InterGuard: User Guide

A detailed guide to setting up your InterGuard Software Application

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Table of Contents

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Table of Contents

EMAIL: sales@awarenesstechnologies.com

PHONE: (888) 224-1288

1 Reports

1.1 Email Usage

The following reports are available:

1. Email Usage Trend
2. Top Email Senders
3. Top Email Receivers
4. Top Webmail Users
5. Most Popular Webmail Sites

1.2 IM/Chat Usage

The following reports are available:

1. IM/Chat Usage Trend
2. Top IM Users by Conversation
3. Top IM Clients Used

1.3 Keystrokes

The following reports are available:

1. Top Keystrokes by Application
2. Top Keystrokes by Use

1.4 Website Surfing

The following reports are available:

1. Website Usage Trend
2. Top Surfers by Number of Websites
3. Top Websites Visited
4. Top Blocked Websites Visited
5. Top Surfers to Blocked Websites

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1 Reports

1.5 Screenshots

The following reports are available:

1. Top Screenshots by Application Trigger
2. Top Screenshots by Website Trigger
3. Top Screenshots by Alert Trigger
4. Top Screenshots by User

1.6 Programs

The following reports are available:

1. Application Usage
2. Top Applications Used

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2 Recorded Data

2.1 Common Dashboard Controls

The following user controls are common to all of the Recorded Data data-types:

2.1.1 Filters

By default, the InterGuard Dashboard will show you the last 48 hours of Recorded Data. If you would like to expand or narrow that timeframe, you can use the "View Data From" pulldown to quickly change the timeframe you are looking at. You can also set custom dates by adjusting dates in the "From:" and "To:" fields.

In addition, you can filter by Favorites (see section 3 for more info on Favorites), Department (see section 4.3.1 for more info on departments), User (windows user account), or Computer. Simply click the pulldown next to each option to select the item you want to display. The filter will only display data from the item (Department, User, or Computer) you have selected

2.1.2 Sort by

Click on the Sort by button to sort the data in the grid by any of the available columns. You can also sort any column by clicking on the column header. If the column is already sorted, clicking the column header will sort it in reverse order.

2.1.3 View

By clicking on the View button you can add columns to the grid that will display additional information. There are several columns already set to be viewed by default.

2.1.4 Export

By clicking on the export button you can export the items displayed in the Data Summary grid, or the items displayed in the Preview Pane. See sections 2.3 - 2.7 for more info on the data Summary Grid and Preview Pane. You can select from various output formats.

2.1.5 Delete

By clicking on the delete button you will have the option to delete only rows you have highlighted, delete everything expect for what you have marked as a Favorite, or to delete all items of that Recorded Data type. In the last two options, only items currently displayed for the selected timeframe (check your Date Filter for the timeframe) will be deleted.

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2.2 Email

All emails that have been recorded can be accessed by clicking on the "Email" link in the Recorded Data tab.

1. Date – the date/time the email was sent
2. User – the user account that was in use during which time the email was sent
3. From – email sender
4. To – email recipient
5. Attach – indicates if there was an attachment on the email
6. Subject – the subject of the email
7. Alert Words – displays alert words found in the email
8. Bookmark Id – allows you to flag an email as a favorite
9. Item Id (hidden by default)
10. Group – the SONAR department the computer/user belongs to (hidden by default)
11. Computer – the name of the computer used (hidden by default)
12. Computer Id – (hidden by default)
13. Login Id – (hidden by default)
14. Group Id (hidden by default)
15. Alert Processed (hidden by default)
16. Cc (hidden by default)

You can display the hidden information in the Summary Grid by selecting the desired item from the "View" menu.

Simply click on an item in the Summary Grid to read the contents of the email in the preview pane below.

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PHONE: (888) 224-1288

2.3 IM/Chat

All instant messages that have been recorded can be accessed by clicking on the "IM/Chat" link in the Recorded Data tab.

