



Getting Started

Quick Start Guide

Version R95

English

January 12, 2021

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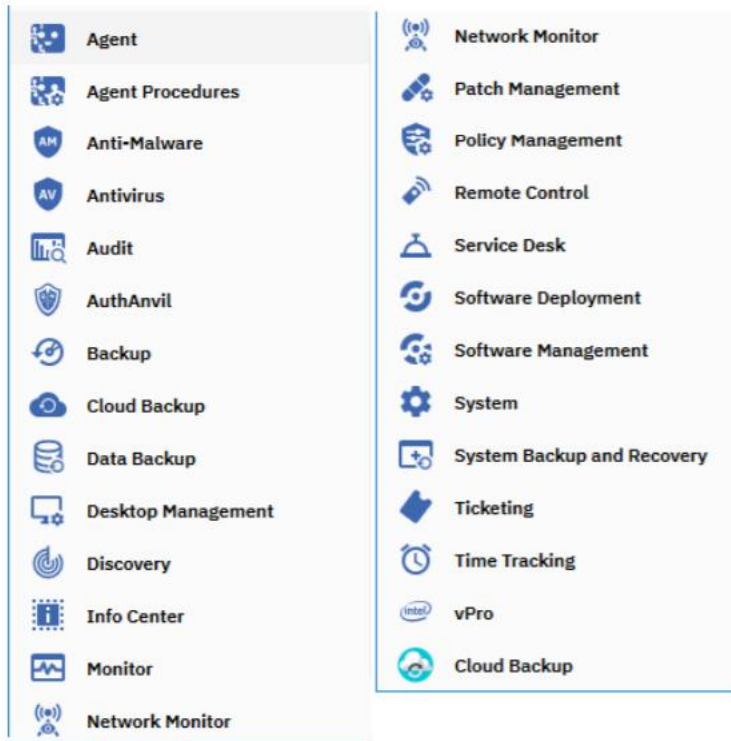
Contents

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VSA Modules.....	i
Page Layout	ii
System notifications and alerts	vi
Online and offline assets.....	viii
Administrator Notes	ix
User Menu	xiii
Color Scheme	xiii
Agents.....	xiv
Check-in Icons	xv
Live Connect	xv
Quick View	xviii
Agent Badges	xix
Data Table Column Options	xxiii
VSA Classic User Interface	xxiv
Learning More.....	xxxvi
Index	37

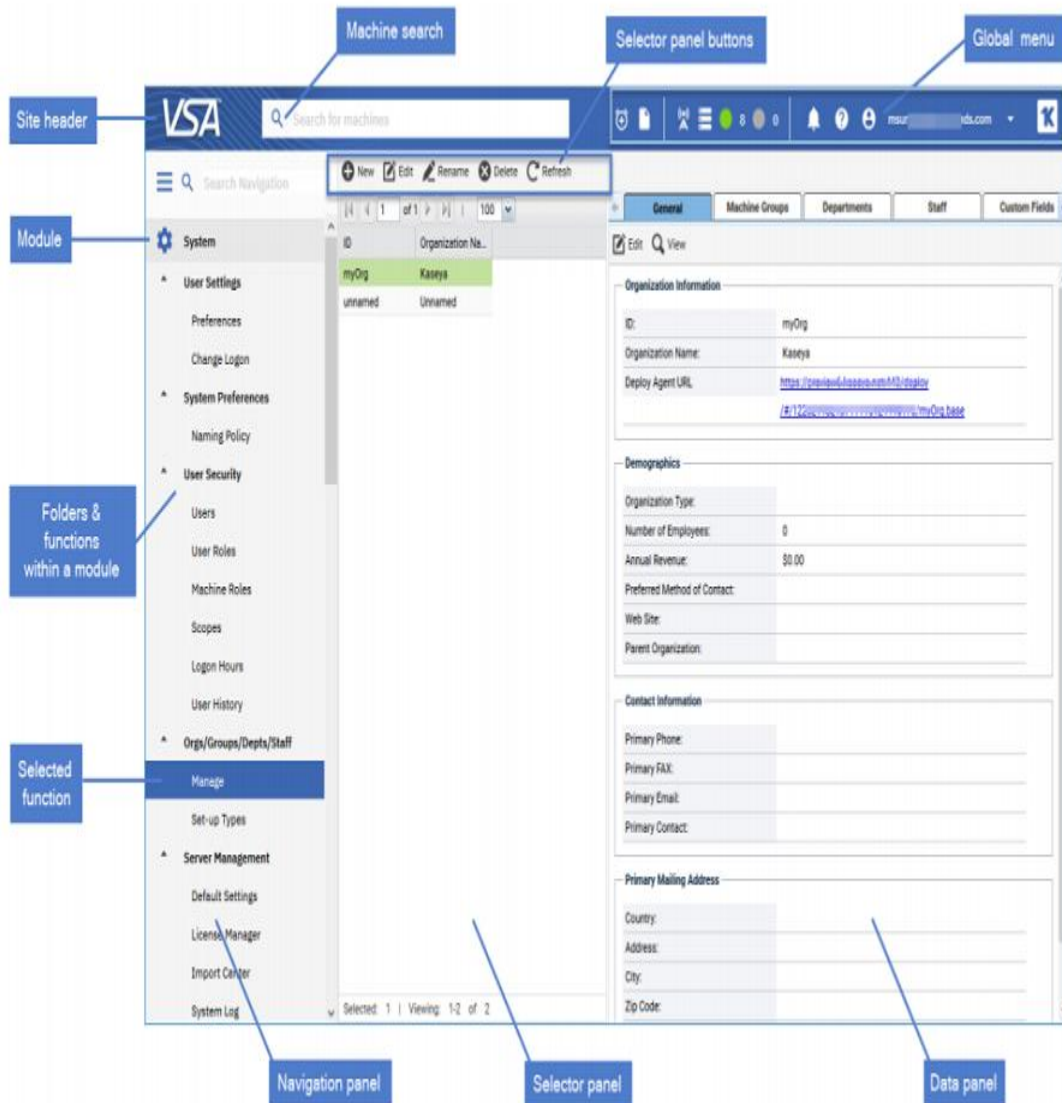
VSA Modules

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/9050000/index.asp#6779.htm>) and the Kaseya Server.



Page Layout

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



Note: Using multiple browser tabs to access the same VSA instance is not supported. Logging on to the same VSA as multiple users from the same browser is also not supported.

VSA page elements

Pages in the VSA user interface contain these main elements:

- **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.
- **Global menu** – Row of icons across the top of the user interface. Hover over an icon to display its description. Sample icons are shown here:



- Click to open the latest **VSA Release Notes**

(<https://helpdesk.kaseya.com/hc/en-gb/categories/360001423952-VSA>).



- Click to add a timer to record time entries that can be applied to timesheets and other work records.



- Click to add notes.



- Click to view machine network status.



- Click to view and manage system notifications.



- Shows the current number of online and offline assets.



- Click to open **Kaseya's Automation Exchange** (<https://automationexchange.kaseya.com/>) marketplace.



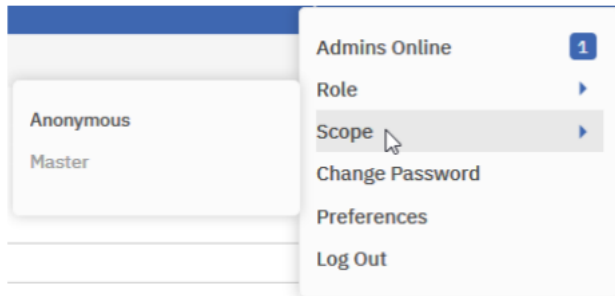
- Click to view alerts.



- Click for help.



- Click to log out or to view/update account settings. If you have more than one role or scope, you can switch roles or scopes at any time during your VSA session.

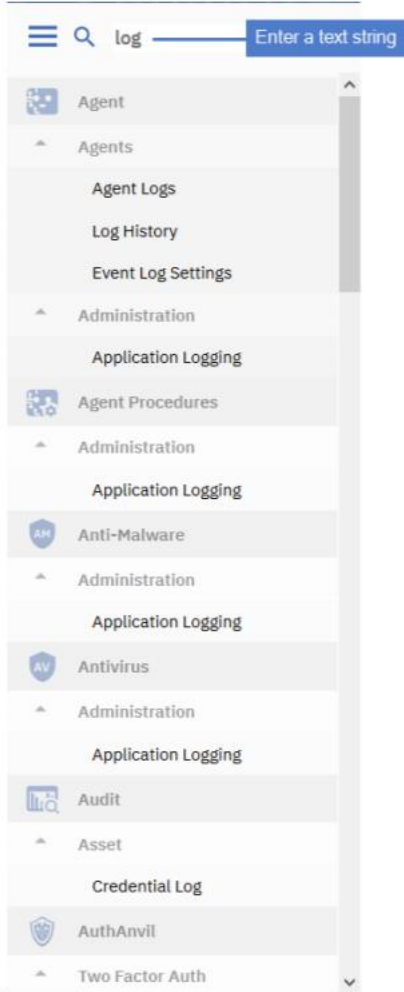


Navigation panel

VSA modules display in a single, explorer-like navigation panel:

- Only the modules that have been installed to this VSA instance display in the navigation panel.
- Only the modules and functions accessible to the current user display in the navigation panel. Any items that the user does not have access to do not display in the VSA.
- To view a module's functions, click to expand the module.

- To search for a module or function, enter text in the Search Navigation field above the navigation panel. Modules and functions containing the string you entered display below.



Selector panel

Many VSA functions display in a middle selector panel where you can select one or more records. You can scroll, filter, and sort the selector panel independently from any other panel.

- Selector panel buttons - At the top of the selector panel is a page-specific button bar. Typically these buttons enable you to create, edit, and delete records listed in the selector panel. Additional buttons display, depending on the page and your user 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.
- Data panel - On the right-hand side of the page 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.

