SysAid™
Getting Started Guide

Document Updated: 10 November 2009

Introduction

This guide will show you, step by step, how to set up and start using SysAid.

SysAid comes as an installed solution, or as an online on-demand web based solution. When using the former, you should first install SysAid.
Please read
Guide 1: Installing the SysAid Server or **Guide 2: Freeware Installation Guide**, depending on your SysAid edition.

If you choose to use SysAid on-demand edition, you do not need to install anything.

If you have any question this guide does not answer, you may contact SysAid for support (support@sysaid.com) or read the FAQ SysAid FAQ and

Troubleshooting section on our web site SysAid Troubleshooting

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Step 1: Log in

Network Installation

If you have installed SysAid on your network, you created a username and password during the installation setup.
If you also e-mailed SysAid and asked for a username and password, the username and password you received by e-mail will not allow you an access. These username and password are only valid for the SysAid hosted online version. Only the username and password you entered during installation will allow your access into SysAid.
In case you have forgotten these username and password, you will have to uninstall then re-install SysAid.

How to log in?

Network Installation
If you are using the installed version, open any browser. Input a URI in the following form: Http://<server IP>:port

"Server IP" refers to the IP address of the server SysAid is installed on.
"Port" is the port number SysAid is listening on. If the port is 8080, you need not enter it, since browsers assume port 8080 by default. You specified the port number when installing SysAid.

If you are using the computer SysAid is installed on, you already have a shortcut under your Start menu. You can start SysAid using this shortcut.
When SysAid loads, input your username and password (Figure 1).

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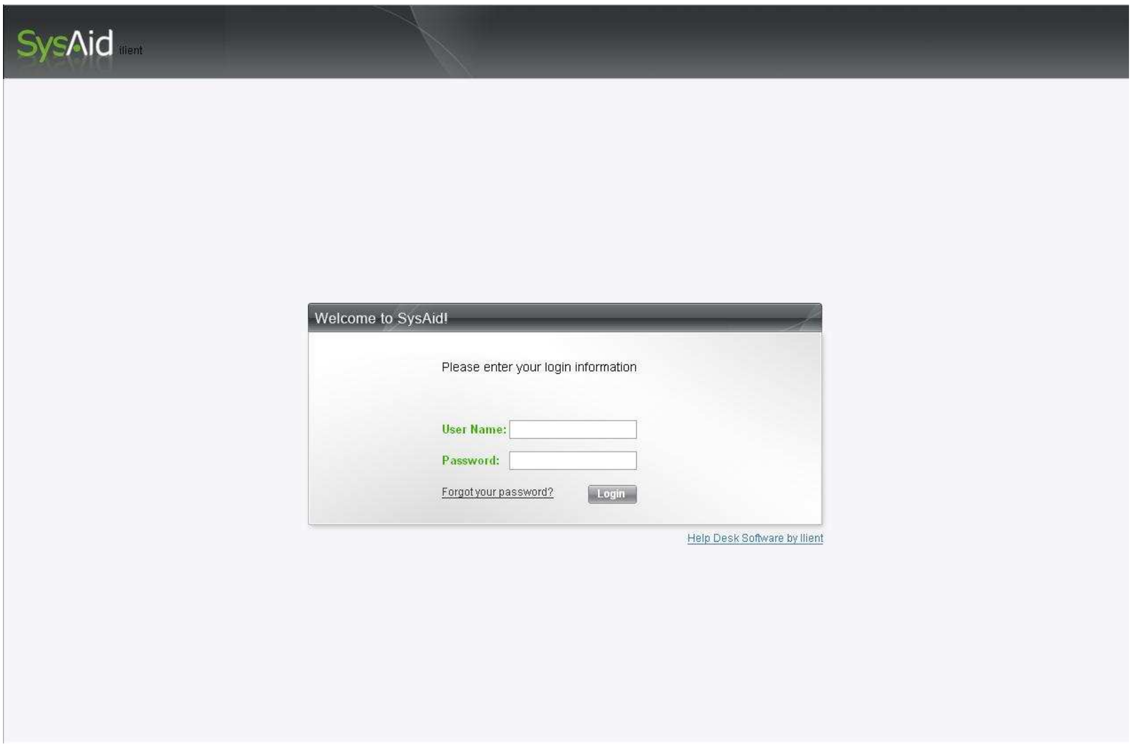
Figure 1: Login screen for local installation



SysAid On-Demand Online Solution

Upon ordering the on-demand online solution of SysAid, you were supplied with an Account ID, Username, Password, and login URL. Use your details to login to your SysAid On-Demand Edition. You can also be provided with a unique domain upon request. The account compartmentalizes your network as to distinguish it from other networks that use SysAid online solution. No account has access to any other account, and one account is enough for even the largest organization.