1. Date/Time - the date/time the IM conversation occurred
2. User - the user account that was in use during which time the IM conversation occurred
3. Participants – the participants of the IM conversation
4. Alert Words – displays Alert Words found in the IM
5. Bookmark Id – allows you to flag a conversation as Favorite
6. Item Id (hidden by default)
7. Group – the SONAR department the computer/user belongs to (hidden by default)
8. Computer – the name of the computer used (hidden by default)
9. Computer Id (hidden by default)
10. Logon Id (hidden by default)
11. Group Id (hidden by default)
12. Instant MessageType Id (hidden by default)
13. EndTime (hidden by default)
14. Alert Processed (hidden by default)

You can display the hidden information in the Summary Grid by selecting the desired item from the "View" menu.

Simply click on an item in the summary grid to read the contents of the instant message in the preview pane below.

2.4 Keystrokes

All keystrokes that have been recorded can be accessed by clicking on the "Keystrokes" link in the Recorded Data tab.

Keystroke data has been grouped by application and by date/time to make the data more useful. If you would like to see all Keystroke data, click on "Keystrokes" in the tree-view pane. All of the Keystroke events that occurred in the timeframe you specified will appear in the Keystroke Summary Grid to the right.

To see the keystroke events for a particular application, click on that application name. You can also see the keystroke events that occurred on a particular day for that application by clicking the date you wish to view.

The Keystroke Summary Grid contains the following information:

1. Date/Time – the date/time the keystroke event occurred
2. User – the user account that was in use during which time the keystroke event occurred
3. Program – the name of the program in which the keystroke event occurred
4. Window Title – the title of the window in which the keystroke event occurred
5. Alert Words – displays Alert Words found in the Keystroke event
6. Bookmark Id – allows you to flag a keystroke event as a Favorite
7. Item Id (hidden by default)
8. Group – the SONAR department the computer/user belongs to (hidden by default)
9. Computer – the name of the computer used (hidden by default)
10. Icon (hidden by default)
11. # of Keystrokes (hidden by default)
12. Computer Id (hidden by default)
13. Logon Id (hidden by default)
14. Group Id (hidden by default)
15. Alert Processed (hidden by default)

You can display the hidden information in the Summary Grid by selecting the desired item from the "View" menu.

Simply click on an item in the summary grid to read the contents of the keystroke event.

EMAIL: sales@awarenesstechnologies.com

PHONE: (888) 224-1288

2.5 Websites

All websites that have been visited can be accessed by clicking on the "Websites" link in the Recorded Data tab.

Website data has been grouped by domain and by date/time to make the data more useful. If you would like to see all Website data, click on "Websites" in the tree-view pane. All of the websites visited within the timeframe you specified will appear in the Website Summary Grid to the right.

To see the websites visited for a particular domain, click on that domain name. You can also see the websites visited on a particular day for that domain by clicking the date you wish to view.

The Website Summary Grid contains the following information:

1. Date/Time – the date/time the website was visited
2. User - the user account that was in use during which time the website was visited
3. Website – the domain name of the website visited
4. 1Window Title – the title of the browser window when the website was visited (this is generally the <title> tag on the webpage itself)
5. Block Trigger – Indicates that a website was blocked and what blocking tool was triggered
6. Bookmark Id – allows you to flag a Website event as a Favorite
7. Department - the department the computer/user belongs to (hidden by default)
8. Item Id (hidden by default)
9. Group – the SONAR department the computer/user belongs to (hidden by default)
10. Computer – the name of the computer used (hidden by default)
11. Duration – approximate length of time the user was on the webpage (hidden by default)
12. Blocked – displays a check mark if the website was blocked when the user attempted to visit it (hidden by default)
13. URL (hidden by default)
14. Computer Id (hidden by default)
15. Logon Id (hidden by default)
16. Group Id (hidden by default)

You can display the hidden information in the Summary Grid by selecting the desired item from the "View" menu.

