

DESKALERTS ADMINISTRATOR'S GUIDE

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901 N. Pitt Street, Suite 325
Alexandria, VA 22314

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1 Pre-Requirements for installing DeskAlerts

DeskAlerts solution consists of two main parts – server web application (hosted on Windows-based Application server running IIS) and client application, installed locally on message recipients' machines.

Server application stores its data in MSSQL database, which may be hosted on the same server as the application itself, or on a different database server somewhere.

Listed below are the hardware and software requirements for Application server, Database server and client workstation.

Note: DeskAlerts server doesn't require a dedicated IIS or database server, and can share any of these with other applications.

1.2 Hardware requirements

Each server must meet a minimal hardware requirement, depending on the message audience size:

1.2.1 Application Server requirements

| | | | | |
|-----------------------|---|---|---|--|
| Number of users | 1-600 | 600-2000 | 2000-10000 | 10000-20000+* |
| CPU speed | 2GHz (1 core or higher) | 3GHz (2 core or higher) | 3GHz (4 core or higher) | 3GHz or higher (8 core or higher) |
| RAM volume | 1GB | 2GB or higher | 4GB or higher | 8GB or higher |
| Hard disk space | 200 MB for installation files + 1-2GB for log files | 200 MB for installation files + 2-4GB for log files | 200 MB for installation files + 4-8GB for log files | 200 MB for installation files + 8-20 GB for logs |
| Client poll frequency | 60 seconds | 60 seconds | 60-120 seconds | 120-300 seconds |

1.2.2 Database Server requirements

| | | | | |
|-----------------|----------------------|--------------------------|--------------------------|--------------------------|
| Number of users | 1-600 | 600-2000 | 2000-10000 | 10000-20000+* |
| CPU speed | 1GHz | 3GHz or higher | 3GHz or higher | 3GHz or higher |
| RAM volume | 1GB, 2GB recommended | 2GB min, 4GB recommended | 4GB min, 6GB recommended | 6GB min, 8GB recommended |
| Hard disk space | 1-5 GB | 5-10 GB | 10-20 GB | 20-50 GB |
| Hard disk speed | 7200 RPM | 7200 RPM | 10000 RPM | 10000 RPM |

*- with more than 20000 users you will need to consider further decreasing polling frequency of client applications or clustering your DA servers.

1.2.3 Workstation requirements

Client application is very lightweight and mostly consumes resources to display a message when it received, consuming about as much as an extra tab in your web browser

256MB RAM

10MB free hard drive space

1.3 Software requirements

1.3.1 Application server requirements

- Windows Server 2008/2012/2016 (R2 editions are supported)
- Microsoft IIS 7.5 or higher (ASP features must be installed for back compatibility)
- Microsoft .NET Framework 4.5 or higher

Note: installing the application on Windows Server 2008 will require some additional steps to be taken – see Pre-installation steps section.

1.3.2 Database server requirements

Microsoft SQL Server 2008 or newer – Express, Standard or Enterprise edition. SQL Server management studio should be installed to set database permissions and user access level.

Note: MSSQL Server Express edition is only suitable for fairly small audiences (below 800 end users). If you're going to target bigger numbers of employees with alerts – consider using Standard or Enterprise edition.

1.3.3 Workstation requirements

Windows 7(SP1)/8.1/10 with IE 11 installed

Or

OSX version 10.7.4 (Lion) or later

2 Installing DeskAlerts server application

Basic installation and configuration of DeskAlerts server usually takes a few hours – the time depends on the specific environment configuration (proxies, firewalls, Active Directory policies)

2.1 Pre-installation steps

Prior to running the DeskAlerts Server installation package, the following steps must be taken:

- The user for database creation and connectivity should exist and authentication must be set up for Windows accounts.
- Necessary IIS features must be installed in accordance with the list

Software can connect to the database instance using a built-in Windows authentication (using a domain account), or using SQL Server authentication, if the MSSQL instance is running in mixed authentication mode.

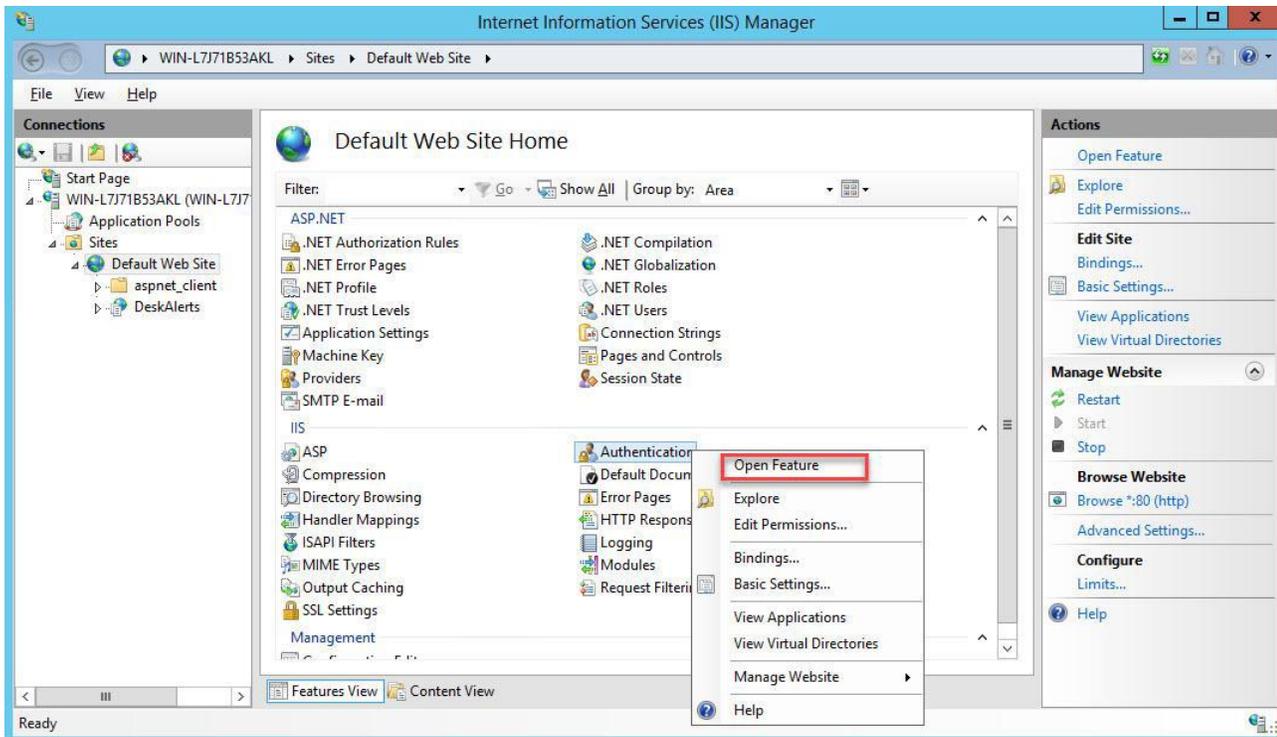
If you are going to use Windows authentication, follow the instructions in the 2.1.1

2.1.1 Setting up IIS connection to database with Windows authentication

1. Make sure that the account you're going to use has sufficient rights to create databases or create a blank database for DeskAlerts application manually using the account that can do that. After the installation, the account used to connect to database will need to be granted db_owner role for the database.

