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# Discovery

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**User Guide**

Version R95

English

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# Contents



# Contents

Discovery Overview .....	i
Discovery Module Minimum Requirements.....	iii
Summary .....	iii
Discovered Devices.....	v
Topology Map .....	vii
Standard SNMP Monitoring .....	xi
Networks.....	xiii
Getting Started with Network Discovery .....	xiii
View Assets .....	xiv
Scanning Networks with SNMP Enabled.....	xiv
Scanning Networks with vPro Enabled .....	xv
By Network .....	xvi
Edit Network .....	xvii
Scan Schedules Dialog .....	xx
Importing Networks .....	xx
Network Probe tab .....	xxi
Scan Schedules tab.....	xxii
Agent Deployment tab.....	xxii
Alerting Profiles tab.....	xxiii
Asset Promotion tab.....	xxiii
Scan Results .....	xxiv
By Agent .....	xxvi
Domains.....	xxviii
Getting Started with Domain Watch .....	xxviii
Managing a Synchronized Security Model.....	xxix
Managing Multiple Domains .....	xxix
Managing Remote Portal Access .....	xxix
Configuration .....	xxx
Configuration Prerequisites .....	xxx
Configuring Probe Deployment.....	xxx
Configuring Agent Deployment.....	xxxii
Configuring OU/Container Policies.....	xxxii
Configuring Contact Policies .....	xxxiii
Configuring Computer Policies.....	xxxiv
Configuring Group Policies .....	xxxiv
Configuring User Policies .....	xxxv
Configuring Alerting Profiles.....	xxxvi
Applying Changes .....	xxxvi
Reviewing Domain Watch Results .....	xxxvii

Configuring Activation .....	xxxvii
Configuring Full Synchronization .....	xxxviii
Domain Watch .....	xxxviii
Probe Deployment .....	xxxix
Agent Deployment .....	xli
Policies .....	xlii
OU/Containers .....	xlii
Computers .....	xliv
Groups .....	xlv
Users .....	xlvii
Alerting Profiles .....	xlx
Schedule and Status.....	l
Computers .....	li
Contacts .....	liii
Users & Portal Access .....	lv
More Information .....	lix
Setting Discovery Policies for Computers .....	lix
Setting Discovery Policies for Contacts.....	lix
Setting Discovery Policies for Users .....	lx
Licensing .....	lx
The Directory Services Feature Set .....	lx
How Agents are Installed Using Discovery.....	lxi
How Machine ID Accounts are Created in Discovery .....	lxii
How Machine Moves in Domains are Reflected in Discovery .....	lxii
Enabling Remote Portal Access in Discovery .....	lxiii
Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords .....	lxiv
Making Changes to Discovery Managed User Logons.....	lxiv
Supported Domain Logon Formats .....	lxv
Synchronization .....	lxvi
Activation / Deactivation .....	lxvii
Uninstalling the Probe and Detaching the Org .....	lxvii
Probe Alerts and Domain Alerts.....	lxvii
Removing a Domain from Discovery Management.....	lxviii
Uninstalling Discovery .....	lxviii
Domain Watch Default Settings .....	lxviii
Administration .....	lxix
Settings.....	lxix
Audit Log .....	lxx
Glossary .....	71
Index .....	75

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# Discovery Overview

**Discovery** discovers computers and devices on individual networks or entire domains.

## Lan Watch

*Discover Network Devices and Deploy Agents*

- **Deploy an agent** - To discover devices on a network, deploy at least one Agent to computer on that network.
- **Select a Network** - Under Lan Watch, a list of discoverable networks is presented based on Agents that are deployed. Choose a network from the list manually create a new network.
- **Edit the Lan Watch Settings** - Associate the network with an organization.
  - Select a probe machine.
  - Tailor the IP Scan Range
  - Enable the SNMP Discovery
  - Enable Vpro Discovery
  - Enable Alerting
  - Configure Asset Tracking
- **Set Agent Deployment Policies** - Set policies to automatically deploy agents discovered computers. Select an agent deployment package and credentials.
- **Run LAN watch, Deploy Agent, View Results** - Run a scan now or schedule it on recurring basis. View the summary page to monitor scan progress. View a list of all discovered devices and drill in see details each devices. If deployment policies are set the LAN watch scan will deploy agents discovered devices.
- **Select a Network** - Under Lan Watch, a list of discoverable networks is presented based on Agents that are deployed. Choose a network from the list or manually create a new network.

## Domain Watch

*Discover and Sync Active Directory Domains*

- **Deploy an Agent** - To work with an active directory domain deploy at least one Agent to a computer on that domain. The system will automatically detect the name of the domain for each agent.
- **Select a Domain** - Under Domain Watch, a list of domains is presented based on the agents that are deployed. Choose a domain from list.
- **Deploy and Activate a Domain Probe** - Deploy a probe to a domain computer. Supply domain credentials and activate the probe to discover domain computers, users and contacts.
- **Set Agent Deployment Policies** - Set a policy to automatically deploy agents to domain computers. Agents can be deployed.
- **Set Computer Policy** - Set policies to create machine accounts that correspond to domain computers, and specify which computers are eligible for the end user portal.
- **Set Contact Policy** - Set policies to create staff records that correspond to domain contacts. Staff records can be referenced on tickets and elsewhere.
- **Set User & Portal Policy** - Set policies to create users and staff records that correspond to domain users. Users can be allowed to login to the VSA using their domain credentials, or they can be granted access to the end user portal.
- **Apply Policies** - Click the 'Apply' button to sync users, contacts, and computers. Agents are deployed to domain computers during this process. While the Domain Watch probe is active, new

users, contacts and computers can be automatically detected as they are added to the domain in the future (configurable by the policy).

- **Set Alerts** - While the probe is activated, Domain Watch detects changes in AD domain and can send notifications when AD objects are added, changed or deleted. These notifications can be configured for computers, users, contacts groups, containers, OUs, and domains.
- **Schedule Periodic Re-Sync** - A re-sync can be used to detect any domain changes that may have occurred during period when the Domain Watch probe was deactivated or disconnected. Schedule a periodic resync to ensure that no domain changes are missed.

## User and Portals Access (Domain)

*Review users, review and assign portal access, reset passwords, enable/disable accounts .*

- **View User Accounts and Staff Records** - View the domain user accounts and see which accounts have been configured for VSA login (these users can login the VSA using their domain credentials).Leverage the grid filters to quickly find specific users.
- **Review and Assign Portal Access** - View the domain users that can access the end user portal .Portal access can be assigned automatically by policy, or manually on a user-by-user basis.
- **Reset Passwords**- Passwords can be reset for any domain user directly from VSA console (No need to remote control to the domain server).
- **Enable & Disable User Accounts** - Domain user accounts can be enabled and disabled directly from the VSA console (no need to remote control to the domain server). Disabling an account prevent the user from logging in to the domain and also the VSA.

## Network Discovery

- Discovers computers and devices on individual networks.
- Deploys agents to discovered machines.
- Identifies SNMP-enabled devices that can be monitored using the Monitor > Assign SNMP page.
- Identifies vPro-enabled machines that can be managed using the **vPro** module.
- Integrates with **Network Monitor**. Agent-less devices can be monitored by **Network Monitor**.
- Enables a device to be "promoted" to a managed **asset** (*page xiv*). An Audit > **View Assets** page provides a consolidated view of all computers and devices managed by the VSA, regardless of the method of discovery.
- Generates alerts for first-time discovery of new device names and new IP addresses.

## Domain Discovery

- Automatically discovers AD domains that can be synced with the VSA.
- Deploys agents to discovered domain machines.
- 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.
- Resets a domain password or enable/disable a domain user from the VSA.
- Uses the industry standard LDAP protocol to safely and securely communicate with Active Directory domains.

**Note:** See **Discovery Module Requirements** (*page iii*).

Functions	Description
Overview	Displays the workflow of discovering computers and devices by network and by domain.



<b>By Agent</b> (page xxvi)	Discovers devices on the same network as a selected "probe" machine.
<b>By Network</b> (page xvi)	Discovers computers and devices by network.
<b>Discovered Devices</b> (page v)	Displays discovered computers and devices in table format.
Discovered Devices - Tile View	Displays discovered computers and devices in tile format.
<b>Domain Watch</b> (page xxviii)	Configures the integration of Discovery with Active Directory domains.
<b>Computers</b> (page li)	Manages machine ID accounts created, based on applied Discovery computer policies, for all domains monitored by Discovery probes.
<b>Contacts</b> (page liii)	Manages staff records created, based on applied Discovery contact policies, for all domains monitored by Discovery probes.
<b>Users &amp; Portal Users</b> (page lv)	Manages VSA users and Portal Access candidates created, based on applied Discovery group policies, for all domains monitored by Discovery probes.
<b>Settings</b> (page lxix)	Sets options and default values that apply to the entire Discovery module.
<b>Audit Log</b> (page lxx)	Displays a log of Discovery module activities.

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## Discovery Module Minimum Requirements

### Kaseya Server

- The Discovery R95 module requires VSA R95.

### 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

- Microsoft Windows Server 2012, 2012 R2, 2016, 2019 (64-bit versions only)
- Microsoft Windows 8, 8.1, 10 (64-bit versions only)

### Domain Probe

- Microsoft Windows Server 2012, 2012 R2, 2016, 2019
- Microsoft Windows 8, 8.1, 10

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## Summary

<b>Discovery Overview</b> .....	<b>i</b>
<b>Discovery Module Minimum Requirements</b> .....	<b>iii</b>
<b>Summary</b> .....	<b>iii</b>
<b>Discovered Devices</b> .....	<b>v</b>
<b>Topology Map</b> .....	<b>vii</b>
<b>Standard SNMP Monitoring</b> .....	<b>xi</b>
<b>Networks</b> .....	<b>xiii</b>