Simply click on an item in the summary grid to see the full website address (URL) the user visited. The URL is hyperlinked so you may quickly navigate to the page the user visited.

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2.6 Screenshots

All screenshots that have been recorded, including those captured by SmartCamera, can be accessed by clicking on the "Screenshots" link in the Recorded Data tab. Screenshot data has been grouped by the trigger and by date/time to make the data more useful. If you would like to see all of the screenshots, click on "Screenshots" in the tree-view pane. All of the screenshots recorded within the timeframe you specified will appear in the Screenshot Summary Grid to the right. To see the screenshots visited for a particular trigger, click on that trigger name. You can also see the screenshots recorded on a particular day for that trigger by clicking the date you wish to view.

The Screenshot Summary Grid contains the following information:

1. Date/Time – the date/time the screenshot was taken
2. User - the user account that was in use during which time the screenshot was taken
3. Trigger – the Alert Word, program name or website visited that triggered the screenshot to be taken
4. # of Screenshots – the number of screenshots taken for that particular triggering event. Note: Alert Words will only trigger one screenshot.
5. Bookmark id – allows you to flag screenshots as favorites
6. Item Id (hidden by default)
7. Session Id (hidden by default)
8. Group – the InterGuard department the computer/user belongs to (hidden by default)
9. Computer – the name of the computer used (hidden by default)
10. Computer Id (hidden by default)
11. Logon Id (hidden by default)
12. Group Id (hidden by default)

You can display the hidden information in the Summary Grid by selecting the desired item from the "View" menu. Simply click on an item in the summary grid to see a preview of the screenshot. Click on the "Click here to open the full-size screenshot" link to view the full screenshot. If there is more than one screenshot triggered by that event, you will see play controls above the full screenshot. You have the option of playing the screenshots in a series as a "slide show", skipping to the next or previous shot in a series, or skipping to the end and beginning of the series.

Please note that by default your account has no alert words or SmartCamera settings configured. You will need to configure either alert words or SmartCamera in order to record screenshots. See section 4.3.2.8 and 4.3.2.9 for more information on how to configure either SmartCamera or alert words.

EMAIL: sales@awarenesstechnologies.com PHONE: (888) 224-1288

2.7 Programs

All program activity including when a program was started, when it stopped, and how long it was active can be viewed by clicking on the "Programs" link in the Recorded Data tab. Program activity data has been grouped by program name and by day to make the data more useful. If you would like to see all of the program activity, click on "Programs" in the tree-view pane. All of the program activity within the timeframe you specified will appear in the Programs Summary Grid to the right.

The Program Summary Grid contains the following information:

1. Active Time – displays the actual time the program was actively being used
2. Duration – displays the total time the program was open
3. Window Title – displays the most recent title of the program
4. User - the user account that was in use during which time the program was active
5. Start Time – the time the program was opened
6. End Time – the time the program was closed
7. Bookmark id – allows you to flag particular program activity as a Favorite
8. Item Id (hidden by default)
9. Session Id (hidden by default)
10. Group – the InterGuard department the computer/user belongs to (hidden by default)
11. Computer – the name of the computer used (hidden by default)
12. Computer Id (hidden by default)
13. Logon Id (hidden by default)
14. Group Id (hidden by default)
15. Item Name (hidden by default)

You can display the hidden information in the Summary Grid by selecting the desired item from the "View" menu.

Simply click on an item in the summary grid to display more information about the program in the preview pane below.

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PHONE: (888) 224-1288

3 Favorites

The Favorites tool is a method to organize your recorded data for quick viewing and make notation. You will be able to quickly find all of the Recorded Data that you have flagged as a “Favorite”. You can flag a recorded event by clicking the “Star” located in the column to the far right of that recorded event. Once clicked you will see a window that will give you the option to select the Type of Favorite and a field where you can enter a note. The Type is simply a tool to organize your favorites into different categories/levels. After you click “Apply”, the star to the right of the recorded event will light up as gold.

