



Kaseya 2

Discovery

User Guide

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English

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Discovery Overview

Discovery (KDIS) discovers computers and devices on individual networks or entire domains. Once discovered agents can be installed on any computer or mobile device. If a discovered device cannot be installed with an agent, the device can still be identified using SNMP. SNMP-enabled devices can then be monitored using the **Monitor** module. Hardware audits of vPro-enabled machines can also be included in discovery scans. vPro-enabled machines can then be managed using the **Desktop Management** module. An **Assets** page provides a consolidated view of all computers and devices managed by the VSA, regardless of the method of discovery.

Discovery by domain enables the installation of agents on any machine known to an Active Directory domain. In addition **Discovery** can integrate VSA user logons and Portal Access logons with domain logons. **Discovery** can also create staff records based on contacts in the domain. Changes in the domain are synchronized with **Discovery** on a scheduled basis and do not require a VSA agent on the AD domain controller. **Discovery** uses the industry standard LDAP protocol to safely and securely communicate with Active Directory domains.

Discovery LAN Watch:

- Discovers computers and devices on individual networks.
- Deploys agents to discovered agent-less machines
- Identifies SNMP devices and vPro machines.
- Enables a device to be "promoted" to a managed **asset** (*page 6*).

Discovery Domain Watch:

- Automatically discovers AD domains that can be synced with the VSA.
- Automatically creates a VSA security hierarchy modeled after an existing domain hierarchy.
- Automatically keeps the VSA synchronized with all domain changes.
- Automatically creates VSA users and staff member records in the VSA based on the creation of users and contacts in the domains.
- Auto-populates domain user and contact information in **Service Desk** tickets.
- Auto-deploys agents to domain computers. Agents are automatically placed in the appropriate machine group relative to the domain hierarchy.
- Resets a domain password or enable/disables a domain user from the VSA.

Note: See [Discovery System Requirements](#).

Functions	Description
Overview	Displays the workflow of discovering computers and devices by network and by domain.
LAN Watch by Probe (<i>page 17</i>)	Discovers devices on the same LAN as a selected "probe" machine.
LAN Watch by Network (<i>page 7</i>)	Discovers computers and devices by LAN.
Discovered Devices - Grid View (<i>page 18</i>)	Displays discovered computers and devices in table format.
Discovered Devices - Tile View (<i>page 20</i>)	Displays discovered computers and devices in tile format.
Domain Watch (<i>page 45</i>)	Configures the integration of Discovery with Active Directory domains.
Computers (<i>page 57</i>)	Manages machine ID accounts created, based on applied Discovery computer policies, for all domains monitored by

Discovery Module Requirements

	Discovery probes.
Contacts (page 59)	Manages staff records created, based on applied Discovery contact policies, for all domains monitored by Discovery probes.
Users & Portal Users (page 61)	Manages VSA users and Portal Access candidates created, based on applied Discovery group policies, for all domains monitored by Discovery probes.
View Assets	Provides a consolidated view of all "assets" managed by the VSA.
Settings (page 67)	Sets options and default values that apply to the entire Discovery module.
Audit Log (page 68)	Displays a log of Discovery module activities.

Discovery Module Requirements

Kaseya Server

- The Discovery 7.0 module requires VSA 7.0.

Directory Services

- Directory Services 1.2 is a feature set that can be licensed and enabled separately. The feature set provides advanced functionality in the Discovery module.

Network Probe

- Any Kaseya supported Windows, Apple or Linux agent operating system can be used. See **Agent Requirements** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/reqs/index.asp#home.htm>).

Domain Probe

- Microsoft Windows Server 2003, 2003 R2, 2008, 2008 R2, 2012, 2012 R2
- Microsoft Windows XP, Vista, 7, 8, 8.1

Note: See general **System Requirements**

(<http://help.kaseya.com/webhelp/EN/VSA/7000000/reqs/index.asp#home.htm>).

Chapter 1

LAN Watch

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Getting Started with LAN Watch

The [LAN Watch by Network](#) and [LAN Watch by Probe](#) pages discover computers and devices on LANs. Any agent machine on a LAN can be selected as the "probe" machine for that LAN. Scanning a LAN using a probe machine discovers any device or machine with an IP address. Discovered devices can be workstations and servers without agents, SNMP devices and vPro-enabled machines. Discovered devices display on the following pages:

- [Discovered Devices - Grid View](#) (page 18)
- [Discovered Devices - Tile View](#) (page 20)

How LANs are Identified

A LAN is detected if a single computer on that LAN is installed with an agent. Detected LANs are identified consecutively as LAN1, LAN2, LAN3, etc. The name assigned to a LAN can be changed for easier recognition. Each LAN is distinguished by a unique combination of the following two items:

- The internal IP range shown in the [Scan Range](#) column, and
- The external IP address shown in the [Gateway](#) column.

The internal IP range shown in the [Scan Range](#) column is expressed as the starting IP address followed by the number of bits—for example, /24—representing the network portion of the IP address.

Using LAN Watch by Network

1. Select the row of a detected LAN in the upper panel.
2. Select [New](#) or [Edit](#) to set the scan properties. This includes the machine to serve as a probe machine. Windows, Mac and Linux agent machines can all serve as probe machines.
3. Optionally deploy agents to discovered computers by policy, using the [Agent Deployment Policy](#) tab in the lower panel.
4. Optionally create alerts for newly discovered types of computers and devices, using the [Alert Profiles](#) tab in the lower panel.
5. Optionally set asset policies for discovered computers and devices, using the [Asset Promotion](#) page.
6. Schedule a scan once or on a recurring basis using the [Schedule Scan](#) button, or run a scan immediately using the [Scan Now](#) button.
 - Optionally search for SNMP devices and vPro enabled machines using the Schedule Scan dialog.

LAN Watch

- A scan can be assigned to multiple LANs at the same time. Each LAN will execute the policies assigned for that LAN using the tabs in the lower panel.

Using LAN Watch by Probe

1. Select one or more machine IDs.

Note: Windows XP machines are not recommended as probe machines. NMAP is more reliable with later Windows operating systems.

2. Schedule a scan once or on a recurring basis using the **Schedule Scan** button, or run a scan immediately using the **Scan Now** button.
 - Optionally search for SNMP devices and vPro enabled machines using the **Schedule Scan** dialog.
 - A scan can be assigned to multiple machine IDs.

Duplicate LAN Ranges

Occasionally two LANs are listed on the **LAN Watch by Network** page with the same IP address range or overlapping IP address ranges. This condition is commonly caused by a device, router, or DHCP with a mis-configured subnet mask. When this happens:

- Discovery generates a system alert that displays on the Monitor > Alarm Summary page.
- Running **Discovery** scans on overlapping LANs will appear to 'move' machines back and forth between each LAN as they are re-discovered.

To avoid this behavior, network administrators can either:

- Reconfigure devices on their networks to correct the condition, or
- Set **Discovery** to "ignore" one of the networks.

Agent Deployment Policies tab

The **Agent Deployment Policies** tab of the **LAN Watch by Network** page sets policies for the deployment of agents on computers discovered on a selected network. For each type of operating system—for Windows, Mac and Linux—set the following:

- **Automatically install agents for <OS type> machines** - Check to enable.
- **Default Package** - For each type of OS, select an OS appropriate agent install package.
- **Designated Deployer Agent** - An agent machine on the same network used to deploy the agent.
- **User Name / Password / Confirm Password** - Enter an administrator credential that allows remote installation of an agent.

The policies you set also serve as defaults when deploying an agent *manually* using:

- **Discovered Devices - Grid View** (page 18)
- **Discovered Devices - Tile View** (page 20)
- **Scan Results** (page 15)

Matching OS Type Requirement

Any OS type of computer that can support an agent can be used to scan a network: Windows, Mac or Linux. If an agent is deployed, **Discovery** automatically switches, if necessary, to a matching OS type machine on the same LAN. Since each type of OS can only deploy agents to target machines matching its own OS type, you must manually install at least one agent of each OS type—Windows, Mac and Linux—on a LAN to deploy agents automatically from then on to all three types of operating system.

Administrator Credential

The logon credential specified must have administrator rights on the remote selected machine.

- **If the target machine is on a domain**, the administrator credential must use the format `domain\administrator` or `administrator@domain`.

- If the target machine is not on a domain, then the administrator credential may require the format `local\administrator` or `<hostname>\administrator`.
- If the target machine is a Linux machine, the `root` username alone—without a hostname or domain—must be used.

Alerts Profiles tab

The **Alerting Profiles** tab of the **LAN Watch by Network** page sets **Discovery** alert policies for a selected LAN and device type: computer, mobile, network and firewall.



Note: The **Alerts Active** checkbox in the **Edit** dialog enable and disables the **Discovery** alerts configured on this tab for a selected network.

Asset Promotion tab


The **Asset Promotion** tab of the **LAN Watch by Network** page configures the automatic promotion of devices to assets when the devices are discovered.



When an agent cannot be installed on a discovered device, the device can be "promoted" to a managed asset. For example, a router or printer may still require monitoring, even if an agent cannot be installed on the machine.

All managed assets must be assigned a machine group and organization. **Scoping rules** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4578.htm>) and **view filtering** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#214.htm>) features within the VSA depend on this assignment.

A discovered device can be manually promoted or demoted on the **LAN Watch by Network** (page 7) page or **LAN Watch by Probe** (page 17) page by toggling the  /  icon.

Scan Results

The **Scan Results** window displays the latest scan results for a network. The same window is displayed by clicking the  icon on two different pages.

- Click the  icon for a network the **LAN Watch by Network** (page 7) page.
- Click the  icon for an agent machine on the **LAN Watch by Probe** (page 17) page.

Note: There may be a delay displaying this page if a network scan is in process.

The **Scan Results** window has two tabs.

- Summary tab
- Devices tab



Discovered Devices

The **Discovered Devices - Grid View** page shows computers and devices discovered using **LAN Watch by Probe** (page 17) and **LAN Watch by Network** (page 7). Use this page to install agents on discovered computers and mobile devices. You can also make discovered devices a managed asset, even if they cannot be installed with agent.

The **Discovered Devices - Tile View** page shows computers and devices discovered using **LAN Watch by Network** (page 7) and **LAN Watch by Probe** (page 17). The scan results are *cumulative* from all probe machines. A record is not removed unless you delete it.

Tile View Format


Tile view displays each device on its own tile. A tile can include the following icons:


-  - Click to display NMAP scan data.
-  - Only displays if an agent is installed. Hover over this icon to display the **Quick View** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#9339.htm>) window. Click to launch **Live Connect**

LAN Watch

(<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4796.htm>).

 /  - Toggling this icon manually **promotes or demotes a non-agent device to an asset** (page 14).


 - Only displays if an agent is installed. The number of tickets created for this computer. Click to display the tickets in a ticket table.

 - Only displays if an agent is installed. The number of alarms created for this device or computer. Click to display the **Alarm Summary** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4112.htm>) page for this device.

 - Only displays if an agent is assigned a monitor set or if a SNMP device is assigned an SNMP set. Click to display the **Machine Status dashlet**

(<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2803.htm>) or **Device Status dashlet**

(<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2817.htm>).

 - Hovering over a tile displays a pencil icon. You can edit the name of a discovered machine or device.

View Assets

The Audit > **View Assets** page is populated by **Discovery** scans of networks and domains. The **View Assets** page provides a consolidated view of all "assets" managed by the VSA. Types of assets include:

- **Agent managed machines and mobile devices** - Computers and mobile devices that have an agent installed on them are always considered managed assets and display on this page for as long as the agent is installed on them.
- **Devices promoted to an asset** - When an agent cannot be installed on a discovered device, the device can still be "promoted" to a managed asset and display on this page. For example, a router or printer may still require monitoring, even if an agent cannot be installed on the machine. There are many different types of non-agent device types that can be managed by the VSA: routers, switchers, printers, firewalls, etc. The **Make Asset** button on the Discovery > **Discovered Devices - Grid View** (page 18) page enables you to "promote" a device to an asset. When you do the device begins displaying on this page. You can "demote" a asset using the **Demote Asset to Device** on this page. When you do, the asset is removed from this page.

All managed assets are assigned a machine group and organization. **Scoping rules**

(<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4578.htm>) and **view filtering**

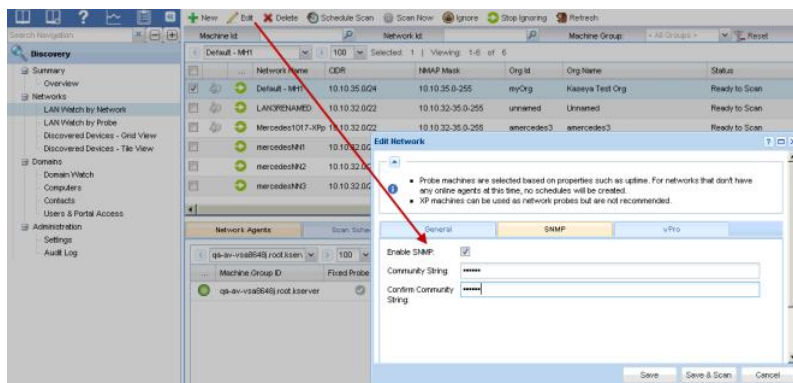
(<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#214.htm>) features within the VSA depend on this assignment.

- Multiple credentials can be defined for each asset. For agent assets, one of the credentials can be designated an agent credential and optionally used by **Policy Management** as an agent credential.
- **Service Desk** tickets can be optionally associated with assets listed on this page.

LAN Watch and SNMP

LAN Watch by Network or **LAN Watch by Probe** in the **Discovery** module uses an existing VSA **agent** (page 69) on a managed machine to periodically scan the local area network for any and all new devices connected to that LAN since the last time LAN Watch ran.

The LAN Watch discovery machine issues the SNMP requests to the SNMP devices it discovers on the same LAN. So you must run LAN Watch first to have access to SNMP-enabled devices using the VSA.



To include SNMP devices in the discovery scan performed by LAN Watch:

1. Select a machine ID on the same LAN as the SNMP devices you want to discover.
2. Check the **Enable SNMP** checkbox.
3. Enter a **community name** in the **Read Community Name** and **Confirm** fields.

A community name is a credential for gaining access to an SNMP-enabled device. The default "read" community name is typically **public**, in all lower case, but each device may be configured differently. You may have to identify or reset the community name on the device directly if you're not sure what community name to use.

4. Click the **Schedule and Scan** button at the bottom of the **Edit Network** dialog. This will start the scan immediately.
5. Review discovered SNMP-enabled devices using the Monitor > Assign SNMP page.

LAN Watch and vPro

The Audit > View Assets > **vPro** tab displays hardware information about vPro-enabled machines discovered by enabling a vPro scan using the **Edit Network** (page 10) dialog, then running **LAN Watch** (<http://help.kaseya.com/webhelp/EN/KDIS/7000000/index.asp#11552.htm>). This information is only available if a machine's vPro credential is specified by the **LAN Watch**.

Types of hardware information returned by the vPro machine include:

- Agent check-in status, if the vPro machine has an agent installed
- Computer Information
- Motherboard Asset Information
- BIOS Information
- Processor Information
- RAM Information
- Hard Drive Information

Note: The **vPro** module provides **vPro management features** (<http://help.kaseya.com/webhelp/EN/vpro/7000000/index.asp#home.htm>).

LAN Watch by Network

Discovery > Networks > LAN Watch by Network

The **LAN Watch by Network** and **LAN Watch by Probe** pages discover computers and devices on LANs. Any agent machine on a LAN can be selected as the "probe" machine for that LAN. Scanning a LAN using a probe machine discovers any device or machine with an IP address. Discovered devices can be workstations and servers without agents, SNMP devices and vPro-enabled machines. Discovered

LAN Watch

devices display on the following pages:

- **Discovered Devices - Grid View** (*page 18*)
- **Discovered Devices - Tile View** (*page 20*)

How LANs are Identified

A LAN is detected if a single computer on that LAN is installed with an agent. Detected LANs are identified consecutively as LAN1, LAN2, LAN3, etc. The name assigned to a LAN can be changed for easier recognition. Each LAN is distinguished by a unique combination of the following two items:

- The internal IP range shown in the **Scan Range** column, and
- The external IP address shown in the **Gateway** column.

The internal IP range shown in the **Scan Range** column is expressed as the starting IP address followed by the number of bits—for example, /24—representing the network portion of the IP address.

Duplicate LAN Ranges

Occasionally two LANs are listed on the **LAN Watch by Network** page with the same IP address range or overlapping IP address ranges. This condition is commonly caused by a device, router, or DHCP with a mis-configured subnet mask. When this happens:

- Discovery generates a system alert that displays on the Monitor > Alarm Summary page.
- Running **Discovery** scans on overlapping LANs will appear to 'move' machines back and forth between each LAN as they are re-discovered.

To avoid this behavior, network administrators can either:

- Reconfigure devices on their networks to correct the condition, or
- Set **Discovery** to "ignore" one of the networks.

Using LAN Watch by Network




1. Select the row of a detected LAN in the upper panel.
2. Select **New** or **Edit** to set the scan properties. This includes the machine to serve as a probe machine. Windows, Mac and Linux agent machines can all serve as probe machines.
3. Optionally deploy agents to discovered computers by policy, using the **Agent Deployment Policy** tab in the lower panel.
4. Optionally create alerts for newly discovered types of computers and devices, using the **Alert Profiles** tab in the lower panel.
5. Optionally set asset policies for discovered computers and devices, using the **Asset Promotion** page.
6. Schedule a scan once or on a recurring basis using the **Schedule Scan** button, or run a scan immediately using the **Scan Now** button.
 - Optionally search for SNMP devices and vPro enabled machines using the Schedule Scan dialog.
 - A scan can be assigned to multiple LANs at the same time. Each LAN will execute the policies assigned for that LAN using the tabs in the lower panel.

Actions

- **New** - Manually adds a new network. Displays the same properties as the **Edit Network** (*page 10*).
- **Edit** - Displays the **Edit Network** (*page 10*). Sets the scan options used by **Scan Now**. These same settings serve as the default settings displayed by the **Scan Schedule** dialog.
- **Delete** - Deletes a network. Use this option to remove a network that no longer has any managed agents.
- **Schedule Scan** - Displays the **Scan Schedules Dialog** (*page 11*). Schedules a LAN Watch scan, on a recurring basis, for a selected network.

- **Scan Now** - Runs LAN Watch immediately on a selected network using the scan options defined by the **Edit Dialog**.
- **Ignore** - Prevents a network from being scanned.
- **Stop Ignoring** - Re-enables the scanning of a network that was previously ignored.
- **Refresh** - Refreshes the page.