If you have any questions you can contact the support team: support@sysaid.com

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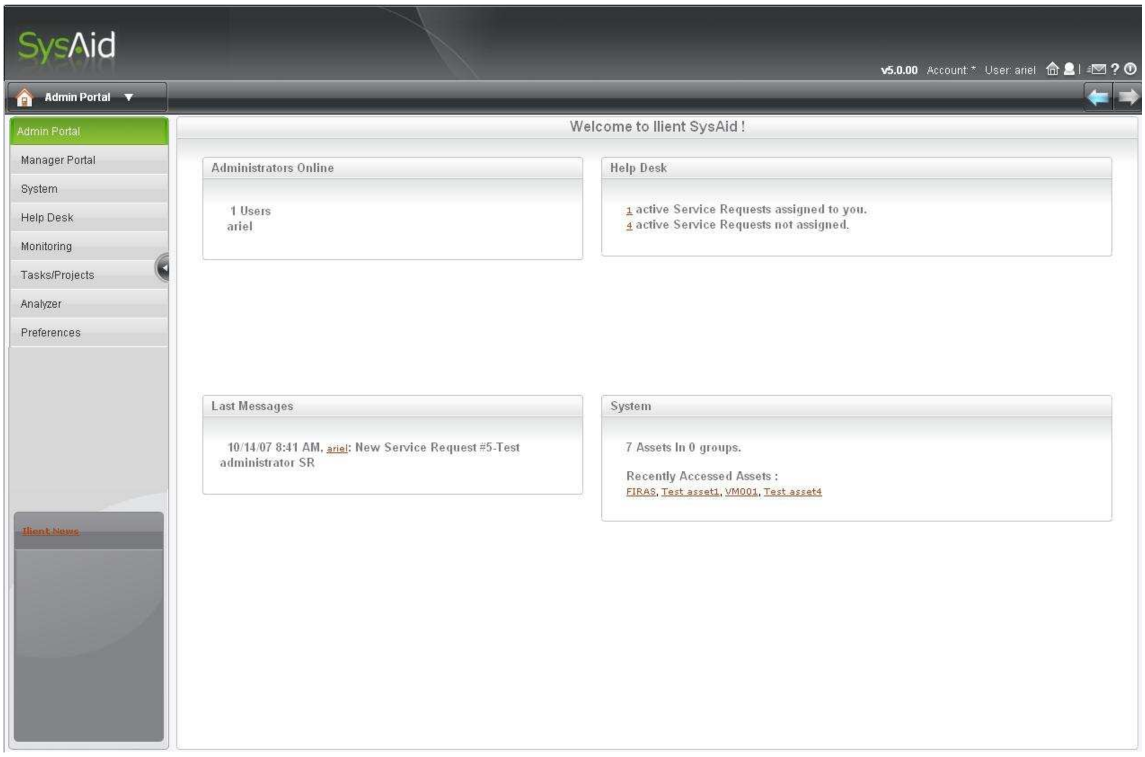
After logging in, all users will finally reach the SysAid home page.

Figure 2: SysAid home page



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Step 2: Register Users: Administrators and End-Users

In SysAid, there are three kinds of users:
1. **End-users**, who can submit service requests.

2. **Administrators**, who are also authorized to manage assets, change the settings in SysAid, respond to service requests and use the Tasks/Projects module if purchased.

3. **Managers**, who can run, create and customize reports in the Manager Portal interface.

The Tasks/Projects and the Manager Portal modules are available only if purchased, in the full version of SysAid. The user you are logged in as (the only user currently registered) is the main administrator. In this step, you will input your settings and register other administrators.

Main Administrator Settings

1. In the sidebar, click Preferences.

2. A submenu opens under Preferences. In the submenu, click **My Settings**. The **My Settings** page opens (Figure 3). Remember, you are logged in as the main administrator you will now specify settings for the main administrator.

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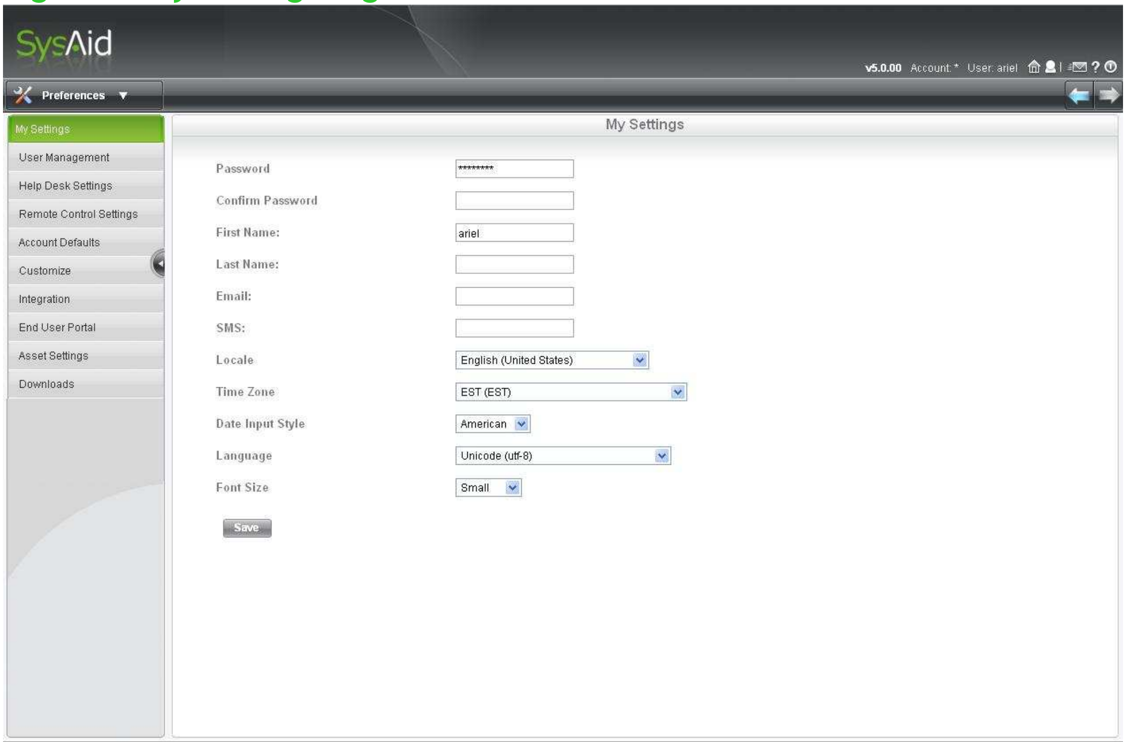
Figure 3: My Settings Page



3. Provide all the requested information. Specify a new password, rather than keeping the password that SysAid supplied. For more explanations, use the Online Help link at the top right of the page.

4. To change the language of your interface in SysAid, go to Locale and select your language from within the drop-down menu. Make a note of this option as you need to select this Locale in the Translate page later on. In order to change the encoding so it will support reading and writing of your local language go further down the page and click on the Language drop-down menu and change this setting to your desired language. Note that SysAid offers interfaces in English, Dutch, French, German, Hebrew, Italian, and Spanish. For languages other than those mentioned above you need to ensure that you select Language: Unicode (UTF-8) under My Settings and in Account Defaults (Preferences > Account Defaults). Once you have selected your options on this page, click **Save**.

