



ADMINISTRATOR'S GUIDE – Client Installation and Management

Using the WebBalanced Office Plug-In

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WebBalanced PLUG-IN INSTALLATION

DOWNLOAD PLUG-IN

Screen Purpose

Access the **Download Plug-in** screen in the WebBalanced Office Management Console (<http://console.webbalanced.net>) under the **Configuration** tab of the menu bar to dynamically create and download the latest version of the WebBalanced plug-in to install on licensed workstations. New plug-in versions are created dynamically with your unique Organization ID number for security. The plug-in file can be downloaded as often as desired.

Screen Data Fields

None.

Two (2) steps are identified for the Administrator that will result in a successful download and installation of the WebBalanced plug-in (before you click on the **DOWNLOAD NOW!** button review and/or print these instructions):

When you click **DOWNLOAD NOW** , a **File Download** screen opens. Most browsers give you the option to “Run this program from its current location” or “Save this program to disk.” Choose “Save this program to disk” and click **OK** .

The plug-in install file that you are downloading is distributed easily by network drive, floppy disk, CD, or USB key. For each WebBalanced licensed workstation, run the installation file and then click **SETUP** to extract and install the WebBalanced plug-in.

Screen Options

DOWNLOAD NOW! Click the **DOWNLOAD NOW!** button to download your previously created WebBalanced Setup Exe file. A **File Download** screen opens. Most browsers give you the option to “Run this program from its current location” or “Save this program to disk.” Choose “Save this program to disk” and click **OK** .

PLUG-IN FILE EXTRACTION SCREEN

The client plug-in is must be installed on every licensed client workstation to appropriately apply the Internet access policies that have been developed by your organization. After downloading the plug-in, simply double click the file to initiate the installation process.

Note: You must be logged in with **FULL LOCAL ADMINISTRATIVE PRIVILEGES** when installing the client plug-in, or the filter will not function properly.

The plug-in can be installed via login script when using a network environment with this capability. Contact WebBalanced Technologies Support for more details.

Screen Purpose

After downloading and running the WebBalanced Plug-in Install File, the **WinZip Self-Extractor** screen appears and is ready to extract and install the plug-in files on the workstation.

Screen Options

SETUP. Click on the **SETUP** button to install the WebBalanced plug-in on your workstation. This plug-in install file is unique to your organization with your Organization ID embedded in the file. Briefly, you may see this message depending on the speed of your computer: "Loading WebBalanced Service. Please Wait..."

CANCEL. Click **CANCEL** to abort installing the WebBalanced Plug-in.

ABOUT. Click **ABOUT** to identify the WinZip Self-Extractor release information and WebBalanced Edition copyright.

Setup Complete

Screen Purpose

Upon successful installation of the WebBalanced Plug-in, you receive a 'Congratulations' message.

Screen Options

OK. Click **OK** to close the WebBalanced **Setup Complete** screen. The WebBalanced Plug-in is installed successfully on your workstation.

WebBalanced LOGIN

Depending on the option selected by the Administrator during the WebBalanced Account Creation, the WebBalanced login is either “Use Network Authentication [A WebBalanced login is NOT required]” or “Force users to log into WebBalanced whenever accessing the Internet.” The Administrator can change the option selected during Account Creation at any time by accessing the **Product Setup Information** screen in the WebBalanced Management Console.

NETWORK AUTHENTICATION LOGIN

Screen Purpose

There is no login screen. The WebBalanced Plug-in icon appears in the workstation's systray at the time a user accesses the Internet through a browser or other applications whose components require Internet access.

Screen Data Fields

None.

Screen Options

None.

Systray Icon Options

The WebBalanced Plug-in icon in your workstation's systray provides the user with important information:

MOUSEOVER. By moving your mouse over the WebBalanced icon, a message is displayed identifying the active user: “WebBalanced Service is Active for [Network User Name, **NOT** WebBalanced]”

ABOUT WebBalanced. By right clicking on the WebBalanced Systray icon and choosing **ABOUT WebBalanced**, the information displayed is the same message as mouseover icon: “WebBalanced Service is Active for (Network User Name, **NOT** WebBalanced)”; Copyright info for WebBalanced; and Technical Support contact info (<mailto:support@webbalanced.com>).

