



Kaseya 2

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# Getting Started

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**User Guide**

Version R8

English

September 18, 2014

**Agreement**

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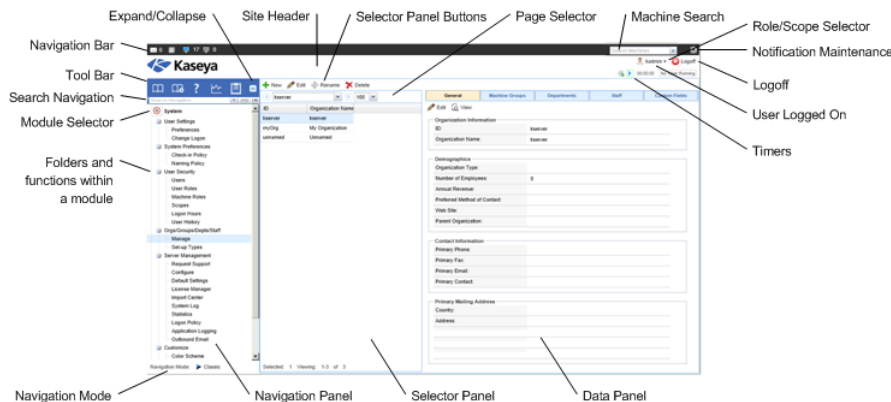
# VSA Modules

All VSA functions can be accessed through modules located along the left side of the user interface. Within each module are the core functions that allow users to perform a variety of tasks on remotely managed **machines** (<http://help.kaseya.com/webhelp/EN/VSA/R8/index.asp#6779.htm>) and the Kaseya Server.





# Page Layout

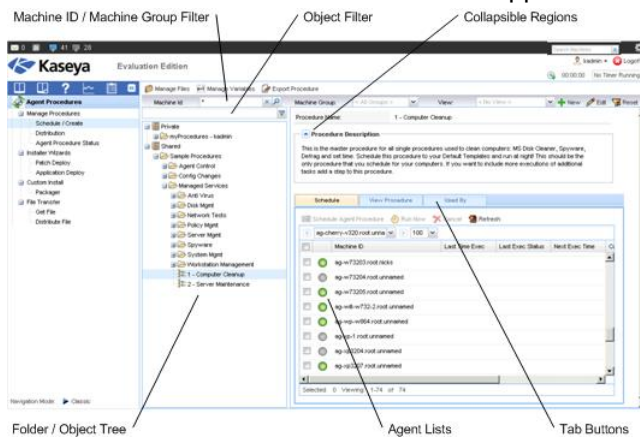
The user interface of Kaseya 2 is designed to be flexible while streamlining the choices a user makes.



- **Navigation Panel** - The module tabs and function panes are combined into a single expandible-collapsible explorer like navigation panel.
- **Navigation Modes** - Two modes are available:
  - **Tree-Based** - Allows you to select and expand individual folders within a module.
  - **Classic** - Displays one module at time. Defaults to fully expanded. Defaults to a collapsed folder view which can then be selectively expanded.
- **Selector Panel** - Many Kaseya 2 functions display a middle selector panel to select one or more records. The selector panel can be scrolled, filtered and sorted independently from any other pane.
- **Data Panel** - On the right hand side of the screen, is a data panel designed as a series of tabbed views, providing quick access to each property or data view no matter how complex a function might be. Many of the tabs have fields you can edit and buttons that provide additional functionality.
- **Module Selector** - At the top of the navigation panel is a module selector. Clicking the visible module displays all the installed modules in the VSA. Clicking any of the other modules selects that

module and displays the folders and functions within that module the user has access rights to see.