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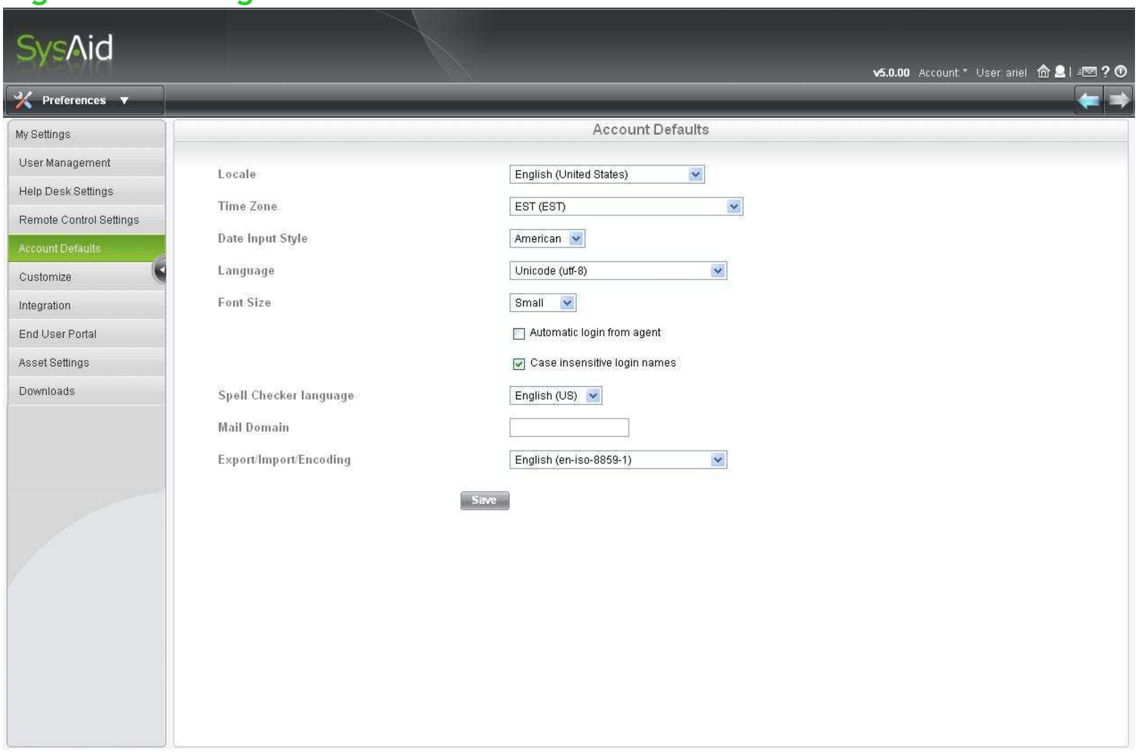
5. Finally go **Preferences → Customize →Translate**. Click on the Locale drop-down menu, and make your language selection. Go to the bottom of the page and click Save. If you have selected a language that is not listed in Step 4 you should perform a one-off translation of the terms listed in the Translate page (overwriting text in the caption box).

6. Click **Save** at the bottom of the page.

Settings for Other Users (Administrators and End Users)

In the sidebar go to **Preferences → Account Defaults**. Since you will create more users, the account defaults save you time by providing automatic, tentative settings for those users. Specify the settings that you will want most users to have, this includes both end users and administrators (Figure 4).

Figure 4: Setting Account Defaults



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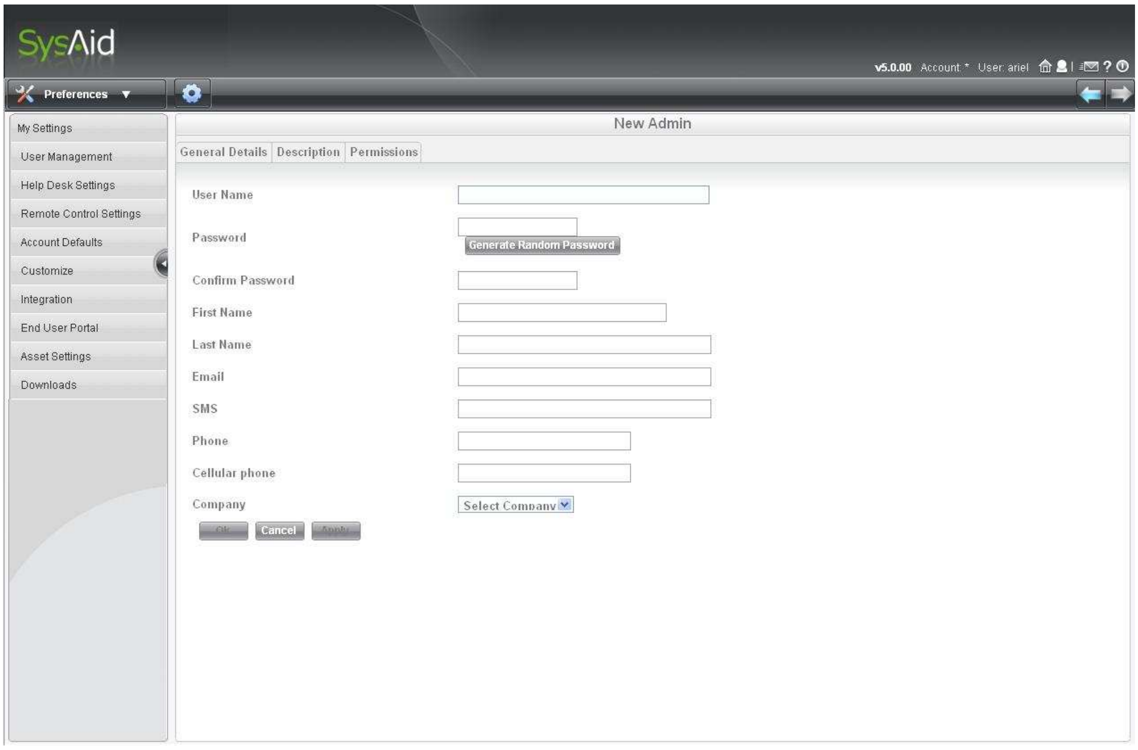
Start Registering Users

Go to **Preferences → User Management** in the sidebar. In the Admin Manager tab, notice that a single user is listed. That being you! You will now want to register more users. Please verify how many user licenses you purchased from SysAid, as you will only be able to set up that specific amount of users. If you are using an LDAP compliant directory and want to import users consult the SysAid User Manual for further instructions. If you are not using LDAP:

Click the New icon. The New Admin page will open. For each administrator, provide the necessary information and then click Save. After saving each user, you return to the list of users.

