

GETTING STARTED WITH TOOLBAR SERVER

The goal of this article is to familiarize the reader and user with the various basic functionalities of Toolbar Server. A synopsis of what is covered in this article is shown in the Table of Contents below.

ASSUMPTIONS

This article is written for both first-time and experienced Toolbar Server users. Knowledge of software installation is assumed. Users who want to install the Active Directory (AD) add-on to the Toolbar Server should also be familiar with AD concepts.

Contents

GETTING STARTED WITH TOOLBAR SERVER	1
ASSUMPTIONS.....	1
Contents	1
WHAT IS TOOLBAR SERVER?.....	1
FEATURES OF TOOLBAR SERVER.....	2
Toolbar Server	2
THE VARIOUS EDITIONS OF TOOLBAR SERVER.....	4
The Toolbar Server Add-Ons	5
THE TOOLBAR SERVER.....	6
Getting the Toolbar Server Installation Package	6
System Requirements for Toolbar Server.....	6
Authentication Modes for Toolbar Server.....	6
Installing the Toolbar Server	7
Running the Toolbar Server	12
CONCLUSION.....	14

WHAT IS TOOLBAR SERVER?

Toolbar Server is a user-friendly, easily customizable browser alert solution based on a modular, scalable architecture. With Toolbar Server, companies can roll out a browser alert solution to their employees easily and in a few simple steps.

Toolbar Server, the software's server component, allows alerts to be defined for unlimited users or groups of users.

Alerts are shown on the browser installed on the user's PC.

With the optional add-ons, companies can link Toolbar Server to their own Active Directory-enabled domains, send SMS alerts to mobile and similar devices, even over public, unsecured networks, and deploy surveys as alerts, which can then be directly answered by recipients.

FEATURES OF TOOLBAR SERVER

Toolbar Server

Easy to install

Toolbar Server's easy to follow installation wizard allows you to set up a browser alerts solution in just a few hours.

Web-based control panel

Toolbar Server's web-based Control Panel means you can access your account and send alerts from any workstation with a browser. You can send alerts even when you're out of the office and on the road.

Easy to use

Toolbar Server's Control Panel presents an easy to use interface makes sending alerts so intuitive. Just click Send Alert and follow the wizard.

100% guaranteed delivery

Once received by the browser, a message can't be missed. Every message will be shown on the desktop. Toolbar Server keeps a record of every sent message. Once sent, a message is saved to a queue, with each user having his or her own queue. Only when the message is received by the browser, the Server mark the message as received. It then deletes the message from the queue.

Instant delivery

Alerts can be delivered to thousands of users within minutes. You can adjust these settings, balancing between delivery speed and hardware requirements. Shorter delivery times mean higher server hardware requirements.

Any Rich-formatted content

Format the message text any which way you want. Add colors, lists, change fonts, and styling. You can edit the HTML source directly as well as make changes to the CSS.

Any content: Flash, video, audio, documents

Alerts can contain not only text but images, animation, video, flash presentations, audio, or any attachment. Communicating with your employees or employees in the most natural way has never been easier.

RSS support

Toolbar Server allows you to subscribe your users to RSS feeds. You can subscribe all users, groups of users, or specific users. Users can't unsubscribe from these feeds; only you can control the subscription.

Scheduled messages

Alerts can be scheduled for sending on an appointed date and time. Moreover, you can set dates when an alert would be valid. For example, your mail server will be down from 2 p.m. until 4 p.m. and you schedule the alert for this time to inform all your employees. The alert will only be received by those users who will be working within those hours. So, if someone logs in at 4:01 pm, they won't receive this alert.

Message templates

Use message templates to quickly design your alerts. You can fully control your alerts' look: add your logo, colors, images etc.

Message tracking

With Toolbar Server, you can track how many messages have been sent, how many have been opened and clicked. You can get all this information by opening the Statistics page from the Toolbar Server's Control Panel.

User tracking

The Toolbar Server's Control Panel allows you to track your users. You can view a user's last activity or know when a user is currently online.

Instant surveys

Toolbar Server allows you to conduct surveys and receive results within minutes. It's not email, it cannot be skipped, and all employees can answer it instantly.