- **Notification Bar** - Displays the status and counts for categories of notifications. Notifies you when a specified RSS feed has been updated.
- **Notification Maintenance** - Customizes the display of notifications, by category.
- **Toolbar** - The toolbar, just above the module selector, provides instant access to the global functions **Show Bookmarks**, **Add Bookmark**, **Help**, **Status**, and **Notes**. This feature can be hidden using the gear  icon in the top right corner of the **Notification Bar** (page 3).
- **Search Navigation** - Enter a string to find all navigation items that match the string. This feature can be hidden using the gear  icon in the top right corner of the **Notification Bar** (page 3).
- **Expand/Collapse** - A << icon on the right side of the toolbar collapses the navigation panel. Once collapsed a >> icon expands the navigation panel.
- **Selector Panel Buttons** - At the top of the selector panel is a page-specific button bar. Typically these buttons include creating, editing and deleting records listed in the selector panel. Additional buttons display, depending on the page and your logon access rights.
- **Page Selector** - If the selector panel list is longer than one page, the page selector enables you to browse through multiple pages. You can set the number of rows displayed on each page.
- **Site Header** - A customizable site logo and header text displays in the upper left corner.
- **Machine Search** - Enter a string without spaces into the edit box and all machine names containing that string display in a drop down list.
- **Role/Scope Selector** - Selects the combination of role and scope that is currently active for your logon. If you have more than one role or scope available to you, you can switch roles or scopes anytime during your logon.
- **Logged On User / Logoff** - Displays the username of the user currently logged on and a logoff link.
- **Unread Messages** - The number of unread messages displays in the upper right corner. You can click this counter at any time to display your VSA inbox immediately.
- **Timers** - Records time entries that can be applied to timesheets and other work type records.



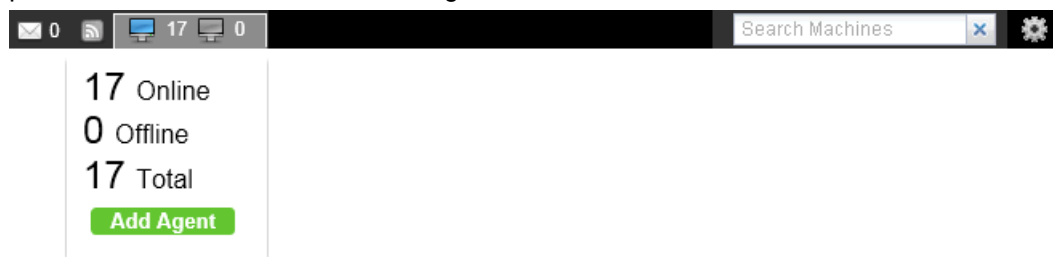
- **Machine ID / Machine Group Filter** - If a page displays an agent list, then the Machine ID / Machine Group filter displays at the top of the page. The filter enables you to limit the list of agents displayed on the machine, by individual machine, machine group, organization or by view definition.
- **Folder / Object Trees** - Certain functions display a folder tree in the selector panel instead of list of records. Typically two folder trees are provided, one **Private** and one **Shared**, but sometimes only the Shared folder tree displays. You can create new objects in these folder trees, and in the **Shared** folder tree, share them with other users.
- **Tree Filter** - All folder trees panels can be filtered by entering a string into the tree filter.
- **Agent Lists** - Agents lists display on many VSA pages. In the new user interface, agents frequently display in one of the tabs in the data panel on the right side of the page.

- **Tab Specific Buttons** - Any tab in the data panel on the right side of the page can display a tab specific set of buttons. Tab specific buttons affect the child record just below it. For example, when you want to run an agent procedure immediately, you select the procedure in the folder tree in the middle panel, then select one or more of the agents in the tab, then click the "Run Now" tab button to execute the agent procedure.
- **Collapsible Regions** - Panels, tabs and dialogs are sometimes segmented into collapsible regions. Clicking the down arrow lets you hide that region of the user interface. A collapsed region displays an expand button, enabling you to expand that region again.

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## Notification Bar

A notification bar displays at the top of the VSA window and is visible from any module. The bar's icons provide immediate notifications throughout the VSA environment.



Types of notifications include:

- **Service Desk tickets** - Multiple notification icons can be created for different desks, groups of desks, or other filter criteria.
- **RSS announcements** - Multiple icons for different RSS feeds can be specified.
- **System notifications** - Includes both "critical" and "warning" level system-level messages.
- **Inbox messages** - Multiple icons can be created for different types of inbox message.
- **Agents up / agents down counters** - Clicking either one of these counters displays a dialog that enables you to select an agent install package and immediately install it on the computer you are currently logged on to.

### Machine Search



A **Machine Search** edit box displays on the right side of the notification bar. Enter a string without spaces into the edit box and all machine names containing that string display in a drop down list. Search strings are matched against the following types of information.

