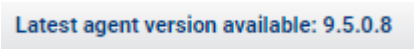
Updated 01/15/2019

Regular Maintenance Tasks

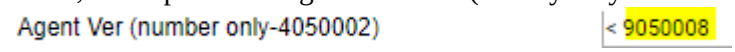
These tasks should be performed on a regular basis to ensure that all automation and maintenance is functioning properly. The New Customer or Site section will remind you of the tasks that are critical to define to ensure that the automation is working as designed. Most tasks take just a few minutes but go a long way in simplifying operations.

After VSA Patches

After any VSA patch or upgrade, check the Latest Agent Version on the Manage Agents screen:



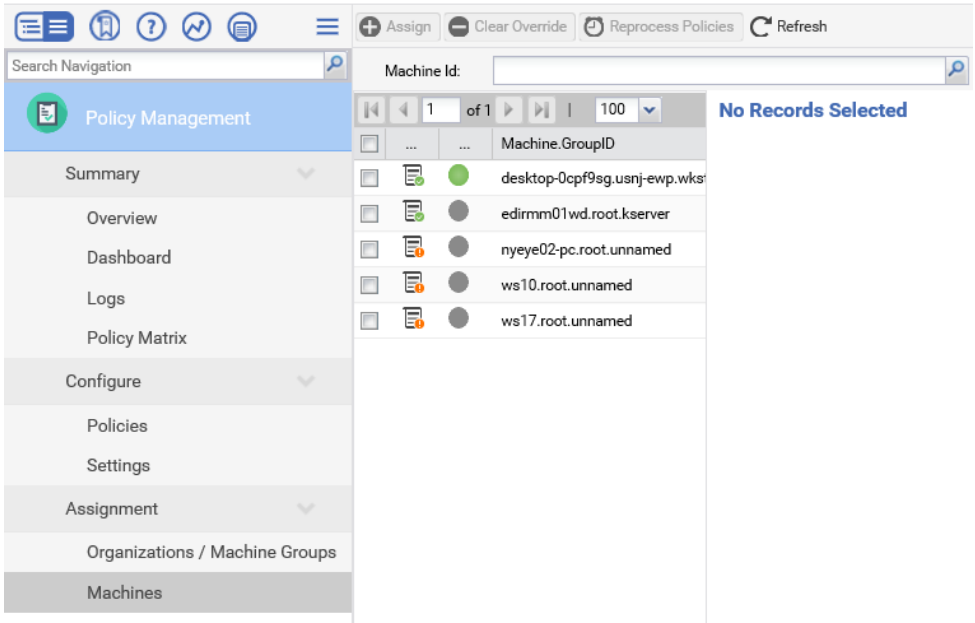
Update the following views: _!_Agent - Agent Version is Current, _!_Agent - Agent Version is Outdated, and XARC_AgentVersion-Outdated. Select each of the views in the View Definitions editor, click the Define Filter button, then update the Agent Ver field (usually only the last 1-2 digits unless there is a version upgrade).



The version number is defined as a main number with no leading zero, then the three minor release numbers with leading zeros to make each value be represented as two digits.

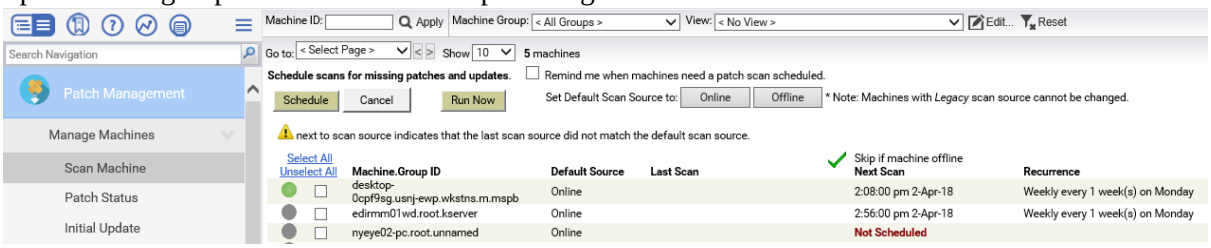
Weekly Tasks

- Check Policy Compliance:



  - Navigate to **Policy Management – Assignment – Machines**
  - Look for agents that have overrides (orange) or non-compliant settings (red) – use the column filter to simplify the search.
  - Select the agents with Overrides, then click **Clear Overrides**
  - Select agents that are non-compliant, then click **Reprocess Policies**
    If the same agents repeatedly report non-compliance, investigate which settings are in conflict and adjust the policies or policy application. Request support assistance if necessary.