When viewing a recorded event that has been marked as a favorite, in the preview pane you will see two tabs; “Details” and “Notes”. “Details” displays the recorded data and “Notes” displays the note that you created when flagging the event as a favorite.

You can use the data Filter to display only items that have been flagged as a Favorite. You can filter by all items marked as a favorite, or only certain categories/levels of favorites.

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4 Search

The search tool will do a text based search of the data in your account. Click “New Search” to start the process. At the top of the page you can enter the words or phrases you’d like to search with in the field below “Keyword Search:”

In the Search Criteria window you can select which Departments, Users, and or Computers to include in your search. To include an item, select it in the box under the “Available” column. Then click the arrow pointing to the right. This will place the item in the box under the “Include” column. You can also use the “Select All” link followed by the arrow to move all of the contents of a box. Moving a Department to “Include” will automatically move all of the computers or users contained in that Department.

By default, the Search tool is set to search the last 24 hours of Recorded Data. If you would like to expand that timeframe, you can use the pulldown found below “Date Range” to quickly change the timeframe you are searching. You can also set custom dates by adjusting dates in the “From:” and “To:” fields.

Under “Data Types” you will need to place a “check” in the type(s) of data you would like to perform the search on.

After you have clicked the “Search” button, you will see a status window while the software works. Once finished, it will display the search results. On the top there will be tabs for each data type. Simply click the desired tab to view a Summary Grid of the results. Click on an item in the Summary Grid to read the contents of the recorded event in the Preview Pane below.

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PHONE: (888) 224-1288

5 Settings

5.1 Account Information

Clicking on the Account Information link under the Settings tab will display the contact information that was used to create the account and the primary account password.

To Edit the Account Information, simply click the "Edit Contact Information". Make the necessary modifications, and click the "Save Changes" button.

To edit the password, click the "Edit Password" button. Once the new password has been entered, click the "Save Password" button.

5.2 Account Information

Clicking on the User Access link under the Settings tab will allow you to create multiple login accounts to the InterGuard dashboard with differing levels of security.

Levels of Access

Levels of Access	The ability to access all reports, read all data, change Recording Options, create/delete dashboard login accounts and change the Account Information.
Manager	The ability to access all reports and read all data except recorded passwords, change Recording Options, create/delete dashboard login accounts and change the Account Information.
Limited	The ability to access all reports and read all data except recorded passwords. Cannot change Recording Options, create/delete dashboard login accounts, or change the Account Information.

EMAIL: sales@awarenesstechnologies.com

PHONE: (888) 224-1288

5 Settings continued

5.3 Recording Options

Clicking on the Recording Options link under the Settings tab will allow you to:

1. Create Departments
2. Assign computers and/or users to Departments
3. Assign specific Recording Option rule-sets about what to record and/or block to computers and users

5.3.1 Departments

Departments are an organization tool and a simple a way to create unique Recording Options rule-sets and assign Windows users or entire computers to the each rule-set. This means you can designate unique recording options for each Windows user or group of Windows users, each computer or group of computers, or a combination of Windows users and computers.

By default, there will be a Department labeled "Unassigned". This Department cannot be deleted as it will act as the default Recording Options rule-set for all computers/users that have not been assigned to another Department.

Creating a Department

To create a department, enter the name of the new Department in the "Add Department" text box and click the "Add" button.

To add a Computer or User to a Department, complete the following steps

1. Highlight the appropriate Department .
2. Click on the "Members" tab on the right.
3. Click on the "Add Member" button
4. Next to "Find", select Computers or Users from the drop down menu
5. Select the Department they currently are assigned to (optional) or search all Groups.
6. In the "Search" box, type the name of the User or Computer you would like to add to the Department. You can leave this field blank and you will see a list of all Users or Computers and the Department they are currently assigned to.
7. Select the User or Computer and click the "Add Selected" button.
8. The Computer or User will now be assigned to the Department.

Please note that users and computers can only be in one department at a time.

