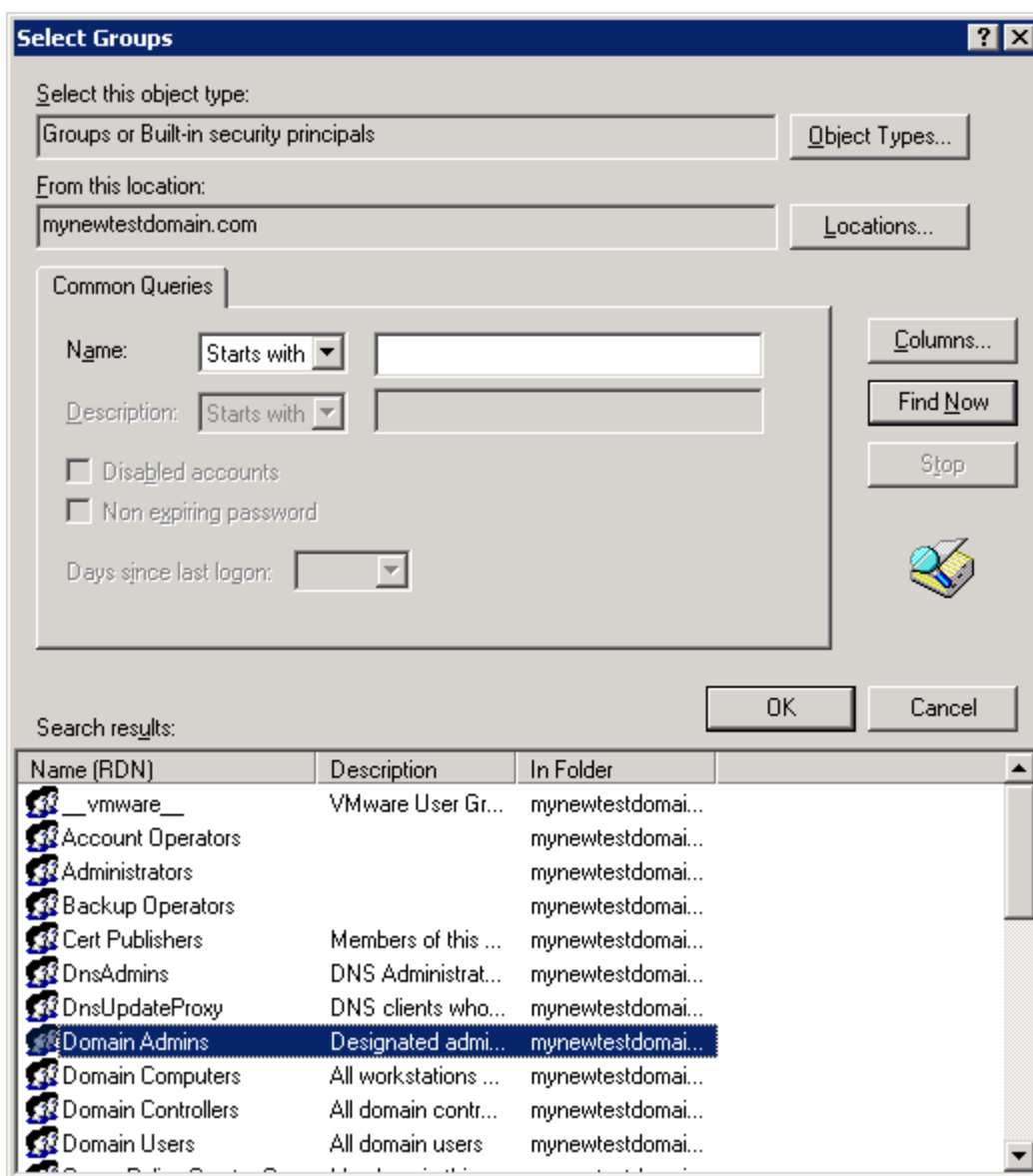
8) Click on the «Add...» button and you will see «Select Group» window.

Click on the «Advanced...» button and you will see advanced select groups window (example shown on the picture).