Personalized alerts

Toolbar Server supports 3 types of alerts: broadcast, group or personal. Alerts can be addressed to a specific user. This feature helps personalize your alert communication to each individual employee.

Multiple User groups

All your users can be grouped. Toolbar Server supports multi-level groups. You can separate users by offices or departments and send information which is relevant only to a particular group.

API

Toolbar Server provides an API using well-known RSS technology. Via this API, third-party applications can send broadcast, group or personal alerts.

Active Directory/LDAP support

If your company uses Active Directory, Toolbar Server database will be synchronized with your Active Directory in real-time. If you change users in the Directory, they will be automatically changed within Toolbar Server.

Centralized data storage

All data is stored in a secure, enterprise-class Microsoft SQL Server database. Data centralization allows you full control. You can easily back up or move to another server, in case of hardware failure.

Mobile devices support

Toolbar Server can send alerts to mobile devices via SMS. You can notify your employees in case of emergency, even if they're away from their computers or when your company experiences network or power failures.

THE VARIOUS EDITIONS OF TOOLBAR SERVER

Toolbar Server comes in Active Directory, Web and Corporate editions

The Active Directory Edition includes the Core components plus Active Directory/LDAP Add-On. This is ideal for companies with Active Directory- or LDAP-enabled domains.

The Web Edition includes only the Core components. This is ideal for small web-based companies with a small number of customers and limited server needs.

The Corporate Edition includes the Core components, and the three (3) optional add-ons, including the Active Directory/LDAP Add-On, the Surveys Add-On, and the SMS Add-On. This is ideal for companies that want to harness the functionalities offered by the optional add-ons to the Toolbar Server.

The Toolbar Server Add-Ons

As mentioned above, there are add-ons that can optionally be installed when installing the Toolbar Server for the first time. Brief descriptions of these add-ons are given below.

The Active Directory Add-On

This add-on allows the Toolbar Server to interface with an Active Directory- or any LDAP-enabled domain. Any update made within the domain is then applied automatically to the Toolbar Server.

The SMS Add-On

The SMS Add-on allows SMS alerts to be sent over the network to mobile phones and similar devices. To avail of this service, you should be subscribed to the ClickATell SMS Gateway service. See <http://www.clickatell.com/> for more details.

The Survey Manager Add-On

The Survey Manager Add-on allows creation of surveys, questionnaires and opinion polls, and the sending of these surveys as alerts. Client users can instantly answer on the alert message displayed on their desktops. Results are immediately sent back to the administrator or any designated user.

THE TOOLBAR SERVER

Getting the Toolbar Server Installation Package

The installation package for Toolbar Server is included in your Toolbar Server license. For users who want to try Toolbar Server, you can request for evaluation by sending an email to sales@besttoolbars.net.

System Requirements for Toolbar Server

The Toolbar Server requires a server with the following configuration:

Windows XP, Windows 2000 Server, Windows 2003 Server, Windows Vista
Internet Information Services 5.1 and above
SQL Server 2000 and up
At least 512MB RAM

Authentication Modes for Toolbar Server

Before we proceed to the procedures for installing Toolbar Server, a discussion of the authentication modes for connecting to the Toolbar Server is in order.

Depending on your edition of Toolbar Server, Toolbar Server operates in two modes, namely, RegistrationMode and Active Directory Mode.

For the Registration Mode - as its name suggests, under this mode, users are required to register before they are allowed to use the system. Alerts can then be sent to the users.

For the Active Directory Mode, you have the option to install the AD/LDAP Add-On to allow Toolbar Server to connect directly to your Active Directory domain. This means that you don't have to define the users in the system. Instead, the system will automatically retrieve the list of users from your Active Directory domain. This authentication mode is termed as Active Directory, or AD, Mode.

If you choose not to install the AD/LDAP during installation, your installation will automatically use Registration Mode.

If you decide later on to change the authentication mode from Registration Mode to Active Directory Mode, you will have to reinstall Toolbar Server.

Installing the Toolbar Server

Follow the steps below to install the Toolbar Server on any hardware that meets the specifications in the immediately preceding section.