Agent list example

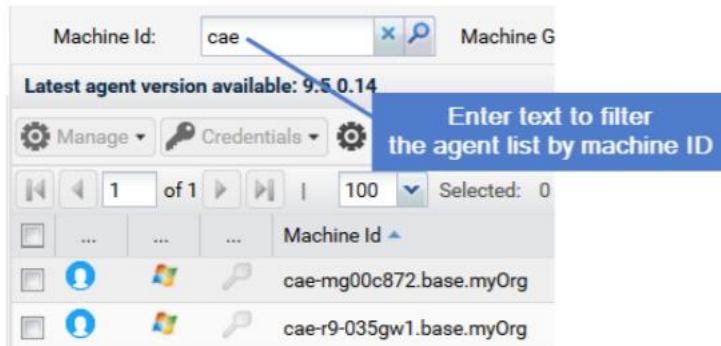
The screenshot displays the VSA (Virus Service Agent) interface. At the top, there is a search bar for machines and a navigation menu. The main area is divided into a left sidebar, a central tree view, and a right-hand details panel.

- Machine ID filter:** A text input field at the top of the central area.
- Machine Group filter:** A dropdown menu labeled "All Groups" at the top of the central area.
- View filter:** A dropdown menu labeled "No View" at the top of the central area.
- Tree filter:** A dropdown arrow next to the tree view.
- Collaps:** A button next to the "Procedure Description" section.
- Folder / object tree:** A hierarchical tree view showing folders like "Private", "Shared", "Sample Procedures", "System", and "VSA Core".

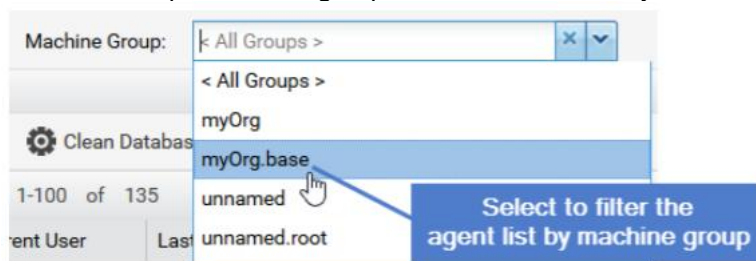
The right-hand panel shows details for the selected procedure "1 - Computer Cleanup", including a description and a table of agents.

Schedule	View Procedure	Used By
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Machine ID, Machine Group, and View filters – If a page displays an agent list, then these filters display at the top of the page. Use these filters to limit the list of agents that display on the page:
 - Machine ID – Enter text to display only agents whose machine IDs contain the string you entered.



- Machine Group – Select a group from the list to filter by machine group.




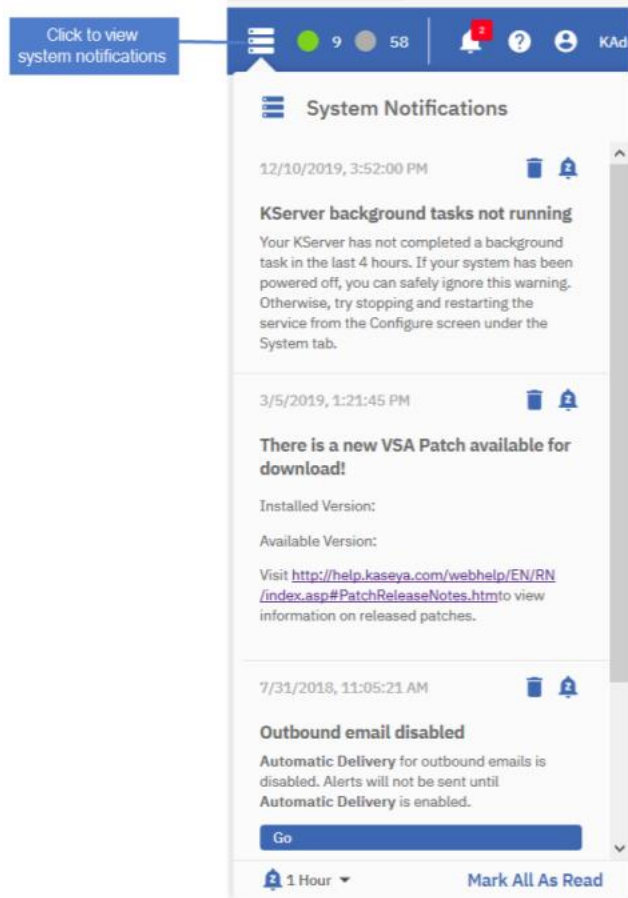
- View – Select a view from the list to filter by view.
- Folder / object tree – Certain functions display a folder tree in the selector panel instead of a list of records. Typically two folder trees are provided, one Private and one Shared, but sometimes only the Shared folder tree displays. You can create new objects in these folder trees, and in the Shared folder tree, share them with other users.
- Tree filter – All folder tree panels can be filtered by entering a string into the tree filter.
- Agent lists – Agents lists display on many VSA pages. 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 apply to any child records that have been selected on the tab. For example, 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 on the tab, then click the **Run Now** tab-specific 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.

System notifications and alerts

The Global menu at the top of the VSA window contains system notification and alert icons that are accessible from any module.

System notifications


Click the  icon to view and resolve VSA notifications:

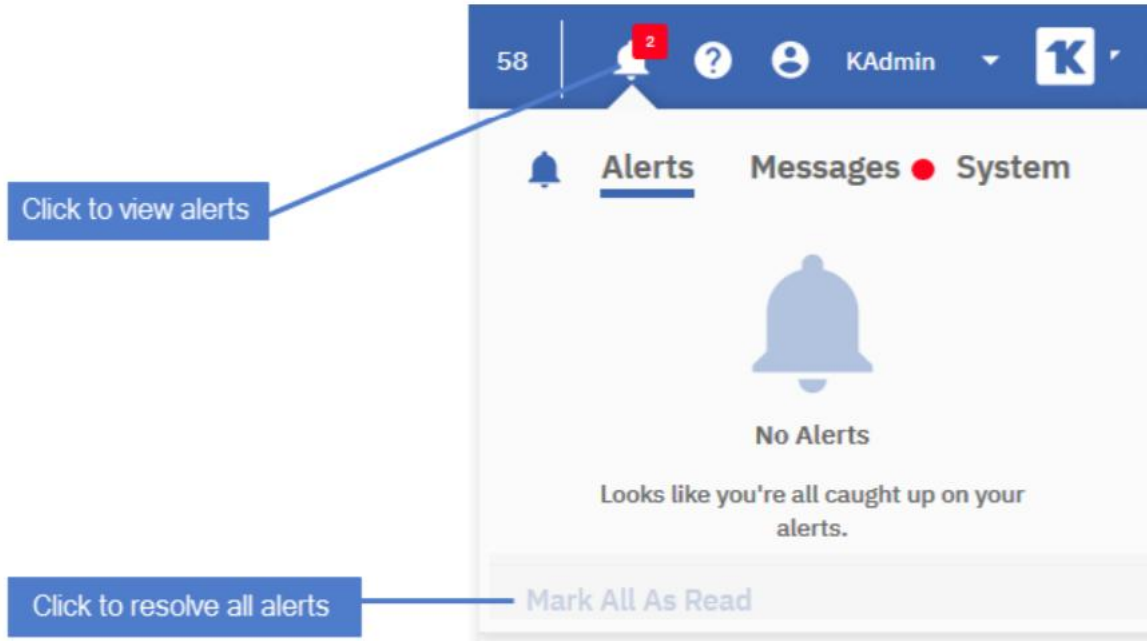


Types of notifications include:

- Service Desk tickets
- System notifications - Includes both critical and warning system-level messages.
- Inbox messages - You can create multiple icons for different types of inbox message.

Alerts

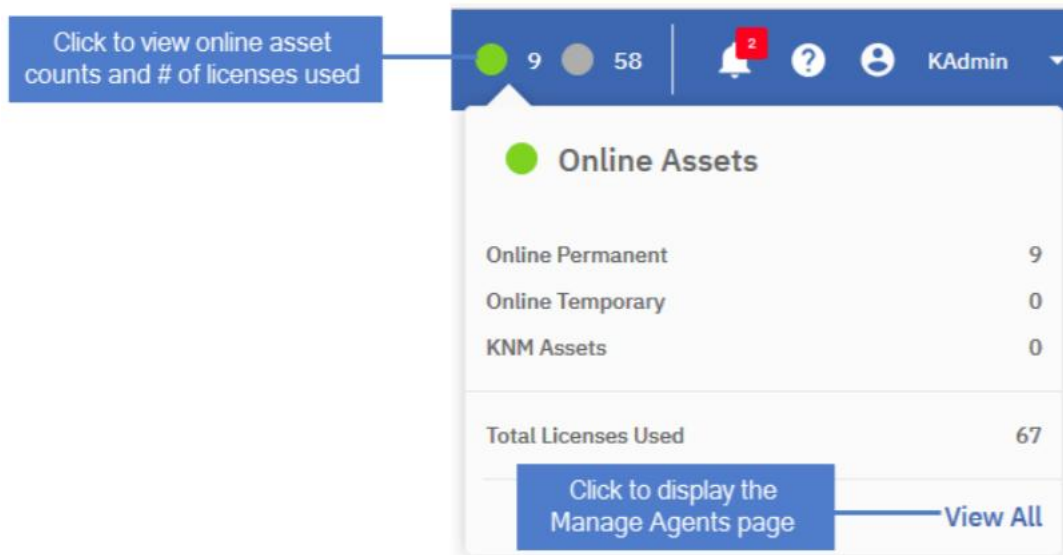
Click the  icon to view and resolve alerts that were generated by the Agent Procedures `sendAlert()` command:




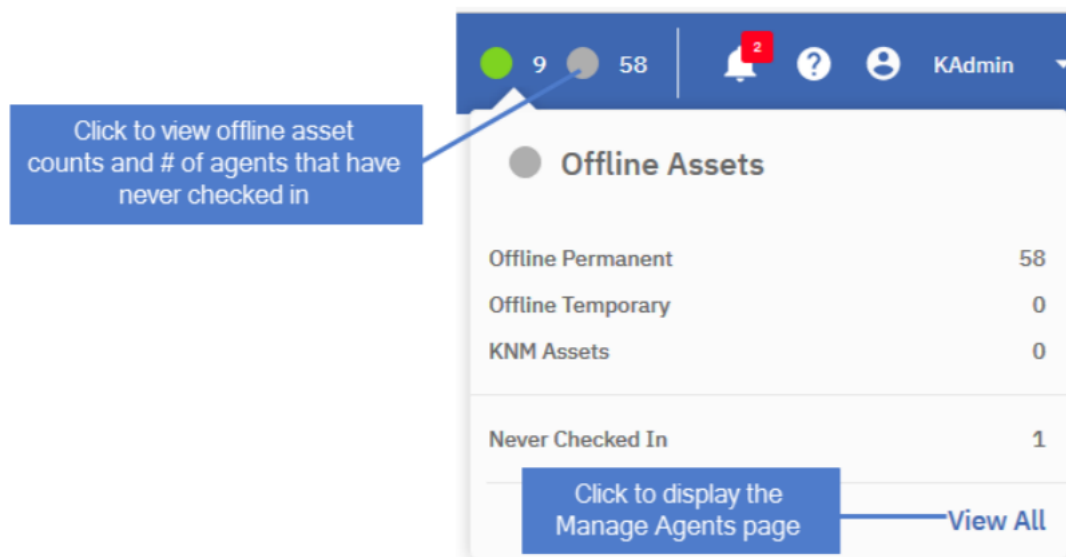
Online and offline assets

The Global menu at the top of the VSA window contains icons that show the number of assets that are currently online and offline.


- Click  to view a list of counts for online assets (permanent, temporary, KNM assets, and total licenses used). Click View All to display the Agents > Manage Agents page:



- Click  to view a list of counts for offline assets (permanent, temporary, KNM assets, and number of agents that have never checked in). Click View All to display the Agents > Manage Agents page:




Administrator Notes

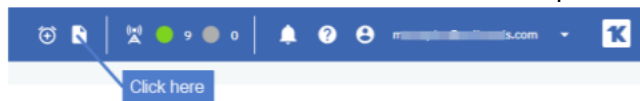
The Global menu at the top of the VSA window contains a notes icon  you can use to log what you did to a machine or group of machines into the system database.



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

See these procedures for details:

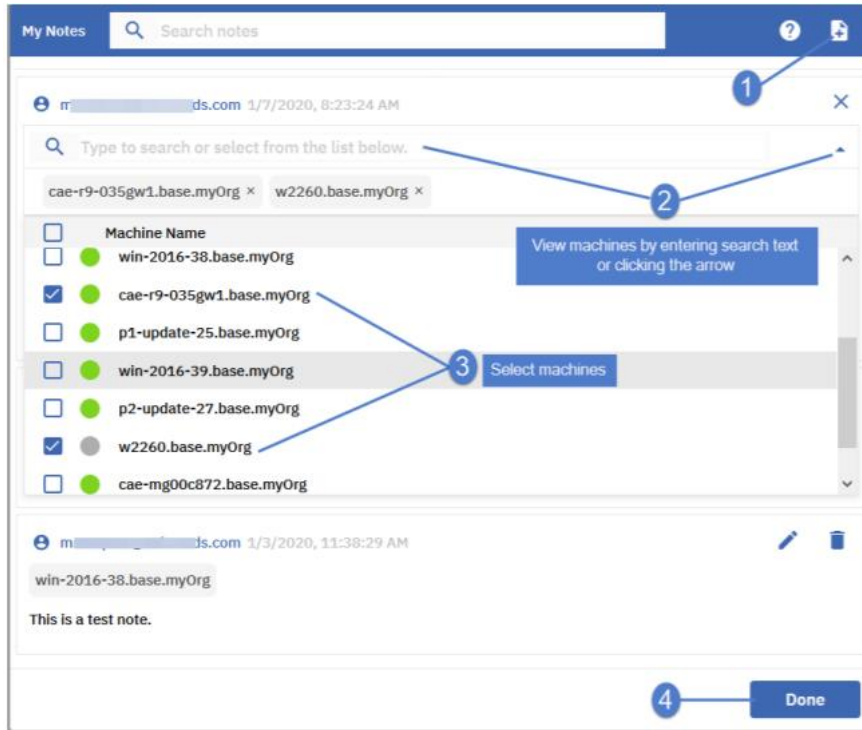
To add a note

1. Click the  icon in the Global menu at the top of the VSA window:

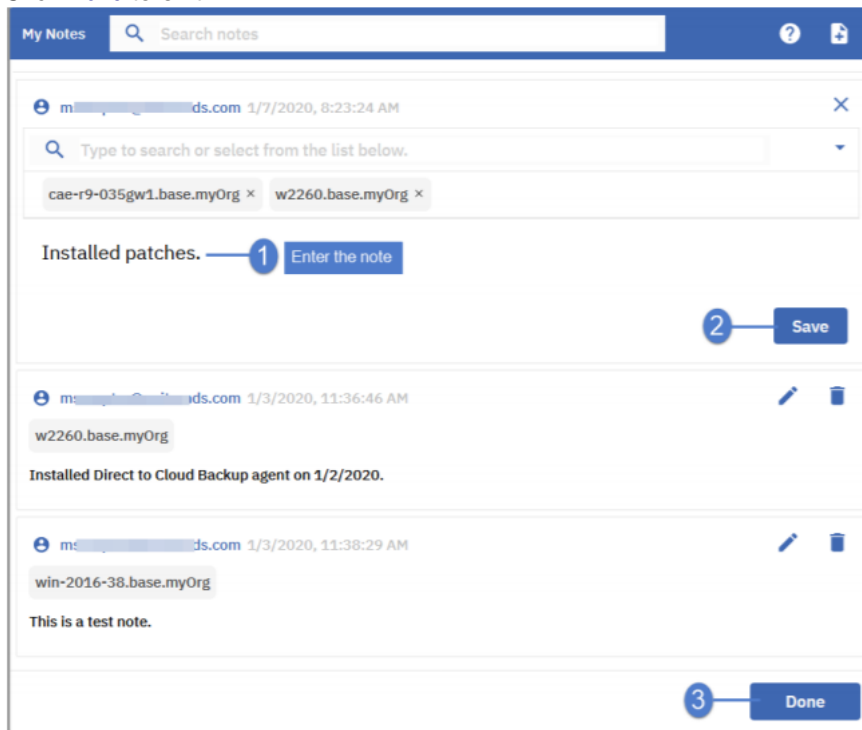


2. Click .
3. Select one or more machines to which the note will be applied:
 - To view all of your machines, click  in the Type to search or select from the list below field.
 - To view a subset of machines, enter search text in the Type to search or select from the list below field. Machine names and user names containing the text you entered display.

- Check boxes to select machines.
4. Click **Done**.

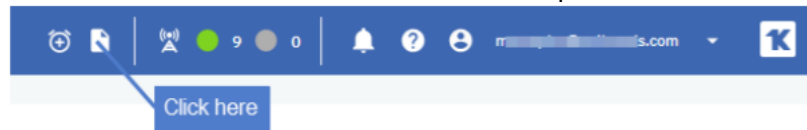


5. Enter the note. Click **Save**.
6. Click **Done** to exit.



To view, edit, or delete a note

1. Click the  icon in the Global menu at the top of the VSA window:




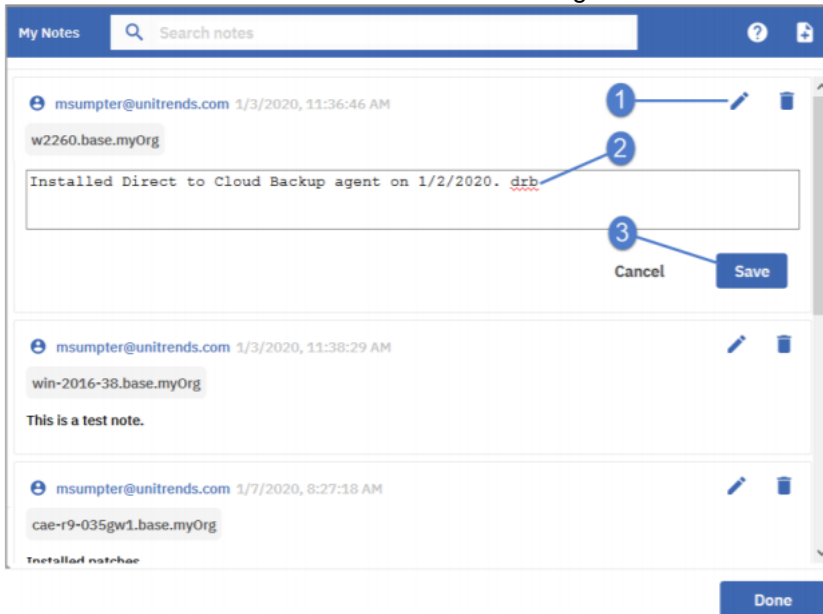
Notes display in the My Notes dialog. (If you have not added any notes, you see a No Notes message.)

2. Do any of the following:

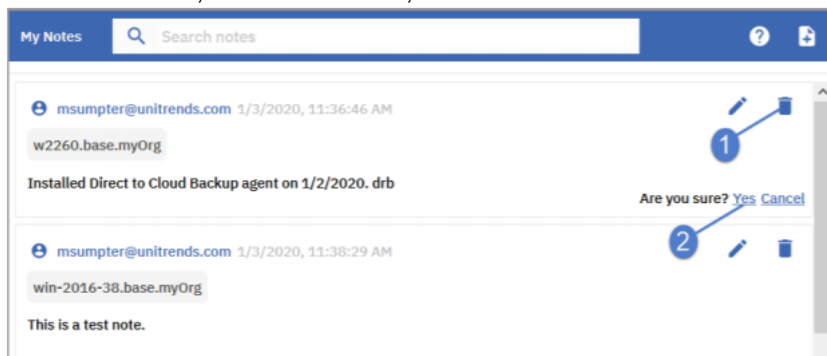
- To filter by machine name, enter text in the *Search* notes field:



- To edit a note, click its  icon, modify the note text, and click **Save**. (The note's date and time indicates when the note was created. Editing a note does not modify this timestamp).