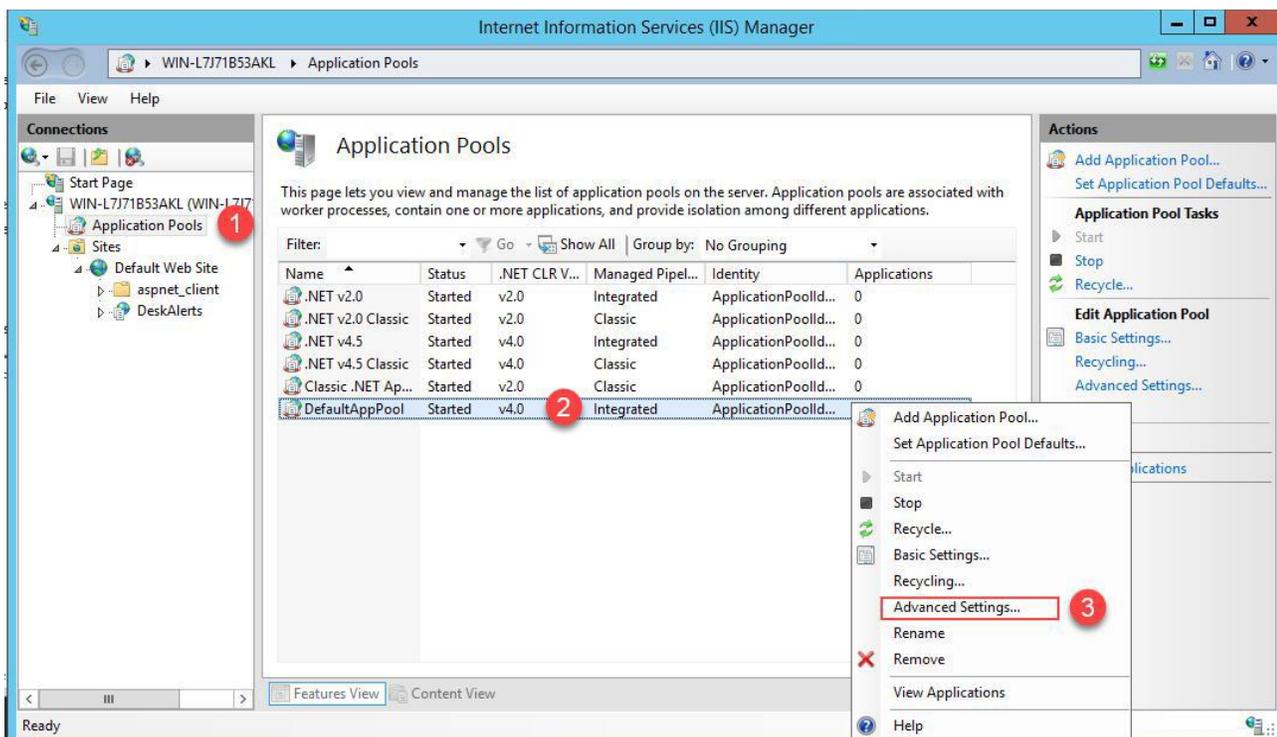
2. Make sure this account's password is set to never expire, so no reconfiguration will be needed after

3. Open the IIS Manager on Application server and navigate to Authentication feature for the site running DeskAlerts:



4. Edit the Anonymous authentication settings and set them to use "Application pool identity".

5. Go to the Application pools and select the application pool that will be running DeskAlerts application. Go to "Advanced Settings":