1. Unzip the Toolbar Server installation package.
2. Browse to the folder where you unzipped the installation package.
3. Double-click ServerInstallation.exe to run the ServerInstallation Setup window, as shown in Fig. 1.

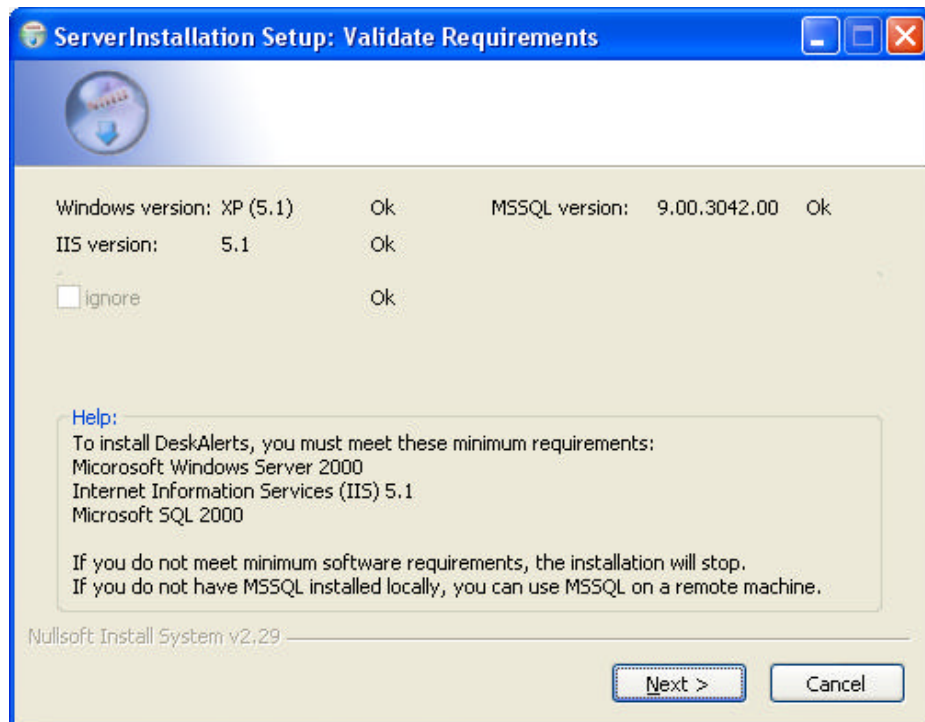


Fig. 1. The Server Installation Wizard Ensures that your Hardware Meets the Software Requirements for Running the Toolbar Server

4. The installation setup will automatically detect if your system has the software requirements for running the application. If you have the minimum system requirements, you will see an OK status on each software requirement on the setup window. If not, the setup will stop automatically and you will not be able to proceed to the next step.
5. If you have the necessary software for running the application, click **Next**. The message as shown in Fig. 2 appears onscreen.

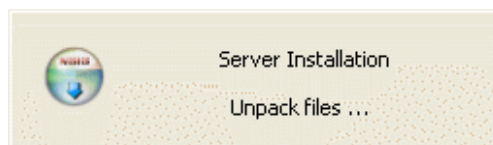


Fig. 2. The Installer Unpacks the Required Installation Files

- When the installer finishes unpacking the installation files, the next page of the wizard appears, as shown in Fig. 3. Here, you will enter the path to the IIS folder where you want to install the Toolbar Server as well as the URL for the server. Unless you know what you're doing, it is recommended that you accept the default values for these fields.

