



Kaseya 2

LiveConnect and Portal Access

Quick Start Guide

for VSA 6.1

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About Kaseya

Kaseya is a global provider of IT automation software for IT Solution Providers and Public and Private Sector IT organizations. Kaseya's IT Automation Framework allows IT Professionals to proactively monitor, manage and maintain distributed IT infrastructure remotely, easily and efficiently with one integrated Web based platform. Kaseya's technology is licensed on over three million machines worldwide.

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Live Connect for VSA Users

Live Connect

Live Connect

The **Live Connect** page displays by *clicking any check-in icon, for example , next to any machine ID in the VSA.*

Live Connect enables you to perform system level tasks and functions on a single managed machine, in most cases without having to interrupt the user.

Note: The *first time Live Connect launches from any machine, it asks to install several browser plugins.*

Windows

Live Connect for Windows machines supports the following menu items: **Home**, **Agent Data**, **Audit Information**, **File Manager**, **Command Shell**, **Registry Editor**, **Task Manager**, **Event Viewer**, **Ticketing**, **Chat**, **Desktop Access** and **Video Chat**.

Macintosh

Live Connect for Macintosh machines supports the following menu items: **Home**, **Agent Data**, **Audit Information**, **Ticketing**, **Chat**, **Desktop Access** and **Video Chat**. Does not include a thumbnail preview image of the desktop in **Live Connect**.

Note: On a Mac OSX Leopard or Snow Leopard, you can use **Desktop Access** in **Live Connect** to remote control a Windows system using Firefox or Safari. On a Windows system using any of our supported browsers you can use **Desktop Access** to remote control a Mac OSX Leopard or Snow Leopard.

Window Header

Basic information about the managed machine displays at the top of the **Live Connect** window.

- **Thumbnail View** - The desktop of the currently logged on user displays in a thumbnail view, if a user is logged onto the machine.
- **Machine Info** - Lists basic information about the managed machine.
- **Performance Graphs** - Shows CPU % and Memory % performance graphs for the managed machine.
- **Log Off** - Only displays if a machine user using **Portal Access** is logged in remotely from the machine.
- **Help** - Displays online help for **Live Connect**.

Menu Options

A menu of tabbed property sheet provides access to various categories of information about the managed machine.

- **Home** - *The **Home** tab is the first tab displayed when the **Live Connect** window opens.*
 - **Home** - Typically the **Home** tab displays a welcome message and the URL page of the agent service provider. The **Run Procedures** section of the **Home** tab enables the **Live Connect** user to run agent procedures on the managed machine immediately. A **Custom Links** section may display on the **Home** tab, if specified by the service provider, offering links to additional resources. Multiple customized **Home** tabs are possible, each with a unique name, if specified by the service provider.
 - **Change Logon** - Changes the *remote* logon user name and password for this managed machine. These logon options enable a user to access the **Live Connect** window to this

managed machine from any other machine, including initiating a remote desktop session with the managed machine, if **Desktop Access** is enabled by the service provider. Enter the same URL used to logon to the VSA. Then enter the **Live Connect** user name and password specified in this tab. Accessing **Live Connect** remotely in this manner from another machine is called **Portal Access**. **Portal Access** logon options can also be maintained within the VSA using Agent > Portal Access.