Upper Panel Tables Columns

- **Scan Results** -  - Click this icon to display the **results of the latest scan and the accumulated results of all previous scans** (page 15).
- **Ignore Network**
 -  - The network ready to be scanned.
 -  - The network is ignored for scanning.
- **Network Name** - The friendly name assigned by the VSA to identify a network.
- **Gateway** - The connection gateway IP address.
- **Scan Range** - The internal IP range expressed as the starting IP address followed by the number of bits—for example, /24—representing the network portion of the IP address.
- **Subnet Mask** - Determines the number of IP addresses in a subnet.
- **Org ID** - The unique identifier of an **organization** (page 71) in the VSA.
- **Org Name** - The VSA friendly name of the organization.
- **Status** - The status of a scan. A scan progresses through the following statuses. These statuses are displayed in Pending Procedures and **Procedure History**. If the scan does not fail, the status returns to `ReadyToScan` once a scan is completed.
 - 0 - `ReadyToScan` - Scan not yet started.
 - 1 - `Installing`
 - 2 - `PerformingQuickScan`
 - 3 - `CompletedQuickScan`
 - 4 - `PerformingDeepScan`
 - 5 - `DNSScan`
 - 6 - `Failed`
- **Scan Progress** - Displays a progress bar for a deep scan.
- **Next Scan** - The date/time a scan is next scheduled.
- **Last Scan** - The date/time a scan last ran.
- **Scanned Devices** - A count of the devices discovered on this network.
- **Assets** - A count of the number of devices marked as managed View Assets.
- **Agents** - The number of machines and devices installed with agents on the LAN.
- **Alerts Active** - If checked, alerts are active on this network.
- **Network Prefix** - The number of bits used to specify the network portion of an IP address.
- **Max Addr Count** - The maximum number of IP addresses specified by a network.

Lower Panel Tabs

- **Network Agents tab** (page 12)
- **Scan Schedules tab** (page 12)
- **Agent Deployment tab** (page 13)
- **Alerting Profiles tab** (page 14)
- **Asset Promotion tab** (page 14)

Edit Network

Discovery > Networks > LAN Watch by Network (page 7) > New or Edit

The **Edit** dialog sets scan options used by **Scan Now**. These same settings serve as the default settings displayed by the **Scan Schedules** dialog.

General tab

- **Network Name** - The friendly name assigned by the VSA to identify a network.
- **Probe** - The agent machine to use for scanning with this network. Windows, Mac and Linux agent machines can all serve as probe machines.

Note: Windows XP machines are not recommended as probe machines. NMAP works much better with newer operating systems.

- **IP Range** - Specifies the range of IP addresses to include in a scan. By default, the entire scan range configured for a network is specified. Example: 192.168.32-35.0-255. Only single IP ranges are supported.
- **IP Exclusions** - Specifies a range of IP addresses to excluded from the scan. Multiple IP ranges separated by commas are supported. Example: 192.168.32-35.0-255, 10.10.14-15.0-255 By default, this field is blank.
- **Organization** - Assign an organization to a network. Once organizations are assigned to all your networks, the network table can be sorted and filtered by organization. *This assignment has no effect on the organization assigned discovered devices when they are promoted to an an asset (page 14).*
- **Alerts Active** - If checked, alerts configured on the **Alerting Profiles tab** (page 14) are active. If blank, alerts are not generated for discovered devices on this network.
- Store contact information for a selected network using the following fields.
 - **Primary Phone**
 - **Primary Fax**
 - **Primary Email**
 - **Country**
 - **Street**
 - **City**
 - **State**
 - **Zip**
- **Days to keep Unseen Devices** - Enter the number of days to suppress alerts for new devices. This prevents creating alerts for devices that are connected to the network temporarily.

SNMP tab

After **Discovery** has performed an SNMP-enabled scan using a valid community name, you can:

- Identify, sort and filter SNMP capable devices on the **Discovered Devices - Grid View** (page 18) page using the **SNMP Active** column.
- Begin monitoring SNMP-enabled devices by assigning SNMP sets using Monitor > **Assign SNMP** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2190.htm>).

Options

- **Enable SNMP** - If checked, scan for SNMP devices within the specified **Scan IP Range**.
- **Read Community Name / Confirm Community String** - LAN Watch can only identify SNMP devices that share the same SNMP Community *Read* value as the managed machine performing the LAN Watch. Community names are *case sensitive*. Typically the default read community name value is `public`, but may be reset by an administrator to `Public`, `PUBLIC`, etc.

vPro tab

After **Discovery** has performed a vPro-enabled scan using a valid vPro credential on a network, you can:

- Identify, sort and filter vPro-enabled devices on the **Discovered Devices - Grid View** (page 18) page using the **vPro Machine** column.
- Display hardware attributes for vPro-enabled machines using the **View** button on the **Discovered Devices - Grid View** (page 18) page.
- Display hardware attributes for vPro-enabled machines classified as assets using the vPro tab on the **Assets** page.
- List vPro machines on the Desktop Management > vPro > **vPro Management** (<http://help.kaseya.com/webhelp/EN/KDPM/7000000/index.asp#10070.htm>) page if the **Show Discovered Assets** checkbox is checked. On this same page these agentless vPro machines can be powered on—on demand or by schedule—and powered off on demand.

A machine does not need to be a vPro machine to discover vPro machines using **Discovery**.

Note: vPro configuration is a prerequisite to using this feature. Refer to the latest Intel documentation for information on how to configure vPro. At the time of this writing, the following link leads to the Intel documentation: <http://communities.intel.com/community/openportit/vproexpert> (<http://communities.intel.com/community/openportit/vproexpert>).

Options

- **Enable vPro** - Windows only. If checked, vPro scanning is enabled for this network.
- **Username / Password / Confirm Password** - Enter the appropriate vPro credentials to return hardware asset details about vPro machines discovered during the scan. Typically the same credentials are defined for all vPro machines on the same LAN.

Scan Schedules Dialog

Discovery > Networks > LAN Watch by Network (page 7) > **Scan Schedules**

The **Scan Schedules** dialog schedules a LAN Watch scan, on a recurring basis, for a selected network.

Note: Set SNMP and vPro parameters using the **Edit Network** (page 10).

Scan Schedule tab

- **Recurrence** - Schedule a scan periodically. Each type of recurrence—Once, Hourly, Daily, Weekly, Monthly—displays additional options appropriate for that type of recurrence. Periodic scheduling includes setting start and end dates for the recurrence.
- **Schedule will be based on the timezone of the agent (rather than server)** - If checked, time settings set in the Scheduler dialog reference the local time on the agent machine to determine when to run this task. If blank, time settings reference server time, based on the server time option selected in System > Preferences. Defaults from the System > Default Settings page.
- **Skip if offline** - If checked and the machine is offline, skip and run the next scheduled period and time. If blank and the machine is offline, run the task as soon as the machine is online again.
- **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-LAN or vPro and another managed system on the same LAN.

Scan Parameters

- **Probe Agent** - Assigns the agent machine used to scan the network. This assignment overrides the default setting on the **Network Agents tab** (page 12), but only for this one scheduled scan.

LAN Watch









- **IP Range** - Specifies the range of IP addresses to include in a scan. By default, the entire scan range configured for a network is specified. Example: 192.168.32-35.0-255. Only single IP ranges are supported.
- **IP Exclusions** - Specifies a range of IP addresses to excluded from the scan. Multiple IP ranges separated by commas are supported. Example: 192.168.32-35.0-255, 10.10.14-15.0-255 By default, this field is blank.
- **Email Addresses** - Assigns the email address used for **Discovery** alerts. This assignment overrides the default setting on the **Alerting Profiles tab** (page 14), but only for this one scheduled scan.

Network Agents tab

Discovery > Networks > LAN Watch by Network > Network Agents tab

The **Network Agents** tab displays the agent machines discovered on a network. Only agent machines on the same network as the selected network display in this table.

Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent quick view window.
 -  Online but waiting for first audit to complete
 -  Agent online
 -  Agent online and user currently logged on.
 -  Agent online and user currently logged on, but user not active for 10 minutes
 -  Agent is currently offline
 -  Agent has never checked in
 -  Agent is online but remote control has been disabled
 -  The agent has been suspended
- **Machine.Group ID** - A unique **machine ID / group ID / organization ID** (page 70) name for a machine in the VSA.
- **Status** - The status of a scan. A scan progresses through the following statuses. These statuses are displayed in Pending Procedures and **Procedure History**. If the scan does not fail, the status returns to **ReadyToScan** once a scan is completed.
 - 0 - **ReadyToScan** - Scan not yet started.
 - 1 - **Installing**
 - 2 - **PerformingQuickScan**
 - 3 - **CompletedQuickScan**
 - 4 - **PerformingDeepScan**
 - 5 - **DNSScan**
 - 6 - **Failed**
- **DNS Name** - The fully qualified domain name used to identify a computer or device on the network.
- **Last Checkin** - The last time this computer's agent checked-in to the VSA.
- **Preferred Probe** - If checked, **Discovery** attempts to use this computer for scanning first, if the agent is active at the time the scan occurs. If the agent for this computer is inactive at the time a scan is run, another agent machine on the same LAN is randomly selected to perform the scan.

Scan Schedules tab

Discovery > Networks > LAN Watch by Network > Scan Schedules tab

The **Scan Schedules** tab maintains recurring scan schedules for a selected network.

Actions

- **Edit** - Adds or edits a selected **scan schedule** (page 11) for a selected network.
- **Delete** - Deletes a selected scan schedule.

Table Columns

- **Type** - The recurring time period: Hourly, Daily, Weekly, Monthly.
- **Next Scan** - The date/time a scan is next scheduled.
- **Scan Range** - The range of IP addresses to include in a scan.
- **Exclude Range** - The range of IP addresses to exclude from the scan.
- **Alert Email** - If not blank, the email address used for **Discovery** alerts for this one scheduled scan. If blank, the default setting on the **Alerting Profiles tab** (page 14) is used.

Agent Deployment tab

Discovery > Networks > LAN Watch by Network > Agent Deployment tab

Agent Deployment Policies tab

The **Agent Deployment Policies** tab of the **LAN Watch by Network** page sets policies for the deployment of agents on computers discovered on a selected network. For each type of operating system—for Windows, Mac and Linux—set the following:

- **Automatically install agents for <OS type> machines** - Check to enable.
- **Default Package** - For each type of OS, select an OS appropriate agent install package.
- **Designated Deployer Agent** - An agent machine on the same network used to deploy the agent.
- **User Name / Password / Confirm Password** - Enter an administrator credential that allows remote installation of an agent.

The policies you set also serve as defaults when deploying an agent *manually* using:

- **Discovered Devices - Grid View** (page 18)
- **Discovered Devices - Tile View** (page 20)
- **Scan Results** (page 15)

Matching OS Type Requirement

Any OS type of computer that can support an agent can be used to scan a network: Windows, Mac or Linux. If an agent is deployed, **Discovery** automatically switches, if necessary, to a matching OS type machine on the same LAN. Since each type of OS can only deploy agents to target machines matching its own OS type, you must manually install at least one agent of each OS type—Windows, Mac and Linux—on a LAN to deploy agents automatically from then on to all three types of operating system.

Administrator Credential

The logon credential specified must have administrator rights on the remote selected machine.

- **If the target machine is on a domain**, the administrator credential must use the format `domain\administrator` or `administrator@domain`.
- **If the target machine is not on a domain**, then the administrator credential may require the format `local\administrator` or `<hostname>\administrator`.
- **If the target machine is a Linux machine**, the `root` username alone—without a hostname or domain—must be used.

Troubleshooting

- See Install Issues and Failures for a general agent install issues and failures.

- See the Kaseya **knowledge base** (<https://helpdesk.kaseya.com/entries/34435416>) for troubleshooting issues and failures specific to deploying agents using **Discovery**.

Alerting Profiles tab

Discovery > Networks > LAN Watch by Network > Alerting Profiles tab

Alerts Profiles tab

The **Alerting Profiles** tab of the **LAN Watch by Network** page sets **Discovery** alert policies for a selected LAN and device type: computer, mobile, network and firewall.

Note: The Alerts Active checkbox in the Edit dialog enable and disables the **Discovery** alerts configured on this tab for a selected network.

Actions

- **Configure** - Edits probe and network alert profile settings displayed on this tab.

Profile

- **Network** - The name of the LAN being configured.
- **Device Type** - The type of device alerts are being set for: for example, computer, mobile, network, firewall.
- **New Device** - If a new device is discovered for the selected type of device:
 - **Alarm** - If checked, create an alarm.
 - **Ticket** - If checked, create a ticket.
 - **Email** - If checked, notify email recipients specified in **Email Addresses**.
 - **Agent** - Runs a selected agent procedure on the specified agent machine. If the discovered device is a computer, leave blank to run the agent procedure on the discovered computer.
 - **Procedure** - Specify the agent procedure to be run.
- **New Device IP** - If the IP address associated with an existing MAC address changes:
 - **Alarm** - If checked, create an alarm.
 - **Ticket** - If checked, create a ticket.
 - **Email** - If checked, notify email recipients specified in **Email Addresses**.
- **Email addresses** - Specify one or more email addresses, delimited by a comma.

Asset Promotion tab



Discovery > Networks > LAN Watch by Network > Asset Promotion tab

Asset Promotion tab

The **Asset Promotion** tab of the **LAN Watch by Network** page configures the automatic promotion of devices to assets when the devices are discovered.

When an agent cannot be installed on a discovered device, the device can be "promoted" to a managed asset. For example, a router or printer may still require monitoring, even if an agent cannot be installed on the machine.

All managed assets must be assigned a machine group and organization. **Scoping rules** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4578.htm>) and **view filtering** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#214.htm>) features within the VSA depend on this assignment.

A discovered device can be manually promoted or demoted on the **LAN Watch by Network** (page 7) page or **LAN Watch by Probe** (page 17) page by toggling the  /  icon.


- **Automatic Asset Promotion Rule** - Specifies which discovered devices—those that cannot be installed with an agent—should be automatically promoted to a managed asset.
 - **All**
 - **None**
 - **IP Address Range**
- **Default Group** - Selects the organization and machine group to assign to discovered devices promoted to a managed asset.
 - **Selected Group** - Selects a fixed organization and machine group.
 - **Use Probe** - Uses the organization and machine group of the probe machine. This is the default.
 - **Default Root** - Uses the default machine group of the organization associated with this LAN.



Scan Results

Discovery > Networks > LAN Watch by Network >  icon

Discovery > Networks > LAN Watch by Probe >  icon

Scan Results

The **Scan Results** window displays the latest scan results for a network. The same window is displayed by clicking the  icon on two different pages.

- Click the  icon for a network the **LAN Watch by Network** (page 7) page.
- Click the  icon for an agent machine on the **LAN Watch by Probe** (page 17) page.

Note: There may be a delay displaying this page if a network scan is in process.

The **Scan Results** window has two tabs.

- Summary tab
- Devices tab

Summary tab

Actions

- **Deploy Agents** - Deploys an agent to all computers without an agent found in the *lower panel*.

(Upper Panel)

The *upper panel* of this tab shows counts for the *latest scan on a network*.

- **All Devices Found** - The total number of devices found by the scan.
- **Classified** - The total number of devices that have been classified.
- **Unmanaged Computers** - The total number of discovered computers that are not assets.

The IP addresses used by this network are listed in the upper right corner.

(Lower Panel)

The *lower panel* of this tab shows counts for *each type of device found by all scans on a network*. Clicking the count for any type of device displays all the members of that count on the **Devices** tab in tile format. See

- **Computers** - by operating system
- **Mobile** - by device type
- **Network** - by device type

LAN Watch






- **Printer**
- **Unclassified**
- **Virtual Server** - by virtual server type

(Probe Information)

- **Network Name** - The friendly name assigned by the VSA to identify a network.
- **Probe IP** - IP address of the probe machine.
- **Subnet Mask** - Subnet mask of the probe machine.
- **Default Gateway** - Default gateway for the probe machine.
- **DNS Server** - DNS server for the probe machine.
- **Wins Server** - WINS server for the probe machine.

Devices tab

Each tile on this tab displays a summary of information about a device. A tile can include the following icons:



-  - Click to display NMAP scan data.
-  - Only displays if an agent is installed. Hover over this icon to display the **Quick View** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#9339.htm>) window. Click to launch **Live Connect** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4796.htm>).
-  - Only displays if an agent is installed. The number of alarms created for this device or computer. Click to display the **Alarm Summary** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4112.htm>) page for this device.
-  - Only displays if an agent is assigned a monitor set or if a SNMP device is assigned an SNMP set. Click to display the **Machine Status dashlet** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2803.htm>) or **Device Status dashlet** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2817.htm>).
-  - Hovering over a tile displays a pencil icon. You can edit the name of a discovered machine or device.

Actions

- **Deploy Agents** - Deploys an agent to all computers on this tab that don't have an agent installed. Filtering limits the agents deployed to those tiles shown.

Device Filter Settings

- **Device** - Filters the display of devices by device ID. Enter the *beginning* of a string to find all device IDs that match that string. Include an asterisk at the beginning of a string to find all devices that match that string anywhere in the device ID. For example, entering the string ***ABC** matches all device IDs that include ABC anywhere in their device ID.
- **Type** - Filters the display by the type of device:
 - Computer
 - Mobile
 - Network
 - Power
 - Printer
 - Unclassified
 - Virtual Server
- **Reset** - Clears the device filter.

- **(Page Selector)** - When more rows of data are selected than can be displayed on a single page, click the  and  buttons to display the previous and next page.
- **(Rows Per Page)** - Select the number of rows displayed per page.
- **Sort By** - Sorts the display of data by:
 - Name
 - IP Address
 - Device Type
- **Assets** - If checked, displays View Assets.
- **unManaged** - If checked, displays devices without an agent.
 - If both **Assets** and **unManaged** are *blank*, only *agent* tiles are displayed.
 - If both **Assets** and **unManaged** are *checked*, all *discovered* devices are displayed.
 - If **Assets** is blank and **unManaged** is checked, then only *non-assets* are displayed.
 - If **Assets** is checked and **unManaged** is blank, then only *assets* are displayed.

LAN Watch by Probe

Discovery > Networks > LAN Watch by Probe

The **LAN Watch by Probe** page discovers devices on the same LAN as a selected *probe* machine. These devices can be workstations and servers without agents, SNMP devices and vPro machines.

Discovered devices display on the following pages:

- **Discovered Devices - Grid View** (page 18)
- **Discovered Devices - Tile View** (page 20)

Using LAN Watch by Probe

1. Select one or more machine IDs.

Note: Windows XP machines are not recommended as probe machines. NMAP is more reliable with later Windows operating systems.