LOGOFF. By right clicking on the WebBalanced Systray icon and choosing **LOGOFF**, the user can log off WebBalanced and systray icon disappears. The icon is removed automatically when a user discontinues access to the Internet. Note: This option is primarily for organizations who are using WebBalanced Authentication. Users who are using Network Authentication can log off, however, as soon as they move to a different web page or initiate a new browser instance, instant messenger, etc., the plug-in will automatically resume operation.

WebBalanced LOGIN

Screen Purpose

The WebBalanced login screen appears initially at the time you first access the Internet through a browser or other applications whose components require Internet access and your organization is using **WebBalanced Authentication**.

Screen Data Fields

USER NAME. To login successfully and start the WebBalanced Service, the Administrator or user must enter his or her correct **USER NAME**.

PASSWORD. To login successfully and start the WebBalanced Service, the Administrator or user must enter his or her correct **PASSWORD** that is linked to the specific **USER NAME** .

The Organization I.D. number appears in the bottom left-hand corner of the login screen. The I.D. number cannot be changed or removed.

Screen Options

LOGIN. After you enter your correct User Name and Password, click **LOGIN** to access the Internet. **Note:** If you enter an incorrect User Name, a Redirect Message of Access Denied is displayed and gives you the opportunity to again log into WebBalanced.

CANCEL. When you click **CANCEL** , the WebBalanced Login Screen **and** browser or application closes.

Systray Icon Options

The WebBalanced Plug-in icon in your workstation's systray provides the user with important information:

MOUSEOVER. By moving your mouse over the WebBalanced icon, a message is displayed identifying the active user: "WebBalanced Service is Active for [WebBalanced User Name, **NOT** Network User Name]."

ABOUT WebBalanced. By right clicking on the WebBalanced Systray icon and choosing **ABOUT WebBalanced** , the information displayed is the same message as mouseover icon: "WebBalanced Service is Active for (WebBalanced User Name, **NOT** Network User Name)"; Copyright info for WebBalanced; and Technical Support contact info (<mailto:support@webbalanced.com>).

LOGOFF. By right clicking on the WebBalanced Systray icon and choosing **LOGOFF** , the user can log off WebBalanced and systray icon disappears. The icon is removed automatically when a user discontinues access to the Internet.

UNINSTALL WebBalanced PLUG-IN

In order to uninstall the WebBalanced Plug-in, the Administrator must first obtain the Plug-in uninstall file from the Management Console's **UNINSTALL Exe** page.

DOWNLOAD Plug-in UNINSTALL

Screen Purpose

From the **Download Plug-in Uninstall** screen, the Administrator can download the plug-in uninstall file to remove the WebBalanced plug-in from their business workstations.

Screen Data Fields

None.

Two (2) steps are identified for the Administrator that will result in a successful download and uninstall of the WebBalanced Plug-in on their business workstations: (before you click on the **DOWNLOAD NOW!** button review and/or print these instructions):

- When you click **DOWNLOAD NOW!** , a **File Download** screen opens. Most browsers give you the option to “Run this program from its current location” or “Save this program to disk.” Choose “Save this program to disk” and save the plug-in for workstations uninstall file to your network, hard drive or floppy disk and click **OK** .
- For each licensed workstation that you want to uninstall the WebBalanced Plug-in, run the plug-in uninstall file from your network, workstation hard drive or floppy disk. Click to extract and uninstall the WebBalanced plug-in from the workstation.

Screen Options

DOWNLOAD NOW! Follow the UNINSTALL screen instructions and click the **DOWNLOAD NOW!** button to download the WebBalanced Plug-in Uninstall file. A **File Download** screen opens. Most browsers give you the option to “Run this program from its current location” or “Save this program to disk.” Choose an option and click **OK** .

PLUG-IN FILE EXTRACTION SCREEN

Screen Purpose

After downloading the WebBalanced Plug-in Install File, the **WinZip Self-Extractor** screen appears and is ready to uninstall the WebBalanced Plug-in on the workstation.