- **Change Profile** - Changes the contact information for this managed machine. This information populates a ticket with contact information when **Live Connect** is used to create a ticket. This information can also be maintained using Agent > Edit Profile.
- **Agent Data** - Displays the following tabs:
 - **Pending Procedures** - Displays and schedules pending agent procedures for a managed machine and the agent procedure history for that machine. Includes the execution date/time, status and user who scheduled the procedure.
 - ✓ Click the **Schedule Another Procedure** button to schedule a procedure not yet pending. Once selected and scheduled, the procedure displays at the bottom of the **Pending Procedures** section.
 - ✓ Click the **Schedule** button to schedule a selected procedure to run in the future or on recurring basis.
 - ✓ Click the **Run Now** button to run a selected procedure once immediately.
 - ✓ Click the **Cancel** button to cancel any selected pending procedure.
 - **Logs** - Displays the logs available for a machine: Alarm Log, Monitor Action Log, Agent Log, Configuration Changes, Network Statistics, Event Log, Agent Procedure Log, Remote Control Log, Log Monitoring.
 - **Patch Status** - Displays *Missing* and *Pending* Microsoft patches and schedules missing patches. If a machine belongs to a patch policy, missing patches may be further identified as *Denied (Pending Approval)*. The user can manually override the denied patch policy by scheduling the patch.
 - ✓ Click the **Schedule** button to schedule a selected missing patch.
 - ✓ Click the **Cancel** button to cancel a selected pending patch.
 - ✓ Click the **Show History** link to display the history of patches installed on the managed machine.
 - **Agent Settings** - Displays information about the agent on the managed machine:
 - ✓ **Agent version**
 - ✓ **Last check-in**
 - ✓ **Last reboot**
 - ✓ **First time check-in**
 - ✓ **Patch Policy Membership** - Defined using Patch Management > Membership: Patch Policy
 - ✓ **View Definition Collections** - Defined using the **Only show selected machine IDs** option in View Definitions.
 - ✓ **Working Directory** - Can also be defined using Agent > Working Directory.
 - ✓ **Check-In Control** - Can also be defined using Agent > Check-In Control.
 - ✓ **Edit Profile** - Can also be defined using Agent > Edit Profile.
 - ✓ **Agent Logs and Profiles** - Can also be defined using Agent > Log History.
 - **Documents** - Lists documents uploaded to the KServer for a managed machine. You can upload additional documents. Provides the same functionality as Audit > Documents.
 - **Get File** - Accesses files previously uploaded from a managed machine. Click the link underneath a file to display the file or run it. Provides the same functionality as Agent Procedures > Get Files.

- **Audit Information** - Information tabs include: **Machine Info**, **Installed Applications**, **System Information**, **Disk Volumes**, **PCI & Disk Hardware**, and **Printers**. Provides audit information based on your Latest Audit. You can perform an immediate audit using the **Machine Info** tab.
- **File Manager** - Displays two file managers, one for your local machine and one for the managed machine. Using the *upper panes* only you can:
 - Create directories and delete, refresh or rename files or directories using either file manager.
 - *Move* files within the *same* file manager using drag and drop.
 - *Copy* files *between* file managers using drag and drop.
- **Command Shell** - Opens a command shell on the managed machine. Defaults to the `c:\windows\system32` directory.
- **Registry Editor** - Displays the registry of the managed machine ID. You can create, rename, refresh or delete keys and values, and set the data for values.
- **Task Manager** - Lists Windows Task Manager data for the managed machine. You can stop or prioritize **Processes**, stop and start **Services**, check typical **Performance** benchmarks for each process, categorized by CPU, disk, network, and memory, review **Users** session data, **Reboot**, power off the managed machine, or log off sessions on the managed machine, and display **User and Groups** on the managed machine.
- **Event Viewer** - Displays event data stored on the managed machine by event log type.
- **Ticketing** - Displays and creates tickets for the managed machine. Displays and creates tickets for **Ticketing** module tickets or tickets and knowledge base articles for the **Service Desk** module, depending on which module is activated.

Note: A service desk must be a member of the `Anonymous` scope to display **Service Desk** tickets in a machine user **Portal Access** session of **Live Connect**.

- **Chat** - Initiates a chat session with the currently logged on user of the managed machine. You can invite other VSA users to join your chat session. See Remote Control > Chat for more information.
- **Desktop Access** - Initiates a remote desktop session with the managed machine.
 - **Share session using VNC** - Use VNC to connect to the desktop.
 - **Create a private session using RDP** - Use RDP to connect to the desktop.
 - **Connect to printers** - If checked, desktop access includes access to printers.
 - **Connect to mapped drives** - If checked, desktop access includes mapped drives.
 - **Automatically connect with saved settings** - If checked and a desktop session has been saved, then **Desktop Access** connects immediately using the previously saved settings when:
 - ✓ Clicking the **Desktop Access** menu item in **Live Connect**
 - ✓ Clicking **Desktop Access** using the agent quick view window.
 - **Display the connection** - Options include `Embedded in this window`, `in a new window`, `as full screen`.
 - **Automatically hide Live Connect panels** - Options include `Top Panel`, `Left panel`, `Both Panels`.
 - **Reset Warnings** - Show warnings about active sessions. - Only one **Desktop Access** session is supported for each **Live Connect** session. If clicked and a **Desktop Access** is active in a separate window, a warning box displays in the **Live Connect** session to warn you that a **Desktop Access** session is active in another window.
- **Video Chat** - If a machine user is logged on to a managed machine, then a **Live Connect** user can initiate a audio/video chat session with that logged on machine user. The session can be audio only for one or both machines if video is not supported on one or both machines.
 - **Video Chat with the Machine User** - Click the Call button to initiate the video chat session. The machine user will see a browser window or browser tab display on their machine that lets them see your video image and their own video image if their machine has a webcam installed.