Getting Started with Network Discovery .....	xiii
View Assets .....	xiv
Scanning Networks with SNMP Enabled.....	xiv
Scanning Networks with vPro Enabled .....	xv
By Network .....	xvi
Edit Network .....	xvii
Scan Schedules Dialog .....	xx
Importing Networks .....	xx
Network Probe tab .....	xxi
Scan Schedules tab.....	xxii
Agent Deployment tab.....	xxii
Alerting Profiles tab.....	xxiii
Asset Promotion tab.....	xxiii
Scan Results .....	xxiv
By Agent .....	xxvi
Domains.....	xxviii
Getting Started with Domain Watch .....	xxviii
Managing a Synchronized Security Model.....	xxix
Managing Multiple Domains .....	xxix
Managing Remote Portal Access .....	xxix
Configuration .....	xxx
Configuration Prerequisites .....	xxx
Configuring Probe Deployment.....	xxx
Configuring Agent Deployment.....	xxxii
Configuring OU/Container Policies.....	xxxii
Configuring Contact Policies .....	xxxiii
Configuring Computer Policies.....	xxxiv
Configuring Group Policies .....	xxxiv
Configuring User Policies.....	xxxv
Configuring Alerting Profiles.....	xxxvi
Applying Changes .....	xxxvi
Reviewing Domain Watch Results .....	xxxvii
Configuring Activation .....	xxxvii
Configuring Full Synchronization .....	xxxviii
Domain Watch.....	xxxviii
Probe Deployment .....	xxxix
Agent Deployment .....	xli
Policies .....	xlii
Alerting Profiles .....	xlix
Schedule and Status.....	l
Computers.....	li
Contacts .....	liii
Users & Portal Access .....	lv
More Information .....	lix
Setting Discovery Policies for Computers.....	lix

Setting Discovery Policies for Contacts.....	lix
Setting Discovery Policies for Users .....	lx
Licensing .....	lx
The Directory Services Feature Set .....	lx
How Agents are Installed Using Discovery.....	lxi
How Machine ID Accounts are Created in Discovery .....	lxii
How Machine Moves in Domains are Reflected in Discovery .....	lxii
Enabling Remote Portal Access in Discovery .....	lxiii
Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords .....	lxiv
Making Changes to Discovery Managed User Logons.....	lxiv
Supported Domain Logon Formats .....	lxv
Synchronization .....	lxvi
Activation / Deactivation .....	lxvii
Uninstalling the Probe and Detaching the Org.....	lxvii
Probe Alerts and Domain Alerts.....	lxvii
Removing a Domain from Discovery Management.....	lxviii
Uninstalling Discovery .....	lxviii
Domain Watch Default Settings .....	lxviii
Administration .....	lxix
Settings.....	lxix
Audit Log .....	lxx
Glossary .....	71
Index .....	75

### In This Section

Discovered Devices	v
Topology Map	vii

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## Discovered Devices

### Discovery > Networks > Discovered Devices

The **Discovered Devices** page shows computers and devices discovered using **By Agent** (page xxvi) and **By Network** (page xvi). 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 an agent. The scan results shown on this page is *cumulative* from all probe machines. A record is not removed unless you delete it.




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/9050000/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 xvii) 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 xxii).
- **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 username format.
- **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/9050000/index.asp#33842.htm>) window. Click to launch **Live Connect** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#33845.htm>).
  -  /  - If enabled, this non-agent device has been **promoted to an asset** (page xxiii).
- **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 a **network scan** (page xvi).
- **Network** - The network that discovered this device.

**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 "discovered" as part of a network 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 xxii).
- **vPro Machine** - If checked, the machine is a vPro-enabled machine. See the **Edit Network** (page xvii) for more information about vPro-enabled machines.

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## Topology Map

Discovery > Networks > Topology Map

The Topology Map is an interactive map that displays information about networks, devices within a network, types of devices, device status and how they are connected. All connections between devices are determined by data collected using the SNMP protocol.

To enable the ability to interact with the topology map, navigate to Discovery > Networks > by Network, and create (or edit) a network using the steps below:

1. Provide a **name** for the network.
2. Select the **agent machine** to use for scanning with this network.
3. Specify **the range of IP addresses** to be included in the network scan.
4. Assign an organization to a network.
5. **SNMP tab** - enable SNMP and provide SNMP community string to establish connectivity on the map. Note: for topology to be properly created, SNMP must be enabled for all network devices (and printers) and a common SNMP community string must be used for all SNMP-enabled devices.
6. (Optional) Select **Asset Status Check** and specify **Asset Status Check Interval** in order to check automatically if the asset is online or offline.
7. (Optional) **AD tab** – put credentials in order to connect to your active directory. Note: providing Active Directory credentials will enhance the accuracy of the network topology visualization.
8. Make sure that all necessary fields are filled and click Save.
9. In order to see the topology map of the network, perform a scan of the network. If you are creating a new network, click **Save & Scan**, or select network from grid on By Network page and click **Scan Now**. It will take some time for VSA to gather information about all the devices within the network, and the topology map will be displayed in Topology Map tab as a result of the network scan.

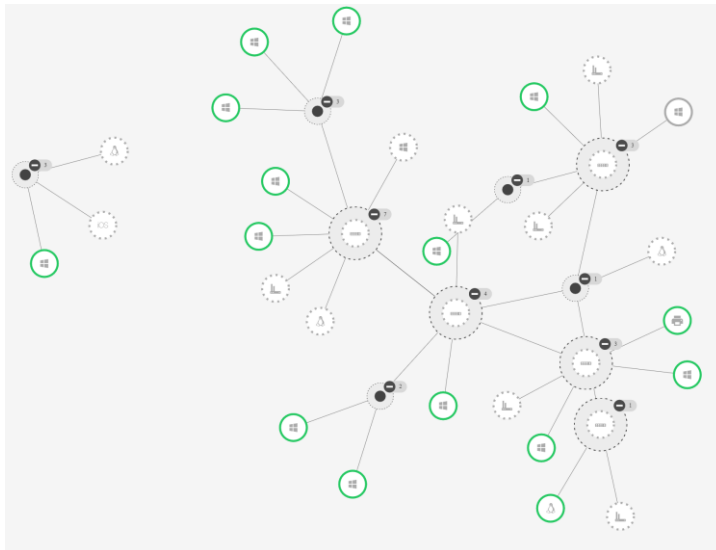
**Note:** If you have networks, that were set up before, please, check their settings (related to steps 1-9 documented above) and re-run a scan to enable the Topology Map.

## Topology Map View

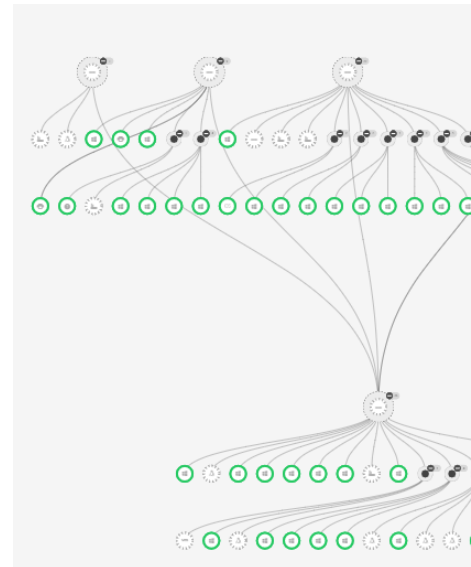
- Topology map has two variants of view: cluster and tree. You can switch from one to the other view clicking on Cluster View/Tree View button in the bottom right.




- In the bottom of the map there is time and date of last network scan.
- Devices displayed on the map are equivalent to those that are displayed in Discovery > Networks > Discovered Devices tab.
- There may be 2 hubs displayed on the topology map. One hub contains the current network devices and the second, historical data. Once discovered, a device will always be displayed even if it is not found during the next scans.
- Relationships between devices and their connection gateway/access points will be shown on networks where **SNMP is enabled** <http://help.kaseya.com/WebHelp/EN/KDIS/9050000/#11052.htm> with valid community string. Otherwise devices will be connected to a "hub" node for each network.

**Cluster View**



**Tree View**



- Collapse All/Expand All- collapse or expand topology map nodes using this button in the bottom right.
- Zoom In/Zoom Out - change the size of the topology map using these buttons on the right.
-  15 Collapse one unit and hide devices.
-  15 Expand one unit and show devices.
-  Alarm Summary badge - alarm counts on agent and non-agent devices that currently have open alarms. Clicking on it, user is redirected to **Alarm Summary** <http://help.kaseya.com/webhelp/EN/vsa/9050000/#41666.htm> page, filtered specifically for the selected node.

## Filter




Use filters on the top of the topology map to highlight specific nodes and for quick navigation on the map.

Filters:

- **Network** - The displayed topology is in the context of an individual network scan.
- **Machine Group** - Select or enter machine group ID, and map will display devices which have the selected machine group ID.
- **Name** - Enter or select the name of the device to show it on the map.
- **Type** - Select or enter device type that you want to highlight on the map.
- **IP Address** - Select or enter the IP address. Map will display those units, that have this IP address.
- **MAC Address** - Select or enter the MAC address of device that you want to display on the map.

## Device Status

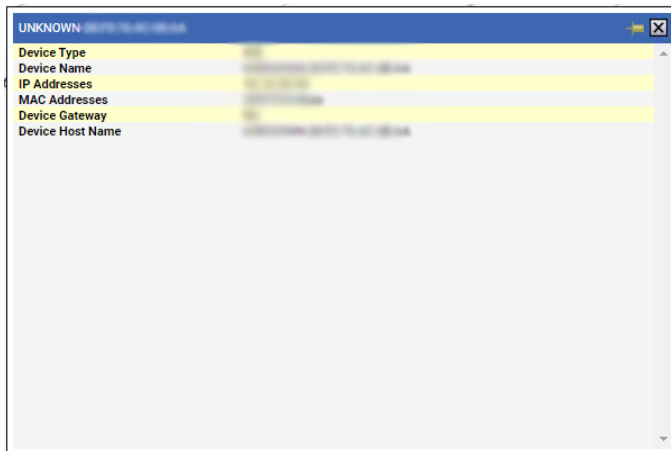
Statuses of the devices are marked as circles of different colors around units. Devices have the following statuses:

Status	Definition
	Device is online, can be an asset or an agent.
	Device is offline.
	Status is unknown and the device is neither an asset nor an agent.

## Device Details

To view details about a specific device, click on the unit circle. The information about the device will be displayed in Quick View window.

- Device Quick View window - Shows information about the device, that is not an asset and not an agent.



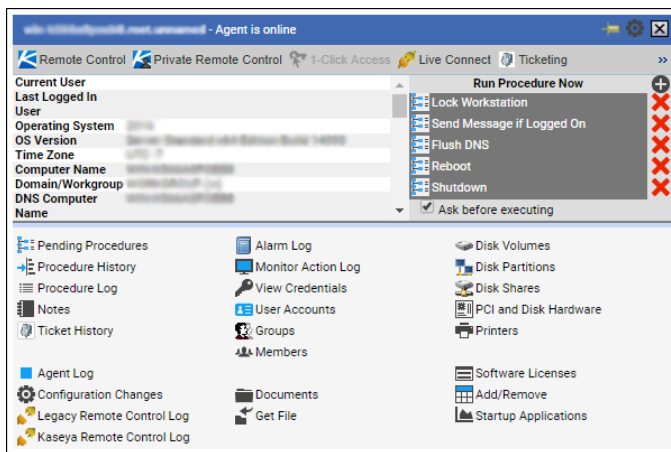
- Asset Quick View window - Shows information about the asset.
  - Scan Results - Displays the latest scan results for a network.
  - View Credentials - View credentials of this asset.
  - Check Status - Manually check status of the asset.