2. Schedule a scan once or on a recurring basis using the **Schedule Scan** button, or run a scan immediately using the **Scan Now** button.
 - Optionally search for SNMP devices and vPro enabled machines using the **Schedule Scan** dialog.
 - A scan can be assigned to multiple machine IDs.

Actions

- **Edit** - Displays the **Edit Network** (page 10). Sets the scan options used by **Scan Now**. These same settings serve as the default settings displayed by the **Scan Schedules** dialog.
- **Scan Schedules** - Displays the **Scan Schedules Dialog** (page 11). Schedules a LAN Watch scan, on a recurring basis, for a selected network.
- **Scan Now** - Runs LAN Watch immediately on network the selected agent machine belongs to, using the scan options defined by the **Edit Network** (page 10) of the **LAN Watch by Network** page.
- **Ignore** - Prevents a network from being scanned.
- **Unignore** - Re-enables the scanning of a network that was previously ignored.
- **Refresh** - Refreshes the page.

Tables Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent quick view window.

-  Online but waiting for first audit to complete
-  Agent online
-  Agent online and user currently logged on.
-  Agent online and user currently logged on, but user not active for 10 minutes
-  Agent is currently offline
-  Agent has never checked in
-  Agent is online but remote control has been disabled
-  The agent has been suspended
-  - Click this icon to display the **results of the latest scan and the accumulated results of all previous scans** (page 15).
- Network Detect**
 -  - The network ready to be scanned.
 -  - The network is ignored for scanning.
- Machine.Group ID** - A unique **machine ID / group ID / organization ID** (page 70) name for a machine in the VSA.
- IP Address** - The IP address of the probe machine.
- MAC Address** - The MAC address of the probe machine.
- Default Gateway** - The default gateway of the probe machine.
- Network Name** - The friendly name assigned by the VSA to identify a network.
- Scan Status** - The status of a scan. A scan progresses through the following statuses. These statuses are displayed in Pending Procedures and **Procedure History**. If the scan does not fail, the status returns to `ReadyToScan` once a scan is completed.
 - 0 - `ReadyToScan` - Scan not yet started.
 - 1 - `Installing`
 - 2 - `PerformingQuickScan`
 - 3 - `CompletedQuickScan`
 - 4 - `PerformingDeepScan`
 - 5 - `DNSScan`
 - 6 - `Failed`
- Scan Range** - The range of IP addresses scanned by the selected machine ID when LAN Watch runs.
- Next Scan** - The date/time a scan is next scheduled.
- Last Scan** - The date/time a scan last ran.
- SNMP Active** - If checked, the device has SNMP functionality, though it may not be enabled.

Discovered Devices - Grid View

Discovery > Networks > Discovered Devices - Grid View




The **Discovered Devices - Grid View** page shows computers and devices discovered using **LAN Watch by Probe** (page 17) and **LAN Watch by Network** (page 7). Use this page to install agents on discovered computers and mobile devices. You can also make discovered devices a managed asset, even if they cannot be installed with agent.

Results are shown in table format. This table supports **selectable columns, column sorting, column filtering and flexible columns widths** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#6875.htm>).


Actions

- **View** - Displays a popup window of information collected about a selected device. Different views, based on the type of probe used to collect the information, can be selected using the **Probe Type** drop-down list:
 - **NMAP Probe** - The standard method of discovering a device on a network, using the **Discovery** module.
 - **Machine Audit** - The audit performed on a machine installed with an agent.
 - **vPro** - The inventory of hardware attributes returned by a vPro audit. A vPro machine must be enabled, and a scan must include a vPro credential to return vPro hardware attributes from a machine. See the **Edit Network** (page 10) and the vPro tab for more information.
 - **Merge View** - Merges all methods of data collection into one consolidated view. The default view.
- **Deploy Agent** - Installs an agent on a selected discovered machine. See **agent deployment prerequisites** (page 13).
- **Delete** - Deletes the row of a discovered device or machine. For example, a mobile device may be "found" on a network during a scan, but only reside there temporarily. It will continue to be listed on the **Discovered Devices** pages until the row is deleted.
- **Ignore** - Prevents a discovered device or machine from being included in subsequent scans. You can remove the ignore status by deleting the row. The next time the network is scanned it will be re-discovered as a new device.
- **Merge** - Merge two or more selected rows that reference the same device or machine. Some devices and machines have multiple IP addresses. Click **Merge** to display a dialog. Select the row you want to keep, then click **Merge** within the dialog to complete the merge and remove the duplicate rows.
- **Rename Device** - Renames a discovered computer or device within the VSA.
- **Make Asset** - Manually designates a device without an agent as a managed asset. All computers and mobile devices with agents installed on them are necessarily managed assets. A device not capable of supporting an agent, such as a router or a printer, may require monitoring and therefore be designated a managed asset. All managed devices and computers display on the View Assets page.
- **Change Type** - Changes a device or computer to another device type. This may be required to deploy an agent successfully to a computer that was mis-typed.

Table Columns

- **(Eligible to Deploy Agent)** - If checked, this device can install an agent.
- **(Device Status)**
 -  - Only displays if an agent is installed. Hover over this icon to display the **Quick View** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#9339.htm>) window. Click to launch **Live Connect** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4796.htm>).
 -  /  - If enabled, this non-agent device has been **promoted to an asset** (page 14).
- **Device Name** - A unique device or machine ID / group ID / organization ID name for a device or machine in the VSA.
- **Discovered Name** - The name of the device or computer assigned by its own operating system or hardware.
- **IP Address** - The IP address of the discovered device or machine.
- **MAC Address** - The MAC address of the discovered device or machine.
- **Device Type** - The type of device or machine.
- **Last Seen** - The last time this device or machine was detected by LAN Watch.
- **Network Name** - The friendly name assigned by the VSA to identify a network.

Note: The phrase **Unscanned Network** displays in this field for machines that are already "known" to the VSA because they have an agent installed on them, but have not yet been included in a **Discovery scan**.

- **NMAP Scan Results** - Click the  icon in this column to display NMAP scan data for this device.
- **Primary Probe** - The primary probe that last detected this device or machine.
- **Probe Type** - The type of probe used to detect this device.
- **OS** - The operating system of discovered device or machine.
- **OS Accuracy** - The probable accuracy of identifying the operating system correctly.
- **Manufacturer** - The manufacturer of the device.
- **SNMP Active** - If checked, the device has SNMP functionality, though it may not be enabled.
- **Computer Agent** - If checked, an agent is already installed on this machine.
- **Mobile Agent** - If checked, this device is a mobile device.
- **Asset** - If checked, this device is already being managed and displays on the View Assets page.
- **Ignore** - If checked, do not continue to scan this device.
- **Deploy Attempt** - The date/time an agent deployment was attempted.
- **Deploy Status** - The status of the agent deployment. Review error messages using this column. See **agent deployment prerequisites** (page 13).
- **vPro Machine** - If checked, the machine is a vPro-enabled machine. See the **Edit Network** (page 10) for more information about vPro-enabled machines.









Discovered Devices - Tile View

Discovery > Networks > Discovered Devices - Tile View

The **Discovered Devices - Tile View** page shows computers and devices discovered using **LAN Watch by Network** (page 7) and **LAN Watch by Probe** (page 17). The scan results are *cumulative* from all probe machines. A record is not removed unless you delete it.

Tile View Format



Tile view displays each device on its own tile. A tile can include the following icons:

-  - Click to display NMAP scan data.
-  - Only displays if an agent is installed. Hover over this icon to display the **Quick View** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#9339.htm>) window. Click to launch **Live Connect** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4796.htm>).
-  /  - Toggling this icon manually **promotes or demotes a non-agent device to an asset** (page 14).
-  - Only displays if an agent is installed. The number of tickets created for this computer. Click to display the tickets in a ticket table.
-  - Only displays if an agent is installed. The number of alarms created for this device or computer. Click to display the **Alarm Summary** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4112.htm>) page for this device.
-  - Only displays if an agent is assigned a monitor set or if a SNMP device is assigned an SNMP set. Click to display the **Machine Status dashlet** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2803.htm>) or **Device Status dashlet** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2817.htm>).
-  - Hovering over a tile displays a pencil icon. You can edit the name of a discovered machine or device.

Actions

- **Deploy Agent** - Deploys an agent to all computers on this tab that don't have an agent installed. Filtering limits the agents deployed to those tiles shown.
- **Deploy Agent by Address** - Deploys agents to IP4 addresses that have not been discovered.
 - **Agent From** - An agent machine on the same network used to deploy the agent.
 - **OS Type** - Deploying to Windows, Mac or Linux.
 - **Address** - An IP4 address. Delimit multiple IP addresses with commas.
 - **Username / Password** - An administrator-level username and password. For domain credentials use the `domain\username` format.

Device Filter Settings

- **Device** - Filters the display of devices by device ID. Enter the *beginning* of a string to find all device IDs that match that string. Include an asterisk at the beginning of a string to find all devices that match that string anywhere in the device ID. For example, entering the string `*ABC` matches all device IDs that include ABC anywhere in their device ID.
- **Type** - Filters the display by the type of device:
 - Computer
 - Mobile
 - Network
 - Power
 - Printer
 - Unclassified
 - Virtual Server
- **Network** - The name and IP range of a selected network.
- **Reset** - Clears the device filter.
- **(Page Selector)** - When more rows of data are selected than can be displayed on a single page, click the  and  buttons to display the previous and next page.
- **(Rows Per Page)** - Select the number of rows displayed per page.
- **Sort By** - Sorts the display of data by:
 - Name
 - IP Address
 - Device Type
- **Asset** - If checked, displays **Assets** (page 6).
- **unManaged** - If checked, displays devices without an agent.
 - If both **Assets** and **unManaged** are *blank*, only *agent* tiles are displayed.
 - If both **Assets** and **unManaged** are *checked*, all *discovered devices* are displayed.
 - If **Assets** is blank and **unManaged** is checked, then only *non-assets* are displayed.
 - If **Assets** is checked and **unManaged** is blank, then only *assets* are displayed.

Chapter 2

Domain Watch

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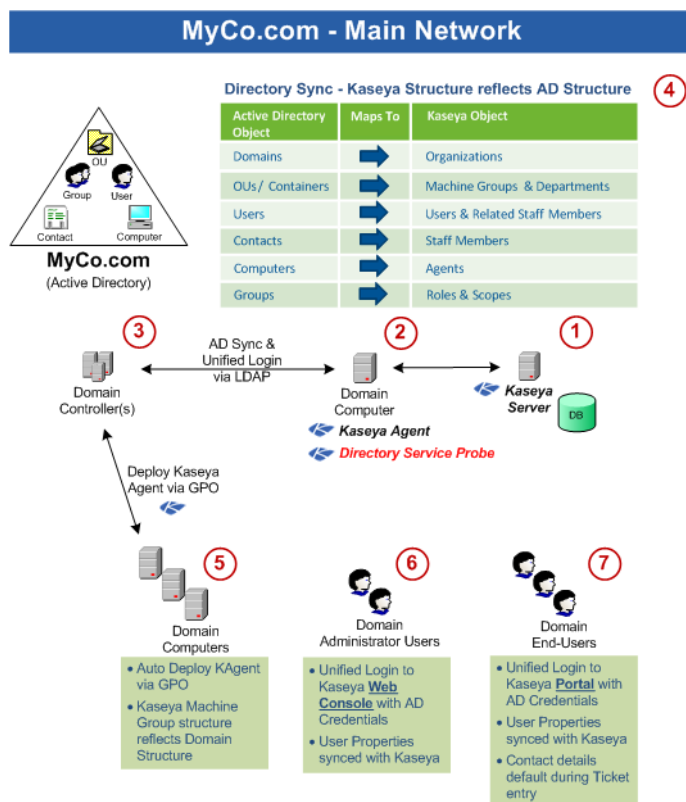
Getting Started with Domain Watch

Discovery on the Kaseya Server (1) uses a probe agent on a domain computer (2) to communicate with an Active Directory (AD) domain (3). Once connected, the probe "harvests" domain data (4) back to the Kaseya Server.

- Agents are deployed to domain machines using a group policy object (GPO) to download the agent install package (5).
- VSA users can use their domain credential to logon to the VSA (6).

Domain Watch

- Portal Access users can use their domain credentials to logon remotely to their machines (7).



- The application protocol used to communicate with the domain server is Lightweight Directory Access Protocol (LDAP).
- See [OU/Container](#) (page 71) for more information about "organizational units".

The following topics provide a step-by-step procedure for configuring **Discovery**.

- [Domains Page Prerequisites](#) (page 36)
- [Configuring Probe Deployment](#) (page 36)
- [Configuring Agent Deployment](#) (page 38)
- [Configuring OU/Container Policies](#) (page 38)
- [Configuring Computer Policies](#) (page 40)
- [Configuring Contact Policies](#) (page 39)
- [Configuring Group Policies](#) (page 40)
- [Configuring User Policies](#) (page 42)
- [Configuring Alert Policies](#) (page 43)
- [Configuring Schedule and Status](#) (page 44)

These additional topics provide an overview of **Discovery** concepts.

- [Managing a Synchronized Security Model](#) (page 25)
- [Managing Multiple Domains](#) (page 25)
- [Managing Remote Portal Access](#) (page 26)
- [Setting Discovery Policies](#) (page 27)
- [Applying Discovery Policies](#) (page 28)
- [Synchronization](#) (page 33)
- [Activation / Deactivation](#) (page 35)
- [Uninstalling the Probe and Detaching the Org](#) (page 35)
- [Probe Alerts and Domain Alerts](#) (page 35)

Managing a Synchronized Security Model

One of the benefits of synchronizing the VSA with the domain is that the domain hierarchy of folders and items—domains, organizational units/containers, computers, groups, users, and contacts—is automatically "harvested" to create and maintain a similar security model in the VSA—organizations, machine groups, machines, users, scopes, roles, and staff. Service providers are freed from having to enter the same data a second time in the VSA. For example, user data, such as email, phone and other contact information need only be updated in the domain to update corresponding fields in the VSA.

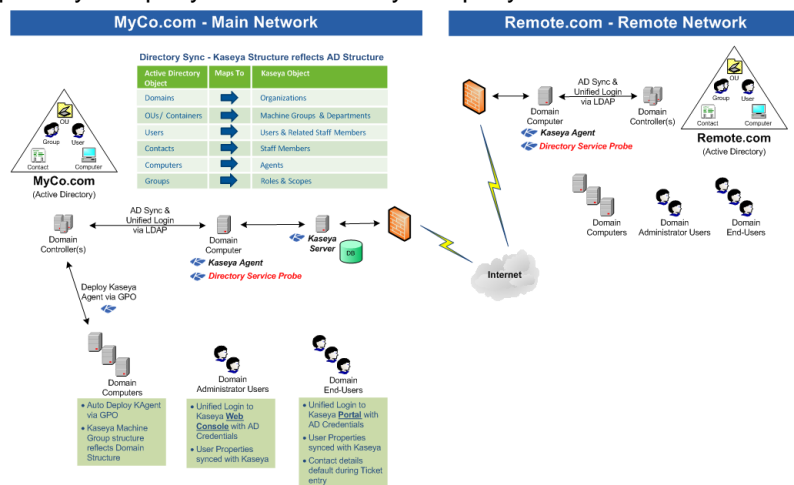
The security model created in the VSA by **Discovery** integration with the Active Directory domain results in the following mapping of objects.

Directory Sync - Kaseya Structure reflects AD Structure

Active Directory Object	Maps To	Kaseya Object
Domains	➡	Organizations
OUs / Containers	➡	Machine Groups & Departments
Users	➡	Users & Related Staff Members
Contacts	➡	Staff Members
Computers	➡	Agents
Groups	➡	Roles & Scopes

Managing Multiple Domains

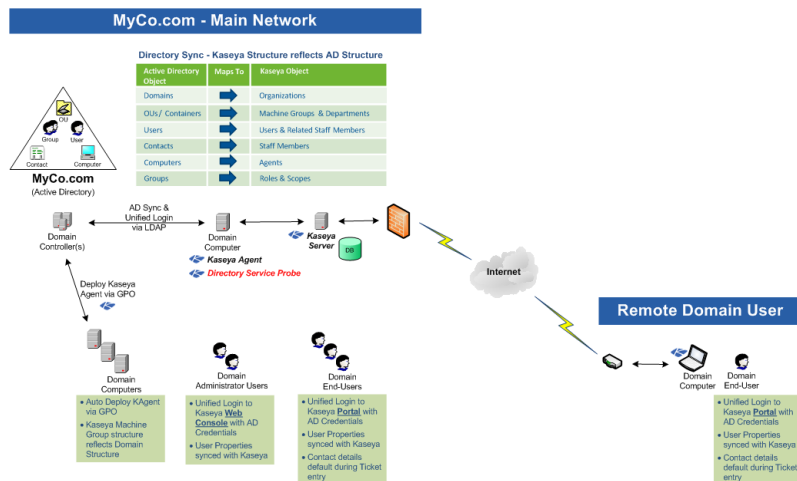
Discovery provides consolidated access throughout the VSA to **Discovery** managed domain computers, users and contacts, regardless of whether these domains have a "trust" relationship between them. For example, **Discovery** can provide a consolidated view of the domains of both a primary company and a subsidiary company.



- Each **Discovery** managed domain is associated with a unique organization within the VSA.
- A scope matching the name of the organization is created. If you like, you can add multiple organizations to the same scope. This enables a VSA user to use a single scope to have visibility of all machine groups in multiple organizations.
- The machine ID / group ID filter enables you to filter the display of machines—by machine property, machine group or organization.

Managing Remote Portal Access

Discovery sets policies that enable users to use their domain credentials to logon remotely to their machines using Portal Access. Remote access using Portal Access can be inside or outside of the company's firewall. For example, a Portal Access user might want to access their office computer from home.



Licensing

Discovery domains are licensed separately from agent licenses. **Discovery** domain license counts display on the **Licenses** tab of the System > **License Manager** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#2924.htm>) page.

A **Discovery** managed domain is a domain attached to an organization. A domain is attached to an organization when *activated* using the Domains > Domain Watch > **Probe Deployment** (page 46) tab. A managed domain can be in one of following licensing states:

- **Unlicensed** - **Discovery** is installed and visible in the VSA but zero domains are licensed.
- **Licensed** - A sufficient number of licenses exist for the domains being managed.
- **Exceeded** - Another domain cannot be installed, because the maximum number of domains has been installed.
- **Expired** - **Discovery** has been disabled because licensing for the entire module has expired.

The Directory Services Feature Set

Directory Services 1.2 is a **feature set** (page 69), licensed separately, that provides advanced functionality in the **Discovery** module.