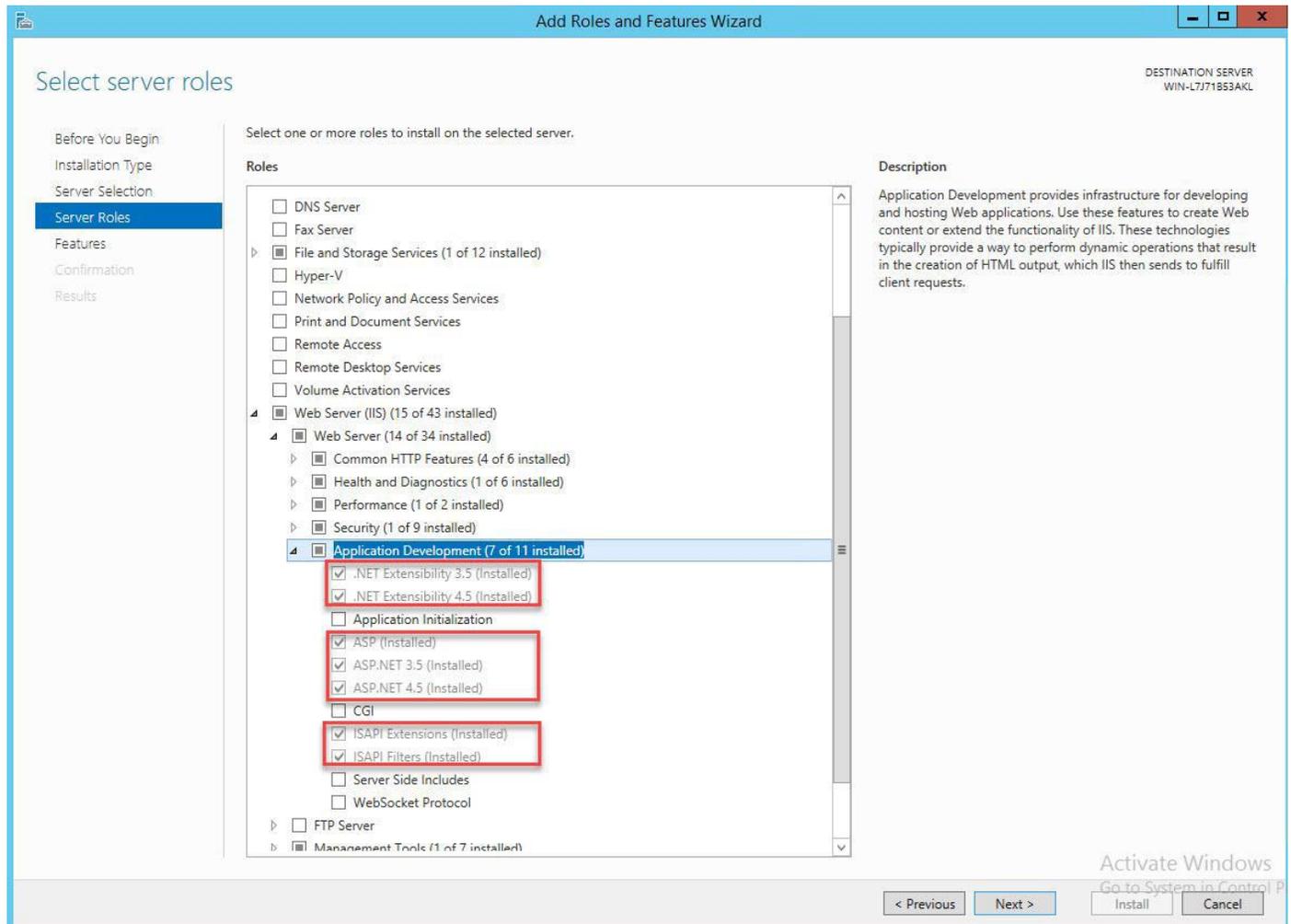


6. In the advanced settings, find the "Identity" field and set it to "Custom account", specifying your AD username credentials

2.1.2 Installing the IIS features

Before running the installation, make sure that all necessary features of IIS are installed. To do this, open Server Manager and enter the "Add Roles and Features" wizard.

The options highlighted on the screenshot below are required for any installation of DeskAlerts server:



2.1.3 Registering the ASP.NET 4.5 (Windows Server 2008 only)

In Windows Server 2008 and 2008R2, the .NET Framework v4.5 is not preinstalled by default and ASP.NET 4.5 cannot be added via server manager.

You will need to:

- Get the .NET Framework v4.5 installer from Microsoft and install it manually
- Register the ASP.NET 4.5 component using the elevated command prompt with the "aspnet_regiis -i" command, as described [here](#).

2.1.4 Verify the specific modules requirements

Some of the DeskAlerts solution modules may have additional requirements, please check the table below and verify if you may be missing something for one of the purchased modules:

| Module | Requirements |
|-------------------------|---|
| SMS Module | SMS gateway you'll be using should be accessible from DA server via the TCP port used by it – some firewall configuration may be required |
| Screensaver Module | Employees' screensavers must not be managed by Group Policy (it will override any DeskAlerts changes) |
| Wallpaper Module | Employees' wallpapers must not be managed by Group Policy (it will override any DeskAlerts changes) |
| RSS Module | The RSS feeds used need to be accessible from the Application server, since the RSS reader is the part of server application |
| Active Directory module | The AD domain controller should be accessible for LDAP requests via port 389 or 636 if LDAPS is used |
| Mobile alerts module | Push notification services of Apple and Google must be accessible via ports 2195 and 443 respectively |

2.2 Running the installer package

The package you received from DeskAlerts contains the installation package for DA server and the DeskAlerts client builder. The server installer executable is named **DeskAlerts.Server.vx.x.x.x.exe**, where x.x.x.x is a version number. To start the installation, copy the file to Application server and launch it as Administrator.

As first two steps, you will be presented with the EULA and the form to enter your trial key if you're installing a trial version. If you don't have a trial key yet, the user interface also contains instructions on retrieving it.

DESKALERTS
Communication Center

End User License Agreement (EULA)

License Agreement

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I Agree
 I Disagree

Install Previous Next

DESKALERTS
Communication Center

Trial

Your Trial Key

Help

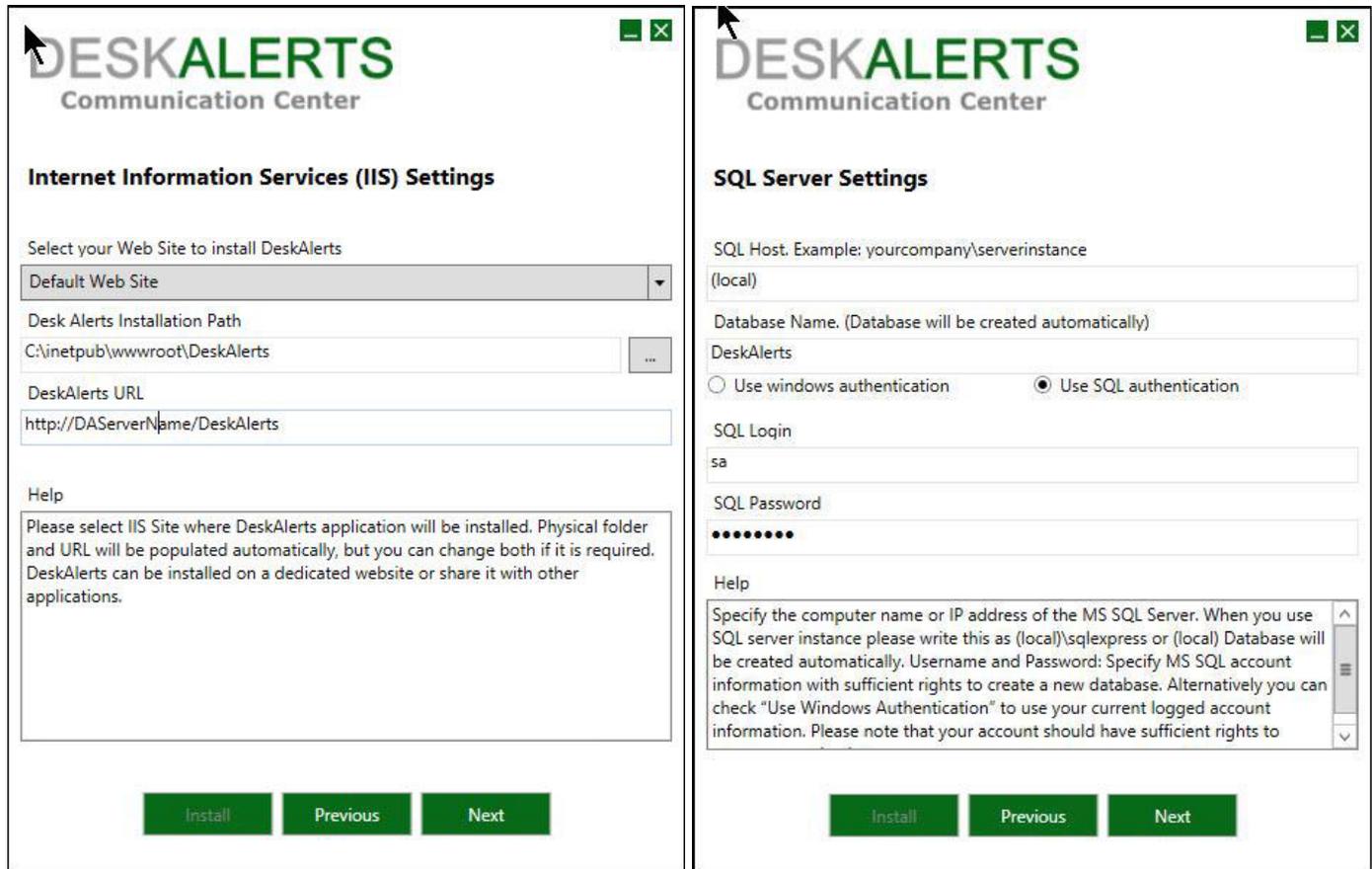
Please get your trial key using this link: <http://alert-software.com/trial/> and enter it in the field above.