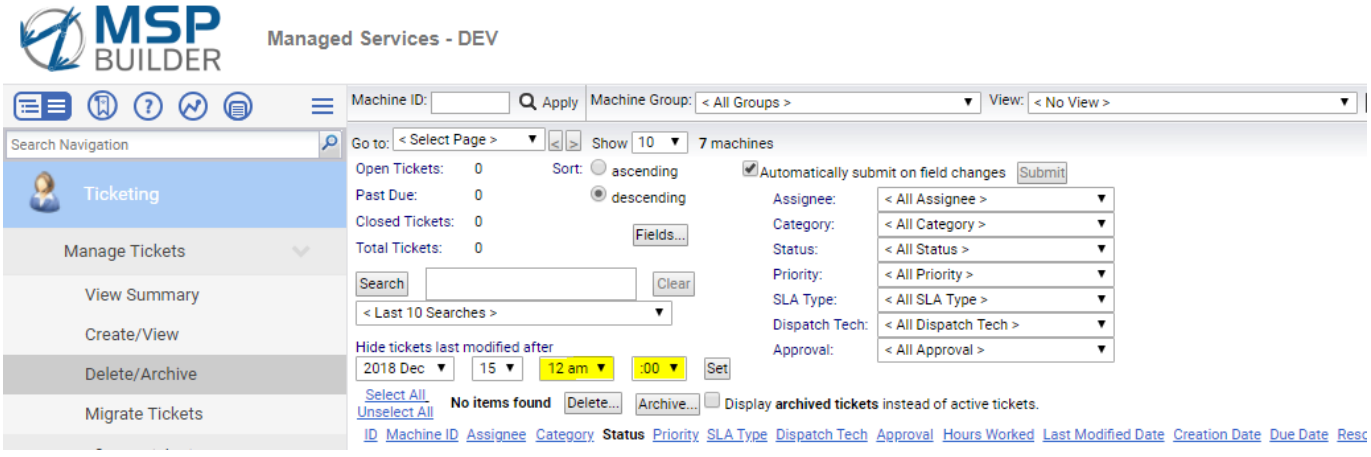
- Check the Patch Scan schedule:
  Spot check a group of machines or a couple of organizations.



  - Verify that each agent has a scan schedule applied – these times may be different if you customized the patching module.
    - Workstations – Every Monday between 10 AM and 4 PM
    - Servers – Every Monday between 12:30 AM and 4:30 AM
    - Systems without scheduled scans – verify the reason – unmanaged or special group, PATCH setting in the Policy Control field?