Domain Policies	Domain policies can be specified for multiple machines and users by: <ul style="list-style-type: none"> • OU/Container • Groups
Incremental Synchronization Activation/Deactivation	Provides incremental discovery and synchronization of domain controller data. Without Directory Services 1.2 only full discovery and synchronization is supported. Activation and Deactivation buttons display on the Domain Watch > Probe Deployment page, enabling and disabling incremental discovery and synchronization.
Auto Portal Access	Auto creates portal access to a machine, based on the person last logged on to the machine.

Contacts	Discovers and synchronizes domain contacts and VSA staff records. A domain contact contains information similar to a domain user, but a contact has no domain logon privileges. Directory Services 1.2 enables you to set policies that create VSA staff member records for newly discovered contacts in a domain and to keep the two records synchronized with each other. Creating a staff record using a Directory Services policy also creates a hierarchy of departments that reflects the OU/container hierarchy in the domain.
Users	<ul style="list-style-type: none"> • Enables and disables domain logons from the Directory Services module. • Resets the domain passwords. • Unlocks domain accounts.
Alerts	Provides alerts for new or changed computers, contacts, OU/containers, domains, groups, organizations, or users.

Setting Discovery Policies

Once a probe is installed, **Discovery** is configured by setting selected domain folders and items to **included** or **excluded**. **Discovery** policies provide IT automation—such as installing agents or creating users—only for *included* folders and items. **Discovery** only harvests detailed information for *included* folders and items, minimizing the amount of data required to maintain synchronization with the domain.

Discovery policies can be set for three types of domain objects:

- **Setting Discovery Policies for Computers** (page 27)
- **Setting Discovery Policies for Contacts** (page 27)
- **Setting Discovery Policies for Users** (page 28)

Setting Discovery Policies for Computers

The following **Discovery** *computer* policies can be set by OU/container or by individual computer. Setting a policy by computer has precedence over setting a policy by OU/container.

- Automatic deployment of agents on newly discovered machines.
- Manual deployment of agents on selected machines.
- Agent deployment on the system hosting the Active Directory domain.
- Designating all machines or selected machines as **portal candidates** (page 30).

Creating a machine ID account using a **Discovery** policy also creates a machine group hierarchy for the new machine ID account that reflects the OU/container hierarchy in the domain.

Discovery computer policies are set using the Domains > Domain Watch > Policies > **OU/Containers** (page 49) tab or **Computers** (page 50) tab.

Setting Policies for Computers

The following **Discovery** *contact* policies can be set for each OU/container in the domain.

- Automatic creation of VSA staff records for all newly discovered domain contacts.
- Manual creation of VSA staff records for all selected domain contacts in an OU/container.

Creating a staff record using a **Discovery** policy also creates a hierarchy of departments that reflects the OU/container hierarchy in the domain.

Discovery contact policies are set using the Domains > Domain Watch > Policies > **OU/Containers** (page 49) tab.

Setting Discovery Policies for Users

Discovery can create VSA users and Portal Access users based on domain users. This means IT administrators can provide their users the same credential for these applications and manage authentication and authorization from a single location, using the Active Directory domain.

The following **Discovery** user policies can be set by (user) group or set by individual user.

1. **Do Not Include Users** - Do not create VSA user logons or Portal Access logons for domain users listed in this user group.
2. **Create Staff Members** - Creates a staff member record. These users can be assigned Portal Access to a machine *manually*.
3. **Create Staff and make Auto Portal Candidates** - Designates domain users in this user group as Portal Access candidates. See **Making Portal Access Candidates** (page 30) for details.
4. **Create VSA Users** - Creates VSA user logons for domain users listed in this group.

Discovery user policies are set using the Domains > Domain Watch > Policies > **Groups** (page 51) tab or **Users** (page 53) tab.

Applying Discovery Policies

Once all **Discovery** policies are set, the settings are applied. Several minutes later, new VSA computers, contacts, VSA users and Portal Access users display in their respective **Discovery** pages in the following **Discovery** page, depending on the **Discovery** policies that were applied.

- **Computers** (page 57)
- **Contacts** (page 59)
- **Users & Portal Users** (page 61)

Review the following specialized topics to ensure you understand how these new VSA records are created and what additional configuration tasks may be required for each type of VSA record created using **Discovery**.

- **How Agents are Installed Using Discovery** (page 28)
- **How Machine ID Accounts are Created in Discovery** (page 29)
- **How Machine Moves in Domain are Reflected in Discovery** (page 30)
- **Enabling Remote Portal Access in Discovery** (page 30)
- **Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords** (page 31)
- **Making Changes to Discovery Managed User Logons** (page 32)
- **Supported Domain Logon Formats** (page 32)

How Agents are Installed Using Discovery

All agents installed on domain machines using **Discovery** are installed using a single agent install package specified for each domain.

Since different types of machines may require different agent settings, Kaseya recommends specifying a "generic" agent install package for **Discovery** agent installs. Change the agent settings after the install, as appropriate, for each type of machine. Agent settings can be changed manually using machine ID templates and Agent > Copy Settings or by importing agent settings using Agent > Import / Export.

Discovery uses two methods for installing agents.

Method 1 - Agent Installs Using Kconnect

Applies to both network installs and domain installs.

This method is successful most of the time and installs the agent immediately without requiring a reboot of the

machine. It is the same technology used by **LAN Watch by Network** (page 7) to remotely install an agent. The agent install package is downloaded from the Kaseya Server to the agent probe computer. The agent probe computer runs a Kaseya utility called `Kconnect.exe`. The agent probe machine uses its Active Directory domain credential to transfer the file to the target computer and install the agent.

Method 2 - Agent Installs using a GPO Script

Applies only to domain installs. Both method 1 and method 2 are initiated at the same time for a domain install. If an install using one method has already succeeded, any subsequent attempt to install an agent is canceled.

This method does not occur until the target computer is rebooted. A single copy of the agent install package for each domain is stored on the system hosting the Active Directory domain. A Group Policy Object (GPO) is created for the domain in Active Directory. When an agent is deployed using **Discovery** the GPO is assigned to that domain machine in Active Directory. If an agent is not already installed on the domain machine, the GPO triggers an agent install the next time the domain machine is rebooted. *If the agent is deleted from the domain machine, the GPO method of installing the agent ensures that the agent is re-installed.*

Updating the Install Package on the Domain Controller

The copy of the agent install package on the system hosting the Active Directory domain is *not* automatically updated when the agent install package is changed. For this release, to update the agent install package manually:

1. In Active Directory, locate the Features > Group Policy Management > <forest> > Domains <domain> > **Group Policy Objects** folder.
2. Right-click the **ADAgentDeployGPO** group policy object and select the **Edit...** option to open the **Group Policy Management Editor** dialog.
3. Locate the Computer Configuration > Policies > Windows Settings > Scripts folder.
4. Right-click the **Startup** script and select the **Properties** option to open up the **Startup Properties** dialog.
5. Select the **InstallAgent.vbs** script and click the **Show Files...** button to display a Windows explorer window.
6. A `KcsSetup<number>.exe` file displays in the selected file folder with a unique number added to the end of the filename. For example: `KcsSetup35475311.exe`.
7. Rename the old `KcsSetup<number>.exe` file and replace it with your updated `KcsSetup.exe`.

Note: Ensure you rename the `KcsSetup.exe` file to the exact `KcsSetup<number>.exe` filename that was used before, including the unique number that was previously used.



New installs of the agent using the GPO method will now install using the agent settings in the new agent install package.

Note: When installing an agent to a Windows XP domain machine using the GPO method, installs may fail if the **Security Center domain policy is disabled**
([http://technet.microsoft.com/en-us/library/cc725578\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc725578(WS.10).aspx)).

How Machine ID Accounts are Created in Discovery

The creation and grouping of **machine ID accounts** (page 70) using **Discovery** depends on how machines are organized in the domain and whether the machine ID accounts already exist in the VSA.

- A single organization is specified for each domain in **Discovery**. The organization selected determines the organization assigned to *newly created machine ID accounts* when installed using **Discovery**.

- The appropriate hierarchy of machine groups for a new machine ID account are created, if the machine group hierarchy doesn't already exist, matching the machine's location in the OU hierarchy in the domain.
- Newly created machine ID accounts initially display as "empty" machine ID template accounts—identified with a  check-in icon—meaning there is no corresponding agent for this machine ID account.
- If no *agent* exists on the domain machine, then a new agent is installed after a reboot of the computer using the newly created machine ID account.
- If an agent already exists on a managed machine in a different machine group, then **Discovery** creates an "empty" **machine ID template** (page 70) account—identified with a  check-in icon—and no agent ever checks in. The new machine ID template account displays a **machine.ID / group ID / organization ID** (page 70) based on the computer's canonical name in the Active Directory domain. *You can merge these duplicate accounts.* The existing, active agent account adopts the name of the new machine ID template account, then the new machine ID template account is deleted. No data is lost by the merge and the machine ID account now matches its location in the domain hierarchy.
- Select a **Duplicate Exists** row in the Discovery > **Computers** (page 57) page then click the **Synchronize Machines** button.

Warning: Use the **Synchronize Machines** method to merge duplicates rather than merging accounts using the **Agent > Rename** page.

How Machine Moves in Domains are Reflected in Discovery

When a machine is *moved* to a new OU in the domain, the effect it has in **Discovery** depends on the policies selected using the Discovery > Domains > Domain Watch > Policies > **OU/Containers** (page 49) or **Computers** (page 50). **Discovery** monitoring of a member machine in the domain depends on whether its policy is set to "included" or "excluded" in both the source OU location and the target OU location.

Assuming the **Include New Computers** checkbox is checked in the target location:

- **From Included to Included** - The machine ID account hierarchy is changed to match the new location in the domain hierarchy.
- **From Included to Excluded** - The machine ID account hierarchy is not changed. The VSA must move the machine ID manually using Agent > Change Group.
- **From Excluded to Included** - A new "empty" machine ID account hierarchy is created, matching the new location in the domain hierarchy. The VSA user can choose to merge the old machine ID account with the newly created machine ID account using the Domains > Computers > **Synchronize Machines** button.
- **From Excluded to Excluded** - No change is made in the VSA.

Enabling Remote Portal Access in Discovery

Portal Access enables the end-user of a managed machine to remotely logon to that machine. Only one end-user of a machine can have Portal Access to that machine at a time. The end-user must have previously logged onto the machine locally at least once. **Discovery** supports both manual and automatic Portal Access assignment. For more information see:

- **Managing Remote Portal Access** (page 26)

Automatic Portal Access Assignment

When a domain user logs on to a domain machine, *both the domain machine and the domain user* must be designated as **Discovery portal candidates** to enable the user to be *automatically assigned* as the **Portal Access** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#438.htm>) user of that machine.

Manual Portal Access Assignment

Discovery can also manually assign and remove Portal Access for domain users, regardless of whether the domain user or domain computer is a portal candidate or not.

Note: A domain user can be either a VSA user or a Portal Access user but not both. Once a VSA user logon has been created for a domain user, that user is no longer eligible to be a Portal Access user of any machine.

Portal Access Using Discovery

Discovery managed Portal Access provides the following unique behavior not available outside of **Discovery**.

- When a portal candidate user logs on to a portal candidate machine—and that portal candidate machine is not already assigned a Portal Access user—he or she is automatically assigned the Portal Access user of that machine.
- The **Change Profile** tab of Portal Access is automatically populated with the *name, email and phone number* of the currently logged in Portal Access candidate. The submitter fields of new **Service Desk** tickets are populated with the contact information stored in the **Change Profile** tab. This means Portal Access users don't have re-enter the same contact information, each time they create a new **Service Desk** ticket.

Note: Regardless of the submitter information recorded in a ticket, the current Portal Access user sees all tickets related to that machine.

- If connection to the Active Directory server is lost, preventing domain authentication, users can still use their Portal Access logon to logon remotely to the Portal Access machine they were last assigned.
- All machines can be designated portal candidates using the **Automatically assign portal access to portal candidates** checkbox in the Computers Policy dialog on the **OU/Containers** (page 49) tab.
- Any domain user who is not already a VSA user—whether a portal candidate or not—can be manually assigned the Portal Access user of a domain computer, using the **Assign Portal User** button on the **Computers** (page 57) page.

Note: The user can only be manually assigned the Portal Access user of a machine—using the **Users & Portal Users** (page 61) page—if the user was the last user logged on to that machine. The list of eligible machines are listed in the **Last Logged-onto Machines** field in the lower panel of this same page.

- Any domain user—whether a portal candidate or not—can be manually removed as the Portal Access user of any domain computer at any time, using the **Remove Portal User** button on the **Computers** (page 57) page.

Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords

Note: The enabling and disabling of domain logons, the resetting of domain passwords and the unlocking of domain accounts is only available if the **Directory Services** feature set is enabled.

When the **Discovery** > Users and Portal Access page is used to enable or disable a domain user account or reset a domain user's password, synchronization occurs immediately for only that domain user record. Detailed domain data is harvested for only that domain user.

- A disabled domain user will no longer be able to logon using the domain credential, nor be able to logon to the VSA using their domain credential.

Domain Watch

- Password changes take effect the next time the domain user logs on, to both the domain and to the VSA using their domain credential.

Note: Enabling/disabling domain user accounts or resetting domain user passwords in Active Directory will not update the VSA until a read time synchronization occurs.

Note: Do not make changes to the password of a **Discovery** managed user or enable/disable that user using the System > **Users** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4576.htm>) page or System > Change Logon page. These changes *only occur in the VSA* and only have a temporary effect on that user. Eventually synchronization will reset the user's VSA password and enable/disable the VSA user as specified in Active Directory.

Making Changes to Discovery Managed User Logons

You may wish to make changes to created VSA user logon or Portal Access candidates after applying **Discovery** policies. You should be aware that:

- The VSA users and Portal Access users created by **Discovery** are never removed automatically by **Discovery**.
- The agents installed by **Discovery** are never uninstalled by **Discovery**.

The deletion of VSA users and Portal Access users and the uninstalling of agents must always be made manually, outside of **Discovery**.

Note: An domain user can only be associated with *either* a VSA user logon or a Portal Access logon, *but not both at the same time*.

Removing VSA User Logon Access Only

- Delete the VSA user logon only.

Removing Portal User Access Only

- Use the Remove Portal Users button on the User and Portal Access page.

Promote a Portal Access Candidate to a VSA User

- Use the Remove Portal Users button on the User and Portal Access page.
- Modify **Discovery** policies so that at least one group the domain user belong to is set to **Create VSA User**. The <VSA user will be created when the **Discovery** user policy is applied.

Demote a VSA User to a Portal Access User

- Delete the VSA user logon only.
- Modify **Discovery** policies so that at least one group the domain user belong to is set to **Create Staff and make Auto Portal Candidate** and no groups the domain user belongs to are set to **Create VSA user**. The Portal Access candidate will be created when the **Discovery** user policy is applied.

Supported Domain Logon Formats

The following domain logon formats are supported using **Discovery**, for both VSA users and Portal Access users.

Format	Field	Full DNS Domain Name Logons*	Pre-Windows 2000 Domain Name Logons**
Domain Back Slash	Username	<i>ITservices.acme.com\william</i>	<i>ITservices\william</i>
	Password	*****	*****
	Domain		
Domain Forward Slash	Username	<i>ITservices.acme.com/william</i>	<i>ITservices/william</i>
	Password	*****	*****
	Domain		
Separate Domain	Username	<i>william</i>	<i>william</i>
	Password	*****	*****
	Domain	<i>ITservices.acme.com</i>	<i>ITservices</i>
Email Style Domain	Username	<i>william@ITservices.acme.com</i>	<i>william@ITservices</i>
	Password	*****	
	Domain		

* The Full DNS domain name is also known as the User Principal Name (UPN) suffix.

** The Pre-Windows 2000 domain name is also known as the NetBIOS Domain Name.

Synchronization

Synchronization refers to the updating of **Discovery** with data harvested from an Active Directory domain. The following **Discovery** events trigger synchronization between **Discovery** and a domain.

- Previews
- Activation / Incremental Synchronization
- Apply Changes
- Full Synchronization

Note: A synchronization also occurs for a specified user when **Enabling/Disabling Domain Users Accounts or Resetting Domain User Password** (page 31).

Previews

When the **Discovery** probe is installed, the first task the probe performs is a **preview**. A preview updates **Discovery** with:

- Summary domain data for all folders and items.

Since this is the first time data is "harvested" from a domain, only summary domain data is required.

- Folders are domain objects that contain other objects. This can refer to organizational units or containers, and groups, meaning groups of users.
- Items can refer to computers, users and contacts.

Activation / Incremental Synchronization

Note: Incremental synchronization is only available if the **Directory Services feature set** (page 26) is enabled.

After the probe is installed—and typically before **Discovery** policies are even set—a **Discovery** probe is activated. **Activation** enables incremental synchronization between an Active Directory domain and the probe computer. An activated probe waits a fixed period of time, call the **synchronization interval**, before updating the VSA with these changes. By default this synchronization interval is 60 minutes. If this default value is used, these domain changes may not be reflected in the VSA up to 60 minutes after the changes are made.

Initially no **Discovery** policies have yet been set, so no folders or items are "included", which would require a detailed harvesting of data. In this case an incremental synchronization harvests summary data from a domain that is similar to a preview, except the harvesting of data is limited to *changes* in the domain.

Later, when **Discovery** policies have been set and selected folders and items are "included," synchronization requires both summary and detailed data. Again the harvesting of data is limited to *changes* in the domain.

Incremental synchronization provides an update of *all changes* to:

- Summary domain data for all folders and items, whether "included" or "excluded"
- Detailed domain data for all "included" folders and "included" items. Computers and contacts can be "included" individually. Users are always "included" by group.

Domain Changes Using the Incremental Synchronization Interval

Most domain changes are stored by the probe until the synchronization interval has elapsed, then uploaded to **Discovery**. The default is 60 minutes. These types of domain changes include:

- User added, moved or deleted
- Computer added, moved or deleted
- User or contact changes such as name, address, phone number, email address
- Reorganization of the domain OU hierarchy

Domain Changes Passed Immediately

A few important domain changes need to be uploaded by the probe immediately. These include:

- Password changes
- Disabling a user account

Apply Changes

Synchronization also occurs when **applying KDIS policies** (page 28), and are equivalent to a *full* synchronization. This ensures applied policies affect *all included* (page 69) domain computers, users and contacts that may exist at that time, regardless of any synchronizations that may have occurred before.