- display name
- current login
- last login name
- mach name
- admin contact
- contact name
- contact phone
- contact email
- ip address
- ipv6 address
- default gateway
- connection gateway ip
- primary wins server
- dns server 1

## Toolbox


- dns serve 2
- os type
- os info
- mac addr
- org name
- group name

The drop-down list displays the following information for each machine ID found:

- The computer name.
- The VSA administrator name responsible for this machine ID.
- The contact name for this computer.
- The number of tickets associated with this machine. Click the  icon to display the tickets in a ticket table.
- The number of alarms associated with this machine. Click the  icon to display the **Alarm Summary** (<http://help.kaseya.com/webhelp/EN/VSA/R8/index.asp#4112.htm>) page for this machine.

The `admin contact`, `contact name`, `contact phone`, and `contact email` can all be specified using the Agent > Edit Profile page. All other fields are collected from audits and display on the Agent > Agent Status page or Audit > Machine Summary page.


## Notification Bar Settings

A gear icon  at the far right of the notification bar provides access to **Notification Bar Settings**, enabling the user to customize the notification bar. Customization includes:

- Selecting different icons for each type of notification.
- Selecting which system-level warnings you want to be reminded of.
- Setting how "noticeable" the notification is: silent, subtle, or flyout.
- Using the separator bar to group icons.
- Hiding notifications that have no items to show.

You can also move any notification icon left or right simply by dragging it along the notification bar.

## Left Side Navigation

A gear icon  at the far right of the notification bar provides access to a **Left Side Navigation** pair of options.

- **Shortcuts** - If checked, displays the tool bar above the navigation pane.
- **Search Navigation** - If checked, displays the search box above the navigation pane.

## Alerts

Currently, the only alerts displayed by the notification bar are alerts generated using the **Agent Procedures** SendAlert() command. Additional types of alerts will be supported in future releases.

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# Toolbox




The **Toolbox** provides the user with a common area to access frequently used commands and functions. The **Toolbox** is accessible from any module, giving users convenient access to frequently used features of the VSA.



## Notes

Click the **Notes** icon  to display the **User Notes** (page 5) window. **User Notes** provides a place to record and retrieve what previous user actions were performed on each machine.

## Status

Click the **Status** icon  display the **Status Monitor** (page 5) window. **Status Monitor** continuously monitors selected machines, notifying you when they go online or offline.


## Help

Click the **Help** icon  to display context-sensitive help for the currently selected function page.

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# Status Monitor

Toolbox > Status

The status monitor  continuously monitors selected machines, notifying you when they go online or offline. If someone is currently logged onto the machine, **Status Monitor** displays their user name in bold along with the IP address of the machine. Master role users can also display the list of logged on VSA users.

## Turn off sound

A unique audible tone sounds each time a machine goes online, machine goes offline, a user logs in, or a user logs out. Turn these sounds off by checking this box.

## Refresh Rate

Refreshes the browser every 30 sec, 1, 2, or 5 minutes. Each browser refresh gets the latest status from **Virtual System Administrator™**. To get an immediate update, click the **Refresh** link.

## List logged on users

Uncheck this box to hide the list of users.

**Note:** This option is available to master role users only.

## Sort By

List machines in any of the following order:

- **Connection Gateway** - Numerically, left to right, by IP address. Best for grouping machines by how they are connected on the network.
- **Group ID** - Alphabetically by group ID.
- **Machine ID** - Alphabetically by machine ID.

## Hide offline machines


Uncheck this box to list all machines. Offline machines have a grayed out icon.

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# Administrator Notes

**Administrator Notes** allows you to log what you did to a machine or group of machines into the system database. The next time you have a problem with any machine, check the notes and see what other

## Bookmarks

VSA users have done on that machine. The system time-stamps each administrator note and associates the note with a VSA user name. Open the notes editor by clicking the Notes icon  in the **Toolbox** (page 4), or in Live Connect, Machine Summary, or **Quick View** (page 9).


**Note:** You can print **Administrator Notes** using **Info Center > Reporting > Reports > Logs - Admin Notes**.

**Note:** **Audit > Documents** provides a different method of documenting a machine, by uploading documentation files for a specific machine to the Kaseya Server.