- Alarm Summary - Redirects to the **Alarm Summary** <http://help.kaseya.com/webhelp/EN/vsa/9050000/#41666.htm> page, filtered specifically for the selected asset.



- Agent Quick View window - Shows agent Quick View with information about the agent.



## Standard SNMP Monitoring

Discovery > Networks > By Network > New or Edit

Discovery > Networks > Topology Map > Enable Monitoring

Standard SNMP Monitoring provides an ability to deploy simple SNMP monitoring to network infrastructure (*non-agent capable assets*) and printers.

To deploy simple SNMP monitoring for the new or existing Network:

1. Navigate to Discovery > Networks > By Network > New or Edit > SNMP tab;
2. Check the **Enable SNMP** checkbox;
3. Check the **Enable Standard Monitoring** checkbox;
4. Check **ATSE** action:
  - **Create Alarm** - If checked, creates an alarm.

- **Create Ticket** - If checked, creates a ticket.
- **Email Recipients** - If checked, notifies email recipients specified in Email Addresses.

The screenshot shows the 'New Network' dialog box with the 'SNMP' tab selected. The 'Enable SNMP' checkbox is checked. Below it, there are two empty text boxes for 'Community String' and 'Confirm Community String'. The 'Enable Standard Monitoring' checkbox is also checked. Under the 'Alert Types' section, three checkboxes are visible: 'Create Alarm', 'Create Ticket', and 'Email Recipients (Comma separate multiple addresses)', all of which are checked. At the bottom right, there are buttons for 'Save' and 'Save & Scan'.

5. Click **Save**.
6. If you are creating a new network, click **Save & Scan**. Once the scan is finished it will automatically enable all SNMP-enabled devices for the selected Network.

**Note:** For the existing network, changes will take place at the time of the next scan and only will be applied to newly discovered devices.

### To deploy simple SNMP monitoring for an individual device within the discovered Network with SNMP devices:

1. Navigate to Discovery > Networks > Topology Map;
2. Right-click on SNMP node, select Enable Monitoring/Edit Monitoring;
3. Check **ATSE** action:
  - **Create Alarm** - If checked, creates an alarm.
  - **Create Ticket** - If checked, creates a ticket.
  - **Email Recipients** - If checked, notifies email recipients specified in Email Addresses.

4. Click **Save**.
5. Right-click on the SNMP node, then click Disable Monitoring to disable monitoring on this SNMP device.

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# Networks

## In This Section

Getting Started with Network Discovery	xiii
By Network	xvi
By Agent	xxvi

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## Getting Started with Network Discovery

The **By Network** and **By Agent** pages discover all computers and devices on networks that have an IP address. Any agent machine can be selected as the "probe" machine for its own network. Discovered devices can be workstations and servers without agents, SNMP devices and vPro-enabled machines. Discovered devices display on the following pages:

- **Discovered Devices** (page v)
- Discovered Devices - Tile View

### Scanning Networks by Agent

*This is the fastest way to scan a new network.*

1. On the **By Agent** page, select a machine ID. Both Windows and Apple agent machines can serve as a probe agent.
2. Click the **Scan Now** button to scan a network immediately.
  - Optionally click the **Schedule Scan** to schedule a scan and enter additional options. For **Schedule Scan**, leave the network scan range blank. It will be populated automatically, based on the subnet defined for the probe agent machine.
3. Enter a network name if the selected agent hasn't scanned a network before.
4. Click the **Scan** button to start the scan.
  - View discovered devices on the **Discovered Devices** page.
  - Visit the **By Network** page to edit networks before you scan again.

### Scanning Networks by Network

1. On the **By Network** page select **New** or **Edit**. Enter a new network or change the name of an existing network.
2. If an agent has not already been selected for the network, select an agent. Both Windows and Apple agent machines can serve as a probe agent.
3. Leave the network scan range blank. It will be populated automatically, based on the subnet defined for the probe agent machine.
4. Optionally search for SNMP devices and vPro enabled machines by configuring these tabs.
5. Select **Save** —instead of **Save & Scan**—so you can configure additional settings.
  - Optionally deploy agents to discovered computers by policy, using the **Agent Deployment Policy** tab in the lower panel.
  - Optionally create alerts for newly discovered types of computers and devices, using the **Alert Profiles** tab in the lower panel.

- Optionally set asset policies for discovered computers and devices, using the [Asset Promotion](#) page.
- 6. Run a scan immediately using the [Scan Now](#) button or schedule a scan on a recurring basis using the [Schedule Scan](#) button.
  - View discovered devices on the [Discovered Devices](#) page.

## Deploy Agents

The [Discovered Devices](#) page shows computers and devices discovered using [By Agent](#) (page *xxvi*) and [By Network](#) (page *xvi*). 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 an agent. The scan results shown on this page is *cumulative* from all probe machines. A record is not removed unless you delete it.

## View Assets

The Audit > [View Assets](#) page is populated by [Discovery](#) scans of networks and domains. The [View Assets](#) (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#10649.htm>) 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](#) (page *v*) 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.

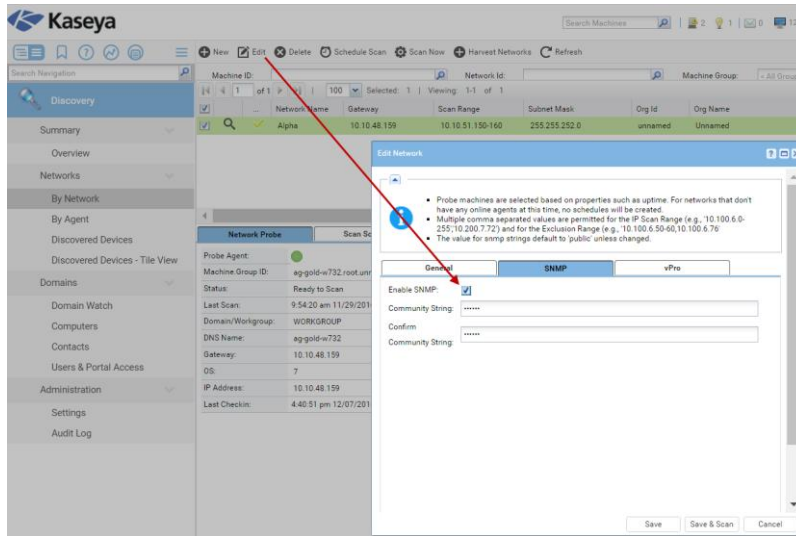
All managed assets are assigned a machine group and organization. [Scoping rules](#) (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#4578.htm>) and [view filtering](#) (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#214.htm>) features within the VSA depend on this assignment.

- 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.

## Scanning Networks with SNMP Enabled

[By Network](#) or [By Agent](#) in the [Discovery](#) module uses an existing VSA [agent](#) (page *71*) on a managed machine to periodically scan the local area network for any and all new devices connected to that network since the last time a network scan ran.

*The discovery machine issues SNMP requests to the SNMP devices it discovers on that same network. So you must run a network scan with SNMP-enabled to have access to SNMP-enabled devices using the VSA.*



To include SNMP devices in the a network scan:

1. Select a machine ID on the same network 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 **Save & 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.

## Scanning Networks with vPro Enabled

The Audit > View Assets > **vPro** tab displays hardware information about vPro-enabled machines discovered by enabling a vPro scan using the **Edit Network** (page xvii) dialog, then scanning the network. This information is only available if a machine's vPro credential is specified when scanning a network.

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/9050000/index.asp#10070.htm>.

# By Network

Discovery > Networks > By Network

The **By Network** and **By Agent** pages discovers all computers and devices on networks that have an IP address. Any agent machine can be selected as the "probe" machine for its own network. Discovered devices can be workstations and servers without agents, SNMP devices and vPro-enabled machines. Discovered devices display on the following pages:

- **Discovered Devices** (*page v*)
- Discovered Devices - Tile View

## Scanning Networks by Network

1. On the **By Network** page select **New** or **Edit**. Enter a new network or change the name of an existing network.
2. If an agent has not already been selected for the network, select an agent. Both Windows and Apple agent machines can serve as a probe agent.
3. Leave the network scan range blank. It will be populated automatically, based on the subnet defined for the probe agent machine.
4. Optionally search for SNMP devices and vPro enabled machines by configuring these tabs.
5. Select **Save** —instead of **Save & Scan**—so you can configure additional settings.
  - Optionally deploy agents to discovered computers by policy, using the **Agent Deployment Policy** tab in the lower panel.
  - Optionally create alerts for newly discovered types of computers and devices, using the **Alert Profiles** tab in the lower panel.
  - Optionally set asset policies for discovered computers and devices, using the **Asset Promotion** page.
6. Run a scan immediately using the **Scan Now** button or schedule a scan on a recurring basis using the **Schedule Scan** button.
  - View discovered devices on the **Discovered Devices** page.

## Filtering Networks and Probe Agents

- Networks are associated with organizations. If your scope and filtering enable you to see a org, you will see that network in the upper panel.
- Agents are assigned to a machine group. If your scope and filtering enable you to see a probe agent assigned to a network you will see that probe agent in the lower panel.
- If you can see a network but cannot see its probe agent, the probe agent will be identified with an \*\*\*\*\* to indicate it exists but is currently hidden from view.

## Actions


- **New** - Manually adds a new network. Displays the same properties as the **Edit Network** (*page xvii*). After selecting a probe agent, if you leave the network scan range blank it will be populated automatically, based on the subnet defined for the probe agent machine.

**Note:** You can also create new networks by importing them using the System > Import Center. See **Importing Networks** (*page xx*).

- **Edit** - Displays the **Edit Network** (*page xvii*) dialog. Sets the scan options used by **Scan Now** and **Scan Schedule**.
- **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 xx*). Schedules a scan, on a recurring basis, for a selected network.