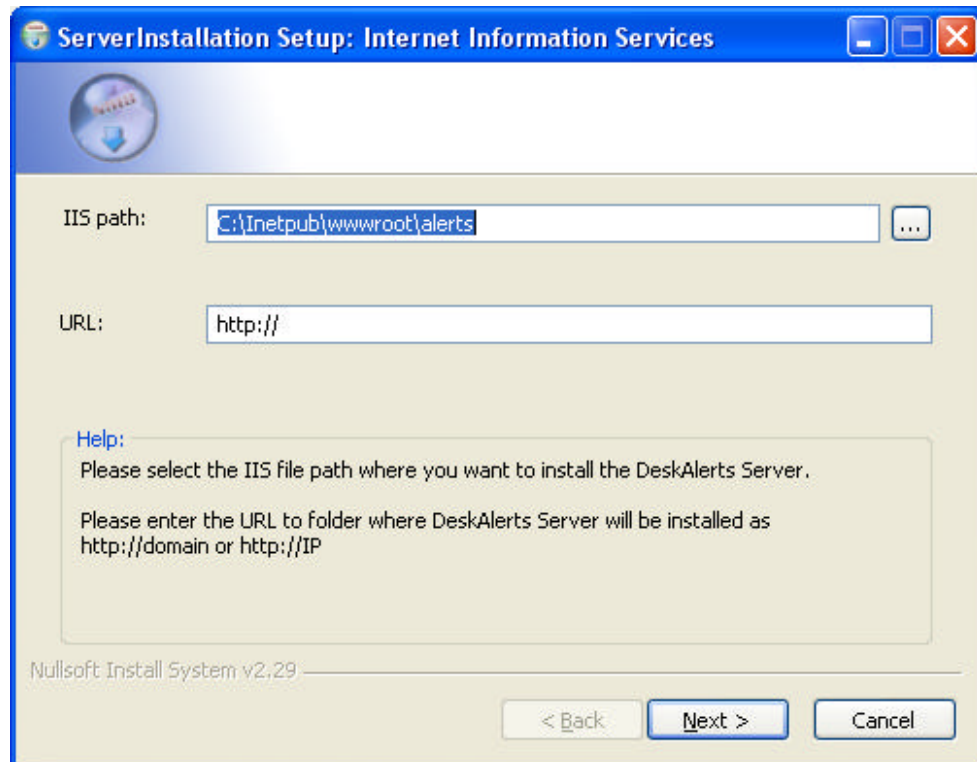


Fig. 3. Enter the IIS Path and URL for the Server

- Click **Next**.
- On the next page of the installation wizard, as shown in Fig. 4, enter the information needed to set up the Toolbar Server database. On the **Host** field, enter the IP address of the PC where your MS SQL Server is installed. Accept the default value for the **Database** field (set as alerts). Accept the default value for the **Username** field (set to SA), then enter the password for the SA user.