### Machine.Group ID

The list of Machine.Group IDs displayed is based on the Machine ID / Group ID filter and the machine groups the user is authorized to see using **System > User Security > Scopes**. Check the box in front of the machines you wish to apply the note to.


### Time

Displays the time-stamp when the note was first entered. The time-stamp can be edited by clicking the edit icon  next to the specific note whose time-stamp you wish to change.


### Admin

Logon name of the user that entered the note. If a different user edits the note, this field is updated with the new user's name.

### Delete the note

Delete the note by clicking the delete icon  next to it. If more than one machine has the same note entered by the same user and has the same time-stamp, the system asks if you want to delete all occurrences of the note.

### Edit the note

Change a note by clicking the edit icon  next to it. Click the **Apply** button to commit the changes. Click **Cancel** to restore the original text. If more than one machine has the same note entered by the same user and has the same time-stamp, the system asks if you want to modify all occurrences of the note.

### Note

Displays the user entered note for the selected machine.

### Notes per Page

Number of notes to display at a time. Choices are 10, 30, and 100.

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## Bookmarks




You can bookmark any item on the navigation pane. Bookmarks are defined by user. If you work with the same set of navigation items each day, this can save you navigation clicks.

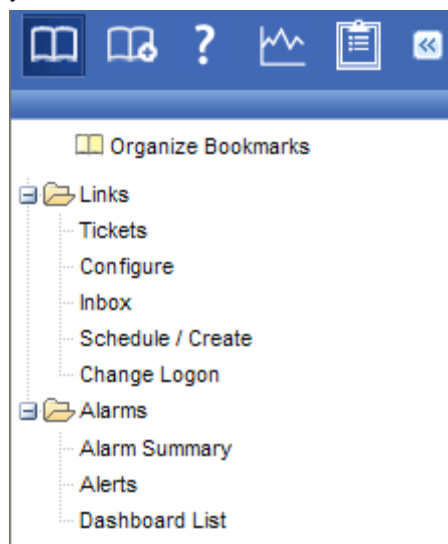


- Click the **Add Bookmark** icon to add a navigation item to your list of bookmarks.



- Click the **Bookmark Show** icon to display the list of bookmarks you have saved.

 - Click the **Organize Bookmarks** icon in the bookmark list to create bookmark folders and organize your bookmarks.




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## Logoff

Click the **Log Off** link to prevent unauthorized access to the server and return to the logon page. The **Log Off** link is located in the upper right-hand corner of the window and is accessible from any tab and function.

**Note:** For increased security, it is recommended that users log off and terminate all browser sessions when not administering the server.

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## Color Scheme

System > Customize > Color Scheme

The **Color Scheme** page determines the set of colors displayed by the VSA environment. **Color Scheme** selection applies to all users within the same partition.


To change color schemes:

1. Select a color scheme in the middle pane.
2. Click the **Set Scheme** button.


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## 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.









## Check-in Icons

- Each installed agent is assigned a unique VSA machine ID / group ID / organization ID. 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** (page 8) 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** (page 8). **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** (page 9) immediately. You can launch an agent procedure, view logs or launch **Live Connect** from the agent quick view window.

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## Check-in Icons

Once a machine ID is created, an agent check-in icon displays next to each machine ID account in the VSA. These icons indicate the agent check-in status of each managed machine. Click a check-in icon to display **Live Connect** (page 8). Hovering the cursor over a check-in icon displays the **agent quick view window** (page 9).

-  Online but waiting for first audit to complete
-  Agent online
-  Agent online and user currently logged on. Icon displays a tool tip showing the logon name.
-  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


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## Live Connect

**Live Connect** is a web-based, single-machine user interface. You can access **Live Connect** by Ctrl+clicking the agent icon , or by clicking **Live Connect** button in **Quick View** (page 9). **Live Connect** enables you to perform tasks and functions solely for one managed machine. A menu of tabbed property sheets provide access to various categories of information about the managed machine.



Additional menu items display, depending on the add-on modules installed and the operating system of the target machine.

