eMonit Employee Monitor | version 2.0

Installation Guide

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Overview

This is a guide to installing eMonit, a versatile employee monitor for Windows PCs connected to a local network. eMonit monitors critical employee activities of interest to concerned business managers, from web browsing, to application use, to keystrokes in applications and web pages, to screen captures of monitor content. eMonit organizes and presents the information it gathers in convenient, user-friendly ways. Small and mid-size businesses use eMonit to spot wasted time, risky online behaviors, and violations of company policies and practices.

eMonit version

This guide is applicable to eMonit version 2.0.

eMonit license options

HeavenWard^{Suite} offers volume discounts for licenses to monitor multiple computers. When you purchase a license online, you will see a link to information on current volume pricing. After purchasing a license, you can buy additional licenses to add more monitored computers later. You can also test drive eMonit on a single computer without using network connections. An internet connection is required, however, for downloading the installation file and for registering a license or adding monitored computers. For more information, see

Who can install eMonit?

No technical knowledge is necessary for installing eMonit. This guide explains the simple steps you use to download, save, and run the installation file. You must install eMonit software components on the supervisor's computer and on each computer the supervisor will monitor.

A few important definitions

To install eMonit, you install two kinds of software, server software, usually installed on a supervisor's computer, and client software installed on the computers you want to monitor. The client and supervisor's computers must be on the same network.

- In this guide, the word **supervisor** means the person who views the activity logs gathered on the computers your company monitors.

- You install eMonit **client software** components on the computers you want to monitor. The client software monitors and records activity on those computers.

- You install eMonit **server software** components on one computer, usually the supervisor's computer. The server software allows the supervisor to view logs collected by the client software. You should install the server software on the supervisor's computer or on another computer the supervisor can access in person or remotely. eMonit client software normally sends new activity logs to the server software every 60 seconds.

✓ **Note:** eMonit server software need *not* be installed on your *network server*. It can be installed on any computer on the same network workgroup as the client computers.

Installation overview

When you install eMonit, you will follow the steps in these chapters in this order:

For instructions on updating eMonit software, see Chapter 9,

Getting additional support

If this guide does not answer all your questions about installing eMonit, you can get additional assistance by contacting HeavenWard^{Suite} Support at support@hwsuite.com. You can also find answers to other questions you may have about eMonit on eMonit's FAQ page at http://www.hwsuite.com/employee-monitor/faq.

1. Checking System and Network Requirements

Before installing eMonit, make sure your computers meet eMonit's system requirements. In most cases, you must also make sure that all monitored computers and the supervisor's computer are on the same network workgroup. Connection to the internet is also necessary.

> ✓ **Note:** for an exception to eMonit network requirements, see
> eMonit network requirements on page 9.

Administrator rights

☐ To install or update eMonit software, you must have administrator rights on the computers you want to monitor and on the supervisor's computer where you install eMonit server software.

eMonit system requirements

The computers on which you install the server and client software have different minimum system requirements.

Server computer minimum requirements

✓ **Note:** remember that in this manual **server computer** means *any* computer in the same network workgroup as monitored computers. It is the computer where monitored computers send activity logs.

These are eMonit server computer minimum requirements:

☐ 50MB free space

☐ Any of these Windows systems:

- Windows 8, 32- or 64-bit

- Windows Server 2008, 32- or 64-bit

- Windows 7, 32- or 64-bit

- Windows Vista, 32- or 64-bit

- Windows Server 2003

- Windows XP SP2, 32-bit only

☐ Any of these browsers:

- Internet Explorer 8.0 and above

- Firefox 19.0 and above

- Opera 12.14 and above

- Chrome 25.0 and above

☐ JavaScript enabled for the browser

Client computer minimum requirements

Monitored computers must meet these minimum requirements:

☐ 50MB free space

☐ Any of these Windows systems:

- Windows 8, 32- or 64-bit

- Windows 7, 32- or 64-bit

- Windows Vista, 32- or 64-bit

- Windows XP SP2, 32-bit only

eMonit network requirements

☐ eMonit requires that monitored computers are in the same network workgroup as the supervisor's computer or other computer where eMonit server software is installed.