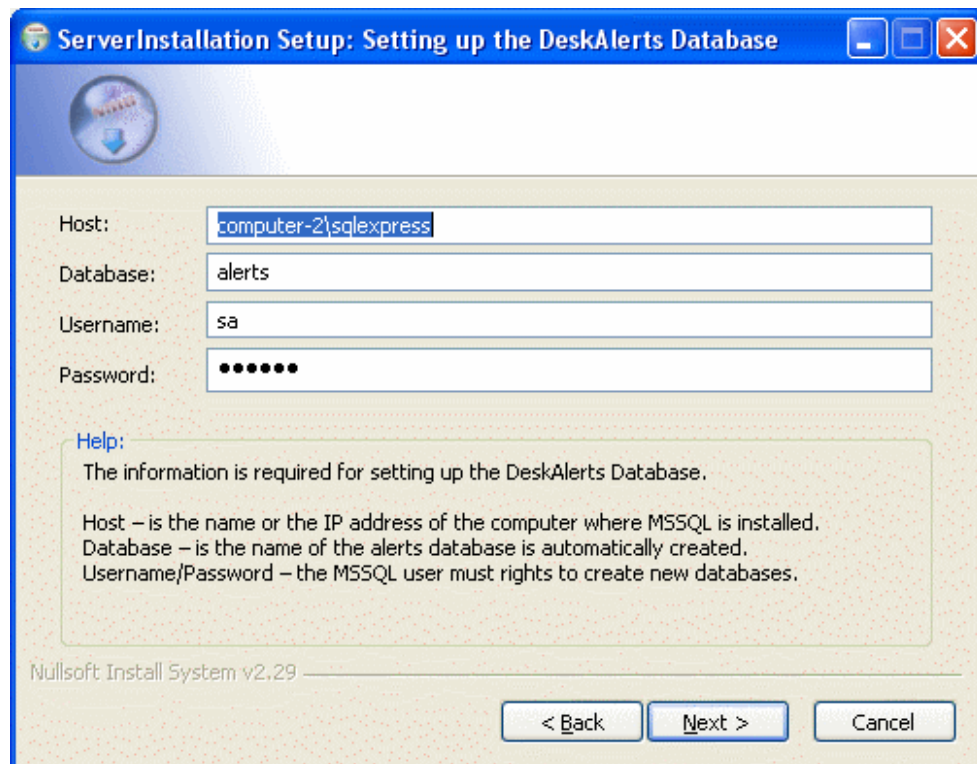


Fig. 4. Enter the Required Information for Setting Up The Database

9. Click **Next**.
10. On the next page of the installation wizard, as shown in Fig. 5, enter the domain name, user and password for your Active or LDAP directory, then select either the **Active Directory** or **Use LDAP** option. You can choose to **Select Later**, in which case you can select either Active Directory or Use LDAP when you've run the application, or you can choose not to install the add-on by checking the **Do Not Install Add-On** option.

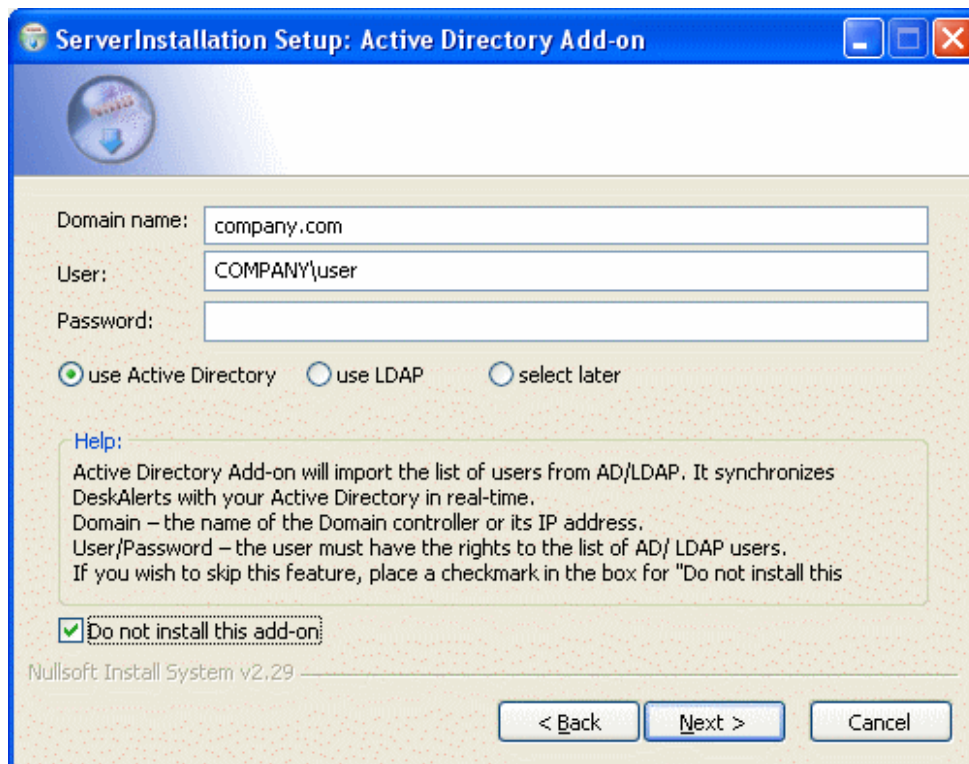


Fig. 5. Integrate Toolbar Server with Active Directory/LDAP
Using the Active Directory/LDAP Add-On

11. Click **Next**.
12. On the next page of the installation wizard, as shown in Fig, 6, you will set the information for making use of the optional SMS Add-On for the server. The **URL** field is set to a default, non-editable value. You can enter your **API ID**, **Username** and **Password** (you will have to secure this from <http://www.clickatell.com/>) on the appropriate fields. You can also choose not to install the SMS Add-On by checking the **Do Not Install Add-On** option.