Full Synchronization

The **Discovery** probe accumulates domain *changes* in real time. If the connection between the **Discovery** probe and a domain is lost for a period of time, the probe has no way to recover those changes. To ensure domain changes are not lost forever, set **probe alerts** (page 35) and schedule a recurring *full synchronization* (page 33). *If a probe alert is triggered, consider running a full synchronization immediately.*

A full synchronization provides **Discovery** with a complete update of domain data, including:

- Summary domain data for all folders and items, whether "included" or "excluded"

- Detailed domain data for all "included" folders and "included" items. Computers and contacts can be "included" individually. Users are always "included" by group.

Typically full synchronization occurs less frequently than incremental synchronization. Once a day or once a week, for example, might be sufficient.

Activation / Deactivation

Activation and **Deactivation** buttons display on the Domain Watch > **Probe Deployment** tab, but only if the **Directory Services Feature Set** (page 26) is installed.

- **Activation** - Enables incremental discovery and synchronization of domain controller data. Activating a probe on a domain computer *deactivates* any other probe on that same domain, without loss of data.

Note: Activation is not required to run full sync on the Domain Watch > **Schedule and Status** (page 56) tab.

- **Deactivation** - Disables incremental synchronization updates from the domain. If reactivation occurs later, a "changes gap" may exist in the data collected by the probe, requiring the scheduling of a full synchronization to correct.

Uninstalling the Probe and Detaching the Org

You associate an organization with a domain when a probe is installed. After the install, the association with the organization cannot be changed without uninstalling the probe and detaching the probe. This prevents creating duplicate users, staff and computer records in multiple organizations.

Uninstalling and detaching the org clears all records for that domain in the **Computers** (page 57), **Contacts** (page 59) and **Users & Portal Users** (page 61) pages, because these records are no longer known to be members of the domain by way of the org association. The actual VSA records are not deleted.

Probe Alerts and Domain Alerts

Note: Alerts are only available if the **Directory Services feature set** (page 26) is enabled.

Probe Alerts

Probe warnings alerts and failure alerts provides alerts and email notifications for any issues concerning the probe's communication with the Active Directory server. Probe alerts can include:

- The Active Directory server goes offline.
- The domain credential used by **Discovery** is no longer valid.
- The probe cannot communicate with the domain controller.

Warning: The **Discovery** probe accumulates domain *changes* in real time. If the connection between the **Discovery** probe and a domain is lost for a period of time, the probe has no way to recover those changes. To ensure domain changes are not lost forever, set **probe alerts** (page 35) and schedule a recurring **full synchronization** (page 33). *If a probe alert is triggered, consider running a full synchronization immediately.*

Domain Alerts

Domain alerts provides alarm, ticket and email notifications for create, change and deletes of selected types of objects in the domain. Types of domain objects include:

- Computer
- Contact
- Container
- Domain
- Group
- Organizational Unit
- User

Configuring the Discovery Domains Page

The following topics provide a step-by-step procedure for configuring the Discovery > **Domain Watch** (page 45) page.

- **Configuration Prerequisites** (page 36)
- **Configuring Probe Deployment** (page 36)
- **Configuring Agent Deployment** (page 38)
- **Configuring OU/Container Policies** (page 38)
- **Configuring Computer Policies** (page 40)
- **Configuring Contact Policies** (page 39)
- **Configuring Group Policies** (page 40)
- **Configuring User Policies** (page 42)
- **Configuring Alerting Profiles** (page 43)
- **Configuring Schedule and Status** (page 44)

Configuration Prerequisites

1. Identify the domain administrator credentials for the Active Directory domain you intend to integrate with the VSA. **Discovery** requires a domain credential authorized to perform the following types of updates:
 - Create a GPO for the purpose of storing Kaseya install packages
 - Reset a password
 - Enable or disable a user account


Note: A domain administrator credential provides the necessary authorization but you may want to limit **Discovery** to just the privileges listed above.



2. Install a VSA agent on a machine that is a member of the Active Directory domain you intend to integrate with the VSA. You won't see a domain in the upper panel of the **Domain Watch** (page 45) page until at least one domain computer has an agent installed on it.

Configuring Probe Deployment

Note: No tabs display unless a domain row in the upper panel is selected. At least one agent must be installed on a domain computer to see that domain row displayed in the upper panel.


1. Click the Discovery > Domains > Domain Watch > **Probe Deployment** (page 46) tab.
2. Select the row of the **Domain Name** in the upper panel you want to configure.

- The **Probe Status** displays  Un-installed.
 - Machines that are members of this domain and that have Kaseya agents installed on them now display in the lower panel.
 - Initially you may only see a single domain computer with a Kaseya agent installed on it displayed in the lower pane. As agents are automatically installed on other domain computers using **Discovery** policies, these domain computers will all be displayed in the lower pane.
3. Select one of the machines in the lower panel.
 - Click the enabled **Install** button in the lower panel.
 4. The first thing the **Install** dialog asks you to enter is a credential. **Discovery** requires a domain credential authorized to perform the following types of updates:
 - Create a GPO for the purpose of storing Kaseya install packages
 - Reset a password
 - Enable or disable a user account

Note: A domain administrator credential provides the necessary authorization but you may want to limit the **Discovery** to just the privileges listed above.
 5. Click the **Verify and Set Credentials** button.
 - If the credential is valid, the dialog displays a second **Install** button.
 6. Optionally filter the scan performed by the probe machine using the **Filter String**. Useful for large domains. Use distinguished name notation. For example, `CN=Users,DC=myDomain,DC=com`
 7. The **Install** dialog asks you to specify a **unique** VSA organization for each domain integrated with **Discovery**.
 - When agents are installed on machines for this domain, the machine ID accounts created in the VSA become members of this organization.
 - When user records or staff records are created in the VSA for this domain, they are associated with the organization you select.
 - After the install, the association with the organization cannot be changed without **Uninstalling the Probe and Detaching the Org** (page 35). This prevents creating duplicate users, staff and computer records in multiple organizations.
 8. Click the **Install** button in the dialog. The dialog closes.
 - **Discovery** probe components are installed on the agent machine.
 - After the install, the probe agent automatically begins "harvesting" a **preview** of all *folders and items* in the domain concerning the OU/container hierarchy, computers, contacts, groups and users. No detailed information is requested. The preview populates the **Policies** tabs with this summary data.
 - The **Probe Status** displays  **Previewing** while harvesting the data. This can take several minutes. Use the **Refresh** button to update the page. Refreshing of the page is not done automatically.
 - When the preview is complete, the **Probe Status** icon displays  **Installed**.

Note: Activation and Deactivation buttons only display if the **Directory Services Feature Set** (page 26) is installed.
 9. Reselect the probe agent row. Click the **Activate** button in the lower panel. The **Activate Probe** dialog opens.
 - At this point you can enter a different credential for the probe than the one entered for the install. Typically the same credential is used.

Note: If a probe has already been installed and activated once, the **VSA Organization** field may be disabled. Click the **Uninstall and Detach Org** button. Then click the **Activate** button to enable the list and pick a different org. See **Activation / Deactivation** (page 35) for issues to consider before *deactivating* a probe.

- Set a **incremental synchronization interval** (page 33) for synchronization of data between the domain and **Discovery**. The default is 60 minutes. This option is only available if the **The Directory Services Feature Set** (page 26) is installed.
- Click the **Activate** button to close this dialog and activate the probe. This should only take a minute or two. Use the **Refresh** button to update the page. Refreshing of the page is not done automatically.
- The **Probe Status** displays  **Activated**.

Note: Activation is recommended immediately after installing the probe, even before you set additional **Discovery** policies. This ensures all changes in the domain are monitored while you continue with your configuration.

Configuring Agent Deployment

1. Click the **Discovery** > Domains > Domain Watch > **Agent Deployment** (page 48) tab.
2. Click the **Edit** button. Set the following:
 - **Automatically install Agents when computer is discovered** - Leave this checkbox blank if you have just activated the probe for the first time. Wait until policies are applied, then return to this tab and check this checkbox. When policies are applied, agents are automatically installed on computers that are members of those policies. *The computers must be rebooted to complete the installation of Kaseya agents.*

Note: Kaseya recommends leaving this checkbox *blank* until all **Policies** (page 48) are configured for a domain for the first time.

- **Allow Agents to be installed on Directory Server** - Leave this checkbox blank. If checked, agents will also be installed on the system hosting the Active Directory domain.
- **Default Package** - Select a Windows-based agent install package to use with the selected domain.

Note: Domain Watch does not support installing agents on Linux or Apple machines. Agents must be installed on domain Linux machines and domain Apple machines outside of Domain Watch. See **How Agents are Installed Using Discovery** (page 28).

3. Click the **Save** button to close this dialog.



Configuring OU/Container Policies

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.

1. Click the **Discovery** > Domains > Domain Watch > Policies > **OU/Containers** (page 49).
 - Use this tab to specify which domain machines you want to install a Kaseya agent on.
 - Each **OU/container** (page 71) in this tab is identified by its canonical name. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.

- Additional columns show counts for the computers and contacts selected and available in each OU/container.
2. Select an OU/container that shows a count for one or more computers.

Note: Sort this tab by clicking the **Sort Descending** option in the **Total Computers** column heading. This ensures any OU/containers with computer counts greater than zero are listed first.

3. Select the **Computers Policy** button.
 - The dialog box lists all the available computers of the OU/container you can *include* (page 69) in selected policies.
 - Entering a checkbox next to a computer in this dialog means you want to install an agent on that domain computer.
 - ✓ If the **Automatically install Agents when computer is discovered** checkbox in the **Agent Deployment** (page 48) tab is checked, then agents will be installed automatically to selected computers of this OU/container as soon as the domain computers are rebooted. If this same checkbox is not checked, you must deploy agents manually by selecting the **machine ID template** (page 70) account created for a domain computer in the **Computers** (page 57) page, then clicking the **Deploy Agent** button on the same page. The domain computer must still be rebooted to complete the agent installation.
 - Optionally checking the **Automatically assign portal access to portal candidates** means you also want to designate these computers as **portal candidate machines** (page 30).
 - Optionally checking the **Include new Computers** checkbox means you want to *include* new computers added to this OU/container. They will be assigned the same **Discovery** policy you have previously configured for selected computers in this OU/container.
4. Check one or more computers in the list and click **Save**.
 - The dialog closes and the count in the **Selected Computers** column is updated with the number of machines included in the computer policy you just set.
 - The **Probe Status** displays  **Activated** and the **Computers/Contacts Status** displays  **Modified** because the policy changes just made have not yet been applied.



Note: You do not need to **Apply Changes** until all **Policies** tabs have been configured. Clicking the **Apply Changes** button on any tab applies **Discovery** policy changes for all tabs at the same time.

Configuring Contact Policies

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.



1. Click the **Discovery > Domains > Domain Watch > OU/Containers** (page 49).
 - Use this tab to specify which domain contacts you want to create a staff record for in the VSA. A domain **contact** contains contact information similar to information defined for a user, but a contact has no domain logon privileges.
 - Each OU/container in this tab is identified by its canonical name. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
 - Additional columns show counts for the computers and contacts selected and available in each OU/container.
2. Select a OU/container that shows a count for one or more contacts.

Note: Sort this tab by clicking the **Sort Descending** option in the **Total Contacts** column heading. This ensures any OU/containers with contact counts greater than zero are listed first.

3. Select the **Contacts Policy** button.
 - The dialog box lists all the available contacts of the OU/container you can *include* (page 69) in selected policies.
 - Entering a checkbox next to a contact in this dialog means you want to create a VSA staff record for that domain contact.
 - Optionally checking the **Include new Contacts** checkbox means you want to *include* new contacts added to this OU/container. VSA staff records will be created for these new contacts as they are discovered.
4. Check one or more contacts in the list and click **Save**.
 - The dialog closes and the count in the **Selected Contacts** column is updated with the number of contacts included in the contact policy you just set.
 - The **Probe Status** displays  **Activated** and the **Computers/Contacts Status** displays  **Modified** because the policy changes just made have not yet been applied.

Note: You do not need to **Apply Changes** until all **Policies** tabs have been configured. Clicking the **Apply Changes** button on any tab applies **Discovery** policy changes for all tabs at the same time.

Configuring Computer Policies

1. Click the Discovery > Domains > Domain Watch > Policies > **Computers** (page 50).
 - Use this tab to select *individual* domain computers you want to install a Kaseya agent on. This tab has precedence over policies set on the **OU/Containers** tab.
 - Each computer in this tab is identified by its canonical name. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
2. Select the **Computers Policy** button.
 - Set the computer policy for the selected machine to **Include** or **Do Not Include**.
 - Optionally set the **Computer Machine Group Override** drop-down list. This specifies the machine group to use when an agent is installed on this computer.
3. Click **Save**.
 - The **Probe Status** displays  **Activated** and the **Policy Status** displays  **Modified** because the policy changes just made have not yet been applied.

Note: You do not need to **Apply Changes** until all **Policies** tabs have been configured. Clicking the **Apply Changes** button on any tab applies **Discovery** policy changes for all tabs at the same time.

Configuring Group Policies

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.




1. Click the Discovery > Domains > Domain Watch > Policies > **Groups** (page 51) tab.
 - **Discovery** user policies enable users to logon to the VSA or to **Portal Access** (page 30) using their domain credentials.
 - Each domain credential can be applied to *only one* of two kinds of VSA logons:

- ✓ **VSA user logons** - These logons are used by VSA administrators.
 - ✓ **Portal Access logons** - These logons are used by machine users who want to access their own machines remotely.
 - User groups are simply called "groups" in an Active Directory domain. Each group in this tab is identified by its canonical name. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
 - An additional column shows a count for the number of users in each group.
2. Select a group that shows a count for one or more users.
 - The same member can be a member of multiple groups in an Active Directory domain.

Note: Sort this tab by clicking the **Sort Descending** option in the **Total Users** column heading. This ensures any groups with user counts greater than zero that don't yet have policies assigned are listed near the top of the tab.

3. Select the **Configure Group Policy** button.
 - The **Group Policy** dialog displays, listing the **Member Users** in this group.
4. Select a **Member Group Policy**.
 - Each user group in **Discovery** can be assigned one of three different VSA logon policies. These policies are applied to all users belonging to the group. They cannot be applied to individual users within a group.
 - ✓ **Do Not Include Users** - Do not create VSA user logons or Portal Access logons for domain users listed in this user group.
 - ✓ **Create Staff Members** - Creates a staff member record. These users can be assigned Portal Access to a machine *manually*.

Note: The user can only be manually assigned the **Portal Access** user of a machine—using the **Users & Portal Users** (page 61) page—if the user was the last user logged on to that machine. The list of eligible machines are listed in the **Last Logged-onto Machines** field in the lower panel of this same page.

- ✓ **Create Staff and make Auto Portal Candidates** - Designates domain users in this user group as Portal Access candidates. See **Making Portal Access Candidates** (page 30) for details.
 - ✓ **Create VSA Users** - Creates VSA user logons for domain users listed in this user group.
- Since each domain user can belong to multiple domain user groups, a domain user is assigned the **highest ranking VSA logon policy** assigned to any user group the domain user is a member of.
- ✓ **Create VSA Users** outranks **Create Staff and make Auto Portal Candidates**
 - ✓ **Create Staff and make Auto Portal Candidates** outranks **Create Staff Members**
 - ✓ **Create Staff Members** outranks **Do Not Include Users**
5. If **Create VSA Users** is selected:
 - **Role Lookup** - Select the role these users will use.
 - **Scope Lookup** - Select the scope these users will use.
 - If a scope with the same name as the organization does not already exist, a  displays to the right of the **Scope Lookup** drop-down list of the **User Policy** dialog. Clicking the  icon enables you to create a new scope that has the same name as the organization associated with the domain. Once the scope is created the  no longer displays to the right of the

Scope Lookup drop-down list and text at the top of the dialog indicates the default scope already exists.

- If the same user is assigned to multiple groups, and different roles and scopes are assigned to each group, then when the user logs on to the VSA, these roles and scopes will be available in the roles/scope selector in the upper-right corner of the VSA window.

Note: Roles/scope assignments using the **Groups** tab and **Users** tab can be modified and reapplied multiple times. Successive changes will cause roles and scopes to *accumulate, rather than be replaced*. **Discovery** never removes records in the VSA.

6. Click **Save** to close this dialog.
 - The dialog closes and the policy you selected displays in the **Users Policy** column.
7. If you've already configured **Discovery** policies for computers and contacts, click the **Apply Changes** button.

Note: You do not need to **Apply Changes** until all **Policies** tabs have been configured. Clicking the **Apply Changes** button on any tab applies **Discovery** policy changes for all tabs at the same time..

Note: See **Supported Domain Logon Formats** (page 32).

Configuring User Policies




1. Click the **Discovery > Domains > Domain Watch > Policies > Users** (page 51) tab.
 - **Discovery** user policies enable users to logon to the VSA or to **Portal Access** (page 30) using their domain credentials.
 - Each domain credential can be applied to *only one* of two kinds of VSA logons:
 - ✓ **VSA user logons** - These logons are used by VSA administrators.
 - ✓ **Portal Access logons** - These logons are used by machine users who want to access their own machines remotely.
 - User groups are simply called "groups" in an Active Directory domain. Each group in this tab is identified by its canonical name. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
 - An additional column shows a count for the number of users in each group.
2. Select a user.
3. Select the **Configure Users Policy** button.
 - The **Users Policy** dialog displays.
4. Select a **Member User Policy**.
 - Each domain user in **Discovery** can be assigned one of three different VSA logon policies.
 - ✓ **Do Not Include Users** - Do not create VSA user logons or Portal Access logons for domain users listed in this user group.
 - ✓ **Create Staff Members** - Creates a staff member record. These users can be assigned Portal Access to a machine *manually*.

Note: The user can only be manually assigned the **Portal Access** user of a machine—using the **Users & Portal Users** (page 61) page—if the user was the last user logged on to that machine. The list of eligible machines are listed in the **Last Logged-onto Machines** field in the lower panel of this same page.

- ✓ **Create Staff and make Auto Portal Candidates** - Designates domain users in this user group as Portal Access candidates. See **Making Portal Access Candidates** (page 30) for details.

- ✓ **Create VSA Users** - Creates VSA user logons for domain users listed in this user group.

5. If **Create VSA Users** is selected:

- **Role Lookup** - Select the role these users will use.
- **Scope Lookup** - Select the scope these users will use.
- If a scope with the same name as the organization does not already exist, a  displays to the right of the **Scope Lookup** drop-down list of the **User Policy** dialog. Clicking the  icon enables you to create a new scope that has the same name as the organization associated with the domain. Once the scope is created the  no longer displays to the right of the **Scope Lookup** drop-down list and text at the top of the dialog indicates the default scope already exists.
- If the same user is assigned to multiple groups, and different roles and scopes are assigned to each group, then when the user logs on to the VSA, these roles and scopes will be available in the roles/scope selector in the upper-right corner of the VSA window.