Figure 5: Creating a new administrator



On the Admin Manager page or in the End User Manager page (**Preferences→ User Management**), you can modify a user’s settings by clicking on the row entry of that person and editing the General Details page.

Delete Users

Delete users by checking the box next to the user's name and then clicking the Delete icon  from the top bar menu. After deleting a user, a pop up box will appear, asking whom to transfer these duties to. Select from the drop-down menu a new administrator to assign the duties to.

Figure 6: Deleting an Administrator

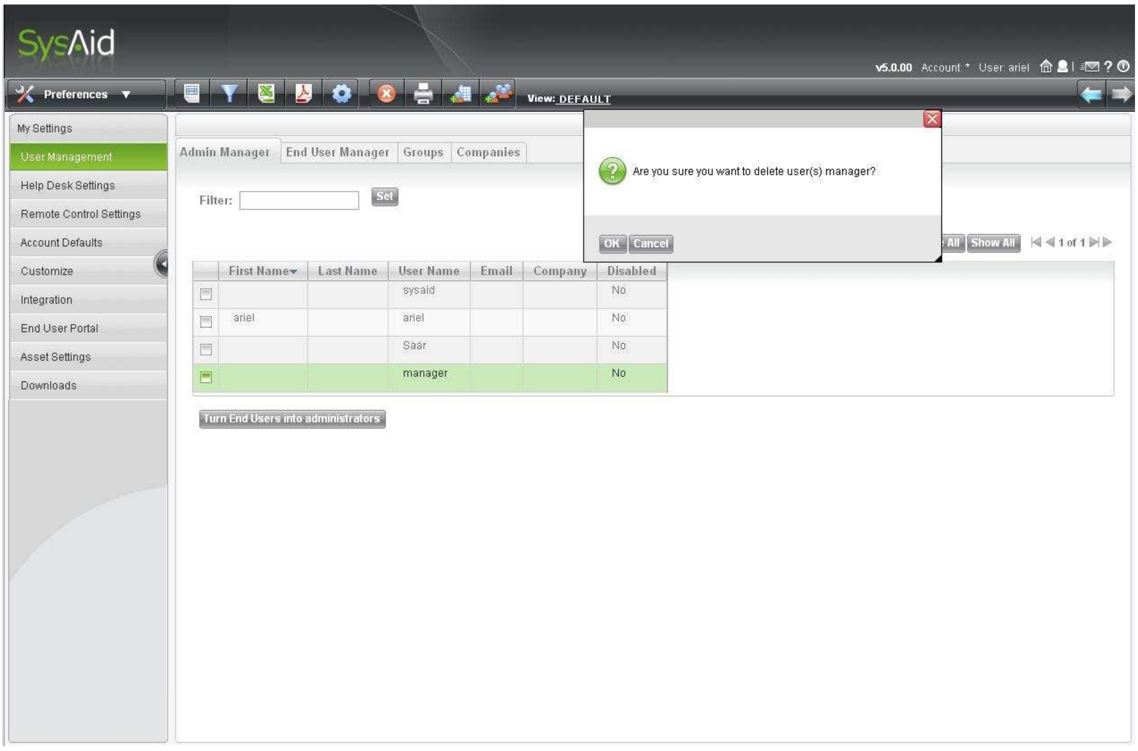


Figure 7: Transfer duties pop up

There is also the option to Disable a user account. This is useful if you want the user to be temporarily disabled. The user is still listed in the End User Manager page, and the disabled status can easily be reversed by enabling the box next to their name and clicking the Enable button  from the top bar menu.

If you have the SysAid Manager Portal module, you can choose to allow a specific number of users access to the Manager Portal. It is recommended that these users will have sufficient knowledge in computer programming, since this is an advanced feature. Go to User **Management→ Permissions**, and allow access to the Manager Portal for a particular user, by checking the appropriate check box.

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Step 3 The Help Desk - an overview

To obtain the most from your Help Desk first you should learn how the Help Desk organizes workflow. Categories, statuses and priorities are important variables in SysAid. They can help you efficiently manage your workflow by identifying those service requests that should be queued to certain sections while at the same time flag those requests which require a more rapid and timely response.
Categories: In SysAid a service request has a Category and a Subcategory. The end user selects from a drop down menu which category the service request falls into before submitting it to SysAid. For example a category can be: Software, with a sub-category of: MS Office.

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Statuses: The life cycle of a service request is defined by statuses in SysAid for example New, Open, Awaiting Response, In Process, Client Responded and Need More Information, are some common statuses. When a service request first enters SysAid it receives the status of **New**.

Priorities: A service request has a priority. The priority is set automatically when the Help Desk receives the service request. A priority indicates the level of attention or precedence rating assigned to a service request when it arrives to the Help Desk. Priority rules can also be set up by the administrator. **Chapter 8 Managing Help Desk – Advanced Settings** of the SysAid User manual online for further details.

Finally applying routing rules to incoming service requests is a way of automating the route service requests take upon entering the Help Desk. Service requests that

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meet all the criteria of the routing rule simply bypass dispatch and go directly to the person or group stated in the settings.

Routing Rule

To set up a routing rule is to create a rule whereby certain service requests, which you define by their category and subcategory and their user group (plus optional company field) are immediately routed to an administrator or an admin group. Dispatch is relieved from reviewing and assigning these service requests.

Set up Categories: Go to **Preferences → Help Desk Settings**. Click the Categories tab. At the top of the page, you will see a caption box for inputting a new category, and subcategory. To add a new category, and subcategory, simply type the name in the caption box and click Add. To add more subcategories to the same category, rewrite the category name in the caption box, and then insert the name of the new subcategory.

Finally click the **Save** button.

Create User Groups

You may create groups of administrators or end users in the Groups tab.
This is useful as you can create certain rules that can be applied to entire groups, for example Routing.