Install Previous Next

Then, the installer package will automatically check the pre-requirements. If you see any red signs on that step, please re-check the steps described in 2.1.

Next two steps after requirements verification prompt you to enter the IIS options and database connection parameters. The IIS options include the DeskAlerts installation path (actual directory where the software will be installed) and DeskAlerts URL (the link the publishers and client applications will use to access the server dashboard). To avoid firewall and DNS-related issues, it usually a good idea to check whether the server name automatically supplied here is accessible from one of the potential employee workstations.

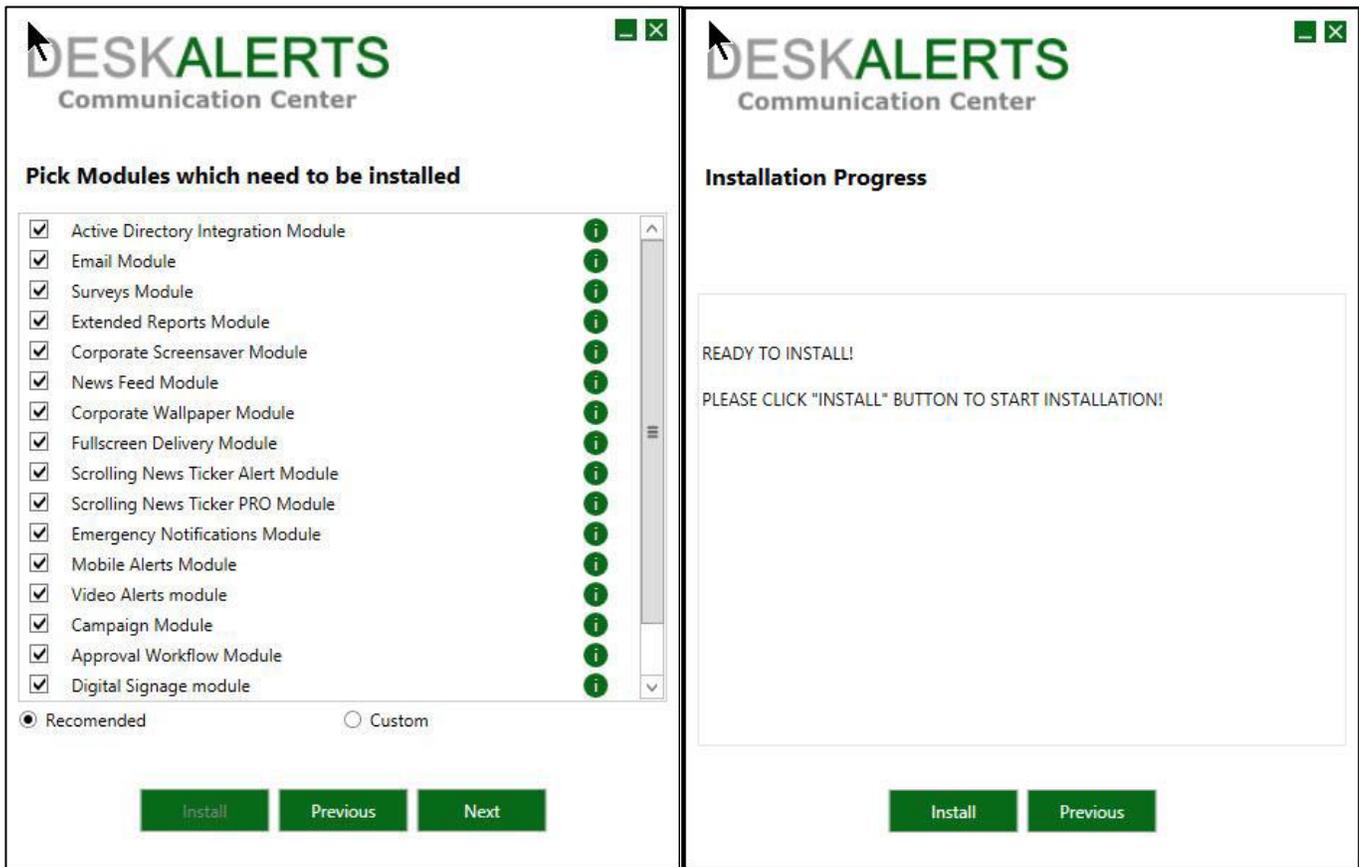
The SQL server settings step will also perform a validation of all information entered. If you encounter errors – check “Help” section in the installer window for hints.



If you are performing a server update (database already exists), you will be prompted whether you need to update the data in existing database, or drop it and create a new one. Click “Yes” to keep all existing data, including messages history, user information etc.

Next steps allow you to select the modules to install. Some of these modules also have installer steps for additional configuration, but the module configuration can also be performed later, from the web UI.

After clicking through module configuration steps (if any of these were necessary), you will be presented with the final step – click “Install” to launch the installation process. Depending on your server performance and existing database size, the process might take up to 10-20 minutes.



If any errors occur during the installation, you will be presented with the installation log. Please save this file and send it to DeskAlerts support using support@deskalerts.com

If the installation completes successfully, you will be presented with a corresponding notification. If this is a first installation on a clean database, you can use the default "admin" user with the "admin" password to log in the product dashboard.

This completes the DeskAlerts server installation, if it is the first one – next step is to build the client applications and perform an AD synchronization (if you're using AD domain integration) to make the software functional enough to send first test messages.