- **Video Chat with Anyone** - Click the Connect URL button. This copies a URL to your clipboard. Copy the URL address into any email or instant message program and send it to anyone. When that URL is entered in a browser the individual will be able to video chat with you. *Video chat does not require the person receiving the chat invitation to be a managed machine.*
- **Video Chat Confirmation** - The Adobe Flash Player used to transmit the audio/video stream requires each user click an "Allow" button to proceed with their side of the video chat.
- **Audio/Video Controls** - Hover the mouse over either video image in the chat window to display audio/video controls.
- **Text Chat** - You can text chat and video chat at the same time using the same window.
- **Anti-Malware** - Displays the Anti-Malware status of the managed machine, if installed.
- **Anti-Virus** - Displays the Antivirus status of the managed machine, if installed.
- **Discovery** - Displays the Network Discovery status of the machine, if installed.

Additional Notes

- Access to specific **Live Connect** functions depends on access rights in System > User Roles > Access Rights and Machine Roles > Access Rights.
- All of the **Live Connect** menu options are enabled when the machine is connected to **Live Connect**. Only **Home**, **Audit Information**, **Agent Data** and **Ticketing** are enabled when the machine disconnected from **Live Connect**.
- *You can customize the **Live Connect Home** page using System > Customize: Live Connect (page 8).*
- **Event Viewer** data does not depend on Agent > Event Log Settings.
- If a `externalLink.xml` exists in the `\Webpages\install` directory of the KServer a **New Ticket** link displays next to the **Help** link in **Live Connect**. Clicking the **New Ticket** link redirects users to the URL specified in `externalLink.xml`. See **Customized New Ticket Link** (page 8) for details.

Setting User Role Access Rights for Live Connect

You can configure the functions displayed during a **Live Connect** session to *VSA users* using the System > **User Roles** > Access Rights tab.

User Role Access Rights

The **Access Rights** tab in the System > **User Roles** page determines what functions *VSA users* belonging to a selected role can perform. For example, access rights can include whether or not a user can open, add, edit or delete a particular record.

Note: *Scopes determine whether a user can see certain user-created data structures displayed in the VSA. Roles determine access rights to the functions that act on those data structures.*

A navigation tree provides access to each module, folder, item, and control in the VSA.

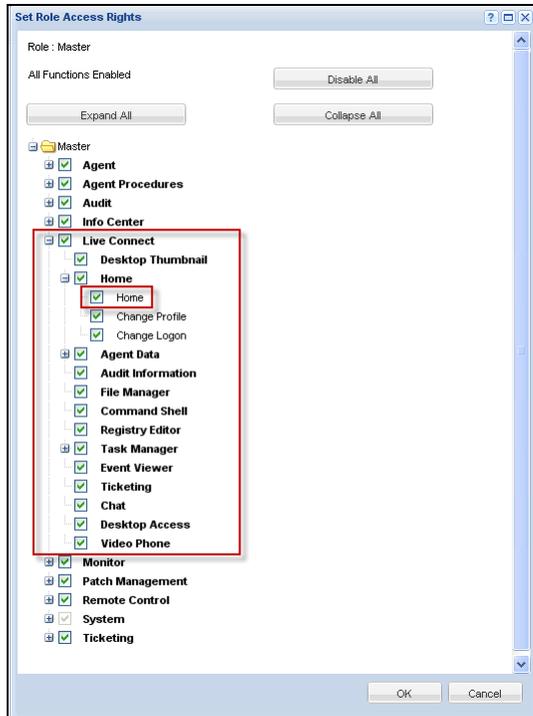
- Click the or icons next to any item in the tree to display or hide child branches of that item.
 - A checked item means a role provides access to that item.
 - An unchecked item means a role does *not* have access to that item.
 - Click **Expand All** to expand the entire tree.
 - Click **Collapse All** to collapse the entire tree.
- Click **Set Role Access Rights** to change access rights for a role.
 - Checking or clearing any checkbox sets the same state for any child items.
 - Click **Enable All** to enable all items.

- Click **Disable All** to disable all items.

Setting User Role Access Rights for Live Connect

A separate **Live Connect** module is listed along with other modules in the **Access Rights** tab tree. You can set different combinations of access rights for each user role and assign them to different populations of VSA users.

Note: The access rights displayed for a role are determined by the roletypes assigned to that role. See **System > User Roles** for more information about role types.