1. Go to Preferences > User Management > Groups tab. Here you can create departmental groups for administrators and end users. Here you can also divide users into logical units, then apply different rules for

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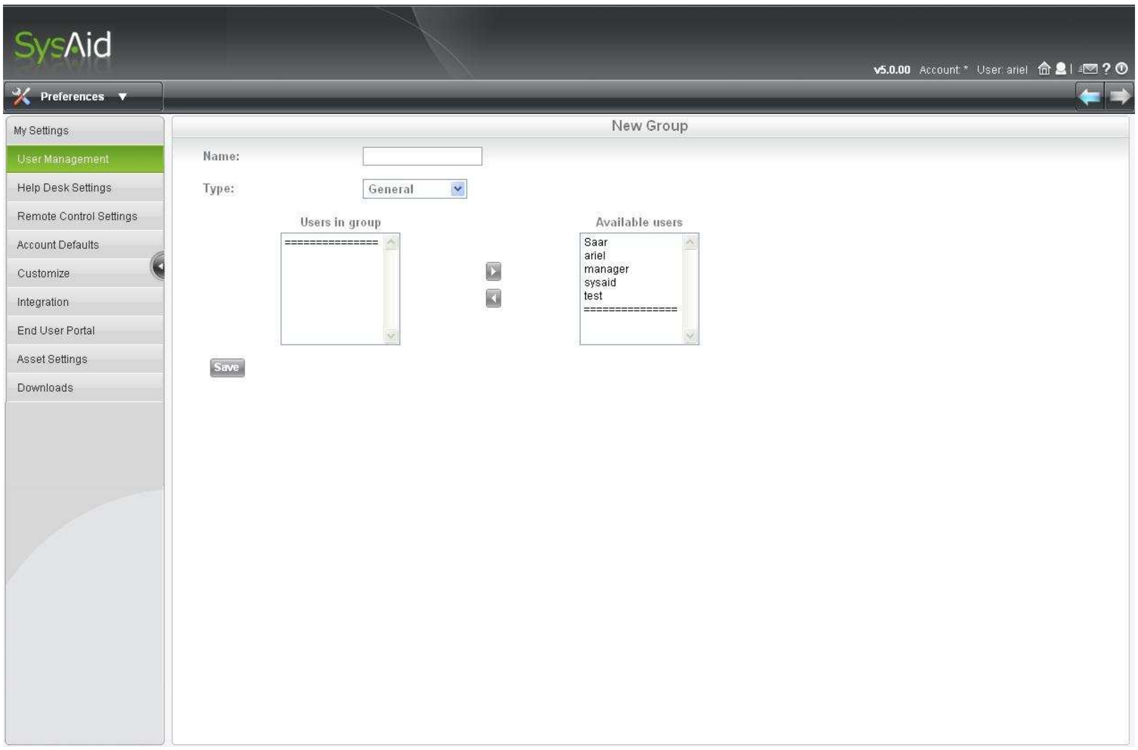
each group. There are three types of user groups: end user groups, administrator groups, and general groups (which include users of both types).

2. Click on **New Group** button.
3. The New Group screen lets you input a name for the new group, select its type, and add users from a list of available ones.
4. Select from the Type drop down menu the type of user. Move users into this group using the arrow button.
5. Name the group and finally click Save. Create as many groups as needed.

Figure 8: New User Group



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Routing Rule:

To set up routing rules go to **Preferences → Help Desk Settings → Routing**.

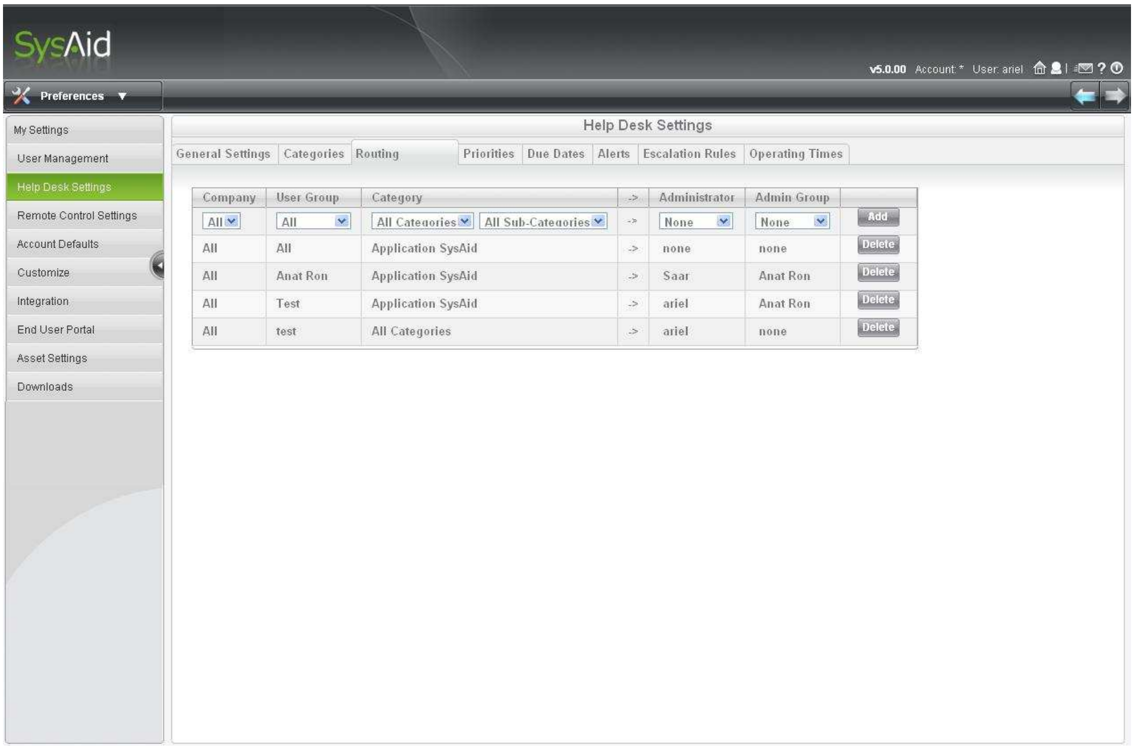
Before setting up any routing rules you should have set-up:

- **Groups** (end user and administrator),
- **Categories**
- If applicable **Companies** (see SysAid User Manual for further instructions).