- **Scan Now** - Runs a scan immediately on a selected network using the scan options defined by the **Edit Dialog**.
- **Harvest Networks** - Displays a list of suggested networks you can scan immediately, based on already installed agents on those networks. Select a network, then enter a **Name**, **Org**, **Probe** and **IP Scan Range** for the new network. The network scan record is saved without starting the scan, so you can edit it before you start the scan.
- **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 xxiv).
- **Monitored by KNM** - If checked, enables integration with **Network Monitor** for this network.
- **Network Name** - A friendly name used to identify a network with the VSA.
- **Gateway** - The connection gateway IP address.
- **Scan Range** - The range of IP addresses included in a scan.
- **Subnet Mask** - Determines the number of IP addresses in a subnet.
- **Org ID** - The unique identifier of an **organization** (page 73) in the VSA.
- **Org Name** - A friendly name used to identify an organization within the VSA.
- **Status** - The status of a scan. A scan progresses through the following statuses. These statuses are displayed in **Pending Procedures** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#33845.htm>) and **Procedure History**. If the scan does not fail, the status returns to **Ready To Scan** once a scan is completed.
  - Ready To Scan
  - Installing
  - Performing Deep Scan
  - 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 network.
- **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 Probe tab** (page xxi)
- **Scan Schedules tab** (page xxii)
- **Agent Deployment tab** (page xxii)
- **Alerting Profiles tab** (page xxiii)
- **Asset Promotion tab** (page xxiii)

## Edit Network

Discovery > Networks > **By Network** (page xvi) > **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** - A friendly name used to identify a network with the VSA.
- **Probe** - The agent machine to use for scanning with this network. Windows and Apple agent machines can serve as probe machines.
- **IP Range** - Specifies the range of IP addresses included in a scan. By default, the entire scan range configured for a network is specified. Example: 192.168.32-35.0-255. Multiple IP ranges separated by commas are supported. Example: 192.168.32-35.0-255, 10.10.14-15.0-255.

**Note:** You can also specify a *cross-subnet scan*. This means your probe agent uses a different router than the router used by devices specified in the IP range. Because the probe agent is scanning beyond its own router, the ARP method of scanning is not used and MAC addresses and host names cannot be included in the returned data. Discovered IP addresses with no MAC address resolution will be included in the Quick Scan results but will **not** be added to the system as Discovered Devices or Assets. After performing an initial cross-subnet scan, you can deploy an agent to a discovered machine on the cross-subnet. Then use that new agent machine as a probe agent to scan its own subnet. This will provide the missing MAC and host name data.

- **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 xxiii).*
- **Alerts Active** - If checked, alerts configured on the **Alerting Profiles tab** (page xxiii) are active. If blank, alerts are not generated for discovered devices on this network.
- **Monitor Network** - If checked, enables integration with **Network Monitor** for this network.
- Store contact information for a selected network using the following fields.
  - **Primary Phone**
  - **Primary Fax**
  - **Primary Email**
  - **Country**
  - **Street**
  - **City**
  - **State**
  - **Zip**

## 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** (page v) 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/9050000/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** - A network scan can only identify SNMP devices that share the same SNMP Community *Read* value as the managed machine performing a network scan. 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.



- **Enable Standard Monitoring** – If checked, enable monitoring for SNMP devices within the network.
- **ATSE** action:
  - **Create Alarm** - If checked, creates an alarm.
  - **Create Ticket** - If checked, creates a ticket.
  - **Email Recipients** - If checked, notifies email recipients specified in Email Addresses.

### 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** (*page v*) page using the **vPro Machine** column.
- Display hardware attributes for vPro-enabled machines using the **View** button on the **Discovered Devices** (*page v*) 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/VPRO/9050000/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 network.

### VMware tab

After Discovery has performed a scan using valid VMware credentials, you can:

- Display a topology for the related assets of the discovered VMware environment in Discovery > Networks > Topology Map.

### Options

- **New** - Adds a new record, click by row to add/edit:
  - **Name/Password** - Enter the appropriate credentials.
  - **Host name or IP address** - Enter the appropriate Host name or IP Address for the VMWare server to provide discovery and return details about the VMWare environment discovered during the scan.
- **Delete** – Deletes a selected record.

### WMI (Hyper-V) tab

After Discovery has performed a scan using valid WMI (Hyper-V) credentials, you can:

- Display a topology for the related assets of the discovered WMI (Hyper-V) environment in Discovery > Networks > Topology Map.

## Options

- **New** - Adds new record, click by row to add/edit:
  - **Name/Password** - Enter the appropriate credentials for the WMI (Hyper-V) server to provide discovery and return details about the WMI (Hyper-V) environment discovered during the scan.
- **Delete** – Deletes a selected record.

## Scan Schedules Dialog

Discovery > Networks > By Network (page xvi) > Scan Schedules

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

**Note:** See how to set SNMP and vPro parameters in **Edit Network** (page xvii).

### Scan Schedule tab

- **Recurrence** - Schedule a scan periodically. Each type of recurrence—Daily, Weekly, Monthly—displays additional options appropriate for that type of recurrence. Periodic scheduling includes setting start and end dates for the recurrence.
- **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. Applies only to recurring schedules, a 'Once' schedule always executes the next time the agent is online.
- **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-network or vPro and another managed system on the same network.

### Scan Parameters

- **IP Range** - By default, the entire scan range configured for a network is specified. Example: 192.168.32-35.0-255. Multiple IP ranges separated by commas are supported. Example: 192.168.32-35.0-255, 10.10.14-15.0-255.

**Note:** You can also specify a *cross-subnet scan*. This means your probe agent uses a different router than the router used by devices specified in the IP range. Because the probe agent is scanning beyond its own router, the ARP method of scanning is not used and MAC addresses and host names cannot be included in the returned data. After performing an initial cross-subnet scan, you can deploy an agent to a discovered machine on the cross-subnet. Then use that new agent machine as a probe agent to scan its own subnet. This will provide the missing MAC and host name data.

- **IP Exclusion Range** - 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 xxiii), but only for this one scheduled scan.

## Importing Networks

You can create networks by importing an XML file using the System > **Import Center**

(<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#6963.htm>) page. You cannot export network records.










The format for the XML is shown below:

```
<?xml version="1.0" encoding="utf-8"?>
<networks>
<!-- <Network> Info =
"0=networkName,1=IpScanRange,2=IpExclusionRange,3=AlertsActive(Y),,,,,,,12=enab
leSNMP(Y),13=commString,14=confirmCommString,15=enableVpro(Y),16=vproUserName,17=
vProPassword,18=vProPasswordConfirm/>"
Use Y for checkboxes. Do not enter values in empty commas shown above.-->
<Network
Info="OhioStar,10.100.23.20-80,10.100.23.40-50,Y,,,,,,,Y,public,public,Y,asmith
,xyz9999!,xyz9999!" />
<Network Info="JaguarIT,10.20.20.20-80,10.20.20.30-60,,,,,,," />
<Network Info="PayServAcct,10.50.20.20-80,10.50.20.50-60,,,,,,," />
</networks>
```

## Network Probe tab

Discovery > Networks > By Network > Network Probe tab

The **Network Probe** tab displays properties of the agent used to scan a selected network.

- **Probe Agent** - 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
  -  An agent icon adorned with a red clock badge is a temporary agent.
- **Machine.Group ID** - A unique **machine ID / group ID / organization ID** (*page 72*) 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** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#33845.htm>) and **Procedure History**. If the scan does not fail, the status returns to **Ready To Scan** once a scan is completed.
  - Ready To Scan
  - Installing
  - Performing Deep Scan
  - Failed
- **Last Scan** - The date/time a scan last ran.
- **Domain/Workgroup** - The workgroup or domain the computer belongs to.
- **DNS Name** - The fully qualified domain name used to identify a computer or device on the network.
- **Gateway** - The connection gateway IP address.
- **OS** - Operating system type the machine is running.
- **IP Address** - IP address assigned to the machine, in version 4 format.
- **Last Checkin** - The last time this computer's agent checked-in to the VSA.

## Scan Schedules tab

Discovery > Networks > 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 xx) for a selected network.
- **Delete** - Deletes a selected scan schedule.

### Table Columns

- **Type** - The recurring time period: **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 xxiii) is used.

## Agent Deployment tab

Discovery > Networks > By Network > Agent Deployment tab

The **Agent Deployment Policies** tab of the **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** (page v)
- Discovered Devices - Tile View
- **Scan Results** (page xxiv)

### Matching OS Type Requirement

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 network 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 `localhost\administrator` or `<hostname>\administrator` or `<workgroup>\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 > By Network > Alerting Profiles tab

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

- If enabled, an alert is only generated for a new device name or a new IP address the *first time any scan* discovers it.
- 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 network 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 > By Network > Asset Promotion tab

The **Asset Promotion** tab of the **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/9050000/index.asp#4578.htm>) and **view filtering** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#214.htm>) features within the VSA depend on this assignment.
- A discovered device can be manually promoted or demoted on the **Discovered Devices** (*page v*) page or Discovered Devices - Tile View page by toggling the  /  icon.


## Settings



- **Promote 'unknown' devices to assets** - When scanning does not return a host name for a discovered device, **Discovery** assigns the device a display name starting with the string 'unknown' on the **Discovered Devices** (page v) page. If this option is checked, 'unknown' devices are promoted to assets. Applies to the entire network across all device types. If not checked, discovered devices identified as 'unknown' are not promoted to assets.
- **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 network.

## Scan Results

Discovery > Networks > By Network >  icon

Discovery > Networks > By Agent >  icon

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 **By Network** (page xvi) page.
- Click the  icon for an agent machine on the **By Agent** (page xxvi) page.

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

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

- **Summary** tab - Displays counts for each type of device found. Can also deploy agents.
- **Deep Scan** tab - Displays a tile view of each device found.
- **Quick Scan** tab - Displays an NMAP scan report.

## Actions

- **Deploy Agents** - Deploys an agent to all computers without an agent found in the *lower panel*. See **agent deployment prerequisites** (page xxii).
- **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.

## Summary tab

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

(Probe Information)

- **Network Name** - A friendly name used to identify a network with the VSA.
- **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.

## Deep Scan 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/9050000/index.asp#33842.htm>) window. Click to launch **Live Connect** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#33845.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/9050000/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/9050000/index.asp#2803.htm>) or **Device Status dashlet** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#2817.htm>).
-  - Hovering over a tile displays a pencil icon. You can edit the name of a discovered machine or device.

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
- **Machine Group** - The organization and machine group of a machine.
- **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.

---

## By Agent

Discovery > Networks > By Agent

The **By Agent** page discovers devices on the same network 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** (*page v*)
- Discovered Devices - Tile View

### Scanning Networks by Agent

*This is the fastest way to scan a new network.*











1. On the **By Agent** page, select a machine ID. Both Windows and Apple agent machines can serve as a probe agent.
2. Click the **Scan Now** button to scan a network immediately.
  - Optionally click the **Schedule Scan** to schedule a scan and enter additional options. For **Schedule Scan**, leave the network scan range blank. It will be populated automatically, based on the subnet defined for the probe agent machine.
3. Enter a network name if the selected agent hasn't scanned a network before.
4. Click the **Scan** button to start the scan.
  - View discovered devices on the **Discovered Devices** page.
  - Visit the **By Network** page to edit networks before you scan again.