EMAIL: sales@awarenesstechnologies.com

PHONE: (888) 224-1288

5 Settings continued

5.3.2 Edit Recording Options

Select the Department from the left pane you would like to edit the Recording Options for. Select either "On" or "Off" for each option. If the option has a "Settings" link next to it, you'll need to click on it to configure the appropriate settings.

5.3.2.1 Record Emails

Select the Department from the left pane you would like to edit the Recording Options for. Select either "On" or "Off" for each option. If the option has a "Settings" link next to it, you'll need to click on it to configure the appropriate settings.

5.3.2.2 Record IM/Chats

Clicking "On" will instruct the InterGuard software to record both sides of a variety of the most popular Instant Message/Chat programs including MSN Messenger, Windows Messenger, Yahoo Messenger and AIM.

5.3.2.3 Record Keystrokes

Clicking "On" will instruct the InterGuard software to record every keystroke typed on the computers you are monitoring.

5.3.2.4 Record Websites

Clicking "On" will instruct the InterGuard software to record the full website addresses (URLs) of every website visited on the computers you are monitoring.

5.3.2.5 Record Programs

Clicking "On" will instruct the InterGuard software to record what programs were used, when they were used and for how long.

5 Settings

5.3.2.6 Block Websites

Clicking "On" will instruct the InterGuard software to record what programs were used, when they were used and for how long.

Block by Category/Website Address

This tab has two main sections:

Website Categories

The software includes a huge proprietary list of categorized websites that makes blocking certain types of websites very easy. To block all of the website addresses in a particular category, click the checkbox next to the category. If the category has a "+" sign next to the checkbox, it contains sub-categories that can be blocked or unblocked.

Website Address

If there is a specific website that you know you would like to block, simply type the website address into the text box next to "Website Address" and click the "Add" button. Do not enter the "WWW" or "http://" portions of a website. You only need the domain portion. For example, to block https://www.awarenesstech.com you would only need to enter "awarenesstech.com. The website you entered should appear in the grid. You can remove websites from the grid by checking the checkbox next to the one you would like to remove and clicking the "Delete" button.

Test Website Address

If you would like to find out if a particular website address will be allowed or blocked (and if blocked, what blocking feature is blocking it), you can enter it into the text box next to "Test Website Address" and click the "Test" button. A box will appear that contains the following information

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PHONE: (888) 224-1288

5 Settings continued

5.3.2.6 Block Websites continued

Block Websites	The website address you are testing.
Category	The category the website belongs to (if applicable).
Category Blocked?	If the checkbox is checked, that category is blocked.
Always Block	If you would like to block the website regardless of whether or not the category is blocked, select this radio button.
Use Category Setting	If you would like to have the website to be blocked or not based upon the category it is in, select this radio button.
Allow	If you would like this website to be allowed regardless of category setting and content on the website, select this radio button.
Always Allow	If you would like this website to be allowed regardless of category setting and content on the website, select this radio button.
Result	This is the expected result of visiting this website address.

Block by Content

The software allows you to block website content based upon text on the page. If the designated words or phrases are found on a webpage, the software will block the webpage.

Enter the word or phrase in the field next to "Add word" then click the "Add" button. Repeat for each word or phrase you would like on the list; you can add as many as needed. The word/s you entered should appear in the grid. You can remove words from the grid by checking the checkbox next to the one you would like to remove and clicking the "Delete" button.

EMAIL: sales@awarenesstechnologies.com

PHONE: (888) 224-1288

5 Settings continued

5.3.2.6 Block Websites continued

Allowed Websites

The software also gives you a variety of ways to configure Allowed Websites.

Step 1 of this screen gives you three options:

1. Disable Allowed Websites -

use this option by default.

2. Only block websites on my block list except if they're in my list of Allowed Websites -

use this option if you want to block websites defined in your Category list, those you manually entered, and the content you entered in Block by Content but want to ALLOW access to all websites entered in Step 2.