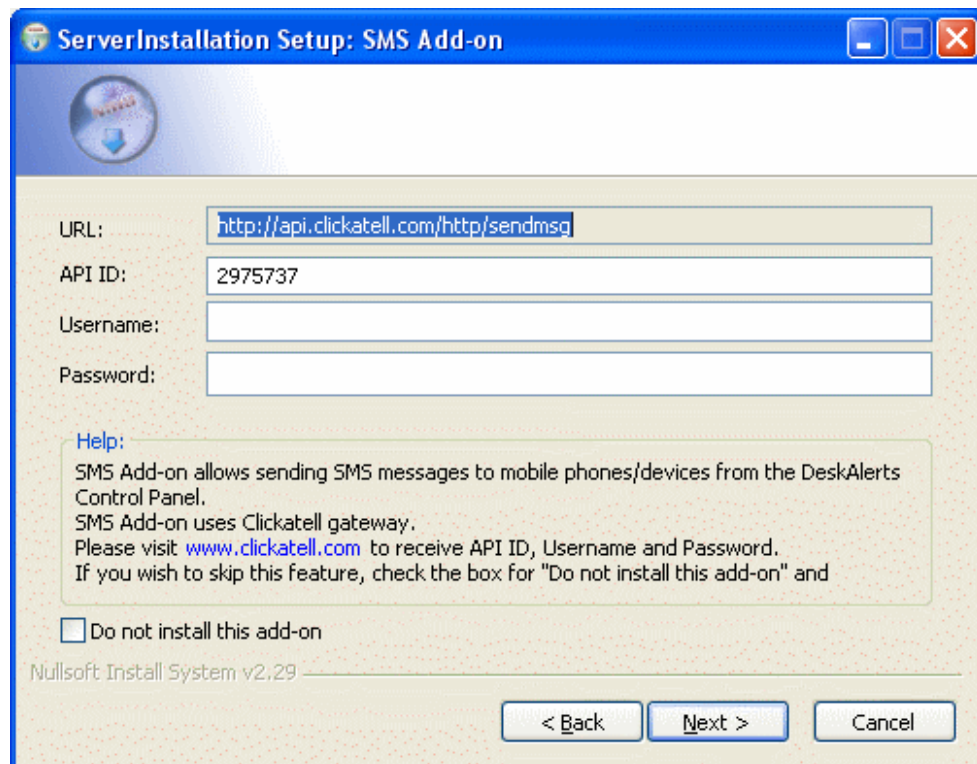


Fig. 6. Send Alerts to Mobile Devices using the SMS Add-On

13. Click **Next**.

14. On the next page of the installation wizard, as shown in Fig. 7, you will be asked to install the Surveys Add-On. The **Enable** option is selected by default. You can choose not to install the add-on by checking the **Do Not Install this Add-On** box.