## Actions

- **Schedule Scan** - Displays the **Scan Schedules Dialog** (page xx). Schedules a scan, on a recurring basis, for a selected network. You must enter a unique name for a new network, if the selected agent is not already serving as a probe agent.
- **Scan Now** - Runs a scan immediately on the network the selected agent machine belongs to, using the scan options defined by the **Edit Network** (page xvii) of the **By Network** page. You must enter a unique name for a new network, if the selected agent is not already serving as a probe agent.
- **Cancel Scan** - Cancel a scan on the network the selected agent machine belongs to.
- **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
  -  An agent icon adorned with a red clock badge is a temporary agent.
-  - Click this icon to display the **results of the latest scan and the accumulated results of all previous scans** (page xxiv).
- **Machine.Group ID** - A unique **machine ID / group ID / organization ID** (page 72) name for a machine in the VSA.
- **IP Address** - The IP address of the probe machine.
- **OS** - Operating system type the machine is running.
- **MAC Address** - The MAC address of the probe machine.
- **Default Gateway** - The default gateway of the probe machine.
- **Network** - The network this agent is assigned to as a probe agent.
- **Scan Status** - The status of a scan. A scan progresses through the following statuses. These statuses are displayed in **Pending Procedures** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#33845.htm>) and **Procedure History**. If the scan does not fail, the status returns to **Ready To Scan** once a scan is completed.
  - Ready To Scan
  - Installing
  - Performing Deep Scan
  - Failed
- **Scan Range** - The range of IP addresses scanned by the selected machine ID when a network scan 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.

# Domains

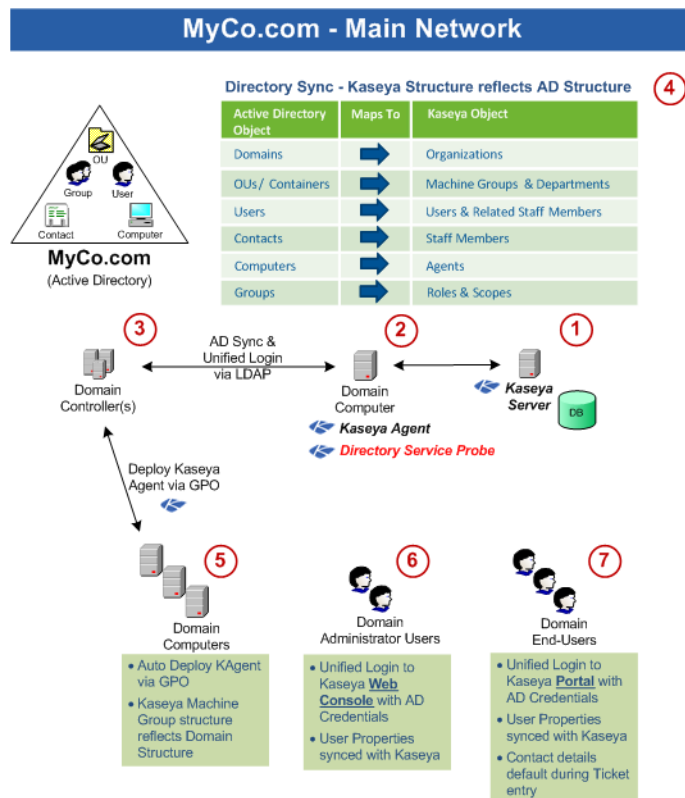
## In This Section

Getting Started with Domain Watch	xxviii
Configuration	xxx
Domain Watch	xxxviii
Computers	li
Contacts	liii
Users & Portal Access	lv
More Information	lix

## 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).
- 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 73) for more information about "organizational units".

## 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.

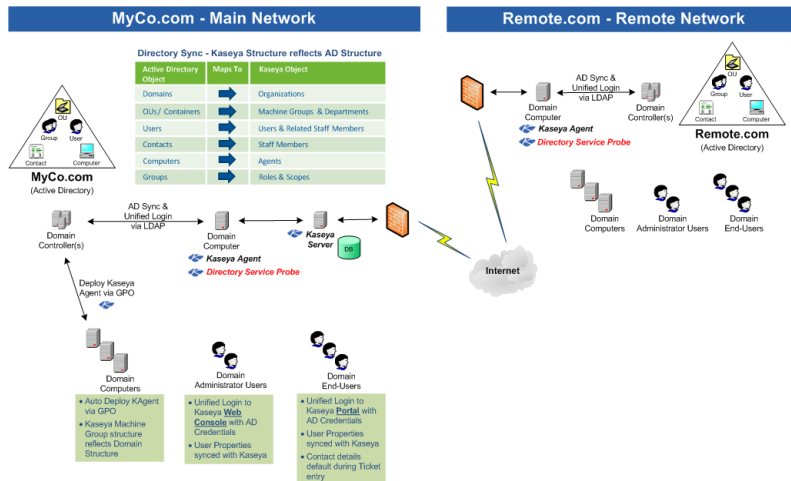
The security model created in the VSA by **Discovery** integration with the Active Directory domain results in the following mapping of objects.

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.

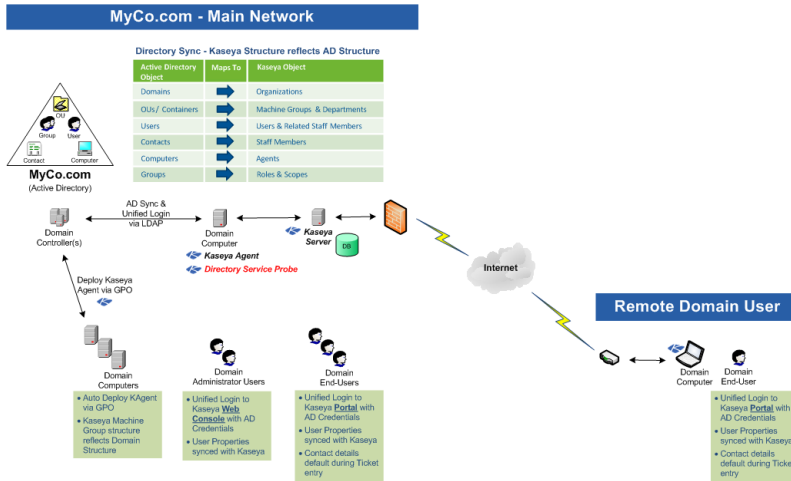


- Each **Discovery** managed domain is associated with a unique organization within the VSA.
- A scope matching the name of the organization is created. If you like, you can add multiple organizations to the same scope. This enables a VSA user to use a single scope to have visibility of all machine groups 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.

**Note:** Portal Access in R95 only works using Live Connect (Classic). Even if the Use new Live Connect when clicking the Live Connect button in Quickview option is set to Yes in System > Default Settings, Live Connect (Classic) will still be used when logging into the VSA using Portal Access credentials.



## Configuration

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

### In This Section

Configuration Prerequisites	xxx
Configuring Probe Deployment	xxxii
Configuring Agent Deployment	xxxii
Configuring OU/Container Policies	xxxii
Configuring Contact Policies	xxxiii
Configuring Computer Policies	xxxiv
Configuring Group Policies	xxxiv
Configuring User Policies	xxxv
Configuring Alerting Profiles	xxxvi
Applying Changes	xxxvi
Reviewing Domain Watch Results	xxxvii
Configuring Activation	xxxvii
Configuring Full Synchronization	xxxviii

## 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
  - Must have administrator level permissions to the assigned probe machine (either locally through the built-in Administrators group OR as a Domain Admin)

**Note:** A domain administrator credential provides the necessary authorization.

2. Create a new organization for your domain using the System > Orgs/Groups/Depts/Staff > Manage page.
3. Install a VSA agent on a machine that is a member of the Active Directory domain you intend to integrate with the VSA.
4. Verify you can see your domain in the upper panel of the **Domain Watch** (page xxxviii) page.
  - At least one domain machine with an agent on it displays in the lower panel.
  - Notice that the Org Id and Org Name for the domain network is currently blank.

## 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 its domain row displayed in the upper panel.

1. Click the Discovery > Domains > Domain Watch > **Probe Deployment** (page xxxix) tab.
2. Select the row of the **Domain Name** in the upper panel you want to configure.
  - The **Probe Status** displays  Un-installed.
  - Domain machines with Kaseya agents installed on them 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
  - Must have administrator level permissions to the assigned probe machine (either locally through the built-in Administrators group OR as a Domain Admin)

**Note:** A domain administrator credential provides the necessary authorization.

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

**Note:** Semicolon can be used to separate multiple OUs, for example:  
CN=OU1,DC=myDomain,DC=com;CN=OU2,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 lxvii). 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**.
    - Notice that the Org Id and Org Name for the domain network is now shows the organization you selected.

## Configuring Agent Deployment

1. Click the **Discovery** > Domains > Domain Watch > **Agent Deployment** (page xli) 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 may need to be rebooted to complete the installation of Kaseya agents.*
  - **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 lxi).

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


## Configuring OU/Container Policies

1. Click the **Discovery** > Domains > Domain Watch > Policies > **OU/Containers** (page xlii).
  - Use this tab to specify which domain machines you want to install a Kaseya agent on.
  - Each **OU/container** (page 73) 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 71) in selected policies.
  - Entering a checkbox next to a computer in this dialog means you want to install an agent on that domain computer.
  - 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.
  - Optionally checking the **Automatically assign portal access to portal candidates** means you also want to designate these computers as **portal candidate machines** (page lxiii).
  - Select the **Machine Group** to assign machine ID accounts created by this policy.
    - ✓ Select a fixed account, or
    - ✓ Use **Directory Default** - Administrators can automatically map the VSA machine groups used to organize domain computers inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a OU policy or a computer policy selects the **Use Directory Default** value. When this occurs, the domain machine is assigned to the machine group that matches its current OU location. If an Active Directory administrator renames the OU or moves the computer to a different OU location, the machine group is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent machine groups are created as necessary, to match the OU hierarchy. Alternatively, a computer can be assigned a policy that assigns it to a fixed machine group.
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 **Computers/Contacts Status** displays  **Modified**.
  - Do not **Apply Changes** yet.

## Configuring Contact Policies


1. Click the Discovery > Domains > Domain Watch > **OU/Containers** (page xlii).
  - 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.
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 71) 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 **Computers/Contacts Status** displays  **Modified**.
  - Do not **Apply Changes** yet.