3 Building and installing DeskAlerts Clients

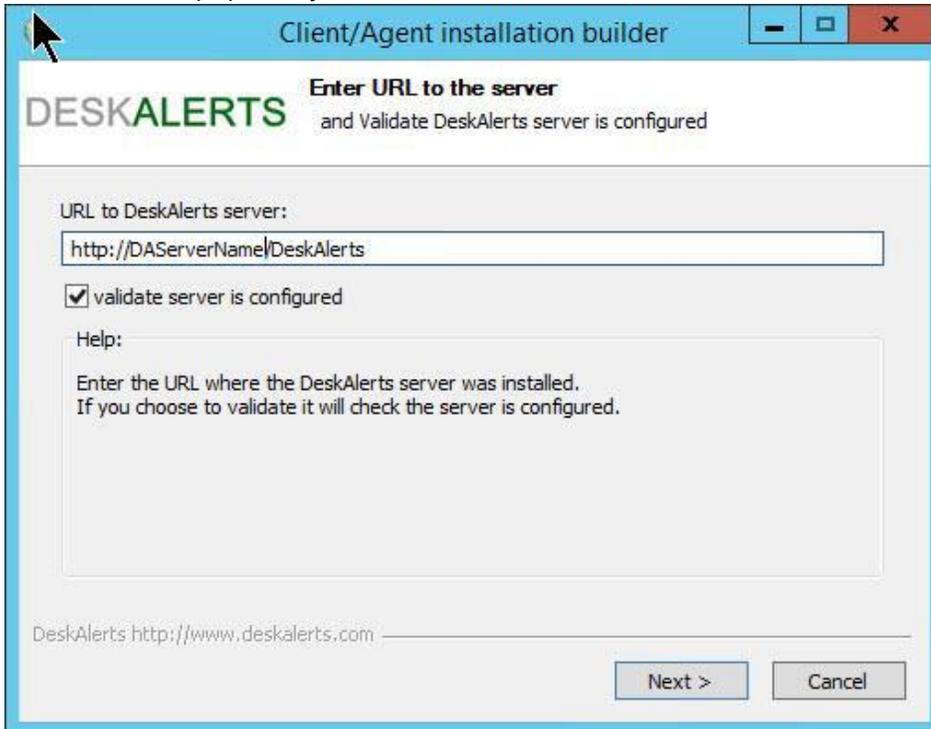
DeskAlerts package contains a client application builder for Windows workstations, that enables you to configure some options and choose which features will be available to the end users. You can also build several versions of client applications with distinctive features available and deliver them to different audiences (e.g. allow upper management to use "do not disturb" mode, while leaving this option off for everyone else).

The client builder files are contained in archive named **DeskAlerts.Client.vx.x.x.x.zip** and must be extracted before use.

Running the builder on the Application server running DeskAlerts is recommended, because this way builder will store your choices for future use.

Run the file named **ClientInstallation.exe** to begin.

On the first step, put in your DeskAlerts URL (same as the one used during the server installation):



The builder will check if DeskAlerts server exists at this URL before proceeding.

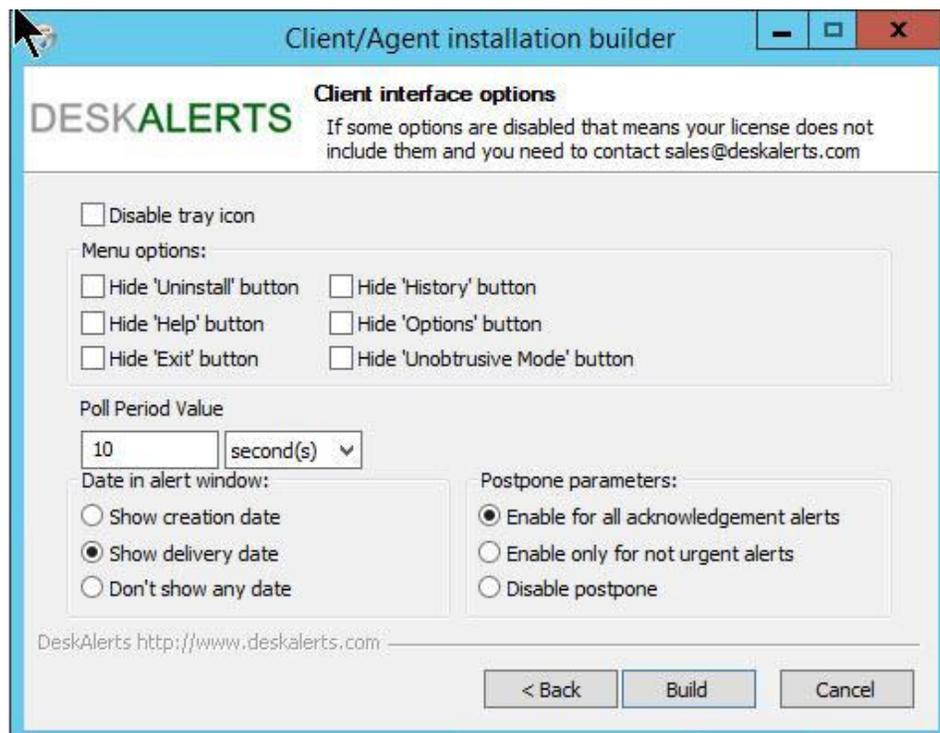
Next step allows you to select platform settings – to choose which modules this client application should integrate with. It also contains an option to build MSI installer, which is a default choice for most deployments.



The next step, Installation options, allows you to select a few more options related to the client presence in the end user's system. It also allows you to specify some URL that will be opened after the installation if you want to provide employees with some instructions or informational message about their DeskAlerts client.



Next step allows you to configure client interface options – affecting the features employee can use. Usually, the "exit" and "uninstall" options are disabled, as well as "unobtrusive mode" – to prevent the users from closing the app and missing the messages.



After you build the client application installers, click on "Close" and the folder containing the installation files will open automatically.

The MSI file (if you built it) is fully compatible with GPO and SCCM deployment. It can be deployed silently using the /quiet or /qn parameter of the msiexec.exe utility.

4 Active Directory synchronization

The Active Directory synchronization is a key part of AD integration implemented in DeskAlerts solution. It allows you to pull in the information from your domain tree or subtree to use it for message targeting purposes.

The synchronization task:

- Retrieves the users and computer objects from the domain to be used for alerts targeting
- Retrieves the object containers, such as groups and organizational units to simplify the targeting to large audiences
- Can be set to run on a schedule with no human interaction
- Can be configured to synchronize the whole domain tree, or only a part of it
- Can be tuned to only synchronize a selected list of groups instead of all groups in a selected subtree
- Can be set to automatically ignore the users with disabled accounts

Note that we do not import the employee passwords, or any personal information not required to target a message. The only user attributes being retrieved are username, display name, group membership, phone (for SMS targeting) and email address (for email notifications). The synchronization doesn't write any data back to the domain and is a read-only mechanism.

Usually, synchronizations are launched automatically on a schedule, but they can also be launched manually from the Synchronizations list:

Synchronizations

Search synchronizations by title

1-1 from 1 Synchronizations
Records per page | 25 | 50 | 100 | 500 | 1000

| <input type="checkbox"/> | Name | Last synchronization time | Actions |
|--------------------------|------|---------------------------|---------|
| <input type="checkbox"/> | test | 12/11/2017 5:21:22 PM | |

1-1 from 1 Synchronizations
Records per page | 25 | 50 | 100 | 500 | 1000

To create a synchronization, go to Active Directory -> Synchronizations menu item and click on "add new synchronization" button, as seen above.

Supply all required fields, narrow down the synchronization scope and create a schedule for it to follow automatically, then save it under an easily recognizable name.

The user credentials you use here can belong to any domain member without any admin rights, but it is recommended to use a service account here, to the password won't expire.

AD Synchronizing

Name

You should enter full name of domain with dots (for example: your.domain.net).
Also you should provide login/password of user who is a member of "Domain Users" group in your Active Directory.