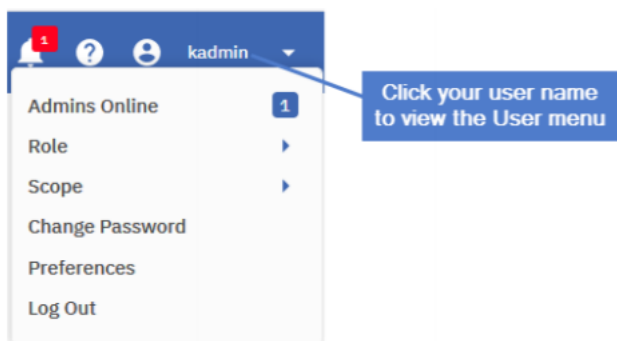


- To delete a note, click its  icon, then **Yes** to confirm:



User Menu

Click your VSA user logon name in the upper right hand corner of the VSA to display your **User** menu.



- **Admins Online** – Number of current distinct user sessions authenticated to the VSA instance.
- **Role** - Lists the user roles you can select. Determines the functions you have access to.
- **Scope** - Lists the user scopes you can select. Determines the user data you have access to.
- **Change Password** - Selects the Change Logon page, where you can change your password, security question, and security answer.
- **Preferences** - Selects the Preferences page.
- **Log Out** - Click to log out of the VSA and display the Logon page.

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

Color Scheme

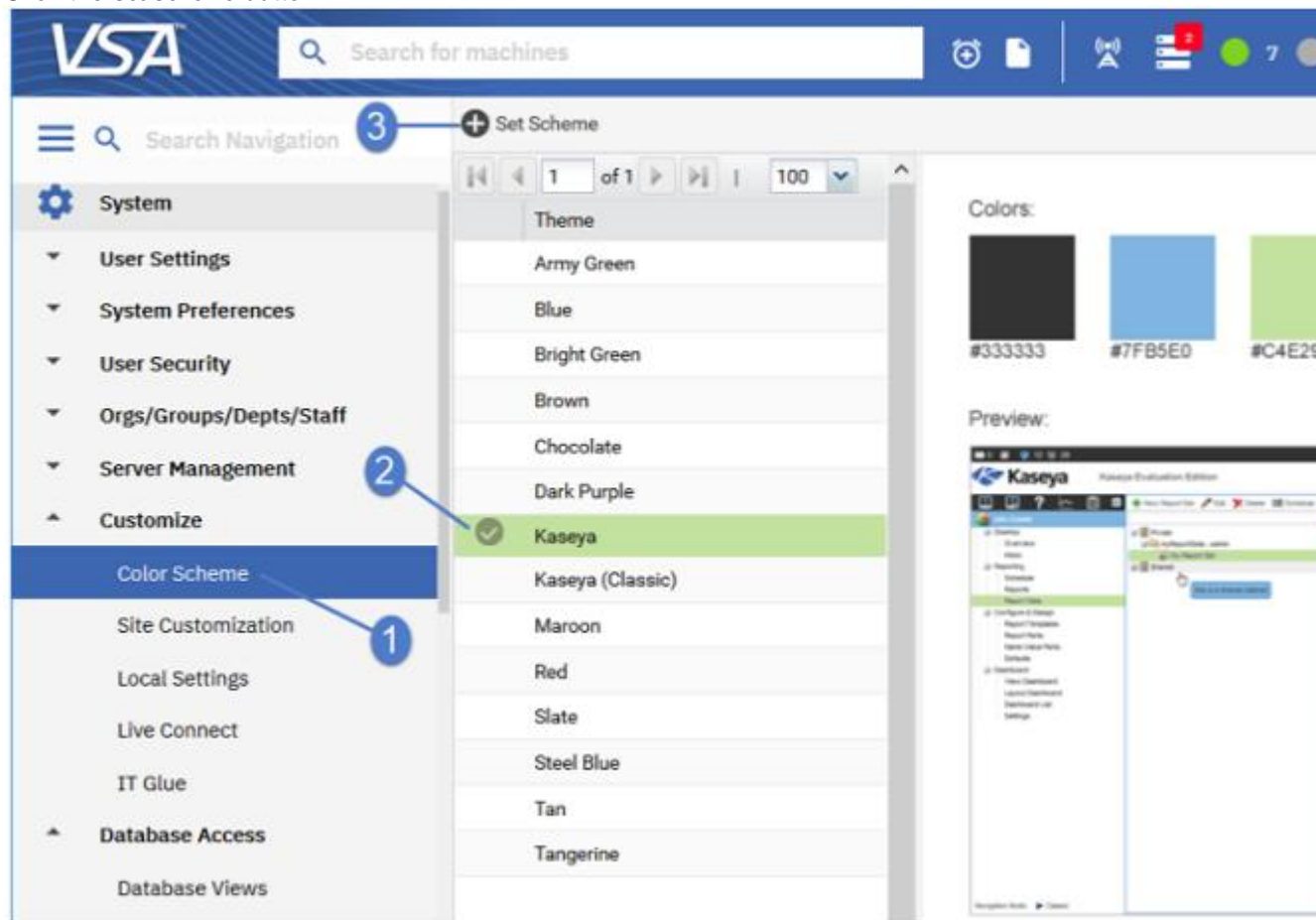
System > Customize > Color Scheme

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

Note: Note that color scheme settings do not apply to the site header and left navigation panel.


To change color schemes:


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



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. 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 xv*) 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.

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. 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. 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
-  An agent icon adorned with a red clock badge is a temporary agent.

Live Connect

The **Live Connect** app is a single-machine user interface that runs natively on your local machine, independent of the browser you are using to log into the VSA.

Note: Live Connect now supports VSA native 2FA.


Note: Live Connect Classic - This updated version of **Live Connect** replaces Live Connect (Classic). Live Connect (Classic) and Quick View (Classic) can be enabled by setting the **Use new Live Connect** when clicking the Live Connect button in Quickview option to No in System > Default Settings.

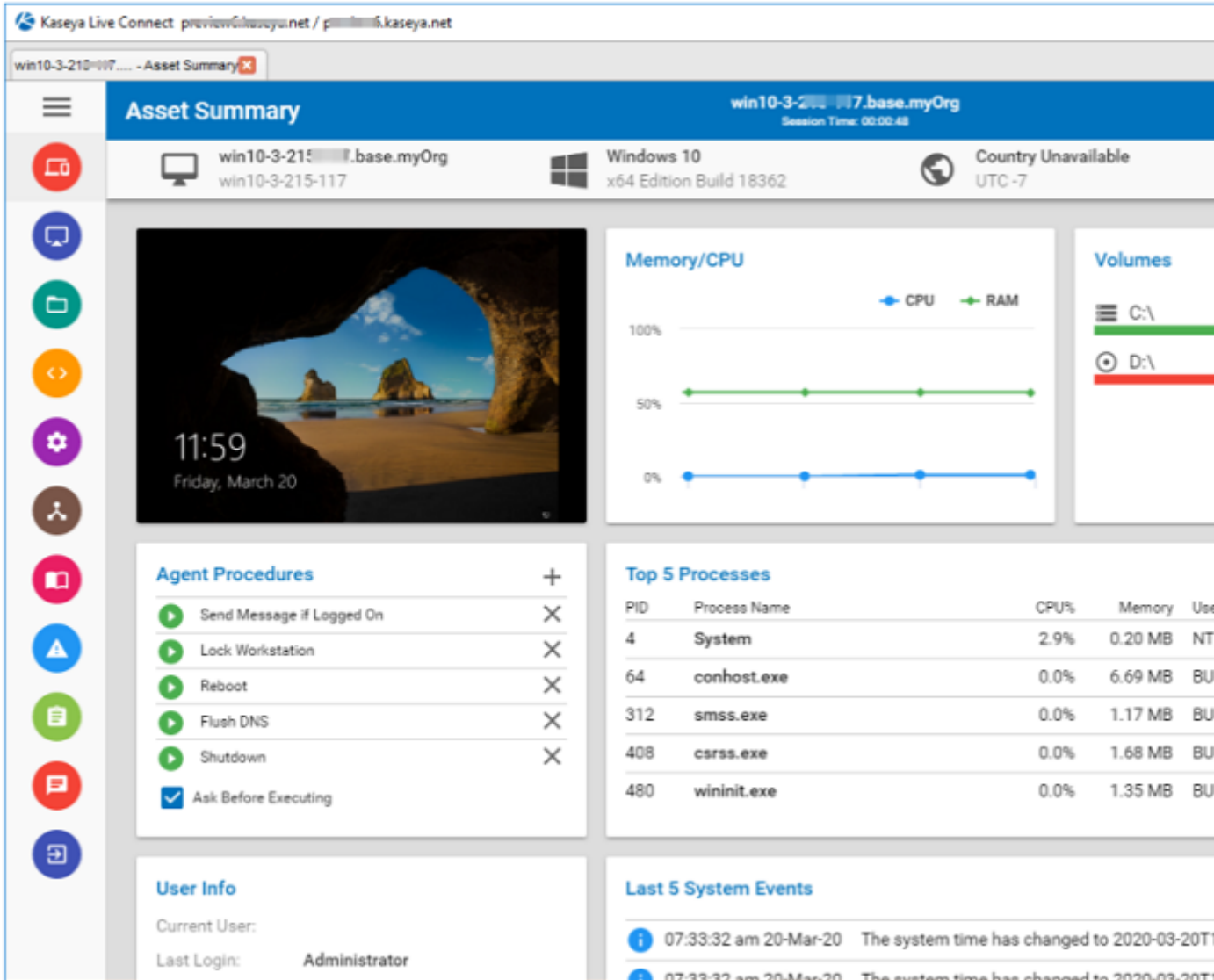
Note: Num Lock key and RDP - If you are connected through Live Connect and launch an RDP session from the Windows endpoint, use of the keyboard Num Lock key is detected on the endpoint only. The Num Lock key is not detected within the RDP session.
See also Live Connect Requirements.