## Configuring Computer Policies

1. Click the Discovery > Domains > Domain Watch > Policies > **Computers** (page *xliv*).
  - Sets the machine group assignment policy for each domain computer *individually*.
  - This tab has precedence over policies set on the **OU/Containers** tab.
2. Select the **Computers Policy** button.
  - Set the computer policy for the selected machine to **Include** or **Do Not Include**.
  - Select the **Machine Group** to assign machine ID accounts created by this policy.
    - ✓ Select a fixed account, or
    - ✓ **Use Default**
3. Click **Save**.
  - The **Policy Status** displays  **Modified**.
  - Do not **Apply Changes** yet.





## Configuring Group Policies

**Note:** In Active Directory, users included in policies must have a first name, last name, username, password and email address.

1. Click the Discovery > Domains > Domain Watch > Policies > **Groups** (page *xlv*) tab.
  - **Discovery** user policies enables domain logons to be used by the VSA in two ways:
    - ✓ **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 called "security groups" or simply "groups" in an Active Directory domain. Each group in this tab is identified by its canonical name.
  - 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.
    - ✓ **Do Not Include Users** - Do nothing with the 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*.
    - ✓ **Create Staff and make Auto Portal Candidates** - Designates domain users in this user group for Auto Portal Access assignment. See **Making Portal Access Candidates** (page *lxiii*) 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. Logon policies are ranked from highest to lowest in this order:
  - ✓ Create VSA Users
  - ✓ Create Staff and make Auto Portal Candidates
  - ✓ Create Staff Members
  - ✓ 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.
    - ✓ 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.
    - ✓ You can assign a VSA user to a scope outside of the organization associated with the domain network. This enables a VSA user to use a single scope to have visibility of all machine groups in multiple organizations. You must ensure the scope selected provides access to each domain organization.
- 6. Select a **Department** to assign staff records created by this policy.
  - Select a fixed department, or
  - **Use Directory Default** - Administrators can automatically map the departments used to organize staff records inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a Group or User policy selects the Use Directory Default value. When this occurs, a staff record created by policy is assigned to the department that matches its current OU location. If an Active Directory administrator renames the OU or moves the user to a different OU location, the staff record is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent departments are created as necessary, to match the OU hierarchy. Alternatively, a staff record can be assigned a policy that assigns it to a fixed department.
- 7. Click **Save** to close this dialog.
  - The dialog closes and the policy you selected displays in the **Users Policy** column.
  - The **Policy Status** displays  **Modified**.
  - Do not **Apply Changes** yet.

## Configuring User Policies

1. Click the Discovery > Domains > Domain Watch > Policies > **Users** (page xlv) tab.
  - Sets user policy for each user *individually*.
  - This tab has precedence over policies set on the **Group** tab.
2. Select a user.
3. Select the **Configure Users Policy** button.

- The **Users Policy** dialog displays.
- 4. Select a **Member User Policy**.
- 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.
- 6. Select a **Department** to assign staff records created by this policy.
  - Select a fixed department, or
  - **Use Directory Default**
- 7. Click **Save** to close this dialog.
  - The dialog closes and the policy you selected displays in the **Users Policy** column.
  - The **Policy Status** displays  **Modified**.
  - Do not **Apply Changes** yet.

## Configuring Alerting Profiles

1. Click the Discovery > Domains > Domain Watch > **Alerting Profiles** (page *xlix*) tab.
2. Enable all probe alerts.
  - This notifies you of any interruptions in the connection between the probe agent and Active Directory.
3. Enable selected domain alerts.
  - If agents are deployed automatically using the **Automatically install Agents when computer is discovered** checkbox in **Agent Deployment** (page *xli*), 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, change or deletion of various domain objects in Active Directory. Each domain object belonging to an alert category--computer, contact, container, domain, group, organization unit, user—must be assigned to a Discovery policy, otherwise alerts for this object will not be triggered. Alerts are only triggered after being detected by the next full or incremental sync.

**Note:** For more information about alerts see: **Probe Alerts and Domain Alerts** (page *lxvii*)

## Applying Changes

You can apply changes to policies at any time. Typically you wait to apply changes until you have completed your configuration changes on all policy tabs.

**Note:** You should not enable **Activation** (page *xxvii*) or **Full Synchronization** (page *xxviii*) until you are satisfied with your initial policy configuration.

1. Navigate to any of the following policy tabs. It doesn't matter which tab you use. Changes are applied to all policy tabs that have been modified.
  - OU/Containers
  - Computers
  - Groups
  - Users.
2. Click **Apply Changes**.
  - An "on demand" incremental synchronization is started. This is the same incremental synchronization performed by Activation, which recurs on a fixed time period.

- Domain Watch harvests detailed data for the Active Directory objects you set to "included" in the policies you configured.
- Harvesting is complete when the **Policy Status** for all policies says **Applied**.

## Reviewing Domain Watch Results

1. Review Domain Watch data on these three pages. These pages display all Active Directory objects discovered by "included" policies in Domain Watch.

- **Computers** (*page li*) - Machine account templates are listed on this page.
  - ✓ New machine groups may have been created for these new machine accounts, depending on the policy.
  - ✓ Any machine account template can be installed with an agent.
  - ✓ Some machines may be designated "auto portal candidate" machines.
- **Contacts** (*page liii*) - Active Directory contacts are listed on this page. These are for reference purposes only.
- **Users & Portal Access** (*page lv*) - There are three types of domain users listed on this page, depending on the policy specified.
  - ✓ **VSA Users** - These domain users can logon to the VSA using their domain credentials. You can see them listed in the System > User Security > Users page. A new domain-specific scope may have been generated for one or more VSA users, depending on the policy. Check the System > User Security > Scopes page.
  - ✓ **Auto Portal** - These domain users are designated "auto portal" users. Whenever a "auto portal" user is the last one to log out of an "auto portal candidate" domain machine, Portal Access for that machine is automatically assigned to the user. Portal Access allows a user to remote desktop into the machine. Any domain user can be manually assigned Portal Access to a domain machine using this page, provided the domain user was the last one logged out of the domain machine. Portal Access assignments display on both this page and the Computers page. You can also see Portal Access assignments on the Agent > Portal Access page.


**Note:** Portal Access in R95 only works using Live Connect (Classic). Even if the Use new Live Connect when clicking the Live Connect button in Quickview option is set to Yes in System > Default Settings, Live Connect (Classic) will still be used when logging into the VSA using Portal Access credentials.

- ✓ **Staff** - Displays domain user information, for reference purposes only. New staff records, and in most cases new departments, are generated for all domain users and contacts discovered by Domain Watch. These are located on the System > Orgs/Groups/Depts/Staff > Manage page.
2. Review Domain Watch records in these additional VSA locations.
- Alarms based on domain alerts are listed on the Monitor > Alarm Summary page and Agent > Agent Logs > Alarm Log tab.
  - Tickets based on domain alerts display in either the Ticketing module or Service Desk module.
  - Create and run reports based on Discovery > Active Directory report parts in Info Center.

## Configuring Activation

After the probe is installed and the initial preview has completed, you should set as many as policies as you can without activating your network domain. Instead click **Apply Changes** to perform an "on demand" incremental synchronization. This is the same event performed by activation on a recurring fixed time period basis. Continue performing "on demand" incremental synchronization until you are satisfied with

the results of your initial configuration. Then click **Activation** to perform incremental synchronization automatically. The default recurring time period is 60 minutes.

1. Select the **Agent Deployment** tab for your selected domain network on the **Domain Watch** page.
2. Select the agent probe row in the lower panel.
3. Click the **Activate** button in the lower panel. The **Activate Probe** dialog opens.
  - You can enter a different credential for the probe than the one entered for the install. Typically the same credential is used.
  - Set a **incremental synchronization interval** (page lxvi) for synchronization of data between the domain and **Discovery**. The default is 60 minutes.
  - 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**.

## Configuring 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 lxvii) and schedule a recurring **full synchronization** (page lxvi), for example, once a week. *If a probe alert is triggered, consider running a full synchronization immediately. You should also run a full synchronization if the probe was temporarily deactivated and reactivated.*

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

---

## 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 xxxix)
2. **Agent Deploy Policy** (page xli)
3. **OU/Containers** (page xlii)
4. **User Policies** (page xlv)
5. **Alert Policies** (page xlix)
6. **Schedule and Status** (page l)

## 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 73) in the VSA.
- **Org Name** - A friendly name used to identify an organization within the VSA.
- **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 xxxi).

## 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 uninstalling 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.

**Note:** **Discovery** passwords cannot contain quotation marks (").

- **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.

- **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 1) 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 lxvii) 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 73) 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 xxxii).

### 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 xlii) 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 lxi).

## Policies

Discovery > Domains > Domain Watch > Policies tab

### In This Section

OU/Containers	xlii
Computers	xliv
Groups	xlv
Users	xlvii

## OU/Containers

Discovery > Domains > Domain Watch > Policies > 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 xxxii)
- **Configuring Contact Policies** (page xxxiii)
- **Setting Discovery Policies for Contacts** (page lix)

## Setting Policies by Individual Computer

You can set policies by individual computer using the **Computers** (page xliv) 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. Clicking **Apply Changes** after modifying policies on any **Policies** (page *xliv*) tab performs an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.

## 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 *lxiii*) machines.
  - **Computer Machine Group Override** - Administrators can automatically map the VSA machine groups used to organize domain computers inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a OU policy or a computer policy selects the Use Directory Default value. When this occurs, the domain machine is assigned to the machine group that matches its current OU location. If an Active Directory administrator renames the OU or moves the computer to a different OU location, the machine group is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent machine groups are created as necessary, to match the OU hierarchy. Alternatively, a computer can be assigned a policy that assigns it to a fixed machine group. This policy can be overridden by **Computers** (page *xliv*) policy.
- **Contacts Policy** - Sets the **Discovery** contact policy for included contacts in an OU/container.
  - **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 *xxxix*) tab.
- **Auto Portal Computers** - If checked, these computers are automatically assigned to be **portal access candidate** (page *lxiii*) 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 the machine group of a domain machine by individual computer. The policy overrides the policy set for the computer using the **OU/Containers** (page xlii) tab.




For more information see:

- **Configuring Computer Policies** (page xxxiv)
- **Setting Discovery Policies for Computers** (page lix)

## 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. Clicking **Apply Changes** after modifying policies on any **Policies** (page xlii) tab performs an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.

## 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** - Administrators can automatically map the VSA machine groups used to organize domain computers inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a OU policy or a computer policy selects the **Use Directory Default** value. When this occurs, the domain machine is assigned to the machine group that matches its current OU location. If an Active Directory administrator renames the OU or moves the computer to a different OU location, the machine group is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent machine groups are created as necessary, to match the OU hierarchy. Alternatively, a computer can be assigned a policy that assigns it to a fixed machine group. This policy has precedence over **OU/Containers** (page xlii) policy.
- **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 xxxix) tab.