On the routing page there is a divider: **- >** All fields located before the divider (Company, User Group, Category, and Subcategory) are what the Help Desk checks against every incoming service request. If the ticket meets all the fields it will route it to the Administrator and/or Admin group you have selected.

To set up who should receive the routed service requests, choose from the Administrator and Admin Group dropdown menus, which are located to the left of the divider on the routing page.

Figure 9:Routing page



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Forms and Lists

In SysAid you will encounter two types of pages: A form and a list page.

Form - A form page contains a summary of information on a specific service request or project or asset. Upon first logging into SysAid you can only navigate to a form page via a list page.

List - If you click , for example, **Help Desk**, **Tasks/Projects** or **System → Asset List** from the main sidebar menu in SysAid, you will be taken to a list page. Here you are provided with a table listing of the contents of service requests, projects and your assets. By clicking on a row entry you can navigate to a specific service request, project or asset.

Both the form and the list pages can be customized in SysAid by clicking on the Customize List icon .

Views in SysAid

In the list pages, SysAid offers the administrator a drop down menu called View. A View in SysAid loads field items you have selected to appear on the screen. Using different views means listing different values and showing different fields. The **Default View** arrives with SysAid. This view should not be altered.

1. To create a new View and save it, click on the Customize List icon . A new screen will open.
2. Select the fields to appear in your view by moving them from the Available Columns to the Visible Columns.
3. Go to Save as and select the **Please enter new view name** radio button. Finally give your view a name. Do not save it as the Default. Click the **Save** button.

You can easily select your new view from the View drop-down menu located at the top of the page. This is useful since you can set up a special view for printing etc.

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Step 4: Assets and Asset Management

If you have purchased the Asset Management (Inventory) module there are four ways in which you can add assets.

1. Automatically add assets (computers) by deploying the SysAid agent, described below. To add printers, scanners and any other type of assets to SysAid you will need to manually input the information.
2. To add an asset manually, go to the main menu, click **Asset Management → Add Assets**. There you will see the link to manually add it.
3. Alternatively you can click **Asset management → Asset List** and double click on the New icon, this will allow you to a create standalone asset. Once you have completed all of the fields in the Information page, click **Ok** to save.
4. Finally, assets can also be imported from a comma delimited file (.csv), in the menu click **Asset Management → Import Assets**, Browse for a file or files to import. The advantage of this method is that if you have a large number of assets to be added manually you can list the details in an excel file and import them into SysAid in one simple step. The Excel file should not include any column headings and should be saved in csv. format.

Automatically add assets by deploying end-user modules, the SysAid agent on your network

If you have purchased the Asset Management module, then all computers in your organization need this module; otherwise SysAid will not be aware of them. Without the agent the asset inventory will not be compiled.

Before SysAid can monitor your network, each computer on the network needs a copy of the SysAid end-user module, the agent.

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Note that this module is needed not only for the computers used for writing and reading service requests, but for your entire computer network.

There are three ways to deploy the SysAid end-user module:

1. Administrator Tools – contains the deployment tool for Windows NT, Windows 2000, and Windows XP computers which performs automatic deployment . This option provides default settings. Read Guide 4 & 5 for further details, both can be found at http://ilient.com/contact_support.htm
2. Automatic deployment with a login script for Windows, Linux, Mac or MSI .
3. Manual installation for MS Windows and Linux (provides default settings).

Click on **Preferences→ Downloads** in the sidebar menu to find these options. In addition, all account information necessary for installing SysAid agent appears on the **Downloads** page (Account, URL Serial key for account) of your working version of SysAid.

A. Automatic deployment with the deployment tool

1. In the sidebar, click **Preferences→ Downloads**.
2. On the Downloads page, click **SysAid Administrator Tools**. Save the file on your hard disk.
3. The file you saved, SysAidTools.exe, is a setup wizard. Run the wizard, follow the instructions, and complete the installation.
4. Run **Deploy SysAid**.
5. To Install, select computers from the Action menu, and click on the **Deploy to selected computers** button. To uninstall the agent, select computers and click on **the Undeploy from selected computers** button.

For more detailed instructions, please read:

Administrator Tools*, *Guide 4

The Deployment Tool*, *Guide 5

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These guides can be found at: http://ilient.com/contact_support.htm

B. Automatic deployment with a login script for Windows

1. In the sidebar, click **Preferences→ Downloads**.
2. On the **Downloads** page, click **SysAid Agent for Windows** link.
3. Save the file which is named SysAidAgent.exe to a location that is shared on the network.
4. Add the following line to the network login script, overwriting the tags < > with appropriate values for your organization. It is not recommended to cut and paste the text, as tags < > are not permitted in the login script. Ensure that there is a space before every slash / in the login script.

<Path to SysAidAgent.exe>\SysAidAgent.exe /VERYSILENT /URL <server URL>
/account <account id> /serial <serial number> /install once /AllowRegister <Y or N>
/AllowRemoteControl <Y or N> /SubmitSRShortcut <caption of the submit service
request shortcut> /HotKey 122 /Interval /ConfirmRC <Y or N>
/RandomMachineID N/AllowSubmitSR <Y or N >

Here is a description of parameters used with the login script.