Note: Roles/scope assignments using the **Groups** tab and **Users** tab can be modified and reapplied multiple times. Successive changes will cause roles and scopes to *accumulate, rather than be replaced*. **Discovery** never removes records in the VSA.

6. Click **Save** to close this dialog.

- The dialog closes and the policy you selected displays in the **Users Policy** column.

7. If you have already defined policies for other tabs, click the **Apply Changes** button.

Note: You do not need to **Apply Changes** until all **Policies** tabs have been configured. Clicking the **Apply Changes** button on any tab applies **Discovery** policy changes for all tabs at the same time.

Note: See **Supported Domain Logon Formats** (page 32).

Configuring Alerting Profiles

Note: The **Alerting Profiles** tab only displays if the **Directory Services** feature set (page 26) is enabled.

1. Click the **Discovery > Domains > Domain Watch > Alerting Profiles** (page 55) tab.
2. Enable all probe alerts.

Warning: The **Discovery** probe accumulates domain *changes* in real time. If the connection between the **Discovery** probe and a domain is lost for a period of time, the probe has no way to recover those changes. To ensure domain changes are not lost forever, set **probe alerts** (page 35) and schedule a recurring **full synchronization** (page 33). *If a probe alert is triggered, consider running a full synchronization immediately.*

3. Enable selected domain alerts.

- If agents are deployed automatically using the **Automatically install Agents when computer is discovered** checkbox in **Agent Deployment** (page 48), you do not need to be notified about the discovery of new computers. If agents are not installed automatically, *you do need to be notified* about newly discovered computers.
- Enable alarms and email notification for the creation, and deletion of organizational units, containers, groups and users. You may need to review **Discovery** policies after creating or deleting one of these objects.

Configuring Schedule and Status

1. Click the Discovery > Domains > Domain Watch > **Schedule and Status** (page 56) tab.
2. Enable full synchronization on a weekly basis.

Warning: The **Discovery** probe accumulates domain *changes* in real time. If the connection between the **Discovery** probe and a domain is lost for a period of time, the probe has no way to recover those changes. To ensure domain changes are not lost forever, set **probe alerts** (page 35) and schedule a recurring **full synchronization** (page 33). *If a probe alert is triggered, consider running a full synchronization immediately.*

Removing a Domain from Discovery Management

If you wish to remove a domain from **Discovery** management, consider deleting the following types of domain generated records from the VSA:

- Optionally delete any domain-generated machine ID template records using Agent > **Delete** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#541.htm>). These are typically identified as belonging to the organization associated with the domain in **Discovery**.
- Optionally delete domain-generated VSA users using System > **Users** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4576.htm>). Each domain-generated VSA username is prefixed with the name of the domain, using the following format:
`domain/username`.
- Optionally delete domain-generated Portal Access user logons using the Agent > **Portal Access** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#438.htm>) page.
- Optionally delete the organization associated with the domain using System > Orgs/Groups/Depts/Staff > **Manage** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4017.htm>).
 - An organization cannot be deleted if machine ID accounts are members of that organization.
 - For machine ID accounts you want to keep, use Agent > **Change Group** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#545.htm>) to move machine ID accounts to a machine group in another organization.
 - For machine ID accounts you don't want to keep, use Agent > **Delete** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#541.htm>) to uninstall the agents and delete the machine ID accounts.
- If you elect to keep the organization associated with the domain, optionally delete the staff records created for domain contacts in the organization, using the System > Orgs/Groups/Depts/Staff > Manage > **Staff** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#7018.htm>) tab.
- It is possible a dedicated scope was created using the Discovery > Domain > **User Policies** (page 51) tab. This dedicated scope is initially assigned the same name as the organization associated with the domain. Optionally delete this dedicated scope.

Uninstalling Discovery

Note: Before uninstalling the **Discovery** module, review **Removing a Domain from Discovery Management** (page 44).

1. Deactivate and detach the organization

2. Uninstall the probe from the agent.
3. Uninstall the **Discovery** module from the Kaseya Server.

Domain Watch

Discovery > Domains > Domain Watch

The **Domain Watch** page configures the integration of **Discovery** with Active Directory domains. Configuration features include:

- Installing **Discovery** probes that monitor a domain.
- Activating and scheduling the synchronization of data between **Discovery** and the domain.
- Applying **Discovery** policies for:
 - The deployment of agents.
 - The creation of VSA users, Portal Access users and staff records.
- Setting **Discovery** alerts.
- Displaying the status of the **Discovery** configuration.

Information about a domain selected in the upper panel of the **Domain Watch** page is organized into the following tabs in the lower panel. *Configure a selected domain in the tab order presented, from left to right.*

1. **Probe Deployment** (page 46)
2. **Agent Deploy Policy** (page 48)
3. **OU/Containers** (page 49)
4. **User Policies** (page 51)
5. **Alert Policies** (page 55)
6. **Schedule and Status** (page 56)

Upper Panel

Actions




- **Refresh** - Refreshes the entire page.

Column Headings

- **Domain Name** - The name of the Active Directory domain.
- **Domain Guid** - The unique identifier in the VSA for this domain.
- **Org ID** - The unique identifier of an **organization** (page 71) in the VSA.
- **Org Name** - The VSA friendly name of the organization.
- **Probe Status**
 - ⊖ - Un-installed - A probe is not installed for this domain.
 - ⦿ - Processing - The probe executing a user request.
 - ⦿ - Installed - The probe is installed and harvesting has been completed.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies are not modified.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies are modified but have not yet been applied.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies are modified and applied.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies have been modified but not yet been applied for at least three synchronization intervals. The **Discovery** administrator may have forgotten to apply the modified policies.

❗ - Attention or Offline - The probe has encountered a problem that may require user attention. Because the probe's attention status may self-correct, the attention status does not necessarily correspond to a warning alert or error alert. If offline, the domain machine is unavailable.

Note: **Discovery** pages are not auto-refreshed. Click the **Refresh** button to ensure the latest **Probe Status** displays.

- **Computers/Contacts / User Policies Status** - The policies of both tabs can be in one of 3 states.
 -  - Original - **Discovery** policies have not yet been configured.
 -  - Modified - **Discovery** policies have been configured but not yet applied. After clicking the **Apply Changes** button, this icon remains unchanged until the harvest has been completed.
 -  - Applied - **Discovery** policies have been applied.
- **Last Probe Agent Check-in** - The latest date/time the probe agent checked in.
- **Last Probe Response** - The last response returned by the probe agent.
- **Last Status Message** - The last status message returned by the probe agent.

Probe Deployment

Discovery > Domains > Domain Watch > Probe Deployment tab

The **Probe Deployment** tab configures the probe agent for a selected domain. All domain computers with a Kaseya agent installed on them display in the lower panel.

Discovery communicates with an Active Directory domain using a **probe agent**. The probe uses the industry standard LDAP protocol to safely and securely communicate with the domain. Each probe agent must be a member of the domain it monitors. Probe deployment installs the extra functionality an agent requires to act as a probe.








Initially you may only see a single domain computer with a Kaseya agent installed on it displayed in the lower pane. As agents are automatically installed on other domain computers using **Discovery** policies, these domain computers will all be displayed in the lower pane.

For more information see:

- **Configuring Probe Deployment** (page 36).

Lower Panel

Header Fields

- **Probe Status**
 -  - Un-installed - A probe is not installed for this domain.
 -  - Processing - The probe executing a user request.
 -  - Installed - The probe is installed and harvesting has been completed.
 -  - Activated - The probe is monitoring the domain. **Discovery** policies are not modified.
 -  - Activated - The probe is monitoring the domain. **Discovery** policies are modified but have not yet been applied.
 -  - Activated - The probe is monitoring the domain. **Discovery** policies are modified and applied.
 -  - Activated - The probe is monitoring the domain. **Discovery** policies have been modified but not yet been applied for at least three synchronization intervals. The **Discovery** administrator may have forgotten to apply the modified policies.
 - ❗ - Attention or Offline - The probe has encountered a problem that may require user attention. Because the probe's attention status may self-correct, the attention status does not necessarily correspond to a warning alert or error alert. If offline, the domain machine is unavailable.

Note: **Discovery** pages are not auto-refreshed. Click the **Refresh** button to ensure the latest **Probe Status** displays.

- **Domain Name** - The name of the Active Directory domain.
- **Administrator User Name** - The administrator name of the credential used to log into the Active Directory domain.

Actions

- **Install** - Installs the probe. After the install, the association with the organization cannot be changed without deactivating the probe and detaching the probe. This prevents creating duplicate users, staff and computer records in multiple organizations.
 - **Domain Name** - The probe machine is a member of this domain.
 - **Administrator User Name** - The probe machine uses this administrator username to access the domain controller.
 - **Administrator Password / Confirm Password** - The administrator password.
 - **Filter String** - Filters the scan performed by the probe machine. Useful for large domains. Use distinguished name notation. For example, `CN=Users,DC=myDomain,DC=com`
 - **VSA Organization** - The VSA organization associated with the selected domain.
- **Uninstall** - Uninstalls the probe.

Note: Before uninstalling the **Discovery** module from the VSA be sure to deactivate and detach the organization, then uninstall the probe agent.

Activation and **Deactivation** buttons only display if the **Directory Services Feature Set** (page 26) is installed.

- **Activate** - Enables incremental discovery and synchronization of domain controller data. Activating a probe on a domain computer *deactivates* any other probe on that same domain, without loss of data.

Note: Activation is not required to run full sync on the Domain Watch > **Schedule and Status** (page 56) tab.

- **Deactivate** - Disables incremental synchronization updates from the domain. If reactivation occurs later, a "changes gap" may exist in the data collected by the probe, requiring the scheduling of a full synchronization to correct.
- **Uninstall and Detach Org** - Uninstalls the probe and detaches the organization. This may be necessary if the wrong organization was selected for the domain initially. See **Uninstalling the Probe and Detaching the Org** (page 35) for issues to consider before *uninstalling* a probe.

Column Headings

- **Domain Name** - The name of the Active Directory domain.
- **Machine.Group ID** - The machine ID.groupID.orgID of the machine in the VSA.
- **DNS Computer Name** - The fully qualified domain name of the computer.
- **Computer Name** - The local host name of the computer.
- **Agent Guid** - A unique identifier for a machine ID.group ID account and its corresponding agent.
- **IP Address** - The IP address of the computer.
- **Domain GUID** - The unique GUID identifying this domain in **Discovery**.
- **Host Type** - `Domain Server` or `Domain Member`.
- **Status** - The probe status of the machine.
- **Last Agent Check-in** - The last time the agent for this machine is checked in.
- **Organization** - The VSA **organization** (page 71) this computer is a member of.

Agent Deployment

Discovery > Domains > Domain Watch > Agent Deployment tab

The **Agent Deployment** tab sets agent deployment policies for a selected domain.

For more information see:

- **Configuring Agent Deployment** (page 38).

Header Fields

- **Probe Status**

- ⊖ - Un-installed - A probe is not installed for this domain.
- ⦿ - Processing - The probe executing a user request.
- ⦿ - Installed - The probe is installed and harvesting has been completed.
- ✔ - Activated - The probe is monitoring the domain. **Discovery** policies are not modified.
- ✔ - Activated - The probe is monitoring the domain. **Discovery** policies are modified but have not yet been applied.
- ✔ - Activated - The probe is monitoring the domain. **Discovery** policies are modified and applied.
- ✔ - Activated - The probe is monitoring the domain. **Discovery** policies have been modified but not yet been applied for at least three synchronization intervals. The **Discovery** administrator may have forgotten to apply the modified policies.
- ⚠ - Attention or Offline - The probe has encountered a problem that may require user attention. Because the probe's attention status may self-correct, the attention status does not necessarily correspond to a warning alert or error alert. If offline, the domain machine is unavailable.

Note: **Discovery** pages are not auto-refreshed. Click the **Refresh** button to ensure the latest **Probe Status** displays.

Actions

- **Edit** - Edit agent deployment policies.
 - **Automatically install Agents when computer is discovered** - Check this checkbox. When policies are applied, agents are automatically installed on computers that are members of those policies. *The computers must be rebooted to complete the installation of the Kaseya agents.*

Note: Kaseya recommends leaving this checkbox *blank* until all **Policies** (page 48) are configured for a domain for the first time.

- **Allow Agents to be installed on Directory Server** - Leave this checkbox blank. If checked, agents will also be installed on the system hosting the Active Directory domain.
- **Default Package** - Select a Windows agent install package to use with the selected domain.

Note: Domain Watch does not support installing agents on Linux or Apple machines. Agents must be installed on domain Linux machines and domain Apple machines outside of Domain Watch. See **How Agents are Installed Using Discovery** (page 28).

Policies

Discovery > Domains > Domain Watch > Policies tab

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.

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OU/Containers

Discovery > Domains > Domain Watch > Policies > OU/Containers tab

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.

The **OU/Containers** tab sets **Discovery** policies by domain OU or container for both computers and contacts.

Related topics:

- [Configuring OU/Container Policies](#) (page 38)
- [Configuring Contact Policies](#) (page 39)
- [Setting Discovery Policies for Contacts](#) (page 27)




Setting Policies by Individual Computer

You can set policies by individual computer using the **Computers** (page 50) tab. Policies set by computer have precedence over policies set by OU/Container.

Included and Excluded

Once a probe is installed, **Discovery** is configured by setting selected domain folders and items to **included** or **excluded**. **Discovery** policies provide IT automation—such as installing agents or creating users—only for *included* folders and items. **Discovery** only harvests detailed information for *included* folders and items, minimizing the amount of data required to maintain synchronization with the domain.

Header Fields

- **Policy Status**
 -  - Original - **Discovery** policies have not yet been configured.
 -  - Modified - **Discovery** policies have been configured but not yet applied. After clicking the **Apply Changes** button, this icon remains unchanged until the harvest has been completed.
 -  - Applied - **Discovery** policies have been applied.
- **Last Full Sync** - Date/time of last full synchronization for this domain.
- **Last Incremental Sync** - Date/time of last incremental synchronization of all outstanding changes for this domain.




Actions

- **Computers Policy** - Sets the **Discovery** computer policy for *included* computers in an OU/container.
 - **Include new Computers** - If checked, the policy assigned this OU/container is applied to newly discovered computers.
 - **Automatically assign portal access to portal candidates** - If checked, these computers are automatically assigned to be **portal access candidate** (page 30) machines.
 - **Computer Machine Group Override** - Specifies the machine group to assign when an agent is installed. Use `Directory Default` specifies the default machine group for the organization associated with the domain using the **Probe Deployment** (page 46) tab.
- **Contacts Policy** - Sets the **Discovery** contact policy for included contacts in an OU/container.

Domain Watch

- **Include new Contacts** - If checked, the policy assigned this OU/container is applied to newly discovered contacts.
- **Apply Changes** - Applies **Discovery** policy changes pending on all **Policies** tabs.

Column Headings

- **Type**
 -  - Domain
 -  - Container
 -  - Organizational Unit
- **Container/Org Unit** - The canonical name of a container or organizational unit in the Active Directory domain. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Include New Computers** - If checked, the policy assigned this OU/container is applied to newly discovered computers.
- **Selected Computers** - Represents the number of machines that have are *included* in this OU/container. Initially this number is zero.
- **Total Computers** - Represents the total number of machines that are members of this OU/container.
- **Machine Group Override** - Specifies the machine group to assign when an agent is installed. Use **Directory Default** specifies the default machine group for the organization associated with the domain using the **Probe Deployment** (page 46) tab.
- **Auto Portal Computers** - If checked, these computers are automatically assigned to be **portal access candidate** (page 30) machines.
- **Incl New Contacts** - If checked, the policy assigned this OU/container is applied to newly discovered contacts.
- **Selected Contacts** - The number of contacts that are *included* in this OU/container. Initially this number is zero.
- **Total Contacts** - The total number of contacts that are members of this OU/container.

Computers

Discovery > Domains > Domain Watch > Policies > Computers tab

The **Computers** tab sets **Discovery** policies by individual computer.

For more information see:

- **Configuring Computer Policies** (page 40)
- **Setting Discovery Policies for Computers** (page 27)

Setting Policies by OU/Container




You can set policies for computers and contacts by *OU/Container* using the **OU/Containers** (page 49) tab. Policies set by individual computer on the **Computer tab** have precedence over computer policies set on the **OU/Container tab**.

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.

Included and Excluded

Once a probe is installed, **Discovery** is configured by setting selected domain folders and items to **included** or **excluded**. **Discovery** policies provide IT automation—such as installing agents or creating users—only for *included* folders and items. **Discovery** only harvests detailed information for *included* folders and items, minimizing the amount of data required to maintain synchronization with the domain.




Header Fields

- **Policy Status**
 -  - Original - **Discovery** policies have not yet been configured.
 -  - Modified - **Discovery** policies have been configured but not yet applied. After clicking the **Apply Changes** button, this icon remains unchanged until the harvest has been completed.
 -  - Applied - **Discovery** policies have been applied.
- **Last Full Sync** - Date/time of last full synchronization for this domain.
- **Last Incremental Sync** - Date/time of last incremental synchronization of all outstanding changes for this domain.

Actions

- **Configure Computer Policy** - Sets the **Discovery** computer policy for included computers in an OU/container.
 - **Computer Policy** - `Include` or `Do Not Include`
 - **Computer Machine Group Override** - Specifies the machine group to assign when an agent is installed. `Use Default` specifies the default machine group for the organization associated with the domain using the **Probe Deployment** (page 46) tab.
- **Apply Changes** - Applies **Discovery** policy changes pending on all **Policies** tabs.

Column Headings

- **Type**
 -  - Domain
 -  - Container
 -  - Organizational Unit
- **Container/Org Unit** - The canonical name of a container or organizational unit in the Active Directory domain. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Computer Name** - The canonical name of the computer in an Active Directory domain.
- **Included** - If checked, this machine can be installed with an agent using **Discovery**.
- **Machine Group Override** - Specifies the machine group to assign when an agent is installed. `Use Default` specifies the default machine group for the organization associated with the domain using the **Probe Deployment** (page 46) tab.

Groups

Discovery > Domains > Domain Watch > Policies > Groups tab

Note: The OU/Containers tab and Groups tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.

The **Groups** tab sets **Discovery** policies by (user) groups for a selected domain.

For more information see:

- **Configuring Group Policies** (page 40)
- **Managing Remote Portal Access** (page 26)
- **Enabling Portal Access in Discovery** (page 30)
- **Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords** (page 31)
- **Making Changes to Discovery Managed User Logons** (page 32)
- **Supported Domain Logon Formats** (page 32)




Setting Policies by Individual User

You can set policies by individual user using the **Users** (page 53) tab.