Asset Summary page

Upon launching Live Connect, the Asset Summary page displays.

- Multiple icons along the left provide access to other menus or pages.

- You can click the add tab  icon to work with multiple menu options for the same machine at the same time.
- Most data lists throughout **Live Connect** can be filtered and sorted.
- **Live Connect** sessions continue without user interruption, even if the VSA user logs out of the VSA or the VSA session times out.
- Enhanced Live Connect features do not display until agents are updated.



The screenshot displays the 'Asset Summary' page for a Windows 10 machine. The interface includes a navigation sidebar on the left with various icons. The main content area is divided into several sections:

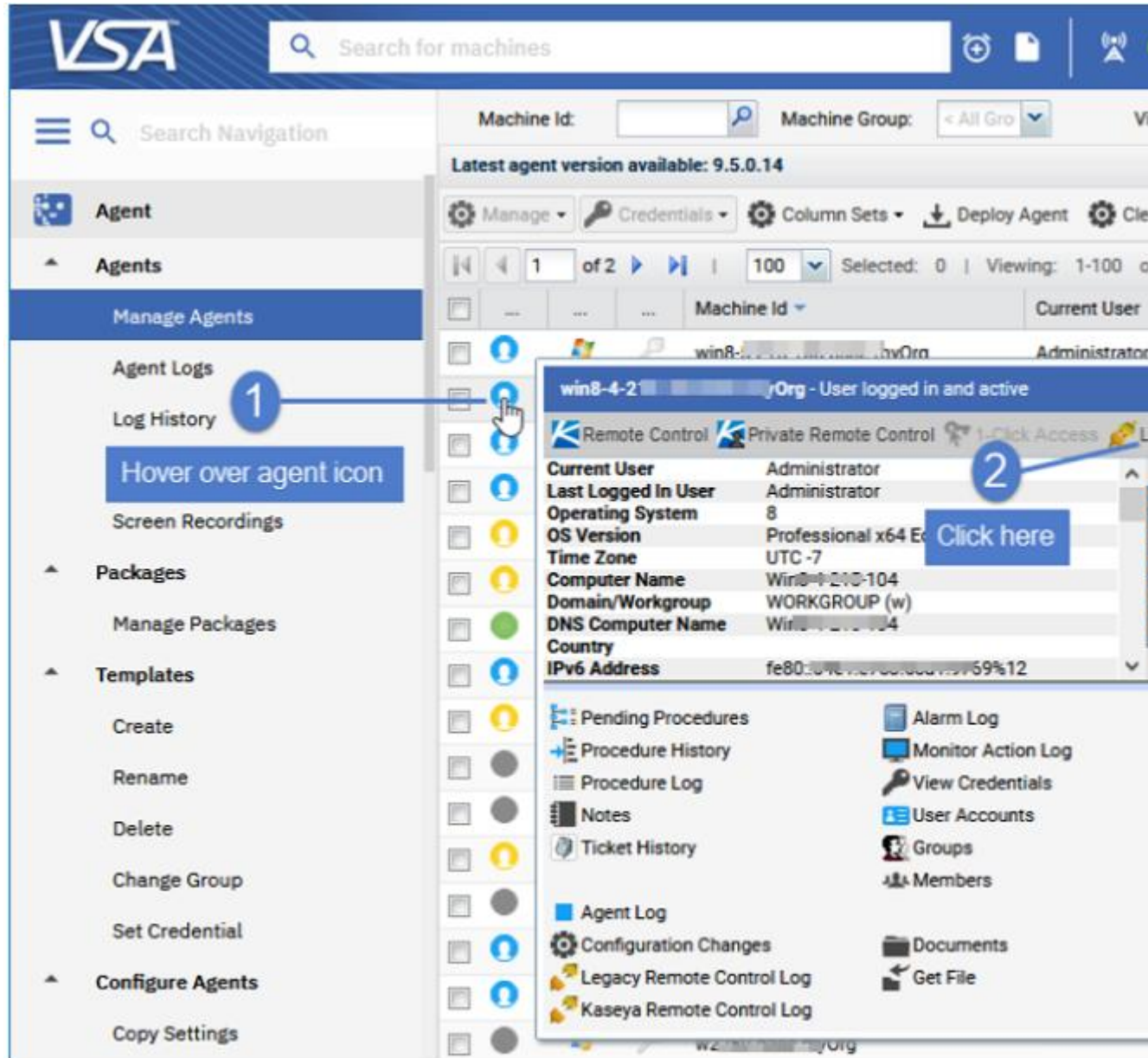
- Header:** 'win10-3-215-117.base.myOrg' with session time '00:00:48'.
- System Info:** 'Windows 10 x64 Edition Build 18362', 'Country Unavailable', and 'UTC -7'.
- Memory/CPU:** A line graph showing CPU usage at 0% and RAM usage at approximately 50%.
- Volumes:** A list of drives including C:\ and D:\.
- Agent Procedures:** A list of tasks such as 'Send Message if Logged On', 'Lock Workstation', 'Reboot', 'Flush DNS', 'Shutdown', and 'Ask Before Executing'.
- Top 5 Processes:** A table listing processes like System, conhost.exe, smss.exe, csrss.exe, and wininit.exe with their respective CPU and memory usage.
- User Info:** Shows 'Current User: Administrator' and 'Last Login: Administrator'.
- Last 5 System Events:** A list of system events, including 'The system time has changed to 2020-03-20T10:07:33.32 am 20-Mar-20'.

Note: This updated version of **Live Connect** replaces Live Connect (Classic). Live Connect (Classic) and Quick View (Classic) can be enabled by setting the Use new Live Connect when clicking the Live Connect button in Quickview option to No in System > Default Settings.

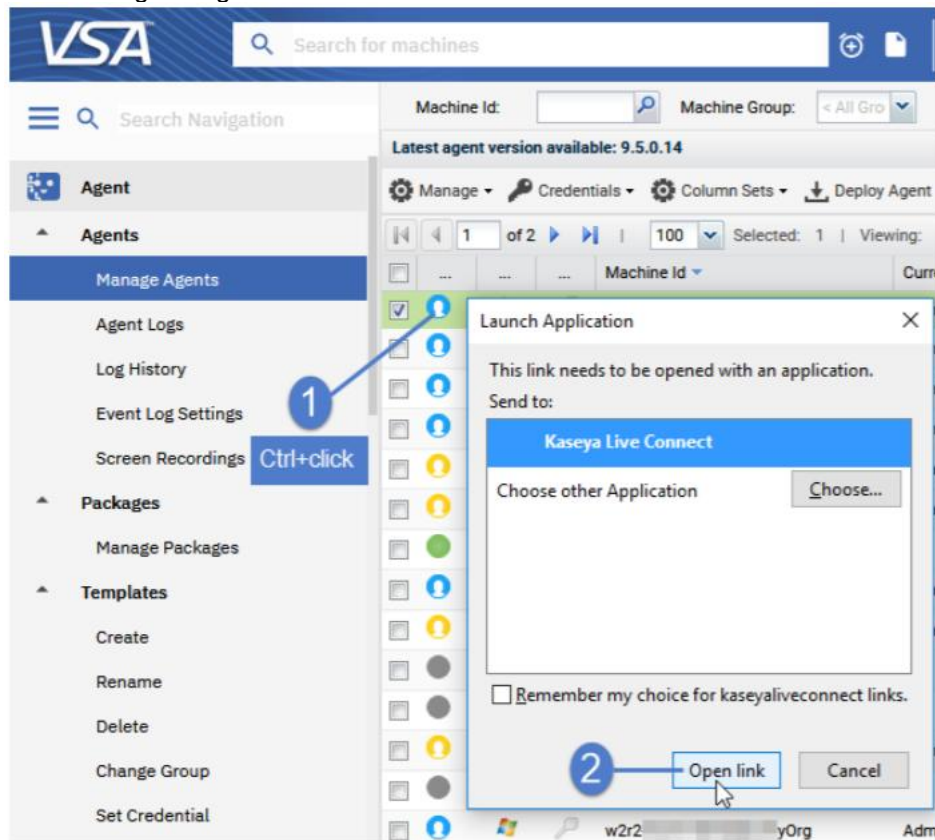
Launching Live Connect

Do any of the following to launch Live Connect:

- Hover the cursor momentarily over an agent check-in icon to display the Quick View window .
Click Live Connect:



- Ctrl+clicking the agent icon. Live Connect launches:



- You can also launch **Live Connect** independently of the VSA using:
 - The Agent/Asset Browser
 - Live Connect Mobile
 - A Custom URL Scheme (for details, see this article: [Launching Live Connect Using a Custom URL Scheme](https://helpdesk.kaseya.com/hc/en-gb/articles/115002524068) (<https://helpdesk.kaseya.com/hc/en-gb/articles/115002524068>))