Parameter	Description
URL	URL of the server SysAid is running on.
account	The account ID.
serial	Your SysAid serial number located on the bottom of the Downloads page on your local SysAid Server.
install once	This option will only install the SysAid agent if it was not installed before. If SysAid was already installed it will not overwrite. Therefore you should

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	delete install once if you are now upgrading or redeploying SysAid.
AllowRegister	Permitted values are Y or N.
AllowRemoteControl	The permitted values are Y or N.
SubmitSRShortcut	This is the name your organization gives the caption of the submit service request shortcut, if greater than one word enclose it in " "
HotKey	The hot key number. Once SysAid is deployed across your network, users will be able to launch the system by clicking a hotkey, for example F11. However login script does not understand F11, it identifies a location of a key within the keyboard from the registry and assigns it according to its numeric placement (e,g. F11 has a value of 122).
Interval	The agent poll interval, in seconds. To monitor computers, SysAid will occasionally scan them, viewing their details and updating the information it displays. By default, SysAid will run as a service on computers, contacting the server every given number of seconds.
ConfirmRC	The permitted values are Y or N. Optionally, when an administrator attempts to remote control a computer, that computer's user must confirm the remote control.
RandomMachineID	Generate random machine ID. The permitted values are Y or N. Generally the default will be N.
AllowSubmitSR	Y – To agree to place a SysAid shortcut on the desktop and to activate the hotkey. N - Not to have a shortcut and to

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deactivate the hotkey.

An example with completed values:

z: \sysaidagent.exe /VERYSILENT /URL http: //10.0.0.10:8080 /account SMITH /serial
3333333 /install once /AllowRegister N /AllowRemoteControl Y /SubmitSRShortcut SysAid
/HotKey 122 /Interval 30 /ConfirmRC N /RandomMachineID N /AllowSubmitSR N

Each computer that logs into the network will automatically execute SysAidAgent.exe and install the SysAid end-user module. From that moment on, SysAid will monitor the computer.

C. Automatic deployment with a script: SysAid Agent for Linux, Mac and MSI

Under **Preferences→ Downloads** you can find a link specifying the different procedure for performing an automatic deployment of SysAid for Linux, Mac and MSI agents.

D. Manual installation for Windows and Linux

1. In the sidebar, click Downloads.
2. On the Downloads page, click SysAid Agent.
3. Save the file, SysAidAgent.exe, to your hard disk.
4. Execute the file from each computer in the network, follow the instructions, and complete the installation. Each computer can either execute the installation remotely, or receive a copy and execute it locally. From that moment, SysAid will monitor the computer.

For more detailed instructions, please read the **Administrator Tools Installation** Guide 4, followed by the **The SysAid Agent** Guide 5.

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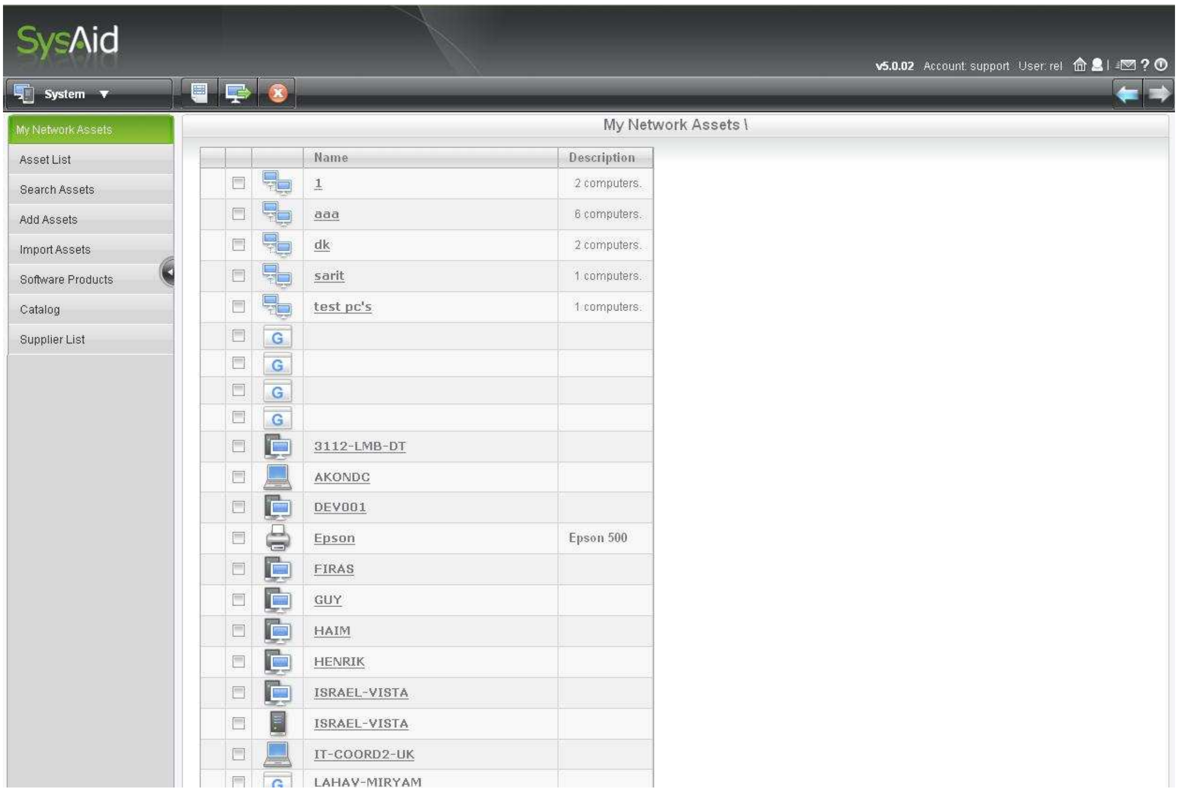
Step 5: Organizing your assets

Having installed the end-user module on the computers of your network, click System on the sidebar of your SysAid screen. A list of the computers appears. You can organize your computers into groups. A computer can belong to a certain group, the group can belong to a larger group, and so on.

Figure 10: Groups of Network Assets



To create a group of assets go to the **My Network Assets** page. To select assets for the new group click on the check box located to the left of the asset icon.

1. Go to the New Group icon on the top menu bar
2. Click the **Move to Group** button. A pop-up box will open prompting you for a name for this group. Type the name of the group and click **OK**.
3. In **My Network Assets** the new group you created will appear with an appropriate icon. Click on it to see all assets assigned to that group.

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Remote Control

Administrators can remote control many assets by accessing a remote asset from their own computer, controlling it from afar. This enables administrators to fix end user problems without leaving their offices.