✓ **Note:** the eMonit network requirement does not apply when you install eMonit server and client software on the same computer and you monitor only that computer. This usually happens when eMonit is installed for demonstration purposes. In that case, you can skip all the steps in this network requirements section. You will still, however, need an internet connection. See the **limited trial** option in <u>Selecting a License Option</u> on page 12.

To determine which computers are in the same workgroup as the supervisor's computer, follow these steps:

1. At the supervisor's computer, go to **start** > **Settings** > **Control Panel**. The **Control Panel** opens.

2. In the **Control Panel**, double click the **System** item. The **System Properties** window opens.

3. In the **System Properties** window, click the **Computer Name** tab.

4. On the **Computer Name** tab, find and make a note of (1) the **Full computer name** (with no period) and (2) **Workgroup name**. You will need these names later.

5. Click **Cancel** in the **Computer properties** window. Then close the **Control Panel**.

6. Now go to each computer you want to monitor. Repeat Steps 1–5 on each. Make sure the workgroup name you find on each computer is the same as the workgroup name you found in Step 4 on the supervisor's computer.

If the workgroup names you find on the supervisor's computer and on each computer you want to monitor are the same, you have met eMonit's network requirement. If the workgroup name is different on any computer you want to monitor, then that computer is in a different workgroup and cannot be monitored.

Internet connection

☐ eMonit requires that the supervisor's computer has a connection to the internet when performing these tasks:

- downloading the eMonit installation file

- registering and activating an eMonit software license

- selecting client computers to monitor

- sending error logs to HeavenWard^{Suite} Support

- checking for software updates from the Admin Panel

- sending support requests and other messages from the Admin Panel to HeavenWard^{Suite} Support.

☐ eMonit requires that each client computer has a connection to the internet for downloading the eMonit installation file. A connection is not required if the file is copied from another computer.

2. Selecting a License Option

HeavenWard^{Suite} currently offers two types of eMonit licenses, trial and paid. You can also check eMonit online for new license options or changes at http://www.hwsuite.com/employee-monitor.

- An eMonit **trial** license is free, fully functional, and allows you to monitor up to five computers for 10 days. You can get a trial license by clicking **Download** at http://www.hwsuite.com/employee-monitor and providing HeavenWard^{Suite} your contact information.

- You can also activate a **limited trial** of eMonit from the **Register | Get an eMonit License** window in the Admin Panel. The limited trial is installed on a single PC, displays pop-up warnings, and is active for 10 days. A license key is not required. Open the **Register | Get an eMonit License** window for instructions.

- An eMonit **paid** license allows you to use eMonit for one year. You can buy a paid license at http://www.hwsuite.com/employee-monitor/order.php. HeavenWard^{Suite} offers volume discounts for licenses to monitor multiple computers. When you purchase a license online, you will see a link to information on current volume pricing. After purchasing a license, you can buy additional licenses to add more monitored computers later.

You can also start with a trial license and upgrade to a paid license any time within 10 days. If you upgrade, you do not have to reinstall eMonit, and all your activity logs are retained.

You can find additional information on eMonit licenses from within the eMonit Admin Panel. Click **Register | Get a License** in the Admin Panel main menu.

3. Downloading and Saving the eMonit Installation File

You must download and save the eMonit installation file on the supervisor's computer and on each computer you want to monitor. We recommended you (1) download, save, and install eMonit on the supervisor's computer, and then (2) download, save, and install eMonit on each monitored computer.

> ✓ **Note:** each eMonit installation file is digitally signed with a code certificate issued by Comodo Group. The certificate verifies the source, authenticity, and integrity of the software. If you attempt to run a software file and a certificate is not present, Windows displays a security warning stating the publisher could not be verified.

Be sure you meet <u>eMonit network requirements</u> (see page 9) before you install eMonit.