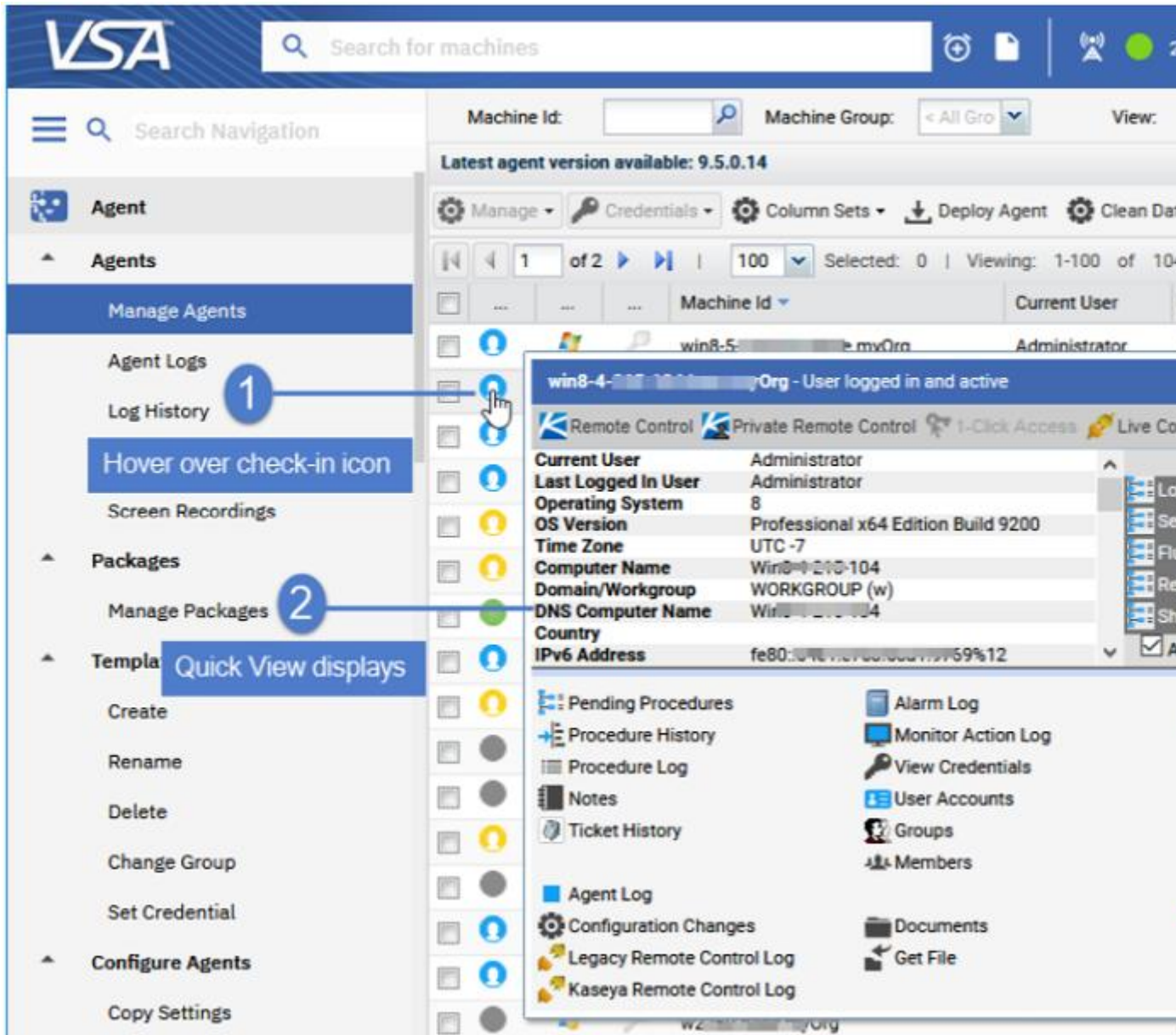
The first time you launch Live Connect, you are prompted to download and install the Live Connect application on your local computer.

Quick View

Hovering the cursor over a check-in icon displays an agent **Quick View** window immediately. You can use **Quick View** to:

- View agent properties
- Start a shared or private Kaseya Remote Control session
- Launch an agent procedure

- Launch Live Connect



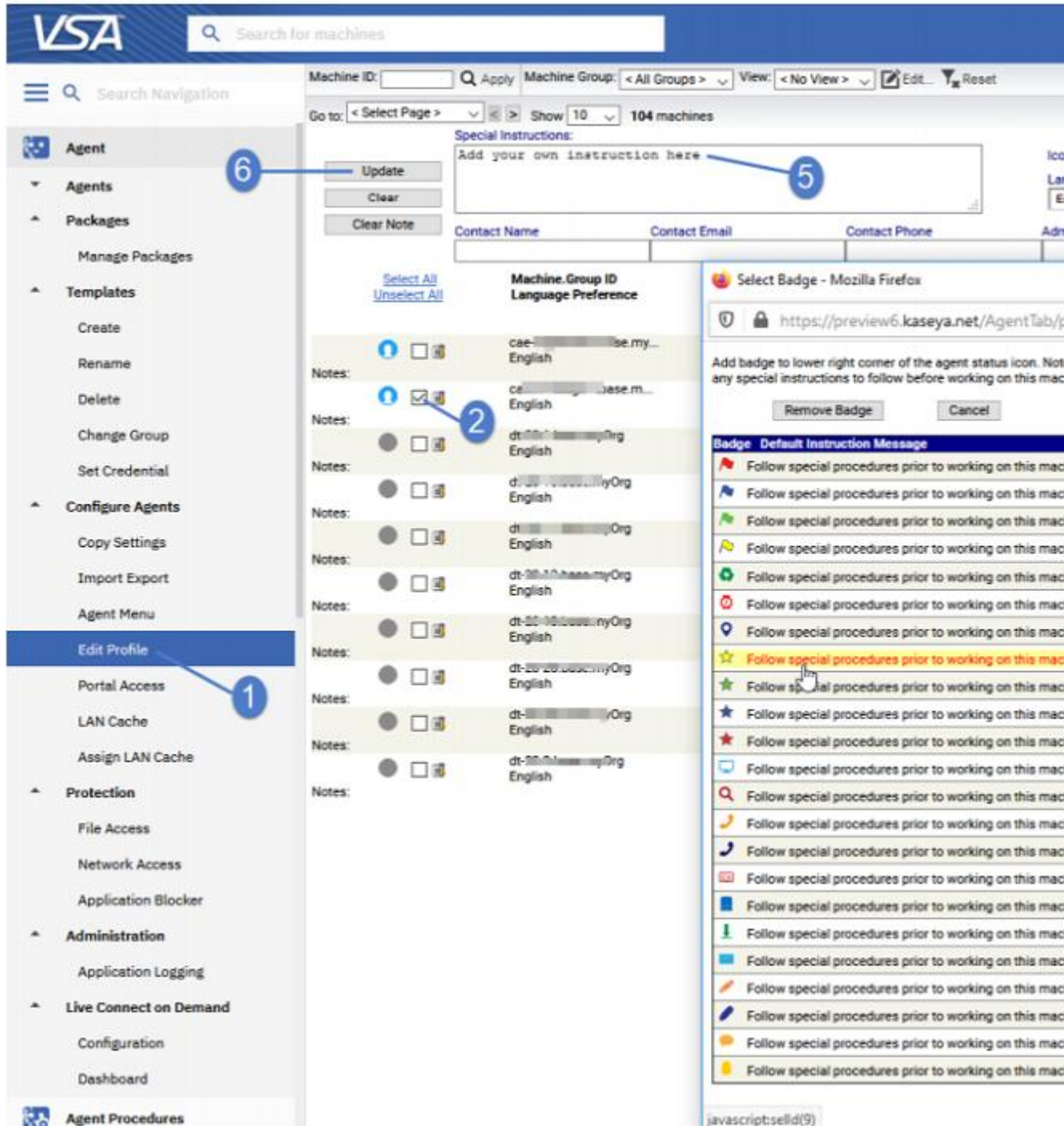
Agent Badges

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.

To add an agent badge

1. Select one or more machines on the Agent > Configure Agents > Edit Profile page.
2. Click the [Icon Badge](#) link at the top of the page and select one of the available badges.

3. Add a special instructions text message for each the badge.
4. Click the **Update** button to assign the badge to selected machines.

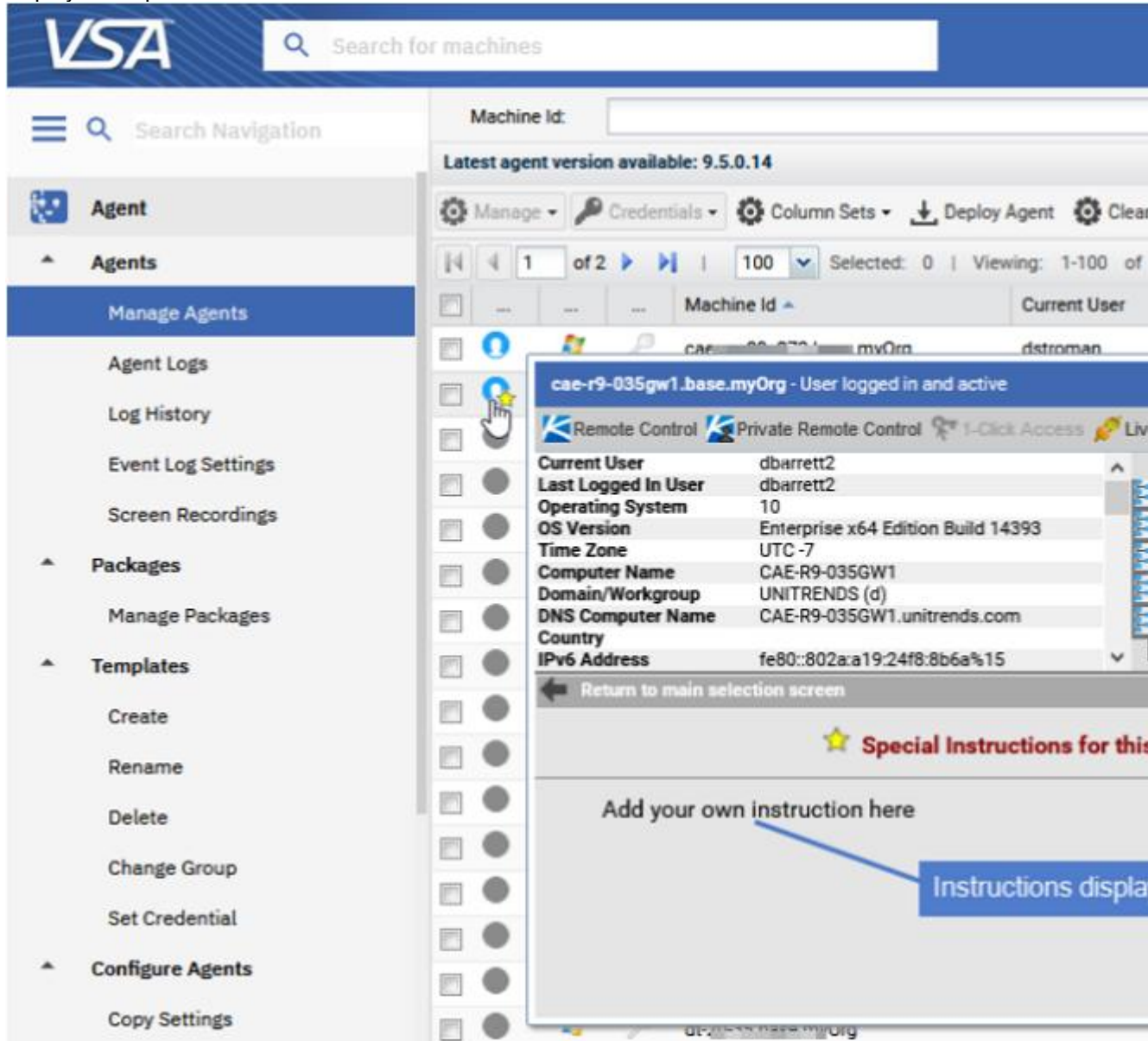


The badge is added to the selected machines:

The screenshot shows the VSA (Virus Solution Agent) interface. At the top, there is a search bar for machines. Below it, there are filters for Machine ID, Machine Group (set to '< All Groups >'), and View (set to '< No View >'). A 'Go to' dropdown is set to '< Select Page >' and 'Show' is set to '10', displaying '104 machines'. On the left, there is a vertical sidebar with various icons, including a star icon. The main area shows a table with columns for 'Machine.Group ID' and 'Language Preference'. Below the table, there are 'Notes' for each machine. A blue callout box with a white border and text 'Badge and instructions are added' points to a machine entry that has a star badge and a note that says 'Add your own instruction here'.

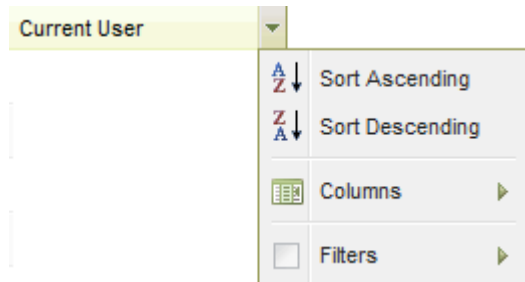
When you hover the cursor over an agent status icon with a badge, the Quick View window







displays the special instructions text in the bottom of the window:



Data Table Column Options

Data tables in the VSA typically provide the following column options.

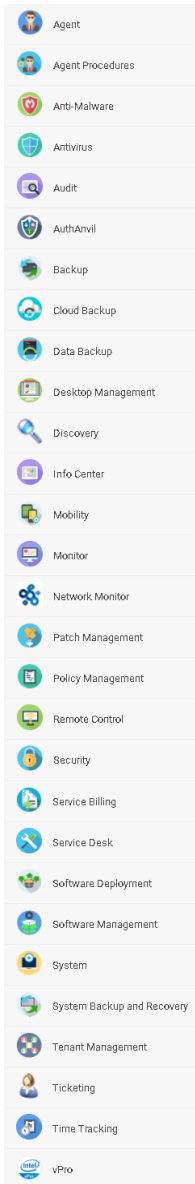


- **Column Selection** - Click any column header drop-down arrow  , then **Columns** to select which columns display in the table. Click the Sort Ascending  or Sort Descending  icons to sort the table by the selected column heading.
- **Column Sorting** - Click the Sort Ascending  or Sort Descending  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.

VSA Classic User Interface

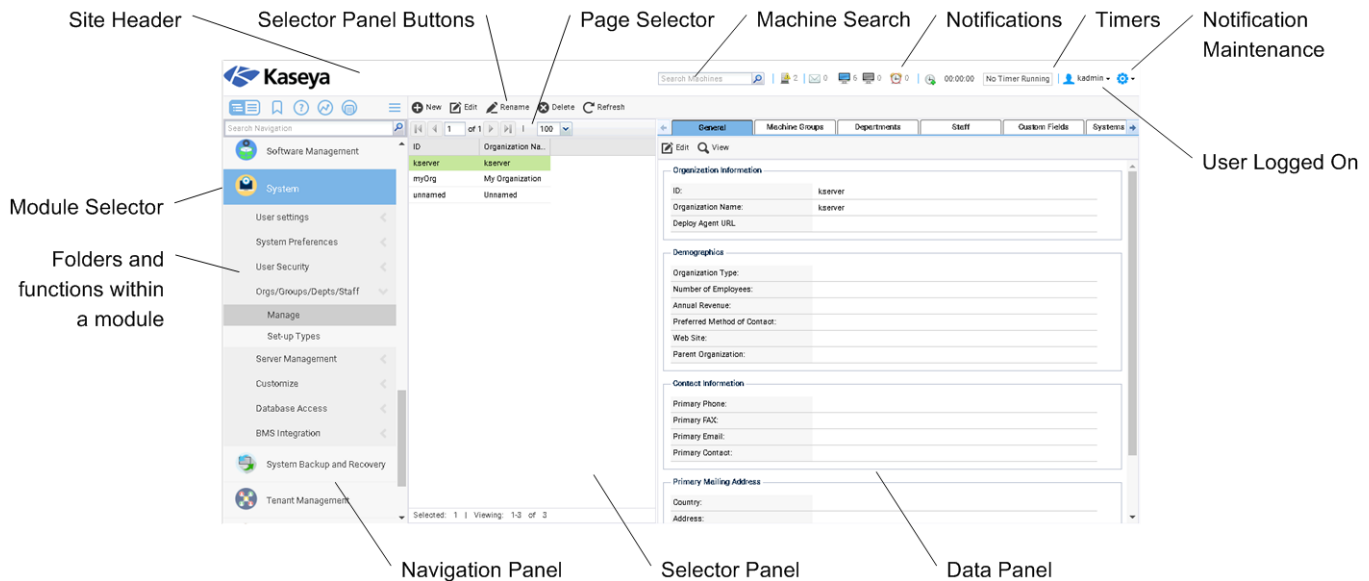
VSA modules



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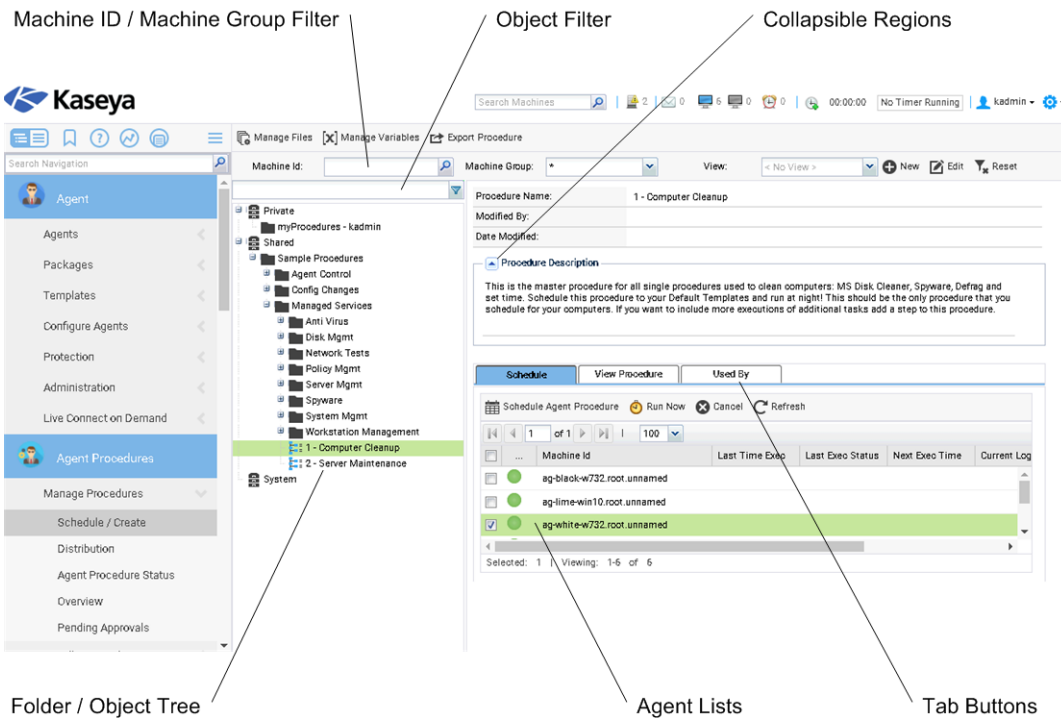
Page layout

The user interface of the VSA 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 expandable-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 a time. Defaults to fully expanded. Defaults to a collapsed folder view which can then be selectively expanded.
- **Selector Panel** - Many VSA 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 **System notifications and alerts** (page vi).
- **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 **System notifications and alerts** (page vi).
- **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.

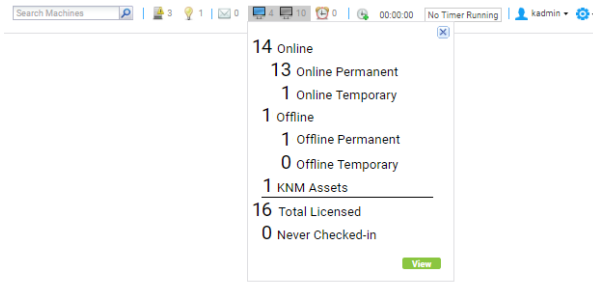


- **Machine ID / Machine Group Filter** - If a page displays an agent list, then the Machine ID / Machine Group filter displays at the top of the page. The filter enables you to limit the list of agents displayed on the machine, by individual machine, machine group, organization or by view definition.
- **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.

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 online / agents offline** - Clicking either of the monitor icons displays a list of counts for agents online and offline, permanent and temporary, KNM assets, total licensed and never checked in. Click **View** to display the Agents > Manage Agents page.



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
- 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/9050000/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 > Manage Agents 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.

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.




Navigation

Click the **Navigation** icon  to toggle between a single module and multi-module (tree) navigation panel.


Bookmarks

Click the **Bookmarks** icon  to display the list of bookmarks you have saved.