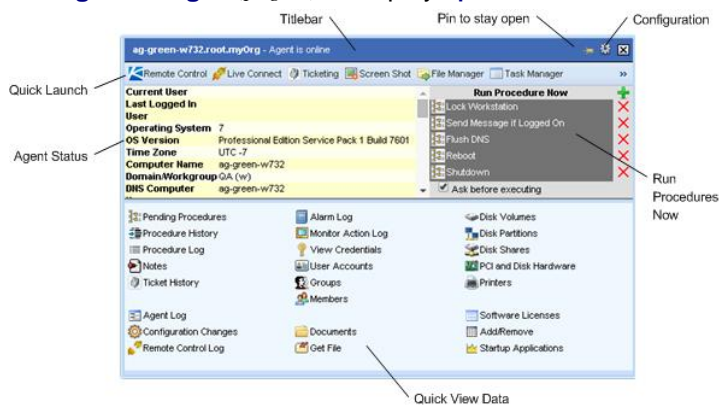
This same **Live Connect** window displays when a machine user clicks the  agent icon in the system tray of the managed machine, with certain restrictions applied. This machine user view of **Live Connect**

is called **Portal Access**.

**Note:** For more details, see [Remote Control > Live Connect](#).

## Quick View

Hovering the cursor over a check-in icon displays an agent **Quick View** window immediately. You can launch an agent procedure, view logs or launch **Live Connect** from the agent **Quick View** window. You can use **agent badges** ([page 9](#)) to display **Special Instructions** text in the bottom of the the **Quick View** window.








### Screen Shot

One function is unique to the **Quick View** window. Click the **Screen Shot** button to snap an image of the current desktop. You can access saved images by clicking the **Get File** folder icon in the same **Quick View** window.

### Record Desktop

*Applies only to machines assigned the WinVNC remote control type.* The **Record Desktop** button records the desktop without launching a remote control session.

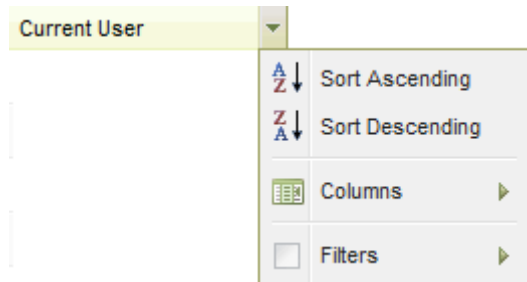
## Agent Badges







Add *badges* to the lower right corner of agent status icons, such as   . These badges display everywhere the agent icon displays in the user interface. For example, you could mark a machine with a  badge to indicate the customer requires a phone call before anyone works on that machine. Or mark a server with a  badge because you should not do anything to it until after hours. Select one or more machines on the Agent > Edit Profile page, then click the **Icon Badge** link at the top of the page and select one of the available badges. You can define a **Special Instructions** text message for each badge. Click the **Update** button to assign the badge to selected machines.

When you hover the cursor over an agent status icon with a badge, the **Quick View** ([page 9](#)) window displays the **Special Instructions** text in the bottom of the window.

# Data Table Column Options

Data tables in Kaseya 2 typically provide the following column options.



- **Column Selection** - Click any column header drop-down arrow  , then **Columns** to select which columns display in the table. Click the Sort Ascending  or Sort Descending  icons to sort the table by the selected column heading.
- **Column Sorting** - Click the Sort Ascending  or Sort Descending  icons to sort the table by the selected column heading.
- **Column Filtering** - Click the column drop-down arrow  to enter a filter value for that column. For example enter `NS` to find all rows that start with `NS` in that column. Enter `NS%2` to find all rows that start with `NS` and end with `2` in that column. You can filter by multiple column filters if you like.
- **Flexible Column Widths** - Expand or collapse the width of each column by dragging the column header boundaries left or right.

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## Learning More

PDFs are available to help you quickstart your implementation of **Virtual System Administrator™**. They can be downloaded from the **first topic in the VSA online help**

(<http://help.kaseya.com/webhelp/EN/VSA/R8>).

If you're new to **Virtual System Administrator™** we recommend the following quickstart guides:

1. Getting Started
2. User Administration
3. Agent Configuration and Deployment
4. Remote Control Tools
5. Monitoring Configuration
6. Custom Reports

The following resources are also available.

### **Kaseya University**

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See **Kaseya University** (<http://university.kaseya.com>) for training options.





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