Included and Excluded




Once a probe is installed, **Discovery** is configured by setting selected domain folders and items to **included** or **excluded**. **Discovery** policies provide IT automation—such as installing agents or creating users—only for *included* folders and items. **Discovery** only harvests detailed information for *included* folders and items, minimizing the amount of data required to maintain synchronization with the domain.

Header Fields

- **Policy Status**
 -  - Original - **Discovery** policies have not yet been configured.
 -  - Modified - **Discovery** policies have been configured but not yet applied. After clicking the **Apply Changes** button, this icon remains unchanged until the harvest has been completed.
 -  - Applied - **Discovery** policies have been applied.
- **Last Full Sync** - Date/time of last full synchronization for this domain.
- **Last Incremental Sync** - Date/time of last incremental synchronization of all outstanding changes for this domain.

Actions


- **Configure Group Policy** - Includes selected users as either VSA users or Portal Access candidates. When this dialog opens, the **Member User Policy** drop-down list provides the following options:
 - **Do Not Include Users** - Do not create VSA user logons or Portal Access logons for domain users listed in this user group.
 - **Create Staff Members** - Creates a staff member record. These users can be assigned Portal Access to a machine *manually*.

*Note: The user can only be manually assigned the Portal Access user of a machine—using the **Users & Portal Users** (page 61) page—if the user was the last user logged on to that machine. The list of eligible machines are listed in the **Last Logged-onto Machines** field in the lower panel of this same page.*
 - **Create Staff and make Auto Portal Candidates** - Designates domain users in this user group as Portal Access candidates. See **Making Portal Access Candidates** (page 30) for details.
 - **Create VSA Users** - Creates VSA user logons for domain users listed in this user group.
 - ✓ Role Lookup
 - ✓ Scope Lookup
 - If a scope with the same name as the organization does not already exist, a  displays to the right of the **Scope Lookup** drop-down list of the **User Policy** dialog. Clicking the  icon enables you to create a new scope that has the same name as the organization associated with the domain. Once the scope is created the  no longer displays to the right of the **Scope Lookup** drop-down list and text at the top of the dialog indicates the default scope already exists.
 - If the same user is assigned to multiple groups, and different roles and scopes are assigned to each group, then when the user logs on to the VSA, these roles and scopes will be available in the roles/scope selector in the upper-right corner of the VSA window.

*Note: Roles/scope assignments using the **Groups** tab and **Users** tab can be modified and reapplied multiple times. Successive changes will cause roles and scopes to *accumulate*, rather than be replaced. **Discovery** never removes records in the VSA.*

- **User Department Override** - Specifies the department to assign a newly created user. Use Directory Default specifies the default department for the organization associated with the domain using the **Probe Deployment** (page 46) tab.
- **Apply Changes** - Applies **Discovery** policy changes pending on all **Policies** tabs.

Column Headings

- **Type** -  - Group
- **Group Name** - A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Users Policy**
 - **Do Not Include Users** - Do not create VSA user logons or Portal Access logons for domain users listed in this user group.
 - **Create Staff Members** - Creates a staff member record.
 - **Create Staff and make Auto Portal Candidates** - Designates domain users in this user group as Portal Access candidates. See **Making Portal Access Candidates** (page 30) for details.
 - **Create VSA Users** - Creates VSA user logons for domain users listed in this user group.
- **Total Users** - The total number of users in this group.
 - **Role Policy** - The VSA role to assign to newly created VSA users if **Users Policy** is **Create VSA Users**.
 - **Scope Policy** - The VSA scope to assign to newly created VSA users if **Users Policy** is **Create VSA Users**.
- **Dept Override** - Specifies the department to assign a newly created user. Use Directory Default specifies the default department for the organization associated with the domain using the **Probe Deployment** (page 46) tab.

Users

Discovery > Domains > Domain Watch > Policies > Users tab

The **Users** tab sets **Discovery** policies by individual user.

Related topics:

- **Setting Discovery Policies for Users** (page 28)
- **Configuring User Policies** (page 42)

Setting Policies by (User) Group

You can set policies for users by (user) group using the **Groups** (page 51) tab.

Note: The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled. Policies for contacts are configured using the **OU/Containers** tab.



Included and Excluded

Once a probe is installed, **Discovery** is configured by setting selected domain folders and items to **included** or **excluded**. **Discovery** policies provide IT automation—such as installing agents or creating users—only for *included* folders and items. **Discovery** only harvests detailed information for *included* folders and items, minimizing the amount of data required to maintain synchronization with the domain.

Header Fields

- **Policy Status**
 -  - Original - **Discovery** policies have not yet been configured.

Domain Watch

-  - Modified - **Discovery** policies have been configured but not yet applied. After clicking the **Apply Changes** button, this icon remains unchanged until the harvest has been completed.
-  - Applied - **Discovery** policies have been applied.

- **Last Full Sync** - Date/time of last full synchronization for this domain.
- **Last Incremental Sync** - Date/time of last incremental synchronization of all outstanding changes for this domain.

Actions

- **Configure Users Policy** - Includes the selected user as either a VSA user or Portal Access candidate. When this dialog opens, the **Member User Policy** drop-down list provides the following options:
 - **Do Not Include Users** - Do not create a VSA user logon or Portal Access logon for this domain user.
 - **Create Staff Members** - Creates a staff member record. This user can be assigned Portal Access to a machine *manually*.

Note: *The user can only be manually assigned the Portal Access user of a machine—using the **Users & Portal Users** (page 61) page—if the user was the last user logged on to that machine. The list of eligible machines are listed in the **Last Logged-onto Machines** field in the lower panel of this same page.*

 - **Create Staff and make Auto Portal Candidates** - Designates a domain user in this user group as a Portal Access candidate. See **Making Portal Access Candidates** (page 30) for details.
 - **Create VSA Users** - Creates a VSA user logon for the selected domain user.
 - ✓ Role Lookup
 - ✓ Scope Lookup
 - **User Department Override** - Specifies the department to assign a newly created user. Use Directory Default specifies the default department for the organization associated with the domain using the **Probe Deployment** (page 46) tab.
- **Apply Changes** - Applies **Discovery** policies changes for both the **Policies > Computers** tab and the **User Policies** tab.

Column Headings

- **User Name** - A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Policy**
 - **Do Not Include Users** - Do not create a VSA user logon or Portal Access logon for this domain user.
 - **Create Staff Members** - Creates a staff member record.
 - **Create Staff and make Auto Portal Candidates** - Designates this domain user a Portal Access candidate. See **Making Portal Access Candidates** (page 30) for details.
 - **Create VSA Users** - Creates a VSA user logon for this domain user.
- **Groups Member Of** - The groups this user is a member of.
 - **Role Policy** - The VSA role to assign the newly created VSA user if **Policy** is **Create VSA Users**.
 - **Scope Policy** - The VSA scope to assign the newly created VSA user if **Policy** is **Create VSA Users**.

- **Dept Override** - Specifies the department to assign a newly created user. Use **Directory Default** specifies the default department for the organization associated with the domain using the **Probe Deployment** (page 46) tab.

Alerting Profiles

Discovery > Domains > Domain Watch > Alert Policies tab

Note: The Alerting Profiles tab only displays if the **Directory Services feature set** (page 26) is enabled.

The **Alerting Profiles** tab sets **Discovery** alert policies for a selected domain.

For more information see:

- **Probe Alerts and Domain Alerts** (page 35)
- **Configuring Alert Policies** (page 43)

Actions

- **Configure** - Edits probe and domain alert policy settings displayed on this tab.








Probe Alerts Policy

Displays enabled/disabled *probe* alert policy settings.

- Alarm on Warning
- Alarm on Failure
- Ticket on Warning
- Ticket on Failure
- Email on Warning
- Email on Failure
- Email Addresses (for warning)
- Email Addresses (for failure)

Domain Alerts Policy

Displays enabled/disabled *domain* alert policy settings.

- Type / Object Type
 -  - Computer
 -  - Contact
 -  - Container
 -  - Domain
 -  - Group
 -  - Organizational Unit
 -  - User
- Alarm on create
- Alarm on change
- Alarm on delete
- Ticket on create
- Ticket on change
- Ticket on delete
- Email on create
- Email on change
- Email on delete
- Email Addresses

Schedule and Status

Discovery > Domains > Domain Watch > Schedule and Status tab

The **Schedule and Status** tab schedules full synchronizations for a selected domain. It also displays the status of incremental synchronizations and full synchronizations.

For more information see:

- **Synchronization** (page 33)

Actions

- **Schedule Full Synchronization** - Schedules a full synchronization once or periodically. Each type of recurrence—Once, Minutes, Hourly, Daily, Weekly, Monthly, Yearly—displays additional options appropriate for that type of recurrence. Periodic scheduling includes setting start and end dates for the recurrence. Options include:
 - **Distribution Window** - Reschedules the task to a randomly selected time no later than the number of periods specified, to spread network traffic and server loading. For example, if the scheduled time for a task is 3:00 AM, and the distribution window is 1 hour, then the task schedule will be changed to run at a random time between 3:00 AM and 4:00 AM.
 - **Skip if offline** - If checked and the machine is offline, skip and run the next scheduled period and time. If blank and the machine is offline, run the task as soon as the machine is online again.
 - **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-LAN or vPro and another managed system on the same LAN.
 - **Exclude the following time range - Applies only to the distribution window.** If checked, specifies a time range to exclude the scheduling of a task within the distribution window. Specifying a time range outside of the distribution window is ignored by the scheduler.
- **Cancel Full Synchronization** - Cancels the full synchronization schedule.

Header Fields

- **Probe Status**
 - ⊖ - Un-installed - A probe is not installed for this domain.
 - ⦿ - Processing - The probe executing a user request.
 - ⦿ - Installed - The probe is installed and harvesting has been completed.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies are not modified.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies are modified but have not yet been applied.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies are modified and applied.
 - ⦿ - Activated - The probe is monitoring the domain. **Discovery** policies have been modified but not yet been applied for at least three synchronization intervals. The **Discovery** administrator may have forgotten to apply the modified policies.
 - ⦿ - Attention or Offline - The probe has encountered a problem that may require user attention. Because the probe's attention status may self-correct, the attention status does not necessarily correspond to a warning alert or error alert. If offline, the domain machine is unavailable.

Note: **Discovery** pages are not auto-refreshed. Click the **Refresh** button to ensure the latest **Probe Status** displays.

- **Computers/Contacts Status** and **User Policies Status**
 - ⦿ - Original - **Discovery** policies have not yet been configured.
 - ⦿ - Modified - **Discovery** policies have been configured but not yet applied. After clicking

the **Apply Changes** button, this icon remains unchanged until the harvest has been completed.

 - Applied - **Discovery** policies have been applied.

General Information

- **Domain Name** - The name of the Active Directory domain.
- **Incr. Sync. Interval (mins)** - The incremental synchronization interval for this domain. The synchronization interval is set when a probe is activated using the **Probe Deployment** (page 46) tab. This option is only available if the **The Directory Services Feature Set** (page 26) is installed.
- **Administrator User Name** - The administrator name of the credential used to log into the Active Directory domain.

Synchronization History

- **Recent Agent Check-in** - The most recent check-in of any agent on the domain.
- **Active Agent Check-in** - Date/time the probe agent of this domain last checked in.
- **Last Probe Request** - Date/time a synchronization request was last sent to the probe of this domain.
- **Last Script Exec.** - Date/time a script was last executed for this domain.
- **Last Full Preview** - Date/time a preview synchronization was last executed for this domain. A preview is only performed when a probe is installed.
- **Last Full Sync** - Date/time of last full synchronization for this domain.
- **Last Incremental Sync** - Date/time of last incremental synchronization of all outstanding changes for this domain.
- **Last Script Status** - Status of last **Discovery** script executed for this domain. For example, `Then/Else Success` or `Then/Else failure in step N.`


Scheduled Synchronization

- **Full Synchronization Period** - The scheduled pattern for full synchronization for this domain. May be once or recurring.
- **Next Full Synchronization** - The next scheduled full synchronization for this domain.

Computers

Discovery > Domains > Computers

The **Computers** page lists **machine ID / group ID / organization ID** (page 70) accounts created using applied **Discovery** computer policies, for all domains monitored by **Discovery** probes.

Newly created machine ID accounts initially display as "empty" machine ID template accounts—identified with a  check-in icon—meaning there is no corresponding agent for this machine ID account.

Changes made to **included** (page 69) computers update their corresponding VSA machine ID accounts at the next synchronization.

For more information see:


- **How Agents are Installed Using Discovery** (page 28)
- **How Machine ID Accounts are Created in Discovery** (page 29)
- **How Machine Moves in Domains are Reflected in Discovery** (page 30)

Upper Panel

Actions

- **Deploy Agent** - If an agent has not yet been deployed for a created machine ID account, you can manually deploy the agent using this page.

Domain Watch

- **Synchronize Machines** - If an agent already exists on a managed machine in a different machine group, then **Discovery** creates an "empty" **machine ID template** (page 70) account—identified with a  check-in icon—and no agent ever checks in. The new machine ID template account displays a **machine.ID / group ID / organization ID** (page 70) based on the computer's canonical name in the Active Directory domain. *You can merge these duplicate accounts.* The existing, active agent account adopts the name of the new machine ID template account, then the new machine ID template account is deleted. No data is lost by the merge and the machine ID account now matches its location in the domain hierarchy.
- **Refresh** - Refreshes the page.

Column Headings

- **Machine.Group ID** - A unique **machine ID / group ID / organization ID** (page 70) name for a machine in the VSA.
- **Domain** - The name of the Active Directory domain.
- **Duplicate Exists** - If checked, a duplicate VSA machine ID account exists for this domain computer.
- **Duplicate Machine.Group ID** - The name of a duplicate machine.group ID for this same machine.
- **Agent Deployed** - If checked, an agent has been deployed on this computer.
- **Install Package** - The agent install package selected for this computer's domain. The agent install package for a domain is specified using the **Agent Deployment** (page 48) page.
- **OS** - The operating system of the computer.
- **Auto Portal** - A domain user is automatically assigned to be the **Portal Access** (page 30) user of domain machine if **Auto Portal** is enabled for *both* the domain user and domain computer.
- **Canonical Name** - A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Agent Deploy Date** - The date/time an agent deployment was attempted.
- **Deploy Status** - The status of the agent deployment. Review error messages using this column.

Lower Panel

The lower panel displays detailed information about a row selected in the upper panel.

VSA Agent Settings

- **Machine ID** - A unique **machine ID / group ID / organization ID** (page 70) name for a machine in the VSA.
- **Agent Deployment Package** - The agent install package selected for this computer's domain.

Status

- **Operating System** - The operating system of the computer.
- **Last Reboot** - The last date/time the computer was rebooted.
- **Created in AD** - The date/time the computer was added to the Active Directory domain.
- **Last Modified in AD** - The date/time the computer record in the Active Directory domain was last modified.
- **Last Logged-on User ID** - The user ID of the last logon to the computer.
- **Last Logged-on User Name** - The user name of the last logon to the computer.

Directory Server Details

Describes detailed information about the computer in the domain.

- **Computer Name** - The name of the computer.
- **Domain Name** - The name of the Active Directory domain.

- **Canonical Name** - A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Distinguished Name** - A **distinguished name** provides the same information as a canonical name, formatted as a series of attributes, sequenced in reverse order from the canonical name. CN = Common name or container. OU = Organization unit. DC = Domain component.
- **DNS Host Name** - The fully qualified domain name of the computer.
- **DC Type** - **Domain Server** or **Domain Member**.
- **Site** - The name of a geographical location, comprising one or more subnets. A local area network (LAN).
- **Description** - A one line description of the computer.
- **Location** - The site/subnet of the computer. Used to locate nearby printers and other resources.
- **Primary Group** - A user or computer is associated with a **primary group** for POSIX compliance, based on UNIX. For Active Directory domain computers, the default primary group is **Domain Computers**.

Contacts

Discovery > Domains > Contacts

Note: Policies for contacts are configured using the **OU/Containers** tab. The **OU/Containers** tab and **Groups** tab only display if the **Directory Services feature set** (page 26) is enabled.

The **Contacts** page lists staff records created using applied **Discovery** contact policies, for all domains monitored by **Discovery** probes.

Changes made to **included** (page 69) domain contacts update their corresponding VSA staff records at the next synchronization.

Upper Panel

Actions

- **Refresh** - Refreshes the page.

Column Headings

- **Contact** - The canonical name for the domain contact. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Staff** - The full name of the staff record created in the VSA.
- **VSA Org** - The VSA organization of the staff record.
- **VSA Dept** - The VSA department of the staff record.
- **Email** - The email of the staff record.
- **Telephone No** - The phone number of the staff record.
- **Mobile** - The mobile phone number of the staff record.

Lower Panel

The lower panel displays detailed information harvested from the domain about a contact selected in the upper panel.

General

Domain Watch

- **First Name** - The first name of the contact.
- **Last Name** - The last name of the contact.
- **Display Name** - The full name of the contact.
- **Description** - A description of the contact.
- **Office** - The contact's office location.
- **Telephone Number** - The primary phone number of the contact.
- **Email** - The email of the contact.

Address

The address of the contact.

- **Street**
- **P.O. Box**
- **City**
- **State/Province**
- **Zip/Postal Code**
- **Country/Region**

Telephones

The phones numbers and notes for the contact.

- **Home**
- **Pager**
- **Mobile**
- **Fax**
- **IP Phone**
- **Notes**

Account

- **Common Name** - The common name of the contact.
- **Canonical Name** - The canonical name of the contact. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Domain Name** - The name of the Active Directory domain.
- **Distinguished Name** - A **distinguished name** provides the same information as a canonical name, formatted as a series of attributes, sequenced in reverse order from the canonical name. CN = Common name or container. OU = Organization unit. DC = Domain component.
- **Description** - A description of the contact.
- **Created in AD** - The date/time the contact record was created in the Active Directory domain.
- **Last Modified in AD** - The date/time the contact record was last modified in the Active Directory domain.

Organization

- **Job Title** - The job title of the contact.
- **Department** - The department the contact is a member of.
- **Company** - The company the contact is a member of.
- **Manager** - The manager of this contact.
- **Direct Reports** - The users or contacts that report to this contact.

Users & Portal Users

Discovery > Domains > Users and Portal Access

The **Users & Portal Access** lists VSA users and Portal Access candidates created using applied **Discovery** group policies, for all domains monitored by **Discovery** probes.

Changes made **included** (page 69) domain (user) groups update their corresponding VSA user and Portal Access candidate records at the next synchronization.