Screen Options

SETUP. Click on the **SETUP** button to uninstall the WebBalanced plug-in on your workstation. This plug-in uninstall file is unique to your organization with your Organization ID embedded in the file.

CANCEL. Click **CANCEL** to abort uninstall of the WebBalanced Plug-in.

ABOUT. Click **ABOUT** to identify the WinZip Self-Extractor release information and WebBalanced Edition copyright.

System Restart

Screen Purpose

After the WebBalanced Plug-in uninstall file finishes uninstalling the plug-in on the workstation, you are notified that your computer must restart to complete the process. You receive this message: "Your computer needs to restart to uninstall the WebBalanced Plug-in from this workstation. Please close all open applications and click OK to restart."

Screen Options

OK. You must restart your computer to complete the uninstall process of the WebBalanced Plug-in. Be sure to close all of your open applications before clicking **OK** to restart your computer. Your computer will restart automatically and return to your desktop.

WINSOCK 2.0 VERIFICATION FOR WINDOWS 95 OPERATING SYSTEMS ONLY

Screen Purpose

Windows 95 must be OSR2 compliant with Winsock 2.0 support. Winsock 2.0 is a programming interface that handles requests for sending/receiving information for Internet applications. Your computer's hardware and software must meet the minimal requirements of the WebBalanced software. **If your computer does not meet minimal system requirements, you receive a "runtime error" after clicking SETUP** . You have the opportunity to obtain information about installing Winsock 2.0 and its updates for Windows95 computers by visiting our Web site at <http://www.webbalanced.com/onlinedocs/winsock2.htm>.

MICROSOFT INFORMATION TO DOWNLOAD AND INSTALL WINSOCK 2.0

(For Windows 95 Computers Only)

Microsoft's Winsock 2.0 is part of the minimal system requirements for WebBalanced to install and run successfully on your personal computer. The Microsoft Knowledge Base provides this link to a Microsoft web page where you can download Winsock 2.0 and Winsock 2.0 Updates for **WINDOWS95** *only* operating systems:

http://www.microsoft.com/windows95/downloads/contents/WUAdminTools/S_WUNetworkingTools/W95Sockets2/Default.asp

Please review the **Read Me First** section of Microsoft's web page:

" **Read Me First**

This is a Windows Socket 2 Update for Microsoft® Windows® 95. This update resolves a number of Winsock2 issues. This update also resolves a number of TCP/IP stack issues. Please read the [release notes](#) for a detailed list of all changes.

This update has been released since the Microsoft Windows 95 Service Pack 1 (Sept 10, 1996).

Before downloading the upgrade, please read the [License Agreement](#) for Microsoft Windows Sockets 2 for Windows 95."

For Windows95 users who do not have Winsock 2.0 installed on their computer, click on the **DOWNLOAD NOW** button.

Please follow the Microsoft directions for downloading Winsock 2.0:

" **How to Download**

1. **Create a folder** by right clicking on the desktop, click **New** , and then click **Folder** . Type a name for the folder and press **enter** .
2. Click the **Download Now** button at the top or bottom of this page. In the File download dialog box that appears on your screen, click **Save Program to Disk** .

3. Choose to save the file in the folder you just created, then click **Save**.
4. Open that folder and double-click **ws2setup.exe** to install the program files. Be sure to read the "Read-Me" files for additional information."

Once Winsock 2.0 is installed on your computer, please run again the WebBalanced Plug-in Install file.

Screen Options

OK. Your only option is to click **OK** to abort the installation of WebBalanced. Download and install Microsoft's Winsock 2.0 for Windows 95 and restart the installation of WebBalanced.

ACCESS MESSAGES

RESTRICTED ACCESS

Screen Purpose

The Web site you are trying to access [<http://www.restricted.net>] cannot be viewed because the content of this site is not consistent with our Internet access policy as it contains these characteristics:

- Games
- News
- Reference

Screen Options

HELP. If you click on the **HELP** button, an **Online Help for Restricted Access** window opens and provides more detailed information.