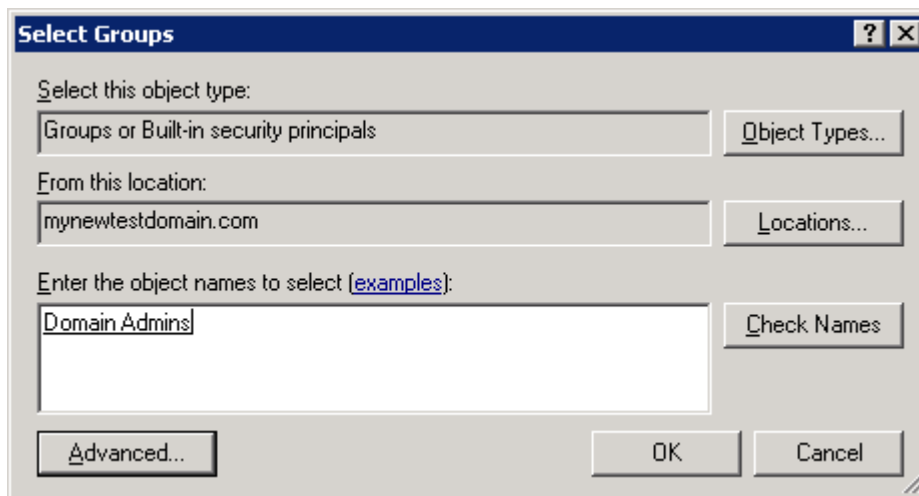
Click on «Find Now» button and you will see the list of all groups in your domain.

Find the groups named «Domain Admins», select them and click the «OK» button.

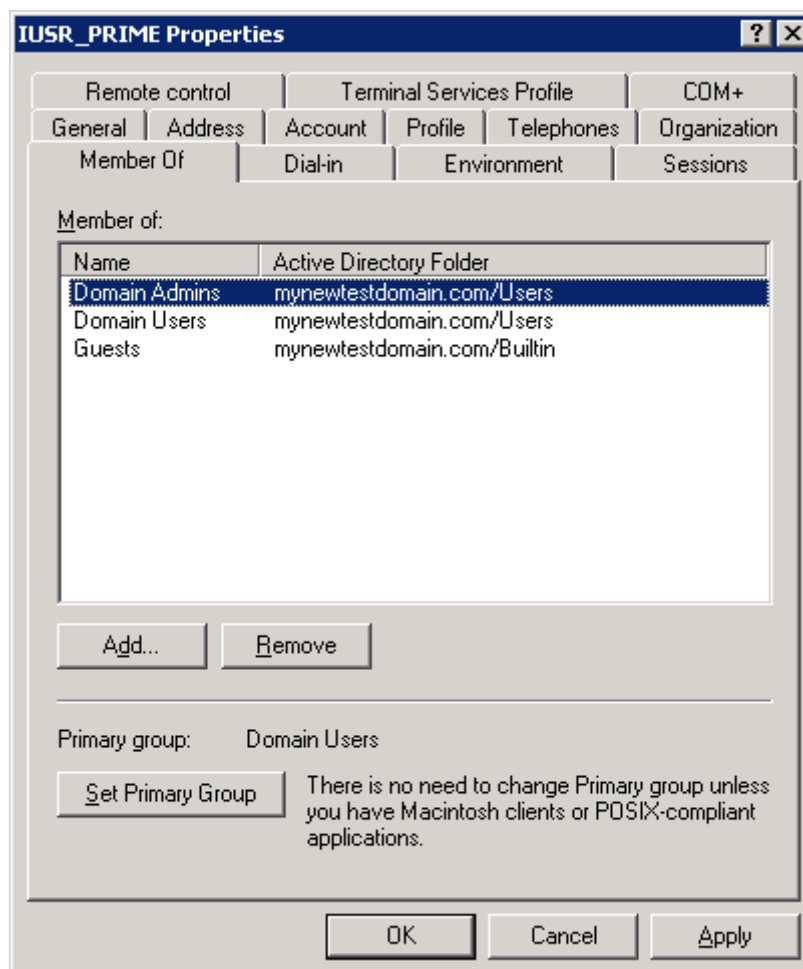
Note: you can use 'Domain users' group instead of the 'Domain Admins', just make sure that IIS users have permissions to read AD. If you have other groups that can read AD, you may add IIS users into these groups.



- 9) You will see the simple «Select Group» window once again and «Domain Admins» group inserted in the field (you can see it on the picture). Click the «OK» button.



- 10) You will see that the «Domain Admins» group has been added to the «Member of» field. Click the «OK» button.



Your IIS user now has all permissions necessary to access Active Directory.