Notes

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


Status

Click the **Status** icon to  display the Status Monitor 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.

Expand/Collapse

Click the Expand/Collapse icon  to expand or collapse the navigation panel.

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.

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 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 viii), or in Live Connect (Classic), Machine Summary, or Quick View (Classic).


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

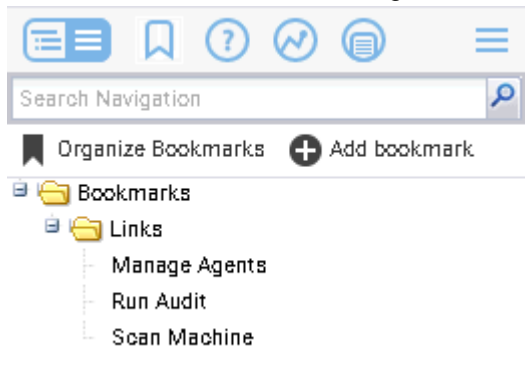
Number of notes to display at a time. Choices are 10, 30, and 100.

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.

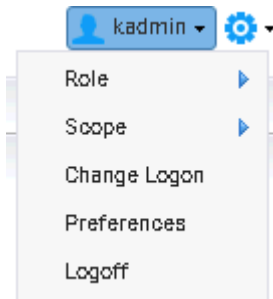
- Click the **Bookmarks** icon  to display the list of bookmarks you have saved.
- Click **Organize Bookmarks** to create bookmark folders and organize your bookmarks.

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



User Menu

Click your VSA user logon name in the upper right hand corner of the VSA to display your **User** menu.



- **Role** - Lists the user roles you can select. Determines the functions you have access to.
- **Scope** - Lists the user scopes you can select. Determines the user data you have access to.
- **Change Logon** - Selects the Change Logon page.
- **Preferences** - Selects the Preferences page.
- **Logoff** - Logs the user out of the VSA and redisplay the logon page.

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

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.

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. 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 xv*) 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.


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. Hovering the cursor over a check-in icon displays the agent Quick View window.

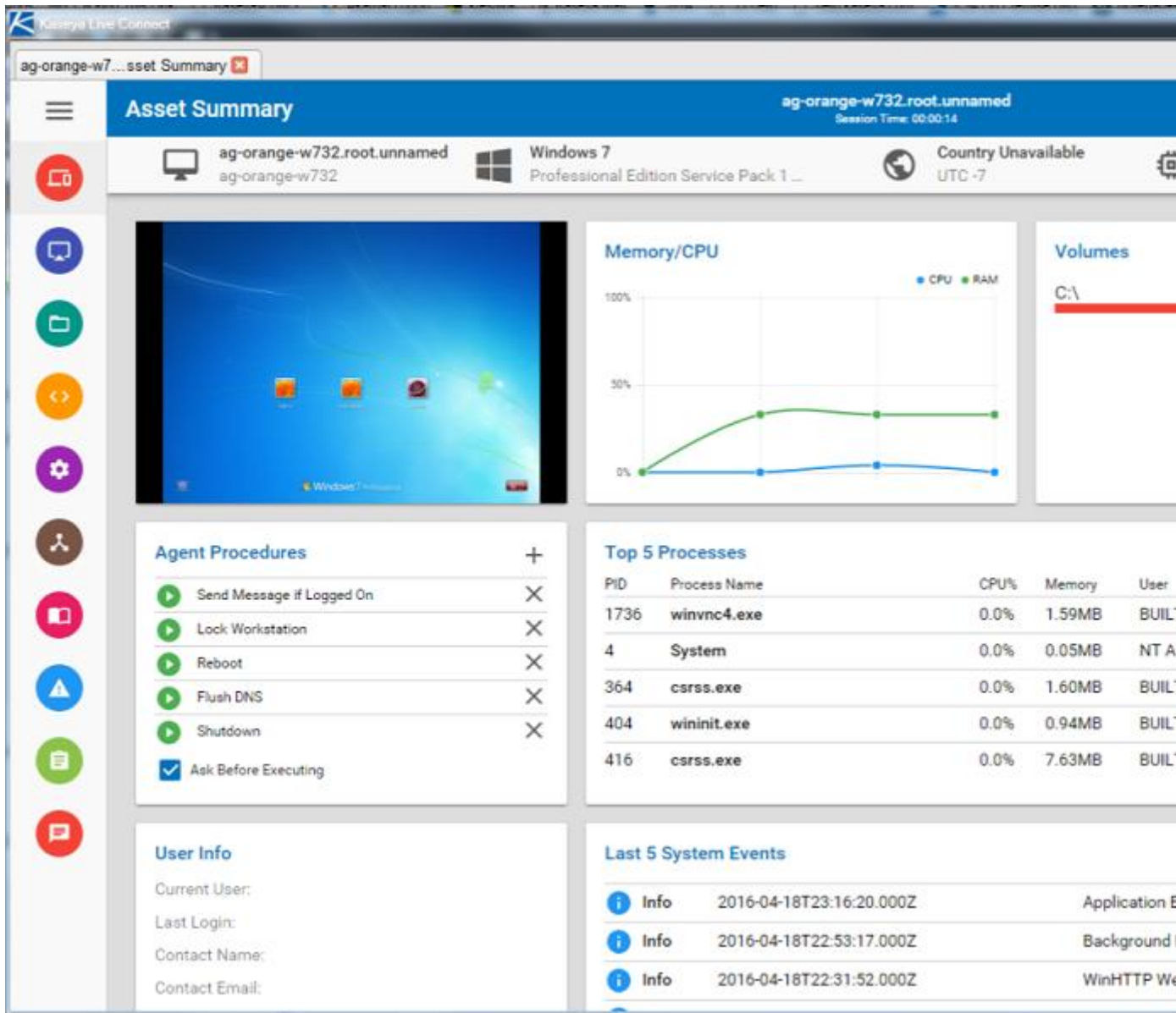
-  Online but waiting for first audit to complete
-  Agent online
-  Agent online and user currently logged on. Icon displays a tool tip showing the logon name.
-  Agent online and user currently logged on, but user not active for 10 minutes
-  Agent is currently offline
-  Agent has never checked in
-  Agent is online but remote control has been disabled
-  The agent has been suspended
-  An agent icon adorned with a red clock badge is a temporary agent.

Live Connect

The **Live Connect** app is a single-machine user interface that runs natively on your local machine, independent of the browser you are using to log into the VSA. The **Live Connect** app is designed using a Material Design look and feel.

- The first page you see is the Asset Summary page.
- Multiple icons along the left provide access to other menus or pages.
- You can click the add tab  icon to work with multiple menu options for the same machine at the same time.
- Most data lists throughout **Live Connect** can be filtered and sorted.
- **Live Connect** sessions continue without user interruption, even if the VSA user logs out of the VSA or the VSA session times out.

- Enhanced Live Connect features do not display until agents are updated.



Note: Live Connect Classic - This updated version of **Live Connect** replaces Live Connect (Classic). Live Connect (Classic) and Quick View (Classic) can be enabled by setting the Use new Live Connect when clicking the Live Connect button in Quickview option to No in System > Default Settings.

Num Lock key and RDP - If you are connected through Live Connect and launch an RDP session from the Windows endpoint, use of the keyboard Num Lock key is detected on the endpoint only. The Num Lock key is not detected within the RDP session.

Launching Live Connect

- If you hover the cursor momentarily over the agent icon, the Quick View window displays. You can use Quick View to launch Live Connect.
- Ctrl+clicking the agent icon launches Live Connect immediately.

- The first time you launch Live Connect, you are prompted to download and install the Live Connect app on your local computer.
- You can also launch **Live Connect** independently of the VSA using:
 - The Agent/Asset Browser
 - Live Connect Mobile
 - A Custom **Custom URL Scheme** (<https://helpdesk.kaseya.com/hc/en-gb/articles/115002524068>)




Quick View

Hovering the cursor over a check-in icon displays an agent **Quick View** window immediately. You can use **Quick View** to:

- View agent properties
- Start a shared or private Kaseya Remote Control session
- Launch an agent procedure

Launch Live Connect

Agent Badges

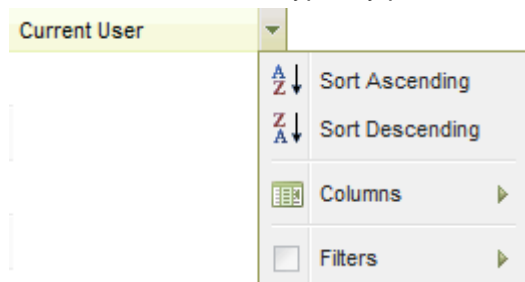
Add *badges* to the lower right corner of agent status icons, such as . These badges display everywhere the agent icon displays in the user interface. For example, you could mark a machine with a  badge to indicate the customer requires a phone call before anyone works on that machine. Or mark a server with a  badge because you should not do anything to it until after hours.






Select one or more machines on the Agent > Configure Agents > 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 window displays the **Special Instructions** text in the bottom of the window.

Data Table Column Options

Data tables in the VSA 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.

VSA Modules..... i

Page Layout ii

System notifications and alertsvi

Online and offline assetsviii

Administrator Notesix

User Menuxiii

Color Schemexiii

Agents.....xiv

Check-in Iconsxv

Live Connectxv

Quick Viewxviii

Agent Badgesxix

Data Table Column Optionsxxiii

VSA Classic User Interfacexxiv

Learning More.....xxxvi

Index37

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/9050000>).

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. Live Connect, Kaseya Remote Control, Quick View, User Portal
5. Monitoring Configuration
6. Custom Reports

The following resources are also available.

Kaseya University

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

Index

A

Administrator Notes • ix
Agent Badges • xix
Agents • xiv

C

Check-in Icons • xv
Color Scheme • xiii

D

Data Table Column Options • xxiii

L

Learning More • xxxvi
Live Connect • xv

O

Online and offline assets • viii

P

Page Layout • ii

Q

Quick View • xviii

S

System notifications and alerts • vi

U

User Menu • xiii

V

VSA Classic User Interface • xxiv
VSA Modules • i