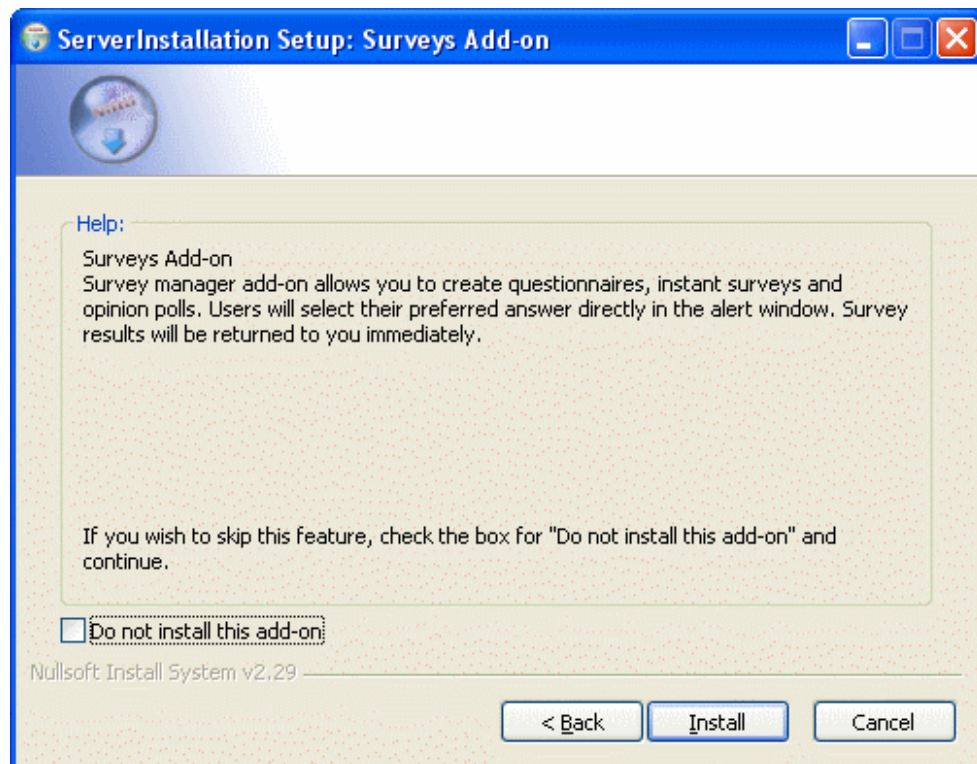


Fig. 7. Enable Surveys to be Sent as Alerts Using the Surveys Add-On

15. Click **Install**. This will start the installation process.
16. Once installed, click **Finish**.

Running the Toolbar Server

To run the Toolbar Server:

1. Open your browser, then enter the URL path you entered during setup of the Server on the URL bar, followed by /admin/index.asp. This will open the Toolbar Server's Control Panel's login page. The exact path in the example provided, as shown in Fig. 8, is **http://localhost/alerts/admin/index.asp**. Note that this may vary, depending on the parameters you entered during setup.

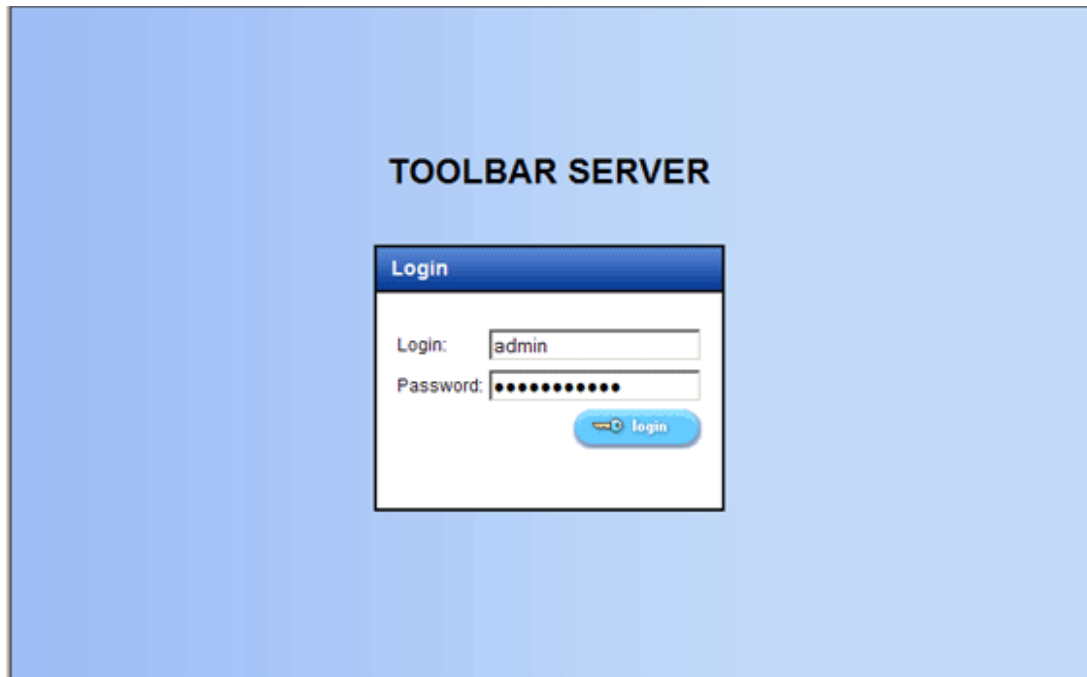


Fig. 8. The Control Panel's Login Page

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

NOTE: If you have the Active Directory edition of Toolbar Server, the program will automatically connect to your Active Directory domain. You can then use your logon credentials to your domain to log on to the Toolbar Server.