Follow these steps to download and save the eMonit installation file:

1. Decide which type of eMonit license you want (see <u>Selecting a License Option</u> on page 12).

2. Go to <u>http://www.hwsuite.com/employee-monitor</u> and click **Download** for a trial license or **Buy Now** for a paid license. Follow the instructions for getting your trial or paid license.

If you select **Download** for a trial license, you must fill out and submit a brief contact information form. Later, HeavenWard^Suite will email you your license key and instructions for downloading and installing eMonit.

If you select **Buy Now** for a paid license, a page for completing your purchase online opens. After you make your purchase, a page opens with your license key and instructions for downloading and installing eMonit. The license key and instructions are also emailed to you.

3. When you receive your instructions for installing eMonit, click the link for downloading the installation file. A Windows dialog, **Opening eMonitSetup.exe**, opens.

4. In the **Opening eMonitSetup.exe** dialog, select <u>S</u>ave File. Then click the **Save File** button. The **Enter name of file to save to…** dialog opens.

5. In the **Enter name of file to save to…** dialog, select a place to save eMonitSetup.exe. Be sure to remember where you save it.

4. Installing Server Components

You install server components on any computer in the same network workgroup as the computers you want to monitor. It must be the supervisor's computer or a computer the supervisor can access physically or remotely.

Follow these steps to install eMonit server components.

1. Go to the supervisor's computer, find the eMonit installation file you saved there, and double click it. An **Open File - Security Warning** dialog opens.

2. In the **Open File - Security Warning dialog**, click **Run**. The e**Monit Setup: License Agreement** dialog opens.

3. In the **eMonit Setup: License Agreement** dialog, click **I Agree**. The **eMonit Setup: Installation Options** dialog opens.

4. In the **eMonit Setup: Installation Options** dialog, select **Server software** in the drop-down box labeled **Select the type of install**. Then click **Next**. The **eMonit Setup: Installing** dialog opens and shows the installation progress.

5. When installation is completed, the **eMonit Setup: Completed** dialog opens. Then your default browser opens automatically and displays the eMonit **Password Action** window.

6. Decide on the password you want to use for accessing the eMonit Admin Panel. Enter your password in the **Pick a password** and

Retype password fields in the **Password Action** window. Then click **Login**. eMonit's setup wizard **Welcome** window opens in your default web browser. The setup wizard takes you through a few steps needed for the initial configuration of eMonit server software.

Instructions for completing the server configuration steps in the eMonit setup wizard follow in the next chapter,

5. Configuring eMonit Server

After successfully installing eMonit server software on the supervisor's computer (see Installing Server Components on page 16), the eMonit server configuration wizard **Welcome** page automatically opens in your default web browser.

Follow these steps to complete server configuration.

> ✓ **Note:** you must be connected to the internet to complete many of the server configuration steps.

Register Your Software

1. Click **Next** in the eMonit configuration wizard **Welcome** page. The **Register Your Software** window opens.

2. You must enter a user name in the **User name** field.

3. Entering your email address in the **Email (optional)** field is optional.

4. If you have purchased a license key or have a trial license key, enter it in the **License key if any** field. If you do not have a license key, leave the field empty. Then click **Next**. The **Select Monitoring Options** window opens.

   > ✓ **Note:** the license key you enter here determines how eMonit will function and its activation period, based on the

type of license you have. If you enter a user name but do not enter a license key here or later in the Admin Panel **Register | Get an eMonit License** tab, you can only activate a limited trial version of eMonit. The limited trial is installed on a single PC, displays pop-up warnings, and is active for 10 days. For additional instructions, open the **Register | Get an eMonit License** tab in the eMonit Admin Panel.

Select Monitoring Options

1. In the **Select Monitoring Options** window, select the items you want to monitor and other options. The monitoring selections you make apply to all computers you monitor.

2. Click **Next**. The **Set Error Reporting** window opens.

Set Error Reporting

1. In the **Set Error Reporting** window, choose whether you want to let eMonit send error reports to the HeavenWard^Suite server automatically. If you select this feature, make sure your internet connection is always enabled.