3. Block ALL websites except those in my Allowed Websites -

Use this option if you only want the users on the computer you are monitoring to visit these websites. Example: you are a business owner and you ONLY want your employees to be able to access your corporate website.

After you have selected the desired option in Step 1, simply type the website address into the text box next to "Website Address" and click the "Add" button. Do not enter the "WWW" or "http://" portions of a website. You only need the domain portion. For example, to add https://www.awarenesstech.com you would only need to enter "awarenesstech.com. The website you entered should appear in the grid. You can remove websites from the grid by checking the checkbox next to the one you would like to remove and clicking the "Delete" button.

5.3.2.7 Block Programs

The software can block specific programs from running (like Peer-to-Peer software, Instant Message applications, etc) on a time schedule. By clicking on the "Settings" link, you will be presented with a window containing two tabs: Block Programs by Time and Schedule Profiles.

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PHONE: (888) 224-1288

5 Settings continued

5.3.2.7 Block Programs continued

Block Programs by Time

In the Resource List you will find a list of the most common programs that you may want to block the use of. Simply click on the "+" symbol next to the type of program you wish to block. Check the checkbox next to the program(s) you want to limit access to and click the "Add Resource" button.

In the Programs window, you will need to specify the Schedule Profile (to create a Schedule Profile, see the instructions in the "Schedule Profiles" section immediately following). Please note that you will not be able to add items until you have created at least one Schedule Profile.

You can add any software programs (applications) not contained in the Resource List. In the "Search" field type the name or description of the desired application. A list of search results will be displayed. Select the appropriate item. Next, select the appropriate Schedule to apply, and finally click the "Add Search" button.

Schedule Profiles

Rather than having to create a schedule for each program, you have the ability to create a Schedule Profile and, once created, you can assign an unlimited number of programs to follow that schedule.

To create a new Schedule Profile, click the "Schedule Profiles" tab. Type the name of the new profile into the text box and click the "Add" button. Once it has been added, click on the name of the profile you just created. Under "Add New Blocking Period", select the days of the week (Step 1) and the times (Step 2) you would like to have blocked. Then click the "Add New" button. The times that will be blocked for each day of the week will appear in the blocking schedule above. Please note that you cannot set a time period that passes through the midnight hour (12am). To accomplish this you will need to create 2 Blocking Periods, one that ends just before 12am (11:55 pm for example) and a new Blocking period starting the following day after 12am (12:05 am for example).

You can add as many blocked times as you would like. Note: Blocking times can not overlap.

5 Settings continued

5.3.2.8 Smart Camera

SmartCamera is our advanced screenshot application that allows you to take screenshots at pre-defined intervals when selected programs are running. It allows you to do the same when specified websites are visited by the people you are monitoring.

In order to utilize SmartCamera, you'll need to understand the difference between "Interval" and "Duration".

Interval – the length of time between snapshots

Duration – the total length of time snapshots will be taken for

Note: Whenever the application or website is not on top (out of focus) or is inactive for 3 minutes, SmartCamera will pause until activity resumes.

Snapshots by Program

We have a categorized Resource List of common programs you will want to take screenshots of. Simply click on the "+" symbol next to the type of program you wish to snapshot. Check the checkbox next to the program(s) you want to take snapshots of and click the "Add Resource" button.

When you add programs to the Active List, they will be given the Master Settings by default. You can change the Master Settings to better suit your needs by selecting the appropriate settings in the Interval and Duration pulldowns and clicking the "Apply" button.

You can edit the Interval and Duration of any particular program by clicking "Edit" next to it. Once you have selected the interval from the drop down menu, click "Update". Additionally, you can stop snapshots on a particular program by clicking "Remove".

You can add any software programs (applications) not contained in the Resource List. In the "Search" field type the name or description of the desired application. A list of search results will be displayed. Select the appropriate item then click the "Add Search" button.

When you are finished adjusting the Smart Camera settings, click the "Save Changes" button.