## Groups

Discovery > Domains > Domain Watch > Policies > Groups tab

**Note:** In Active Directory, users must have a first name, last name, username, password and email address.

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

For more information see:

- **Configuring Group Policies** (page xxxiv)
- **Managing Remote Portal Access** (page xxix)
- **Enabling Portal Access in Discovery** (page lxiii)
- **Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords** (page lxiv)
- **Making Changes to Discovery Managed User Logons** (page lxiv)
- **Supported Domain Logon Formats** (page lxv)




### Setting Policies by Individual User

You can set policies by individual user using the **Users** (page xlvii) 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. Clicking **Apply Changes** after modifying policies on any **Policies** (page xlii) tab performs an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.

### 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 lv) 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 lxiii) for details.
- **Create VSA Users** - Creates VSA user logons for domain users listed in this user group. You must select a role and scope.
  - ✓ 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.
  - ✓ 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.

You can assign a VSA user to a scope outside of the organization associated with the domain network. This enables a VSA user to use a single scope to have visibility of all machine groups in multiple organizations. You must ensure the scope selected provides access to each domain organization.

You can assign a VSA user to a scope outside of the organization associated with the domain network. This enables a VSA user to use a single scope to have visibility of all machine groups in multiple organizations. You must ensure the scope selected provides access to each domain organization.

- **User Department Override** - Administrators can automatically map the departments used to organize staff records inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a Group or User policy selects the Use Directory Default value. When this occurs, a staff record created by policy is assigned to the department that matches its current OU location. If an Active Directory administrator renames the OU or moves the user to a different OU location, the staff record is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent departments are created as necessary, to match the OU hierarchy. Alternatively, a staff record can be assigned a policy that assigns it to a fixed department. This policy can be overridden by **Users** (page xlvii) policy.
  - **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 lxiii) 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 xxxix) tab.

## Users

Discovery > Domains > Domain Watch > Policies > Users tab

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

**Note:** In Active Directory, users must have a first name, last name, username, password and email address.

Related topics:

- **Setting Discovery Policies for Users** (page lx)
- **Configuring User Policies** (page xxxv)




### Setting Policies by (User) Group

You can set policies for users by (user) group using the **Groups** (page xlv) 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. Clicking **Apply Changes** after modifying policies on any **Policies** (page xlii) tab performs

an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.

## 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 lv) 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 lxiii) for details.
  - **Create VSA Users** - Creates a VSA user logon for the selected domain user.
    - ✓ Role Lookup
    - ✓ Scope Lookup
  - **User Department Override** - Administrators can automatically map the departments used to organize staff records inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a Group or User policy selects the Use Directory Default value. When this occurs, a staff record created by policy is assigned to the department that matches its current OU location. If an Active Directory administrator renames the OU or moves the user to a different OU location, the staff record is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent departments are created as necessary, to match the OU hierarchy. Alternatively, a staff record can be assigned a policy that assigns it to a fixed department. This policy has precedence over **Groups** (page xlv) policy.
- **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 lxiii) 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 xxxix) tab.

## Alerting Profiles

Discovery > Domains > Domain Watch > Alert Policies tab

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

For more information see:

- **Probe Alerts and Domain Alerts** (page lxvii)
- **Configuring Alert Policies** (page xxxvi)

### 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. Each domain object belonging to an alert category--computer, contact, container, domain, group, organization unit, user—must be assigned to a Discovery policy, otherwise alerts for this object will not be triggered. Alerts are only triggered after being detected by the next full or incremental sync.

- 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. 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 *lxvii*) and schedule a recurring **full synchronization** (page *lxvi*), for example, once a week. *If a probe alert is triggered, consider running a full synchronization immediately. You should also run a full synchronization if the probe was temporarily deactivated and reactivated.*

For more information see:

- **Synchronization** (page *lxvi*)

### 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. **Distribution Window must be greater than or equal to the Recurrence Interval.**
  - **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. Applies only to recurring schedules, a 'Once' schedule always executes the next time the agent is online.
  - **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-network or vPro and another managed system on the same network.
  - **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 xxxix) tab.
- **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. Clicking **Apply Changes** after modifying policies on any **Policies** (page xlii) tab performs an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.
- **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.

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## Computers

Discovery > Domains > Computers

The **Computers** page lists **machine ID / group ID / organization ID** (page 72) 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 71) computers update their corresponding VSA machine ID accounts at the next synchronization.

For more information see:

- **How Agents are Installed Using Discovery** (page lxi)
- **How Machine ID Accounts are Created in Discovery** (page lxii)
- **How Machine Moves in Domains are Reflected in Discovery** (page lxii)

## 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.
- **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 72) 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 72) 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 72) 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 xli) page.
- **OS** - The operating system of the computer.
- **Auto Portal** - A domain user is automatically assigned to be the **Portal Access** (page lxiii) 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 72) 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.
- **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.

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## Contacts

Discovery > Domains > Contacts

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

Changes made to **included** (page 71) 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

- **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 phone 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.

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## Users & Portal Access

Discovery > Domains > Users & Portal Access

**Note:** Portal Access in R95 only works using Live Connect (Classic). Even if the Use new Live Connect when clicking the Live Connect button in Quickview option is set to Yes in System > Default Settings, Live Connect (Classic) will still be used when logging into the VSA using Portal Access credentials.

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 71) 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 lx)
- **Enabling Portal Access in Discovery** (page lxiii)
- **Enabling/Disabling Domain Users Accounts or Resetting Domain User Password** (page lxiv)
- **Making Changes to Discovery Managed User Logons** (page lxiv)
- **Supported Domain Logon Formats** (page lxv)

### Upper Panel

#### Actions

- **Disable Account** - Disables a domain user account immediately. Affects VSA logons and Portal Access logons using the same domain logon.
- **Enable Account** - Enables a domain user account immediately. Affects VSA logons and Portal Access logons using the same domain logon.
- **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. 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. A user must be 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.
- **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 73) 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 lxiii*) user of a domain machine if **Auto Portal** is enabled for *both* the domain user and domain computer.
- **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 lv*) 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 - User Details tab

#### 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 user 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 phone 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 73).
- **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.

### Lower Panel - Portal Access tab

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

#### VSA Portal Settings

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

(<http://help.kaseya.com/webhelp/EN/VSA/9050000/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/9050000/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/9050000/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/9050000/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.

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## More Information

### In This Section

Setting Discovery Policies for Computers	lix
Setting Discovery Policies for Contacts	lix
Setting Discovery Policies for Users	lx
Licensing	lx
The Directory Services Feature Set	lx
How Agents are Installed Using Discovery	lxi
How Machine ID Accounts are Created in Discovery	lxii
How Machine Moves in Domains are Reflected in Discovery	lxii
Enabling Remote Portal Access in Discovery	lxiii
Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords	lxiv
Making Changes to Discovery Managed User Logons	lxiv
Supported Domain Logon Formats	lxv
Synchronization	lxvi
Activation / Deactivation	lxvii
Uninstalling the Probe and Detaching the Org	lxvii
Probe Alerts and Domain Alerts	lxvii
Removing a Domain from Discovery Management	lxviii
Uninstalling Discovery	lxviii
Domain Watch Default Settings	lxviii

## 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 lxiii).
- Automatic assignment of domain machines to machine groups based on the OU hierarchy in Active Directory. Alternatively you can assign domain machines to a fixed machine group.

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

## Setting Discovery Policies for Contacts

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 *xliv*) 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 *lxiii*) for details.
4. **Create VSA Users** - Creates VSA user logons for domain users listed in this group. Automatic assignment of VSA users to departments can be based on the OU hierarchy in Active Directory. Alternatively you can assign domain machines to a fixed machine group.

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

## 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/9050000/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 *xxxix*) 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 *71*), licensed separately, that provides advanced functionality in the **Discovery** module.

<b>Domain Policies</b>	Domain policies can be specified for multiple machines and users by: <ul style="list-style-type: none"> <li>• OU/Container</li> <li>• Groups</li> </ul>
<b>Incremental Synchronization Activation/Deactivation</b>	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.
<b>Auto Portal Access</b>	Auto creates portal access to a machine, based on the person last logged on to the machine.

<b>Contacts</b>	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.
<b>Users</b>	<ul style="list-style-type: none"> <li>• Enables and disables domain logons from the Directory Services module.</li> <li>• Resets the domain passwords.</li> <li>• Unlocks domain accounts.</li> </ul>
<b>Alerts</b>	Provides alerts for new or changed computers, contacts, OU/containers, domains, groups, organizations, or users.

## 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 **Policy Management** or Agent > Copy Settings.

Domain **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 **By Network** (page xvi) 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** ([https://technet.microsoft.com/en-us/library/cc725578\(WS.10\).aspx](https://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 72) 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 72) 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 72) 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 li) page then click the **Synchronize Machines** button.

**Warning:** Use the **Synchronize Machines** method to merge duplicates rather than merging accounts using **Agent > Manage Agents** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/index.asp#250.htm>) > **Rename**.

## 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 xlii) or **Computers** (page xlii). **Discovery** monitoring of a member machine in the domain depends on

whether its policy is set to "included" in both the source OU location and the target OU location. OU/Containers and Computers policies must also be set to **Use Default Directory** in the target directory.

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 > Manage Agents > 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 xxix*)

**Note:** Portal Access in R95 only works using Live Connect (Classic). Even if the **Use new Live Connect when clicking the Live Connect button in Quickview** option is set to Yes in System > Default Settings, Live Connect (Classic) will still be used when logging into the VSA using Portal Access credentials.

### 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/9050000/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 xlii) 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 li) page.

**Note:** The user can only be manually assigned the Portal Access user of a machine—using the **Users & Portal Users** (page lv) 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 li) page.

## Enabling/Disabling Domain Users Accounts or Resetting Domain User Passwords

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.
- 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/9050000/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.

**Note:** Active Directory passwords used to authenticate to VSA must conform to the VSA password requirements described in **System > Server Management > Logon Policy** <http://help.kaseya.com/webhelp/EN/VSA/9050000/#522.htm>.

## 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**
<b>Domain Back Slash</b>	Username	<i>ITservices.acme.com\william</i>	<i>ITservices\william</i>
	Password	*****	*****
	Domain		
<b>Domain Forward Slash</b>	Username	<i>ITservices.acme.com/william</i>	<i>ITservices/william</i>
	Password	*****	*****
	Domain		
<b>Separate Domain</b>	Username	<i>william</i>	<i>william</i>
	Password	*****	*****
	Domain	<i>ITservices.acme.com</i>	<i>ITservices</i>
<b>Email Style Domain</b>	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
- Incremental Synchronization (Apply Changes or Activation)
- Full Synchronization
- **Enabling/Disabling Domain Users Accounts or Resetting Domain User Password** (page lxiv).