2. Click **Next**. The **Finished!** window opens. Configuration is complete.

    ✓ **Note:** You will return to the **Monitor Users** step (shown in the configuration wizard) later. See

Instructions for installing client components follow in the next chapter,

6. Installing Client Components

Follow these steps to install eMonit client software on the computers you want to monitor. You can install client software on several computers and then choose later which you want to monitor.

Make sure the computers you want to monitor are in the same network workgroup as the supervisor's computer where you installed eMonit server software. See eMonit network requirements on page 9.

Finding supervisor's computer name

In Steps 1–4 under eMonit network requirements above (page 9) you found the name of the computer, usually the supervisor's computer, where you installed eMonit server software. If you do not have the name now, go to the supervisor's computer and repeat those steps. Do not include the period after the computer name.

> ✓ **Note:** You do not need the supervisor's computer name if you installed the server software on the same computer you want to monitor and you will not monitor any other computers. This usually happens when eMonit is installed for demonstration purposes.

Installing client software

Follow these steps to install eMonit client software on each monitored computer.

1. If you have not already done so, go to the computer you want to monitor and download and save the eMonit installation file. See Downloading and Saving the eMonit Installation File on page 14.

2. Find and double click the installation file. An **Open File - Security Warning** dialog opens.

3. In the **Open File - Security Warning** dialog, click **Run**. The **eMonit Setup: License Agreement** dialog opens.

4. In the **eMonit Setup: License Agreement** dialog, click **I Agree**. The **eMonit Setup: Installation Options** dialog opens.

5. In the **eMonit Setup: Installation Options** dialog, select **Client software** in the drop-down box labeled **Select the type of install**. Then click **Next**. The **eMonit Setup** dialog opens.

6. In the **Computer name** field in the **eMonit Setup dialog**, take one of these actions:

   - Enter the name of the computer where eMonit server software was installed, usually the supervisor's computer.

   - If you installed eMonit server software on this computer, and you also want to monitor this computer, leave the field empty. You

usually do this when eMonit is installed for demonstration purposes.

7. Now click **I̲nstall**. The **eMonit Setup: Installing** dialog opens and shows the installation progress. When installation is completed, the **eMonit Setup: Completed** dialog opens.

Installation of client software on the computer is now finished. For instructions on choosing which computers to monitor, see the next chapter,

7. Choosing Computers to Monitor

You choose the computers you want to monitor after you install eMonit server and client software. You can only monitor computers on which you installed client software, and you can only monitor the number of computers permitted by your paid or trial license.

Follow these steps to choose computers to monitor:

1. Go to the supervisor's computer or other computer where eMonit server software is installed. Open the eMonit Admin Panel if it is not already open. If you have remote access to the computer, you can access the Admin Panel remotely from another computer.

2. Go to **start** > **Programs** > **HeavenWard** > **eMonit** > **AdminPanel**. The eMonit **Password Action** window opens in your default web browser.

3. In the eMonit **Password Action** window, enter your password in the **Enter your password** field. Then click **Login**. The eMonit Admin Panel opens and displays the **New users were detected** dialog. The dialog lists computers on which eMonit client software is installed but which eMonit is not currently monitoring.

4. From the list of computers in the **New users were detected dialog**, choose the ones you want to monitor. Then click **Monitor**. The **New users were detected dialog** will refresh, showing whether your request was successful and indicating the reason for failure if your request failed.

5. Now click **Close** in the **New users were detected dialog**. The Admin
   Panel is displayed. eMonit is now monitoring the computers you
   chose.

   ✓ **Note:** it may take several minutes for eMonit client
   software to collect and send its first activity logs to the
   eMonit server, where you can view them in the Admin Panel.

8. Reviewing Monitoring Options

When you have finished eMonit installation Steps 1–8, you can view activity logs from monitored computers. It may take several minutes for the first logs to appear.