Domain: e.g. "your.domain.net" Port:

Login:

Password:

Use secure LDAP connection ?

Synchronize all Organizational Units (users and groups will be selected from whole Domain tree)

Synchronize selected Organizational Units (only users and groups from selected OU's will be synchronized)

Don't synchronize Organizational Units (users and groups will be synchronized from the domain without OU's)

and

Synchronize all groups

Synchronize only selected groups and users from them

Remove objects that were removed from AD ?

Import users with disabled accounts

Import Computers

Use old synchronization

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

An important thing to note is that while the synchronization enables you to import computer objects, only the synchronized users will receive the messages. So, if you've synchronized a computer instance and sent an alert to it, but none of its regular users are synchronized with the system – they will not receive any alerts.

5 Managing non-domain users and workstations

If you're not using Active Directory integration, or targeting a mix of domain and non-domain users, there are 2 ways to register them in the system – automatically with the workstation name, or via self-registration, where users will be able to pick their own usernames in the system. For mixed environments where you have employees who have accounts in Active Directory joining from non-domain workstations (like personal laptops), there is also a 3rd option, that allows users to register by manually entering their AD credentials, which will be validated on a server side.

Note that if you're using the DeskAlerts server with AD integration support, no one can register and receive alerts on non-domain workstations by default. You will need to enable this capability from Common settings first:

▼ Active Directory, eDirectory

Enable non AD/ED members to register and receive alerts

Enable self registration with Active Directory

Checking only the first box here will allow anybody to register in the system as the messages recipient. Checking the second one as well will force the end users to supply valid AD credentials for registration.

5.1 Creating and managing custom groups

To simplify the messages targeting, you can create custom groups of users. The number of groups is unlimited, and each user can belong to more than one group.

To manage the groups, go to either Active Directory -> Organization page (if your package includes AD integration), or Groups page (if it doesn't).

Organization/Audience

Object type: Groups

Add group / Create audience Add user

Organization/Audience Registered

Search groups

Search

1-1 from 1 Groups
Records per page | 25 | 50 | 100 | 500 | 1000

Delete

| <input type="checkbox"/> | Group name | Domain | Users | Computers | Groups | Parent groups | Action |
|--------------------------|-------------------|--------|-------|-----------|--------|---------------|--------|
| <input type="checkbox"/> | Test custom group | | 1 | 0 | 0 | 0 | |

Delete

1-1 from 1 Groups
Records per page | 25 | 50 | 100 | 500 | 1000

The groups can be nested inside each other. Click on the numbers in the table to display a list of group members.

6 Managing IP ranges

Another option of content targeting aside from broadcasting and selecting the specific users is to target IP ranges. You can add and manage them from "IP Groups" page. Each groups can contain several ranges and single IP addresses. Currently, only IPv4 addresses are supported, but the IPv6 adaptation of this feature is being developed.

IP groups

Add IP group

IP group name: Main Building

IP range: 192.168.0.1 - 192.168.0.120

IP address: 192.168.0.124

IP range: 192.168.0.135 - 192.168.0.190

[Add IP address](#) / [Add IP range](#)

Cancel Add

7 Managing Content publishers and access rights

Content publishers' tasks include composing and sending various types of content, as well as gathering reports and managing the user audiences if given the necessary rights.

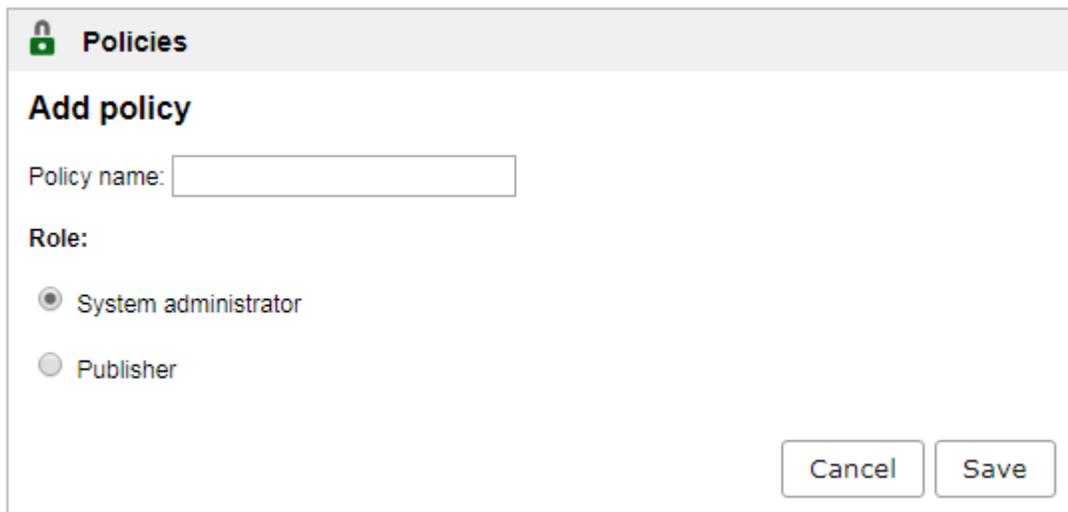
The scope of a Publisher access is defined by the Policy he has assigned.

7.1 Creating Policies

To create and manage Policies, navigate to Publishers->Policies menu item.

Click "Add policy" button to create a new one.

All policies are split into 2 types – system administrator and publisher-level.



The screenshot shows a dialog box titled "Policies" with a lock icon. Inside, there is a section titled "Add policy". Below this title, there is a text input field labeled "Policy name:". Underneath, there is a "Role:" section with two radio button options: "System administrator" (which is selected) and "Publisher". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Users with System administrator level policies are similar to the default built-in "admin" account and have full access to all software features.

Publisher level policies are highly configurable. Each publisher policy is defined by three points:

1. Level of access to product features which is defined by the access matrix, as shown on the screenshot below
2. Acceptable audience restriction – basically, whether a member of this policy can send notifications to all registered users, or only to the selected part of organization
3. Content viewing rights – whether the member of this policy can only see the self-created content in the system, or everything created by other users as well.

Publisher level policies never have access to:

- Publisher and policy management
- System configuration settings
- AD synchronization settings

Here is how typical publisher access level matrix looks like:

Policies

Add policy

Policy name:

Role:

- System administrator
- Publisher

Access control list

List of recipients

Publisher view rights

Grant full control

| | | Create | Edit | Delete | Send | View | Stop |
|-------------------------------------|-------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | Desktop alerts | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Campaign | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | E-mails | | | | <input type="checkbox"/> | | |
| <input type="checkbox"/> | Surveys | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Users | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| <input type="checkbox"/> | Groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | |
| <input type="checkbox"/> | Message Templates | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Reports | | | | | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | IP groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | RSS/news feed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Screensavers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Wallpapers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Emergency Alerts | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | Color codes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | |

This policy example grants the person rights to create and send desktop alerts, possibly using message templates created by other people, and view the delivery reports. All user/group management, as well as different kinds of content are off limits for publishers who will have this policy assigned.