For more information see:

- **Setting Discovery Policies for Users** (page 28)
- **Enabling Portal Access in Discovery** (page 30)
- **Enabling/Disabling Domain Users Accounts or Resetting Domain User Password** (page 31)
- **Making Changes to Discovery Managed User Logons** (page 32)
- **Supported Domain Logon Formats** (page 32)

Upper Panel

Actions

- **Disable Account** - Disables a domain user account immediately. Affects VSA logons and Portal Access logons using the same domain logon. This option only displays if the **Directory Services feature set** (page 26) is enabled.
- **Enable Account** - Enables a domain user account immediately. Affects VSA logons and Portal Access logons using the same domain logon. This option only displays if the **Directory Services feature set** (page 26) is enabled.
- **Reset Password** - Resets a domain user password. The effect takes effect at the next logon. Affects VSA logons and Portal Access logons using the same domain logon. This option only displays if the **Directory Services feature set** (page 26) is enabled. Options include:
 - **Unlock Account** - If checked, unlocks a domain user's locked account.
 - **Force Password Change** - If checked, forces the domain user to change the reset password the next time the user logs on to the domain.
- **Assign Portal User** - Manually assigns Portal Access to a domain computer *to* a domain user.
- **Remove Portal Users** - Manually removes Portal Access to a domain computer *from* a domain user.
- **Refresh** - Refreshes the page.

Column Headings

- **Domain Name** - The name of the Active Directory domain.
- **Domain User** - The fully qualified domain name of the user.
- **User Name** - The domain user name.
- **User Logon Name** - The VSA logon name, if this is also a VSA user logon.
- **Enabled** - If checked, the user is enabled in the domain.
- **VSA Org** - The VSA **organization** (page 71) this user is a member of.
- **VSA Dept** - The VSA department this user is a member of.
- **Supervisor** - The VSA supervisor for this staff member.
- **Expires** - The date this account expires.
- **VSA** - If checked, the VSA user can logon to the VSA using his or her domain credential.
- **Portal** - If checked, this domain user is assigned the Portal Access user of the domain machine listed in the **Portal Assignment** column. Unchecked, the user is not assigned to any domain computer as the Portal Access user.
- **Auto Portal** - A domain user is automatically assigned to be the **Portal Access** (page 30) user of a domain machine if **Auto Portal** is enabled for *both* the domain user and domain computer.

Domain Watch

▪ Portal Assignment

- None (will be assigned upon login to an 'Auto Portal' computer) - Auto Portal is enabled for this user.
- None (assign using the 'Assign Portal User' button) - Auto Portal is not enabled for this user, but can be manually assigned to be the Portal Access user of a machine.

Note: *The user can only be manually assigned the Portal Access user of a machine—using the **Users & Portal Users** (page 61) page—if the user was the last user logged on to that machine. The list of eligible machines are listed in the **Last Logged-onto Machines** field in the lower panel of this same page.*

- <machineID> - The domain computer currently assigned to the domain user with Portal Access to that machine.
- VSA User - The user is a VSA user and cannot be assigned as a Portal Access user of a machine.

- **Email** - The email of the domain user.
- **Phone** - The phone of the domain user.
- **City** - The city of the domain user.
- **Country** - The country of the domain user.
- **User Policy** - The policy assigned to the user.

Lower Panel

The lower panel displays detailed information harvested from the domain about a user selected in the upper panel.

User Details

General

- **First Name** - The first name of the user.
- **Last Name** - The last name of the user.
- **Display Name** - The full name of the user.
- **Office** - The user's office location.
- **Telephone Number** - The primary phone number of the user.
- **Email** - The email of the user.
- **View All Tickets** - If checked, the VSA user associated with this staff member can view all **Service Desk** tickets in his or her scope as well as tickets associated with this specific staff member record. If blank, this VSA user can only view **Service Desk** tickets associated with this specific staff member record.
- **Approve All Timesheets** - If checked, this staff member can approve any timesheet. This ensures all timesheets can be approved in a timely manner, if other approvers are temporarily unavailable.
- **Timesheet Approval Pattern** - Specifies the approval pattern required to approve this staff member's timesheets. Approval patterns determine whether the staff member's supervisor, or the supervisor's supervisor, or both, are required to approve the staff member's timesheet.
- **VSA Logon** - If **Yes**, the VSA can logon to the VSA using his or her domain credential.
- **VSA Roles** - The VSA roles assigned to the VSA user.
- **VSA Scopes** - The VSA scopes assigned to the VSA user.

Address

The address of the user.

- **Street**
- **P.O. Box**
- **City**
- **State/Province**
- **Zip/Postal Code**
- **Country/Region**

Telephones

The phones numbers and notes for the user.

- **Home**
- **Pager**
- **Mobile**
- **Fax**
- **IP Phone**
- **Notes**

Last Logged-onto Machines

- **Last Logged-on to (Machines)** - The domain computer the domain user last logged on to. Portal Access to a domain machine can only be assigned to the last machine a domain user has logged on to.

Account

- **User Logon Name** - The domain user's logon name.
- **Account Expires** - The expiration date for the domain account.
- **Common Name** - The common name of the user in the domain.
- **Canonical Name** - The canonical name of the user. A **canonical name** provides the *complete hierarchy of OUs/containers* used to locate folders and items—such as computers, contacts or groups—in a domain, similar in format to the full path name of a file in a disk directory.
- **Domain Name** - The name of the Active Directory domain.
- **Distinguished Name** - A **distinguished name** provides the same information as a canonical name, formatted as a series of attributes, sequenced in reverse order from the canonical name. CN = Common name or container. OU = Organization unit. DC = Domain component.
- **Last Password Change** - The last date the password changed.
- **Last Logon** - The date/time the user last logged on.
- **Last Logoff** - The date/time the user last logged off.
- **Created in AD** - The date/time the user record was created in the Active Directory domain.
- **Last Modified in AD** - The date/time the user record was last modified in the Active Directory domain.

Organization

- **Title** - The job title of the user.
- **Domain Department** - The department the user is a member of.
- **VSA Department** - The department the VSA staff record is a member of.
- **Domain Company** - The company the user is a member of.
- **Supervisor** - The user or contact this user reports to. Called the **Manager** in domain and **Supervisor** in VSA.
- **VSA Org Id** - The VSA identifier of the **organization** (page 71).

Domain Watch

- **VSA Org Name** - The VSA friendly name of the organization.
- **Description** - A description of the domain user account.
- **Direct Reports** - The domain contacts or domain users that report to this domain user.

Portal Access tab

Additional details display in the **Portal Access** tab if the user is a **Portal Access candidate** (page 30).

VSA Portal Settings

These settings are the same as those shown on the Agent > **Portal Access**

(<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#438.htm>) page.

- **Portal Access Enabled** - If **Yes**, the domain user is currently assigned a Portal Access remote logon to a VSA managed machine.
- **User ID** - The Portal Access user ID.
- **Contact Name** - The name for the Portal Access user.
- **Contact Email** - The email for the Portal Access user.
- **Contact Phone** - The phone for the Portal Access user.

Note: The **Change Profile** tab of **Portal Access** is automatically populated with the *name, email and phone number* of the currently logged in **Portal Access candidate**. The submitter fields of new **Service Desk** tickets are populated with the contact information stored in the **Change Profile** tab. This means **Portal Access** users don't have re-enter the same contact information, each time they create a new **Service Desk** ticket.

- **Language Preference** - The Portal Users language preference.
- **Machine Role** - The **machine role** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#4827.htm>) assigned to the Portal Access machine.
- **Show Notes as Tooltip** - If checked, Agent > **Edit Profile** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#256.htm>) notes are included as part of the tooltip that displays whenever the cursor hovers over a machine ID's check-in status icon.
- **Auto Assign Tickets from inbound emails** - If **Yes**, auto assign a ticket to this machine ID if the Ticketing email reader receives an email from the same email address as the Contact Email. Applies when new emails come into the ticketing email reader that do not map into any of the email mappings.

Note: if multiple machine IDs have the same contact email, then only one machine ID can have this checkbox checked.

- **Portal Assignment** - The machine the Portal Access user is assigned to.
- **Last Logged-on to Machine** - The date/time the Portal Access user last logged onto the machine.

VSA Machine Administrator

- **Admin Email** - The email address providing administrator support for this managed machine. Set using the Agent > **Edit Profile** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#256.htm>) page.

Computer Manager from Directory Server

- **Manager** - The domain user this domain user reports to. Called the **Manager** in an Active Directory domain and **Supervisor** in the VSA.
- **Office** - The user's office location.
- The user's address:
 - **Street**

- City
- State/Province
- Country/Region
- **Telephone No.** - The user's phone number.
- **Fax No.** - The user's fax number.

Chapter 3

Administration

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Settings

Discovery > Administration > Settings

The **Settings** page sets options and default values for the entire **Discovery** module.

Discovery Settings

- **Enable automatic network harvest** - If checked, networks are detected and created (harvested) based on at least one agent installed on each network.
- **Interval in minutes for network harvest** - If **Enable automatic network harvest** is checked, the number of minutes between network harvests.
- **Use only online agents in network harvest** - If checked, only online agents are used to harvest networks.
- **Ignore networks that begin with 192.168...** - If checked, private networks starting with 192.168 are not scanned.
- **Ignore networks that begin with 172...** - If checked, private networks starting with 172 are not scanned.
- **Ignore networks that begin with 10...** - If checked, private networks starting with 10 are not scanned.
- **Ignore networks that have a subnet mask of 255.255.255.255** - If checked, single node networks are not scanned, because only one device can exist on the network and that must belong to the agent machine performing the scan.

Alert Defaults

Sets the default values—checked or unchecked—for the **Alerting Profiles tab** (*page 14*).

- **Alarm on new device**
- **Ticket on new device**
- **Email on new device**
- **Alarm on IP change**
- **Ticket on IP change**
- **Email on IP change**

Actions

- **Edit** - Edits settings.

Audit Log

Discovery > Administration > Audit Log

The **Audit Log** page displays a log of **Discovery** module activity by:

- **Event ID**
- **Event Date**
- **Admin**
- **Event Name**
- **Message**

If information has changed or been removed unexpectedly, check this page to determine what events and administrators may have been involved.

This table supports **selectable columns, column sorting, column filtering and flexible columns widths** (<http://help.kaseya.com/webhelp/EN/VSA/7000000/index.asp#6875.htm>).

KDS - Domain Activity

Info Center > Reporting > Reports > KDS - Domain Activity

- Displays only if the **Discovery** add-on module is installed.

The **Domain Activity** report definition generates a report of domain configuration changes visible to **Discovery**.

Configure your report definition using the following parameters:

Time Selection

Filter by date range.

- **Start DateTime**
- **End DateTime**

Activity



Filter by type of object and type of actions performed on those objects.

- **Objects Types** - Computer, Contact, Container, Domain, Group, Organization Unit, User
- **Action Types** - Created, Updated, Deleted

Glossary

Agents

The VSA manages machines by installing a software client called an **agent** on a managed machine. The agent is a system service that does not require the user to be logged on for the agent to function and does not require a reboot for the agent to be installed. The agent is configurable and can be totally invisible to the user. The sole purpose of the agent is to carry out the tasks requested by the VSA user. Once installed:

- An agent icon—for example the  agent icon—displays in the system tray of the managed machine. Agent icons can be custom images or removed altogether.
- Each installed agent is assigned a unique VSA **machine ID / group ID / organization ID** (page 70). Machine IDs can be created automatically at agent install time or individually prior to agent installation.
- Each installed agent uses up one of the available agent licenses purchased by the service provider.
- Agents are typically installed using packages created using Agent > Deploy Agents inside the VSA.
- Multiple agents can be installed on the same machine, each pointing to a different server.
- A check-in icon displays next to each machine ID in the VSA, displaying the overall status of the managed machine. For example, the  check-in icon indicates an agent is online and the user is currently logged on.
- Clicking a check-in icon displays a single machine interface for the managed machine called Live Connect. **Live Connect** provides instant access to comprehensive data and tools you need to work on that one machine.
- Hovering the cursor over a check-in icon displays an agent quick view window immediately. You can launch an agent procedure, view logs or launch **Live Connect** from the agent quick view window.


Contact

A domain **contact** contains contact information similar to information defined for a user, but a contact has no domain logon privileges.

Distinguished Name

A **distinguished name** provides the same information as a canonical name, formatted as a series of attributes, sequenced in reverse order from the canonical name. CN = Common name or container. OU = Organization unit. DC = Domain component.

Duplicate Exists

If an agent already exists on a managed machine in a different machine group, then **Discovery** creates an "empty" **machine ID template** (page 70) account—identified with a  check-in icon—and no agent ever checks in. The new machine ID template account displays a **machine.ID / group ID / organization ID** (page 70) based on the computer's canonical name in the Active Directory domain. *You can merge these duplicate accounts.* The existing, active agent account adopts the name of the new machine ID template account, then the new machine ID template account is deleted. No data is lost by the merge and the machine ID account now matches its location in the domain hierarchy.

Feature Set

A feature set provides advanced, specialized functionality that is typically hidden in the basic module. The basic module must be installed and the feature licensed separately to display feature set options.

Included / Excluded domain Folders and Items

Once a probe is installed, **Discovery** is configured by setting selected domain folders and items to **included** or **excluded**. **Discovery** policies provide IT automation—such as installing agents or creating users—only for *included* folders and items. **Discovery** only harvests detailed information for *included* folders and items, minimizing the amount of data required to maintain synchronization with the domain.

Machine Group

Machines are always defined by **machine group** and machine groups are always defined by organization. You can define multi-level hierarchies of machine groups by identifying a parent machine group for a machine group. You can also move a machine group and all of its associated machines to a different parent machine group within the same organization.

Machine ID / Group ID / Organization ID

Each **agent** (page 69) installed on a managed machine is assigned a unique **machine ID / group ID / organization ID**. All machine IDs belong to a machine group ID and optionally a subgroup ID. All machine group IDs belong to an organization ID. An organization typically represents a single customer account. If an organization is small, it may have only one machine group containing all the machine IDs in that organization. A larger organization may have many machine groups and subgroups, usually organized by location or network. For example, the full identifier for an agent installed on a managed machine could be defined as `jsmith.sales.chicago.acme`. In this case `sales` is a subgroup ID within the `chicago` group ID within the organization ID called `acme`. In some places in the VSA, this hierarchy is displayed in reverse order. Each organization ID has a single default machine group ID called `root`. Group IDs and subgroup IDs are created using the System > Orgs/Group/Depts/Staff > Manage > Machine Groups page.

Machine ID Template

A machine ID template is *a machine ID record without an agent*. Since an agent never checks into a machine ID template account, it is not counted against your total license count. You can create as many machine ID templates as you want without additional cost. When an agent install package is created, the package's settings are typically copied from a selected machine ID template. Machine ID templates are usually created and configured for certain types of machine. Machine type examples include desktops, Autocad, QuickBooks, small business servers, Exchange servers, SQL Servers, etc. **A corresponding install package can be created based on each machine ID template you define.**

- Create machine ID templates using Agent > Create.
- Import a machine ID template using Agent > Import/Export.
- Base an agent install package on a machine ID template using Agent > Deploy Agents.
- Copy *selected* settings from machine ID templates to existing machine ID accounts using Agent > Copy Settings.
- Identify the total number of machine ID template accounts in your VSA using System > Statistics.
- Configure settings for the machine ID template using the standard VSA functions, just as you would a machine ID account with an agent.
- Separate machine ID templates are recommended for Windows, Apple and Linux machines. Alternatively you can create a package that selects the appropriate OS automatically and copy settings from a template that includes an agent procedure that uses OS specific steps.

Machine IDs vs. Agents

When discussing agents it is helpful to distinguish between the **machine ID / group ID / organization ID** (page 70) and the **agent** (page 69). The machine ID / group ID / organization ID is the **account name** for a managed machine in the VSA database. The agent is the client software installed on the managed machine. A one-to-one relationship exists between the agent on a managed machine and its account name on the VSA. Tasks assigned to a machine ID by VSA users direct the agent's actions on the managed machine.

Machine Roles

The **Machine Roles** page creates and deletes machine roles. Machine roles determine what *machine users* see when they use Portal Access—a version of Live Connect—from a machine with an agent. The **Portal Access** window displays when a *machine user double-clicks the agent icon in the system tray of their managed machine*.

Note: The **User Roles** page determines what *VSA users* see when they use Live Connect from within the VSA.

Within the **Machine Roles** page you can select:

- **Members** - Assign or remove machines for a machine role.
- **Access Rights** - Select the access rights for a machine role. Access rights determine the functions a *machine user* can access.
- **Role Types** - Assign or remove role types for a machine role. Currently there is only one machine role type provided and no access rights are restricted.

Managed Machine

A monitored machine with an installed **agent** (page 69) and active **machine ID / group ID** (page 70) account on the Kaseya Server. Each managed machine uses up one agent license.

Org

The VSA supports three different kinds of business relationships:

- **Organizations** - Supports machine groups and manages machines using agents.
- **Customers** - Supports the billing of customers using **Service Billing**.
- **Vendors** - Supports the procurement of materials using **Service Billing**.

The **Org** table is a support table shared by *organizations*, *customers* and *vendors*. Each record in the **Org** table is identified by a unique **orgID**. The **Org** table contains basic information you'd generally need to maintain about any kind of business relationship: mailing address, primary phone number, duns number, yearly revenue, etc. Because the **Org** table is shared, you can easily convert:


- A customer into an organization or vendor.
- A vendor into an organization or customer.
- An organization into a customer or vendor.

Note: **myOrg** is the organization of the service provider using the VSA.

OU/Container

An **organizational unit** (OU) is a container object within Active Directory. An OU/container is used to organize users, groups, computers, and other organizational units. An organizational unit cannot contain objects from other domains.

Portal Access

Portal Access is a Live Connect session initiated by the machine user. The machine user displays the **Portal Access** page by clicking the agent icon  on the system tray of a managed machine. **Portal Access** contains machine user options such as changing the user's contact information, creating or tracking trouble tickets, chatting with VSA users or remote controlling their own machine from another machine. **Portal Access** logons are defined using Agent > Portal Access. The function list the user sees during a **Portal Access** session is determined by the System > Machine Roles page. You can customize **Portal Access** sessions using the System > Customize > Live Connect page. Both the **Live Connect** and **Portal Access** plug-in installers can be pre-installed using the Agent > Update Agent page.

Probe Agent

Discovery communicates with an Active Directory domain using a **probe agent**. The probe uses the industry standard LDAP protocol to safely and securely communicate with the domain. Each probe

Glossary

agent must be a member of the domain it monitors. Probe deployment installs the extra functionality an agent requires to act as a probe.

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