### 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.

### Incremental Synchronization (Apply Changes or Activation)

An incremental synchronization compares Domain Watch policies against any changes the probe agent has detected on *monitored* OUs, computers, security groups and users in Active Directory and synchronizes the two systems. Only *monitored* Active Directory records are compared.

After the probe is installed and the initial preview has completed, you should set as many as policies as you can without activating your network domain. Instead click **Apply Changes** to perform an "on demand" incremental synchronization. This is the same event performed by activation on a recurring fixed time period basis. Continue performing "on demand" incremental synchronization until you are satisfied with the results of your initial configuration. Then click **Activation** to perform incremental synchronization automatically. The default recurring time period is 60 minutes.

- 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

### 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 lxvii) and schedule a recurring **full synchronization** (page lxvi), for example, once a week. *If a probe alert is triggered, consider running a full synchronization immediately. You should also run a full synchronization if the probe was temporarily deactivated and reactivated.*

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.

### Enabling/Disabling Domain Users Accounts or Resetting Domain User Password.

A few important domain changes are uploaded by the probe immediately. These include:

- Password changes



- Enabling / disabling a user account

## Activation / Deactivation

**Activation** and **Deactivation** buttons display on the Domain Watch > **Probe Deployment** tab.

- **Activation** - Enables incremental discovery and synchronization of domain controller data on a fixed time period. Activating a probe on a domain computer *deactivates* any other probe on that same domain, without loss of data.
  - Clicking **Apply Changes** after modifying policies on any **Policies** (page *xlii*) tab performs an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.
  - Activation is not required to run full sync on the Domain Watch > **Schedule and Status** (page *l*) 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 *li*), **Contacts** (page *liii*) and **Users & Portal Users** (page *lv*) 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

### 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 *lxvii*) and schedule a recurring **full synchronization** (page *lxvi*), for example, once a week. *If a probe alert is triggered, consider running a full synchronization immediately. You should also run a full synchronization if the probe was temporarily deactivated and reactivated.*

### 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

Each domain object belonging to an alert category--computer, contact, container, domain, group, organization unit, user—must be assigned to a Discovery policy, otherwise alerts for this object will not be triggered. Alerts are only triggered after being detected by the next full or incremental sync.

## 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/9050000/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/9050000/index.asp#5476.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 (Classic)** (<http://help.kaseya.com/webhelp/EN/VSA/9050000/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/9050000/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/9050000/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/9050000/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/9050000/index.asp#7018.htm>) tab.
- It is possible a dedicated scope was created using the Discovery > Domain > **User Policies** (page *xliv*) 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 *lxviii*).

1. Deactivate and detach the organization
2. Uninstall the probe from the agent.
3. Uninstall the **Discovery** module from the Kaseya Server.

## Domain Watch Default Settings

The following options on the System > Default Settings page apply to Domain Watch.

- **Discovery - Domain Watch policies "Include new Computers/Contacts" include moved objects** - If a policy is applied to an OU/Container that has "Include New Computers" or Include new Contacts" checked, and:
  - This option is Y, then the policy is applied to computers or contacts moved into the OU/Container.

- This option is N, then the policy is not applied to computers or contacts moved into the OU/Container.
- **Discovery - Staff record "View All Tickets" enabled** - If checked, the View All Tickets checkbox is checked when the staff member record is created.
- **Discovery - Staff record Department name assignment scheme**
  - **Assign based on Active Directory OU Name** - A department is created for the new staff record based on the OU/Container name.
  - **Assign based on Active Directory Department property** - A department is created for the new staff record based on the department name specified for the user in Active Directory.
- **Discovery - Staff record Staff name assignment scheme**
  - **Assign based on Active Directory Display name. If empty, use First name plus Last name**
  - **Assign based on Active Directory User logon name**
  - **Assign based on Active Directory First name plus Last name**
- **Use domain short name in the construction of user passwords** - If legacy AD logons were created using the **View AD Users** page in VSA 6.2 or earlier and these legacy AD logons continue to be used, then set to Yes. This enables user passwords for existing legacy AD logons to continue to be recognized. Whenever a password for an existing AD logon is reset, a newer hashing algorithm is used, based on fully qualified domain names. If legacy AD logons using the **View AD Users** page were never implemented prior to 6.3, then set this option to No.

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# Administration

## In This Section

Settings  
Audit Log

lxix  
lxx

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# Settings

Discovery > Administration > Settings

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

## Discovery Settings

- **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 xxiii).

- **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.

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## 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/9050000/index.asp#6875.htm>).

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# 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 72). 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 view agent properties, quick launch selected agent procedures, 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 72) 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 72) 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.

### Incremental Synchronization

- Clicking **Apply Changes** after modifying policies on any **Policies** (page *xlii*) tab performs an "on demand" incremental synchronization. Activation performs a recurring incremental synchronization.

### 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 *71*) 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 > Manage Packages.
- 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 *72*) and the **agent** (page *71*). 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. The user access window displays when a *machine user double-clicks the agent icon in the system tray of their managed machine.*

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 71) and active **machine ID / group ID** (page 72) 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. A container is a "built-in" organizational unit.

### Portal Access (Classic)

**Note:** Portal Access in R95 only works using Live Connect (Classic). Even if the **Use new Live Connect when clicking the Live Connect button in Quickview** option is set to **Yes** in **System > Default Settings, Live Connect (Classic)** will still be used when logging into the VSA using Portal Access credentials.

Portal Access (Classic) is a Live Connect (Classic) 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.



## Glossary

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

### Use Directory Default - Computer

Administrators can automatically map the VSA machine groups used to organize domain computers inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a OU policy or a computer policy selects the **Use Directory Default** value. When this occurs, the domain machine is assigned to the machine group that matches its current OU location. If an Active Directory administrator renames the OU or moves the computer to a different OU location, the machine group is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent machine groups are created as necessary, to match the OU hierarchy. Alternatively, a computer can be assigned a policy that assigns it to a fixed machine group.

### Use Directory Default - Users

- Administrators can automatically map the departments used to organize staff records inside the VSA using the OU hierarchy that already exists in Active Directory. This occurs when a Group or User policy selects the **Use Directory Default** value. When this occurs, a staff record created by policy is assigned to the department that matches its current OU location. If an Active Directory administrator renames the OU or moves the user to a different OU location, the staff record is changed in the VSA to match it. Tracking moves fully requires policies be set in both the source and target OUs. Parent departments are created as necessary, to match the OU hierarchy. Alternatively, a staff record can be assigned a policy that assigns it to a fixed department.



# Index

## A

Activation / Deactivation • lxvii  
 Administration • lxix  
 Agent Deployment • xli  
 Agent Deployment tab • xxii  
 Agents • 71  
 Alerting Profiles • xlix  
 Alerting Profiles tab • xxiii  
 Applying Changes • xxxvi  
 Asset Promotion tab • xxiii  
 Audit Log • lxx

## B

By Agent • xxvi  
 By Network • xvi

## C

Computers • xliv, li  
 Configuration • xxx  
 Configuration Prerequisites • xxx  
 Configuring Activation • xxxvii  
 Configuring Agent Deployment • xxxii  
 Configuring Alerting Profiles • xxxiv  
 Configuring Computer Policies • xxxiv  
 Configuring Contact Policies • xxxiii  
 Configuring Full Synchronization • xxxviii  
 Configuring Group Policies • xxxiv  
 Configuring OU/Container Policies • xxxii  
 Configuring Probe Deployment • xxxi  
 Configuring User Policies • xxxv  
 Contact • 71  
 Contacts • liii

## D

Discovered Devices • v  
 Discovery Module Minimum Requirements • iii  
 Discovery Overview • i  
 Distinguished Name • 71  
 Domain Watch • xxxviii  
 Domain Watch Default Settings • lxviii  
 Domains • xxviii  
 Duplicate Exists • 71

## E

Edit Network • xvii  
 Enabling Remote Portal Access in Discovery • lxiii  
 Enabling/Disabling Domain Users Accounts or  
 Resetting Domain User Passwords • lxiv

## F

Feature Set • 71

## G

Getting Started with Domain Watch • xxviii

Getting Started with Network Discovery • xiii  
 Groups • xlv

## H

How Agents are Installed Using Discovery • lxi  
 How Machine ID Accounts are Created in Discovery •  
 lxii  
 How Machine Moves in Domains are Reflected in  
 Discovery • lxii

## I

Importing Networks • xx  
 Included / Excluded domain Folders and Items • 72  
 Incremental Synchronization • 72

## L

Licensing • lx

## M

Machine Group • 72  
 Machine ID / Group ID / Organization ID • 72  
 Machine ID Template • 72  
 Machine IDs vs. Agents • 72  
 Machine Roles • 73  
 Making Changes to Discovery Managed User Logons •  
 lxiv  
 Managed Machine • 73  
 Managing a Synchronized Security Model • xxix  
 Managing Multiple Domains • xxix  
 Managing Remote Portal Access • xxix  
 More Information • lix

## N

Network Probe tab • xxi  
 Networks • xiii

## O

Org • 73  
 OU/Container • 73  
 OU/Containers • xlii

## P

Policies • xlii  
 Portal Access (Classic) • 73  
 Probe Agent • 74  
 Probe Alerts and Domain Alerts • lxvii  
 Probe Deployment • xxxix

## R

Removing a Domain from Discovery Management •  
 lxviii  
 Reviewing Domain Watch Results • xxxvii

## S

Scan Results • xxiv  
 Scan Schedules Dialog • xx  
 Scan Schedules tab • xxii  
 Scanning Networks with SNMP Enabled • xiv

## **Index**

Scanning Networks with vPro Enabled • xv  
Schedule and Status • I  
Setting Discovery Policies for Computers • lix  
Setting Discovery Policies for Contacts • lix  
Setting Discovery Policies for Users • lx  
Settings • lxix  
Standard SNMP Monitoring • xi  
Summary • iii  
Supported Domain Logon Formats • lxv  
Synchronization • lxvi

## **T**

The Directory Services Feature Set • lx  
Topology Map • vii

## **U**

Uninstalling Discovery • lxviii  
Uninstalling the Probe and Detaching the Org • lxvii  
Use Directory Default - Computer • 74  
Use Directory Default - Users • 74  
Users • xlvii  
Users & Portal Access • lv

## **V**

View Assets • xiv