BACK. Clicking the **BACK** button returns you to your previous Web page.

SITE OVERRIDE

Screen Purpose

The Web site you are trying to access [<http://whatever.com>] cannot be viewed because the content of this site is not consistent with our Internet access policy as it contains these characteristics:

- Shopping
- Sports
- Travel

If you need access to this site for work related purposes, please click on **SITE OVERRIDE**.

Screen Options

HELP. If you click on the **HELP** button, an **Online Help for Site Override** window opens and provides more detailed information.

BACK. Clicking the **BACK** button returns you to your previous Web page without previewing the Web site.

SITE OVERRIDE. Click **SITE OVERRIDE** to view the Web page. Your Administrator has provided you access to this site if needed without requiring a password.

SITE NOT REVIEWED

Screen Purpose

The Web site you are trying to access [<http://www.notfound.com>] is restricted because it is not reviewed. This Web site is submitted automatically for review.

Screen Options

HELP. If you click on the **HELP** button, an **Online Help for Site Not Reviewed** window opens and provides more detailed information.

BACK. Clicking the **BACK** button returns you to your previous Web page.

SITES OF UNPROTECTED ACCESS

Screen Purpose

The Web site you are trying to access [<http://unprotected.com>] cannot be viewed because it allows unprotected access to the Internet.

Screen Options

HELP. If you click on the **HELP** button, an **Online Help for Sites of Unprotected Access** window opens and provides more detailed information.

BACK. Clicking the **BACK** button returns you to your previous Web page.

SEARCH TERMS

Screen Purpose

If you are attempting to use a search engine to search a word or words that are linked to restricted sites, you receive the following Redirect Message: "The requested search cannot be accessed because of the subject matter."

Screen Options

HELP. If you click on the **HELP** button, an **Online Help for Search Terms** window opens and provides more detailed information.

BACK. Clicking the **BACK** button returns you to your previous Web page.

SECURED SITE

Screen Purpose

The Web site you are trying to access is restricted because it is a secured site.

These Web sites are hosted on servers that code information for secure Internet transactions of critical information. Secured Web sites are stored on a 'safe' server that often hosts online ordering forms for Internet commerce and personal information.

[Screen Options](#)

BACK. Clicking the **BACK** button returns you to your previous Web page.

ACCESS DENIED

[Screen Purpose](#)

Access to your account is denied. The system cannot identify properly your account with the User Name and Password (if required) that you provided.

If you forgot your user name or password, please contact your Administrator.

[Screen Options](#)

HELP. If you click on the **HELP** button, an **Online Help for Access Denied** window opens and provides more detailed information.

LOGIN. To try another login, press the **LOGIN** button.

NO POLICY CONFIGURATION

[Screen Purpose](#)

Your account is not configured properly. Specifically, your account has no browsing policy in effect at this time. Please contact your Administrator for further assistance.

[Screen Options](#)

HELP. If you click on the **HELP** button, an **Online Help for No Policy Configuration** window opens and provides more detailed information.

CLOSE WINDOW. Click on the **CLOSE WINDOW** button to return to your application or desktop.

SPECIAL RESTRICTED URLS

[Screen Purpose](#)

The Web site you are trying to access [<http://www.noaccess.com>] cannot be viewed as it is restricted by Internet usage policy.

[Screen Options](#)

HELP. If you click on the **HELP** button, an **Online Help for Special Restricted URLs** window opens and provides more detailed information.

BACK. Clicking the **BACK** button returns you to your previous Web page.

EVALUATION PERIOD EXPIRATION

Screen Purpose

The evaluation period for your account has expired. Please contact your Administrator for further assistance.

Screen Options

HELP. If you click on the **HELP** button, an **Online Help for Trial Period Expiration** window opens and provides more detailed information.

CLOSE WINDOW. [Displayed to Users ONLY.] Click on the **CLOSE WINDOW** button to return to your application or desktop.

GO LIVE. [Displayed to Administrators ONLY.] Click on the **GO LIVE** button to access Management Console's GO LIVE screen.