When the policy is created, you can view its members from the Policies page:

| <input type="checkbox"/> | <u>Name</u> | Publishers count | Actions |
|--------------------------|---------------------------|------------------|---|
| <input type="checkbox"/> | send alerts - no approval | 1 |    |
| <input type="checkbox"/> | non-sender | 1 |    |
| <input type="checkbox"/> | defaultuser | 0 |    |

7.2 Creating Publishers

To create a new publisher accounts, go to Publishers -> Publishers List page and use "Add Publisher" button. For each publisher, you will need to specify the login, password and the policy. Number of publishers is limited by your license.

Publishers

Search publishers by title

You can create 48 more publishers

1-2 from 2 Publishers
Records per page | 25 | 50 | 100 | 500 | 1000

| <input type="checkbox"/> | Name | Policy name | Actions |
|--------------------------|-----------|---------------------------|---------|
| <input type="checkbox"/> | nonsender | non-sender | |
| <input type="checkbox"/> | test | send alerts - no approval | |

1-2 from 2 Publishers
Records per page | 25 | 50 | 100 | 500 | 1000

7.3 Setting up a single sign on publisher logon

DeskAlerts system can be configured so the publishers will be able to log in using their current Active Directory credentials. This requires additional configuration, described in the SSO configuration manual that can be downloaded from the Knowledge Base: <https://deskalertssupport.zendesk.com/hc/en-us/articles/115002274649-DeskAlerts-SSO-Guide>

8 Settings

Most of DeskAlerts configuration is done from the publisher dashboard when logged in the system administrator-level account. To enter the Settings section, click on the gear icon next to Logout button.

8.1 Common system settings

The Common settings section is available only to system administrators and affects various sides of the software performance.

By default, the Common settings page is split to two tabs (more can appear in customized packages) – System configuration and Default settings

8.1.1 System configuration

System configuration settings affect the solution performance for all its current users. All options in this section are split into subsections in accordance with the area they are affecting.

Console interface settings affect some parts of user interface and messages workflow. The special thing about these options is that after saving your changes, you need to manually refresh the page.

▼ Console Interface

Changes will apply after full Control Panel page refresh.

- Enable help
- Allow user to rearrange menu sections by dragging them
- Enable content approving

Enable Help option turns the right-side help on or off for all users. This section contains hints relevant to every page of the product and can be useful for newer product users. If enabled (and it is by default), the help section can be expanded/collapsed at any time by clicking the button in the page header. The DeskAlerts dashboard also remembers whether you had the help opened last time you logged in or not and follows this preference.

Allow user to rearrange menu sections by dragging them – if this option is turned on (it is by default), the users can drag-and-drop menu items to make the ones they’re using more often easily accessible – their choice is saved and used for further sessions, even if they are logging in from a different machine or browser.

Enable content approving option activates the advanced approval workflow for messages, which is described in the separate unit of this manual.

▼ Alerts

- Enable alert title styling
- Show skin selection dialog before alert creation
- Show message type selection dialog before alert/survey creation

Show postpone button in alert preview:

- for all alerts
- for non-urgent alerts
- do not show postpone button

Changing the state of this option will not affect the client. To change postponing policy in client, you should rebuild it, or edit conf.xml file manually

Digital signage page refresh rate:

Enable alert title styling allows publishers to use HTML in the message title – changing its color, size, font-family and so on.

Show skin selection dialog before alert creation option makes an additional dialog pop up on the alert creation page, asking the publisher to select the message skin. If the option is disabled – they can still change the skin by manually clicking on the skin selection control

Show message type selection dialog before alert/survey creation option makes an additional dialog pop up during the alert creation page, asking the user whether they need to create a pop-up alert, a

scrolling ticker message, or an RSVP (considering the modules are installed). If the option is turned off – the user still can change the message type by selecting a different tab.

Show postpone button in alert preview defines how the postpone controls are displayed in the alert preview. Note that this option doesn't affect the look and feel of alerts on end users' machines – it has to be set up during the client building process.

Digital signage page refresh rate option determines how often digital signage pages cycle through the content available on them.

▼ Message delivery

Allow to deliver messages to multiple computers with the same account logged in

Allow to survey users with the same account logged in

Lifetime setting is available from Default settings

Allow to deliver messages to multiple computers with the same account logged in if you think that might be the often scenario in your environment. The feature is turned off by default for performance reasons, so if a person is logged in at two workstations simultaneously – the race condition will exist and the alert will only arrive to the one that requests it first.

Allow to survey users with the same account logged in option works as the previous one, but for surveys. The users still won't be able to submit different answers to the same questions, as this is prohibited on the server side.

The Active Directory options behavior is described in unit 5 of this manual.

▼ Active Directory, eDirectory

Enable non AD/ED members to register and receive alerts

Enable self registration with Active Directory

▼ API

API secret: [Re-generate](#)

The **API secret** option is used to communicate with DeskAlerts API. More details on using it can be found in the Knowledge Base: <https://deskalertssupport.zendesk.com/hc/en-us/articles/115003548053-DeskAlerts-API-Guide>

▼ Language

Default language: [Add new](#) [Modify this](#)

Changes will apply after full Control Panel page refresh.

The language options let you choose the default system language – meaning that it will be used for the login page and all freshly created publisher accounts. Note that each publisher still can choose their preferred language in the Profile settings once they are logged in.

The language settings page also lets you create your own translations for DA interface using “Add new” control:

Alert languages

Language name

Language code

| Value | Current english text |
|--|----------------------|
| <input type="text" value="Update"/> | Update |
| <input type="text" value="Alerts"/> | Alerts |
| <input type="text" value="Sent alerts"/> | Sent alerts |
| <input type="text" value="Records per page"/> | Records per page |
| <input type="text" value="from"/> | from |
| <input type="text" value="pages"/> | pages |
| <input type="text" value="Date"/> | Date |
| <input type="text" value="Actions"/> | Actions |
| <input type="text" value="Duplicate alert"/> | Duplicate alert |
| <input type="text" value="Reschedule alert"/> | Reschedule alert |
| <input type="text" value="Stop alert"/> | Stop alert |
| <input type="text" value="Start alert"/> | Start alert |
| <input type="text" value="There are no alerts"/> | There are no alerts |
| <input type="text" value="Add alert"/> | Add alert |

To create a new translation, you will need to specify a language name and ISO 639-1 compliant language code, as well as provide translations for all user interface terms in the solution (the English versions will be used for reference). You don't have to do it all at once – you can save the progress at any time and continue later.

