



WebBalanced Office - Quick Start Guide

Five Basic Steps to Managing Your Account and Downloading the Plug-in

Step 1: Accessing the Management Console

Access the Management Console at <http://console.webbalanced.net> by entering your Administrator User Name, Administrator Password and Organization ID Number on the Console login screen. Click **SUBMIT** to enter the Console. From the Console, you can manage Characteristic Sets, Policies, Groups, Users and Workstation IPs as well as view User Activity Logs, generate/display/print Reports, restrict specific applications, and download the latest Plug-in and plug-in uninstall files for workstations. For detailed product information, click on **Help** in the Management Console for the Administrators Guide. The Administrators, Quick Start and Reports Guides are available for downloading in Acrobat Reader PDF format through the **SUPPORT** link on WebBalanced Technologies homepage (www.webbalanced.com).

Step 2: The IP>U>G>O Factor

Administrators should always factor in WebBalanced's **security hierarchy** in managing Policies: **IP>U>G>O**.

Assigned policies for Workstation **IPs** override individual **User** policies, which in turn override policies assigned to **Groups**, which supersede **Organization [Default]** policies.

Step 3: Getting Started in the Management Console

The **Internet Access Management** submenus control access to Characteristic Sets, Policies, Groups, Users, Workstation IPs, Special URLs, User Overrides, Process Management, and Submit URL's. Administrators can accept library or business default Policy and Characteristic Sets or create their own.

Characteristic Sets

First, create **Characteristic Sets** to select what type of content you want to filter. You can choose to Permit, Override [can view a Website without a password] or Restrict 50 Characteristics categorized in 3 content areas: Legal Issues; Productivity; and Bandwidth. You can also select any of 3 other browsing options: Allow Access to Non-Reviewed Web Sites; Allow Access to Secure Web Sites; and Keywords Entered in Search Engines are Filtered by WebBalanced's Protected Word List. You may have as many or as few Characteristic Sets as you require; the sets that are present when you created your account can be used, renamed, or deleted.

Policies

Second, create **Policies** to determine when you want to apply the Characteristic Sets. After configuring your Characteristic Sets, select the days/times when Policies are active. **Each Policy** you create **must have an assigned Characteristic Set**. Then, assign your Characteristic Sets to them. You can also restrict access to selected applications for individual policies (audio/video players, browsers, instant messengers, etc). **If you check the Default Policy box, this Policy is ACTIVE when there are NO other Policies assigned.** You may have as many or as few Policies as you require; the policies that are present when you created your account can be used, renamed, or deleted.

Groups

Third, create **Groups**. You can manage Internet access for groups of employees by groups or departments (for example, 'accountants' or 'clerical').

WebBalanced Security Hierarchy: System Policies assigned to Workstation IPs and Users override Policies assigned to these Groups.

Users

Fourth, add **Users**. You can manage Internet access for individual employees. By using the Network Authentication login preference, Users are added automatically (their Windows user name) when they first log into WebBalanced. If you choose to use WebBalanced's login, Users must be added manually. To help manage your corporate account, Users can be assigned 'Administrator' and/or 'View Reports' privileges and permitted to "see all groups" or just "one group" in accessing report data.

WebBalanced Security Hierarchy: Workstation IP Policies override those assigned to Users.

Workstation IPs

Fifth, add **Workstation IPs**. You can manage Internet access for individual workstations. This is used when the administrator wants to permanently assign a policy to a given PC regardless of the user logged in [for example, when setting up a public access computer]. However, please be aware that IP Addresses are not required, and are typically not used by most administrators.

WebBalanced Security Hierarchy: System Polices assigned to Workstation IPs override those assigned to Users and Groups.

Special URLs

Sixth, add **Special URLs**. You can manage ALL employee access (Permit or Restrict) to specific URLs.

WebBalanced Security Hierarchy: These Special URLs are ALWAYS ACTIVE and OVERRIDE all Policies, Characteristic Sets and browsing options.

When adding Special URLs, always use a wildcard character [*]to effectively manage your list.

For example, if you need to add 'http://www.sampleurl.com,, the most efficient way to enter it in the list is like this: *.sampleurl.*

Be aware, however, that not all URLs include 'www', so will not require a '.' at the front. The website 'http://exampleurl.net' would be entered like this: *exampleurl.*

In some cases you will want to include added information to effectively manage your URL overrides. In the example above there might be two similar sites; one is named

'http://exampleurl.com' and the other is 'http://exampleurl.net'. If you want to control the '.net' site while ignoring the '.com' site, just extend the URL like this; *.exampleurl.net*

Process Management

Seventh, restrict access to selected applications for ALL policies across your organization (audio/video players, browsers, and instant messengers). **NOTE:** Applications restricted at the organization level are **ALWAYS RESTRICTED AND OVERRIDE ALL POLICY SETTINGS.**

Step 4: Downloading the Plug-in Installation File for Workstations

Download Plug-in from the **Configuration** submenus to download the latest version of the WebBalanced plug-in to install on licensed workstations. This plug-in file is created dynamically with your unique Organization ID number for security. Click **DOWNLOAD NOW!** to download and install the plug-in. This plug-in file is distributed easily by network drive, floppy disk or simple email to WebBalanced licensed workstations. **PLEASE NOTE: When installing the plug-in file, you MUST be logged on to the computer with FULL LOCAL ADMINISTRATOR PRIVILEGES.**

Step 5: Managing Other Features of the Console.

The **Reports** submenus control access to User Activity Log & Version Control; User Report; Characteristic Report; URL Report; Activity Report; Workstation IP Report; Group Report; Process Log Report; and Custom Reports. Administrators and Users with 'View Reports' privileges can manage reports by creating and printing default or customized reports of their organization's Internet usage and productivity. You can control the information that is displayed in your organization's reports by choosing from a list of criteria as well as start/end dates. By using WebBalanced's *drill down* reporting tool, you can generate unparalleled detail of your organization's Web activity.

The **Configuration** submenus control access to Corporate Information, Product Setup, Go Live & Billing Information, Download Plug-in and Download Plug-in Uninstall:

Corporate Info

Accesses the **Corporate Account Information** screen to view or edit corporate account and contact information.

Product Setup

Accesses the **Product Setup Information** screen to view or edit options chosen during account creation, including User Login preference (Network Authentication Login or WebBalanced Login) and Policy Time/Date Values Authentication (workstations or WebBalanced servers).

Go Live

Accesses the **GO Live** screen where Administrators can complete the required contact and billing information by the end of the WebBalanced 30-day evaluation period. Once the information is completed and submitted to WebBalanced Technologies, the text link changes to **Billing Information** on your next log into the Management Console.

Billing Info

Accesses the **Billing Information** screen where Administrators can edit their organization's Billing Contact Information.

Download Plug-in

[See Step #4 - Downloading Plug-in Installation]

Download Plug-in Uninstall

Accesses the **Download Plug-in Uninstall** screen to download the plug-in uninstall file to remove the WebBalanced plug-in from workstations. The plug-in uninstall file is created dynamically with your unique Organization ID number for security.

Help

The **Help** submenus control access to WBO's Administrators, Reports and Quick Start Guides:

Guides. Access WebBalanced's **Administrators**, **Reports** and **Quick Start Guides** for detailed user information. These Guides open in a separate window and are available for downloading in Acrobat Reader PDF formats through the **SUPPORT** link on the WebBalanced Technologies homepage (www.webbalanced.com).

Contact Us. Accesses the **Technical Support Contact Form** screen where Administrators can enter information to keep WebBalanced informed about their experiences with WebBalanced and receive feedback about product concerns and issues.

Logoff

Log off the WebBalanced Management Console.