3. Click **Login** or press **Enter** to open the page as shown in Fig. 9. 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.

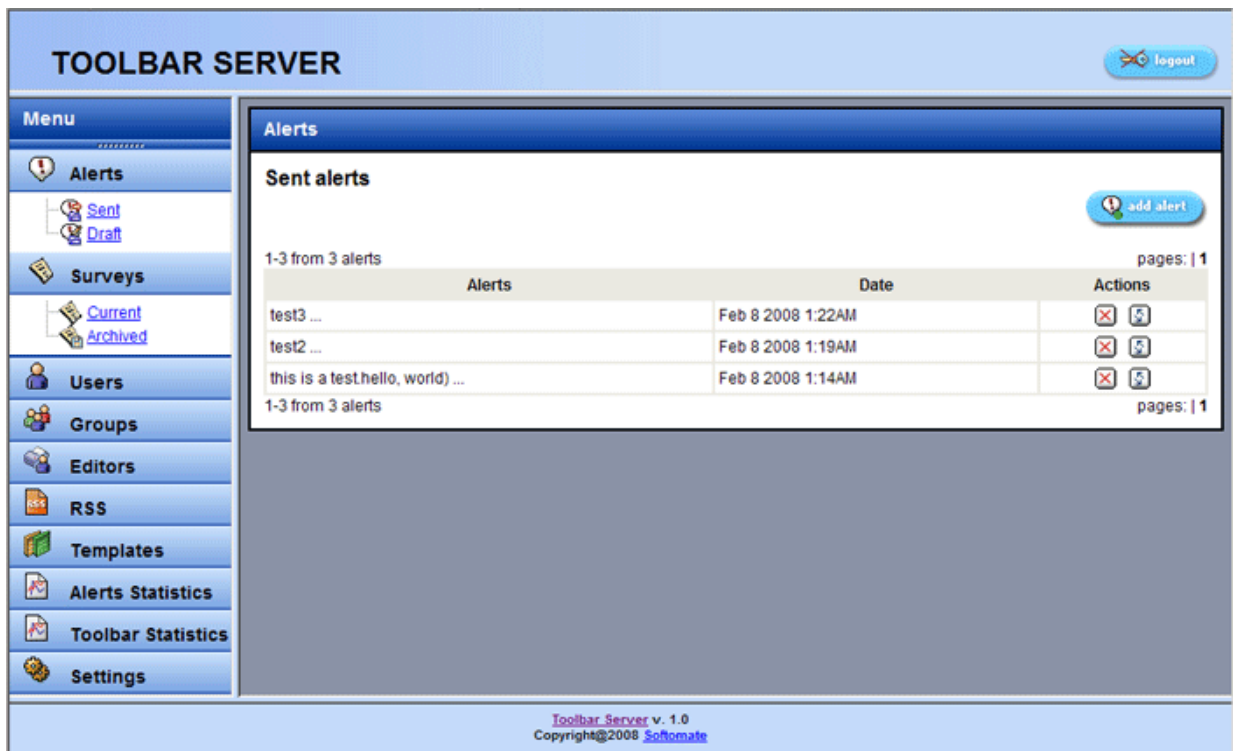


Fig. 9. The Control Panel's Default Display

The Toolbar Server's Control Panel is where you create and send alerts and surveys, add, edit and delete users (in Common Mode), add groups of users, define RSS feeds and templates, view statistics and change your password.

CONCLUSION

This Getting Started Guide tackled how you can use Toolbar Server. With it, we hope that you will now be able to appreciate Toolbar Server' power and capability to help you in informing your users or employees about developments within your organization. In turn, your users and employees will appreciate your efforts to keep them informed.