Multiple User Role Home Tabs

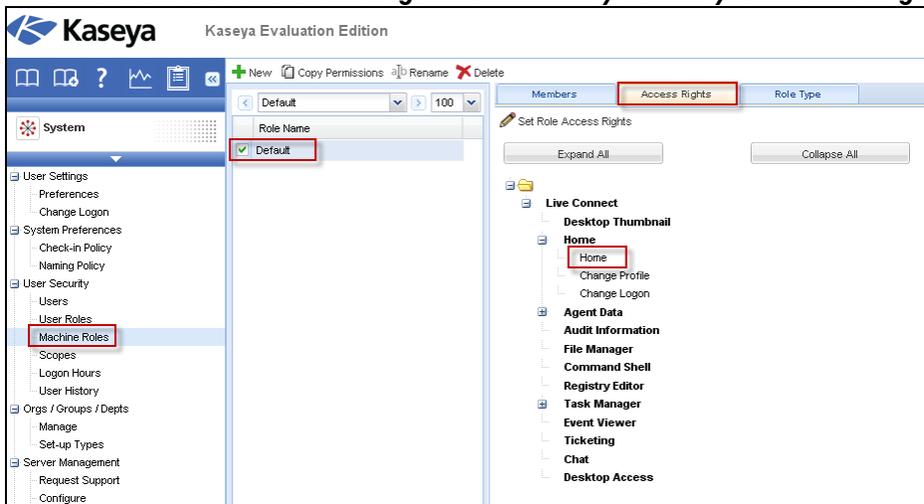
If more than one **Home** tab is defined using the **System > Customize > Live Connect** page, then both **Home** tabs display in the **System > User Roles > Access Rights** tab tree, underneath the **Live Connect > Home** menu checkbox. For example, you might have two **Home** tabs, one called **Home** and a second one called **Resources**. You can enable or disable one or more home pages in the **Access Rights** tree for each user role. This affects the **Home** tabs displayed to the different populations of VSA users using these user roles. See **Customize: Live Connect** (page 8) for more information.

Portal Access for Machine Users

Setting Machine Role Access Rights for Portal Access

Machine Roles

The [Machine Roles](#) page controls access to the [Portal Access](#) window, which is a session of [Live Connect](#) (page 1) provided specifically for *machine users*. The [Portal Access](#) window displays when a *machine user* double-clicks the *agent icon* in the system tray of their managed machine.



The Default Machine

Role

A predefined `Default` machine role is provided when the VSA is installed. Newly created machine ID accounts are automatically assigned to the `Default` machine role when the account is created. If you create other machine roles, you can re-assign machine ID accounts to these other machine roles. You might want to do this if you want to limit machine user access to functions on the [Portal Access](#) page for different populations of machine users. Each machine ID account can only belong to a single machine role.

Machine Role Access Rights

The [Access Rights](#) tab in the System > [Machine Roles](#) page determines what functions *machine users* can perform on machines belonging to a selected machine role. For example, access rights can include whether or not a machine user has access to their own machine remotely from another machine.

A navigation tree provides access to each item and control on the [Live Connect](#) page.

- Click the or icons next to any item in the tree to display or hide child branches of that item.
 - A checked item means a machine role provides access to that item.
 - An unchecked item means a machine role does *not* have access to that item.
 - Click [Expand All](#) to expand the entire tree.
 - Click [Collapse All](#) to collapse the entire tree.
- Click [Set Role Access Rights](#) to change access rights for a machine role.
 - Checking or clearing any checkbox sets the same state for any child items.
 - Click [Enable All](#) to enable all items.

- Click **Disable All** to disable all items.

Setting User Role Access Rights for Live Connect

A single **Live Connect** module is listed in the **Access Rights** tab tree of System > **Machine Roles**. You can set different combinations of access rights for each machine role and assign them to different populations of machine users.

Note: The access rights displayed for a role are determined by the role types assigned to that role. See System > Machine Roles for more information about role types.

Multiple Machine Role Home Tabs

If more than one **Home** tab is defined using the System > Customize > **Live Connect** page, then both **Home** tabs display in the System > Machine Roles > **Access Rights** tab tree, underneath the Live Connect > **Home** menu checkbox. For example, you might have two **Home** tabs, one called `Home` and a second one called `Resources`. You can enable or disable one or more home pages in the **Access Rights** tree for each machine role. This affects the **Home** tabs displayed to the different populations of machine users using these machine roles. See Customize: **Live Connect** (page 8) for more information.