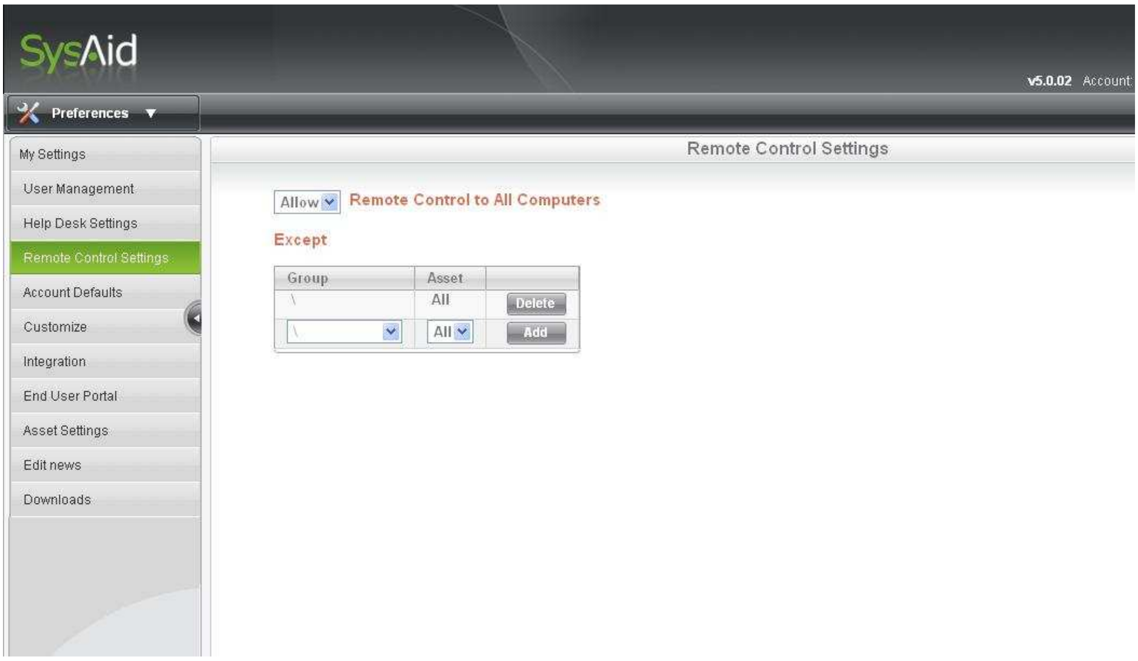
Click on **Preferences→ Remote Control Settings**. If you elect for all computers to be remote controlled, leave the default settings as they are. The drop-down menu contains two options:

Allow - Permits and authorizes remote control access to all assets.

Deny - Prevents/prohibits remote control access to all assets.

List assets in the **Except** table with the Add button, that are not to included in the rule you selected in the drop down menu.

Figure 11: Remote Control Settings



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Step 6: Advanced Help Desk Configurations

Many advanced configurations are available from the Help Desk Settings page. (**Preferences → Help Desk Settings**). Select the Due Dates tab, to create rules for the automatic assignment of due dates to service requests.

Click on the **Alerts** tab. Here, you can set up an alert system for your service requests. There are four different alert colors: green, yellow, red, and flickering red. For each color, you can select statuses, priorities, and a state of escalation (escalated or not escalated). A service request will activate the alert if it meets all the conditions you select. The request must match at least one of selected statuses, one of the selected priorities, and one of the states of escalation. If you do not choose a status, priority, or state of escalation, the alert will never go off.

You can see the alert lights in the list of service requests. Alert lights are also visible under System. They appear for assets, or groups of assets.

Select the Escalation Rules tab. Clicking on the **Create New Rule** button will lead you to a simple form, where you can create a new escalation rule. Please consult SysAid Online Help, or SysAid User Manual to learn more about escalation rules and their functions.

Operating Times

An advanced feature of SysAid is the concept of timers, which can record time for service request operations. For example, a **Time to Respond** timer can record how long it took an administrator to begin handling the service request. The timers can be viewed in the service request list (you can add them to your list views).

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Step 7: Customization

It is recommended that only skilled users, who have the necessary knowledge, will perform these configurations; otherwise, the functionality of SysAid might be harmed.

The Customized Notification tab (**Preferences→ Customize**) contains basic notification templates. You can learn how to configure these, by consulting the SysAid User Manual, especially **chapter 7: Advanced Configurations**.

Insert a dropdown menu, using the **Customized Lists** tab. First go to the **Customize → Translate** tab and type the new list name in the cust_list1 or cust_list2 caption box.

Save the page. Return to Customized Lists page, and build your list. In the Key box adopt any numerical coding sequence (1, 2, 3, 4, 5 or 10, 11, 12, 13, 14); you cannot use the same number twice as this causes the entry to be overwritten. Do not punctuate numbers with comma "," or period "." After you have added text to the caption box click Add. Finally Save the page.

To view the new list, click on the **Customize List** icon , and then move the new list name to the **Visible Fields** box. Click **Save**.

In the Customized Lists tab you can also modify existing values SysAid offers for urgency, priority, status, and location.

An alternative to using the SysAid interface is to allow submitting service requests to the Help Desk via e-mail, phone, or Via any web form, using code generated by the Customize>Web Forms tab. Click New Form. Then, move to the Visible Fields box, those items that should appear on the web form. Preview the form layout using the Preview tab. Once finalized go to the HTML tab and copy the HTML code into an existing web page. On the Customized Forms tab in the Customize page, only two options are currently functional "Company Logo" field and "HTML files location" field. All other options are not functional.

To learn about more advanced configurations, please consult the **Administrator's Guide**, Guide 8 at http://ilient.com/contact_support.htm

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What Next?

Now that you have set up SysAid, you can start improving your IT efficiency.

End users will submit service requests to the Help Desk. Administrators will view and solve those service requests. Administrators will also review the details of the various assets.

In the Tasks/Projects page (if purchased, this is not available in the free edition of SysAid), administrators will create projects and assign tasks to various users.

By using the Manager Portal interface, administrators can generate, edit and send reports on Help Desk and assets at a click. This option is also available only in the full version of SysAid, and should be separately purchased.

Remember that you may consult the SysAid Online Help for information on everything described in this guide. If you have any other questions, do not hesitate to contact SysAid support team.

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