Date and time settings determine how the date/time are displayed in the publisher UI, as well as allow you to set up the session timeout value:

▼ Date and time

Date format:

Time format: 24 AM/PM

First day of week:

Session timeout: minute(s)

The SMTP settings need to be set up in order to use the Email notifications channel:

▼ SMTP settings

| | |
|-----------------------|--|
| SMTP server: | <input type="text" value="localhost"/> |
| SMTP port: | <input type="text" value="25"/> |
| Using SSL: | <input type="checkbox"/> |
| Using authentication: | <input type="checkbox"/> |
| SMTP user name: | <input type="text"/> |
| SMTP password: | <input type="text"/> |
| From: | <input type="text"/> |
| SMTP connect timeout: | <input type="text"/> |

The SMS settings are used to connect to the SMS gateway API:

▼ SMS settings

| | |
|--------------------------|--|
| Gateway URL: | <input type="text" value="var"/> |
| Choose content type: | <input checked="" type="radio"/> Plain text <input type="radio"/> JSON <input type="radio"/> XML Use %smsText% in place where your sms text should be. Use %mobilePhone% in place where your recipient number should be. |
| Post data: | <input type="text" value="va"/> |
| Authentication type: | <input type="text" value="None"/> |
| Use proxy authorization: | <input type="checkbox"/> |

If you're having troubles with the last one – reach out to support@deskalerts.com, providing the documentation about your SMS Gateway Provider.

8.1.2 Default settings

Default settings control the default options that will be selected for desktop alerts and some other content types when publishers try to create new ones.

Each option here is similar to the alert option you can see on the creation page.

8.2 Profile settings

Profile settings are available for both admins and publishers, since they only affect the user interface of a specific user of a dashboard.

The options here include:

- Username change (as long as the new one is not taken)
- Password change
- Email or phone change
- Preferred language of the user interface (can differ from the system default)

- Start page – Dashboard by default, but can be set to any page present in the left-side menu

Profile settings

Name:
admin

Change password

Email:

Mobile phone:

Interface language:
English ▼ *Changes will apply after full Control Panel page refresh.

Start page
Choose start page ▼

Save

Note that you may need to log out and log back in again to apply some changes.

9 License limit and system lockdown

On the top part of left-side menu, you can see a license counter:

Licenses used: 1/3000

The bar shows the currently used user licenses (1) and the license limit (3000). Note that only the **Active** users are calculated towards the utilized licenses count. The user is considered to be **Active** only if he has received some Email/SMS from DeskAlerts in the past 24 hours, or had his desktop/mobile client online during the same timeframe. That means that if the user leaves the company or his user account is removed from the system, in 24 hours the license he did occupy will be released.

If you go over the license limit, the system will enter a lockdown state, disabling all messaging capabilities, so monitor the license burndown carefully and contact sales@deskalerts.com immediately if you see a “license limit is exceeded” warning in the menu.

10 Approval workflow configurations

Sometimes, you may need more control over what is being sent to your workforce. One way to achieve this is to only allow the publishers to send messages using pre-defined templates, the other one is to set up an approval workflow.

To enable the approval feature, turn it on in the Common Settings -> System Configuration -> Console Interface section.

Once enabled, the access level matrix in Policy creation mechanism will gain a new column named "approval":

| Access control list | | List of recipients | | | Publisher view rights | | | |
|---|-------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Grant full control | | | | | | | | |
| | | Create | Edit | Delete | Send | View | Stop | Approval |
| <input type="checkbox"/> | Desktop alerts | <input type="checkbox"/> |
| <input type="checkbox"/> | Campaign | <input type="checkbox"/> |
| <input type="checkbox"/> | E-mails | | | | <input type="checkbox"/> | | | |
| <input type="checkbox"/> | Surveys | <input type="checkbox"/> |
| <input type="checkbox"/> | Users | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | Groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | | |
| <input type="checkbox"/> | Message Templates | <input type="checkbox"/> | | |
| <input type="checkbox"/> | Reports | | | | | <input type="checkbox"/> | | |
| <input type="checkbox"/> | IP groups | <input type="checkbox"/> | | |
| <input type="checkbox"/> | RSS/news feed | <input type="checkbox"/> |
| <input type="checkbox"/> | Screensavers | <input type="checkbox"/> |
| <input type="checkbox"/> | Wallpapers | <input type="checkbox"/> |
| <input type="checkbox"/> | Emergency Alerts | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> | Color codes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | | |

Only system administrators and publishers with the "Approval" right checked for some type of content will be able to send it straight to the end users. People with the "send" rights not possessing the "approval" right as well will instead "Submit it for approval".

When message is submitted for approval, all publishers with approval rights are being notified that there's some unapproved content and can act on it in a few ways:

| <input type="checkbox"/> | Type | Title | Sender | Creation date | Actions |
|--------------------------|------|-------------------------|--------|-----------------------|---------|
| <input type="checkbox"/> | | Corporate policy change | test | 12/12/2017 4:02:37 PM | |

- They can review the message content and audience, then click "Approve" to confirm its validity and send it to the intended recipients
- They can edit the message and send it out with the adjustments
- They can reject the message specifying the reason for rejection – in this case, the original message creator will get a notification and will have a chance to correct the mistakes or delete the alert
- They can delete the created content entry completely

Such workflow ensures that the content is being reviewed by qualified personnel before being delivered to the end users.

11 Creating Emergency alerts shortcuts

The Emergency alerts module is designed to speed up delivery of urgent messages – which is achieved by creating the messages in advance with the pre-defined content and audience and sending them out later in one click. One of the ways to speed up the process even more is creating desktop shortcuts for the publishers – the message will be sent out just by double-clicking a desktop shortcut.

Since the desktop shortcuts do not feature any authentication, the sender of a message will not be identified, so consider the risks of using this feature.

To create a shortcut for already composed Emergency alert, go to Emergency Alerts -> Create Shortcut menu. Click on a desired emergency alert tile and use “Create shortcut” button.

The server will generate two files – an executable and the .bat file. The executable is a portable alert sending utility, while the other one is the shortcut itself – these should be placed in the same directory in order for the sending to work. Note also that the name of the sending utility (DeskAlertsAPI.exe) must not be changed, while the filename of a shortcut can be changed to whatever suits you best.

Once both files are generated, use SCCM or similar utility to place the files on a desktop of the employees you trust to trigger the emergency alert messages.

12 Where to get more documentation

If you encounter any issues with the setup and want to do some troubleshooting yourself before reaching out to support@deskalerts.com – check our knowledge base at <https://deskalertssupport.zendesk.com/hc/en-us>

The FAQ and Troubleshooting sections might answer your questions and contain useful tips and tricks.

The Documents section contains downloadable instructions on some specific setup scenarios, like:

- Single sign on configuration
- API integration with 3rd party systems like monitoring and automation tools
- Deployment on a load balanced configuration with more than one application server
- Setting up the software to work over HTTPS

It also contains a copy of deployment guide, some guidelines regarding the skin customization service and the network diagram of a typical DeskAlerts installation.