EMAIL: sales@awarenesstechnologies.com PHONE: (888) 224-1288

5 Settings continued

5.3.2.8 Smart Camera continued

Snapshots by Website

We have a categorized Resource List of common websites. Simply click on the "+" symbol next to the type of website you wish to snapshot. Check the checkbox next to the website(s) you want to take snapshots of and click the "Add to List" button. You can also manually type the website address of the desired site in the "Add Website" field then click the "Add" button

When you add websites to the Active List, they will be given the Master Settings by default. You can change the Master Settings to better suit your needs by selecting the appropriate settings in the Interval and Duration pulldowns and clicking the "Apply" button.

You can edit the Interval and Duration of any particular program by clicking "Edit" next to it. Once you have selected the interval from the drop down menu, click "Update". Additionally, you can stop snapshots on a particular program by clicking "Remove".

When you are finished adjusting the Smart Camera settings, click the "Save Changes" button.

5.3.2.9 Alert Words

Alert Words are words or phrases that you decide are important enough to:

1. Be highlighted in the Dashboard – each Alert Word you define will be highlighted whenever they are encountered in a piece of recorded data.
2. Screenshot when the Alert Word is typed
3. Screenshot when the Alert Word is viewed on a webpage

To add an Alert Word, simply enter the word or phrase into the "Add Alert Word" text field and select either "Don't Screenshot" or "Screenshot when word is:". If you opt to have a screenshot taken, you can select to have it taken when the word or phrase is "Typed" and/or when "Viewed on Website". To add the Alert Word, click the "Add" button.

If you would like to change the settings of any Alert Word you have already added, simply check or uncheck the checkbox next to the setting you want to change.

To remove an Alert Word, check the checkbox on the row containing the Alert Word and click the "Delete" button.

5 Settings continued

5.4 Hotkey Sequence

The Hotkey Sequence is a configurable series of keys that will allow you to access the software's Status Panel on the computer(s) you are monitoring. The status Panel serves a function to temporarily shut down the software, or uninstall it. Since the software runs hidden, it will not show up in the Add/Remove Programs list or the Task Manager on the computer(s) you are monitoring, so the Status Panel is the only way to perform these functions.

When the Hotkey Sequence is pressed on the computer(s) you are monitoring, a generic password dialog box will be displayed. To access the Status Panel, you will need to enter your password. It's the same password you use to log into your account.

You can edit the Hotkey Sequence by clicking the "Edit Hotkey Sequence" button. A valid Hotkey Sequence must contain 2-3 system keys (Control, Alt, Shift, Windows) and 1 other key. Please note that you cannot use duplicate keys in your Hotkey Sequence.

To save your new Hotkey Sequence, click the "Save Hotkey Sequence" button.

5.5 Download/License Mgmt.

The Download/License Management screen will give you basic information about each license that you have installed. You will also be able to download the client software installation wizard from this page.

The following information is provided:

1. Group – you can see computers in all profiles or only the computers in a specific profile by clicking on the group name in the Group pane.
2. Computer Name – displays the name of the computer on which client software is installed
3. Purchase Date – displays the date this license was purchased
4. Last Checkin – displays the date and time of the last time the client software checked in with the account. Checkins are generated when the client software uploads recorded data to the account.
5. Software Version – displays the version of the client software currently installed on the computer
6. Software – If the license has not been used a download link for the client software will be displayed. If the software has been installed, a link to reset the license will be displayed instead of the download link. Clicking the Reset link will allow you to reset a license, enabling

6 Help

6.1 Trouble Ticket System

You can submit a trouble ticket directly to one of our support personnel by clicking on the Trouble Ticket System link in the Help slider. To submit a ticket click on the “New Ticket” link and provide as much information as possible.

We strive to respond to trouble tickets as quickly as possible.

6.2 Live Chat

You can speak with a live representative via online chat. Simply click the “Chat Live with an AGENT” button to initiate the online chat. Please note in rare cases representatives may not be available for chat during periods of system maintenance.

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