You may want to change monitoring or other program options now. If you are not already logged on to the Admin Panel, go to **start** > **Programs** > **HeavenWard** > **eMonit** > **AdminPanel**.

Changing monitoring settings

To change the activities you want to monitor or other program options, click **Change Settings** in the Admin Panel menu. The kinds of settings you can modify are displayed. Click any category to see your options in detail and make changes.

Buying or registering a license

You can find instructions for registering a license, buying an eMonit license, and activating trial versions of eMonit in the eMonit Admin Panel. Click **Register | Get a License** in the main menu.

9. Installing eMonit Software Updates

You can check for available eMonit software updates any time. If a new version of eMonit software is available, you can install it easily. You install both server and client updates from the supervisor's computer.

Checking for software updates

To check for updates to eMonit software, follow these steps:

1. Go to the supervisor's computer or other computer where eMonit server software is installed. Make sure it is connected to the internet.

2. Open the Admin Panel and click **Get Help** in the main menu. Then click **About**. The **About eMonit Employee Monitor** window opens.

3. In the **About eMonit Employee Monitor** window, Click **Check for Update** in the **Server** section.

   The message **Your current version is up to date** indicates no update is available. If the message **A new version is available** is displayed, a link for downloading the update will be shown in the **Server** section following **Download Link:**. A description of the update is also provided.

   ✓ **Note:** you will not see available client software updates in the **Active users** section until you install a new server software version.

Installing software updates

If you find that a new version of eMonit software is available, updating your software is relatively easy. You will update the server software first. After updating the server software, available updates for the client software are shown and can be installed if they are displayed. You must have administrator rights on the supervisor's computer (or other computer where eMonit server software is installed) to install server or client updates.

Updating server software

If you have checked for software updates and the message **A new version is available** is shown, follow these steps install it:

1. Go to the supervisor's computer or other computer where eMonit server software is installed. Make sure it is connected to the internet.

2. Click the link following **Download Link:** in the **Server** section of the **About eMonit Employee Monitor** window. The **Opening eMonit….exe** dialog opens.

3. In the **Opening eMonit….exe** dialog, select <u>S</u>**ave File** and click **Save File**. The **Enter name of file to save to…** dialog opens**.**

4. In the **Enter name of file to save to…** dialog, choose a location to save the installation file to. Then click <u>S</u>**ave**. Remember where you saved the file.

5. Now find the file you saved and double click it. The **Open File - Security Warning** dialog opens.

6. In the **Open File - Security Warning** dialog, click <u>**Run**</u>. The **eMonit Server Update Setup: Installing** dialog is shown followed after a short time by the **eMonit Server Update Setup: Completed** dialog. Then the Admin Panel **Password Action** window opens automatically. Updating the server software is finished.

Updating client software

After updating eMonit server software, the Admin Panel **Password Action** window opens automatically. To update eMonit client software, follow these steps at the supervisor's computer or other computer where eMonit server software is installed:

1. Make sure the computers on which current eMonit client software is installed are running the software and connected to the network workgroup.

2. Open the eMonit Admin Panel. Click **Get Help** and then **About** in the main menu. The **About eMonit Employee Monitor** window opens.

   The newly installed server version is shown in the **Server** section of the **About eMonit Employee Monitor** window. If an update is available for eMonit client software, it is now shown in the **Active users** section in the drop-down list following **Select version to update on all clients**.

   ✓ **Note:** after installing an eMonit server update, you should always install a client software update if one is available.

3. In the drop-down list following **Select version to update on all clients**, select the latest version. Then click **Install**. The message **Updating the files and restarting the program will take some time** is displayed.

4. Wait approximately five minutes. Then refresh the **About eMonit Employee Monitor** window. You can refresh by clicking your browser's refresh button or by clicking **Get Help** and then **About** in the main menu. The **About eMonit Employee Monitor** window opens. The newly installed version of eMonit client software is shown below **Version** in the **Computer-Version** table in the **Active users** section.