Accessing Portal Access Remotely

Agent > Portal Access

The **Portal Access** page defines the logon name and password, by machine ID, required to use **Live Connect** as a machine user *remotely*. A **Live Connect** session run by a machine user is called **Portal Access**. The functions displayed using **Portal Access** are determined by the System > Machine Role > Access Rights tab.

Accessing Portal Access Locally

Machine users do not have to logon to **Portal Access** locally. Clicking the agent icon in the system tray of their machine initiates the **Live Connect** session without having to logon.

Accessing the Portal Access Logon Page Remotely

A user can display the **Portal Access** logon page for their own machine from another machine as follows:

1. Browse to the `http://your_KServer_address/access/` page, substituting the appropriate target KServer name for `your_KServer_address` in the URL text.

Note: This is the same page that VSA users use to logon to the VSA.

2. Logon by entering the user name and password assigned to machine user's machine ID. This user name and password is specified using the Agent > **Portal Access** page in the VSA.

The **Portal Access** page displays. The machine user can click any menu option as though he or she were logged in from their own managed machine. The user can click the **Desktop** or **File Transfer** menu options to initiate a remote connection to their own machine, create or view ticket, or initiate a chat, if these options are enabled.

A **Log Off** link displays only for machine users accessing **Portal Access** remotely from their machine.

Enabling Ticketing for Portal Access Users on Unsupported Browsers

Live Connect and **Portal Access** are not supported on certain browsers, such as browsers older than IE8 or Firefox 3.5. Machine users required to work with unsupported browsers can be enabled to create

and view Ticketing tickets as follows:

1. Create a separate machine role for unsupported browser users in System > Machine Roles. For example, create a `Tickets Only` machine role.
2. For the new machine role you just created, uncheck the **Live Connect** checkbox in the System > Machine Roles > Access Rights tab.
3. Assign machines with unsupported browsers to this new machine role.
4. When machine users click their agent icon, a single **Ticketing** window displays instead of the **Portal Access** window.

Note: Enabling this option applies to all users using the same managed machine.

Customize: Live Connect

System > Customize > Live Connect

- This page applies to the following products: On Premises, Kaseya Advanced, Kaseya Essentials, IT Center

The **Customize: Live Connect** page customizes **Home** tabs that display in the **Live Connect** (*page 1*) and Portal Access windows. You can create multiple, customized **Home** tabs and save them by name.

These **Home** tabs are enabled for a particular role by checking the checkbox underneath Live Connect > Home in:

- System > User Roles > Access Rights
- System > Machine Roles > Access Rights

Note: You can download a **Live Connect PDF** from the first topic of online help.

You can customize three sections on the default **Home** page.

- **Portal Header** - Customize the text and image displayed at the top of the **Home** tab.
- **Agent Procedures** - Provide a customized list of agent procedures that the user can run immediately from this tab.
- **Custom Links** - Provide a customized list of URLs that the user can click using this tab. For example, you could provide a URL to a website page providing technical information used to troubleshoot problems on managed machines.

Make available to All Tenants

If checked, this Home page can be added to user roles and machines roles on all tenant partitions. This option only displays for master role users.

Customized New Ticket Link

To customize **New Ticket** links on the **Live Connect** page, fill out the `externalLink.xml` file as described in the comments section of the XML below. To activate the new ticket link, place the `externalLink.xml` file in the `\WebPages\install\` directory of your KServer.

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
<externalLinks>
  <!--
  URL STRING SUBSTITUTIONS: The URL string displayed is associated
  with a particular machine ID. The string is searched for the following
  case sensitive values and substituted for the values below.
  machineNameVal - the machine name for the active machine is substituted
```

```
        in the URL string.
    groupNameVal - the group name for the active group.
-->
<ticketLink displayName="Ext Ticket"
url="http://192.168.212.52/?mname=machineNameVal&gname=groupNameVal"/>
</externalLinks>
```

Learning More

PDFs are available to help you quickstart your implementation of Virtual System Administrator™. They can be downloaded from the [first topic in online help](http://help.kaseya.com/WebHelp/EN/VSA/6010000/index.htm?toc.htm?6939.htm) (<http://help.kaseya.com/WebHelp/EN/VSA/6010000/index.htm?toc.htm?6939.htm>).

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 and Portal Access
5. Monitoring Configuration

The following resources are also available.

Training

You can view VSA training videos at the [Kaseya Portal](http://portal.kaseya.net) (<http://portal.kaseya.net>). Click the *Kaseya LMS* link under the Education folder.