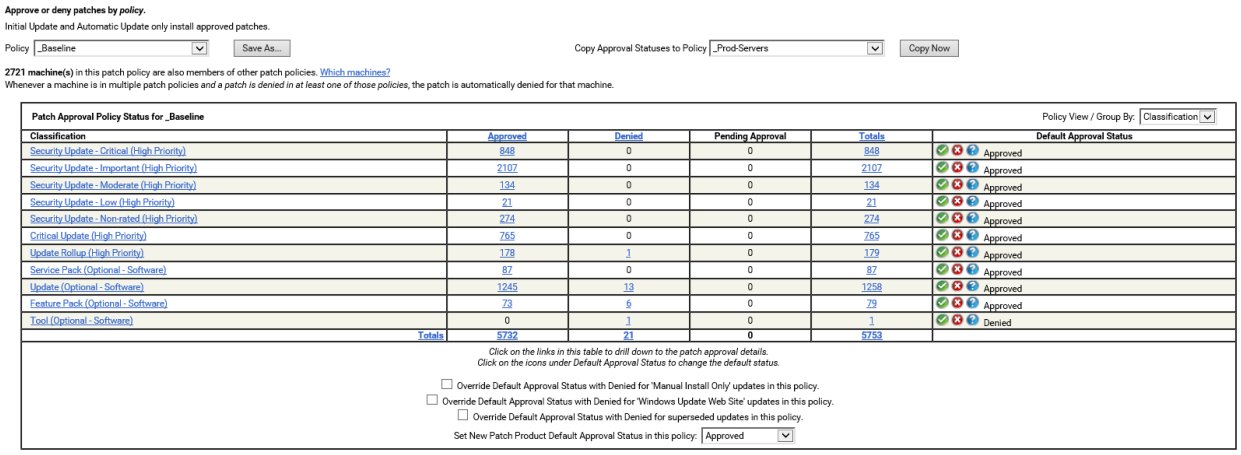
- Review/Adjust network monitors (if used):
  - Navigate to Network Monitor – Monitoring – View
  - Check groups with RED status
    - Drill down and select the agent with Alarm status
    - Note the state of the monitors prefixed with "_Monitor:" – if *all* of these monitors are red, it usually indicates a local security issue. Run the **WIN-Verify WMI for KNM Monitoring (MV)** procedure on the affected machine.
    - If the affected machine is the KNM Gateway (listed as "Hostname" on the overview display), make sure that WMI is Disabled (Select the agent, click Edit, select the Advanced tab, un-check **Use WMI**.)

- Archive the processed tickets. It is important to keep the ticket count below 200 – you may need to do this more than once a week if you have a high ticket volume. ***THIS IS A CRITICAL MAINTENANC TASK!***
  - Navigate to Ticketing – Manage Tickets – Delete/Archive
  - In the "Hide Tickets" option, set the time to midnight and click "Set"
  - Click "Select All", then click "Archive"



Monthly Tasks

Review and Approve Patches by Policy



Approve or deny patches by *policy*.

Initial Update and Automatic Update only install approved patches.

Policy _Baseline Save As... Copy Approval Statuses to Policy _Prod-Servers Copy Now

2721 machine(s) in this patch policy are also members of other patch policies. Which machines?
Whenever a machine is in multiple patch policies *and a patch is denied in at least one of those policies*, the patch is automatically denied for that machine.

Patch Approval Policy Status for _Baseline Policy View / Group By: Classification

Classification	Approved	Denied	Pending Approval	Totals	Default Approval Status
Security Update - Critical (High Priority)	848	0	0	848	Approved
Security Update - Important (High Priority)	2107	0	0	2107	Approved
Security Update - Moderate (High Priority)	134	0	0	134	Approved
Security Update - Low (High Priority)	21	0	0	21	Approved
Security Update - Non-rated (High Priority)	274	0	0	274	Approved
Critical Update (High Priority)	765	0	0	765	Approved
Update Rollup (High Priority)	178	1	0	179	Approved
Service Pack (Optional - Software)	87	0	0	87	Approved
Update (Optional - Software)	1245	13	0	1258	Approved
Feature Pack (Optional - Software)	73	6	0	79	Approved
Tool (Optional - Software)	0	1	0	1	Denied
Totals	5732	21	0	5753	

Click on the links in this table to drill down to the patch approval details.
Click on the icons under Default Approval Status to change the default status.

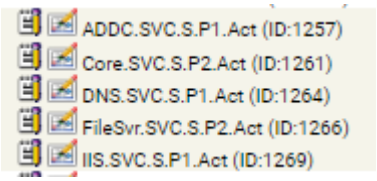
Override Default Approval Status with Denied for 'Manual Install Only' updates in this policy.
Override Default Approval Status with Denied for 'Windows Update Web Site' updates in this policy.
Override Default Approval Status with Denied for superseded updates in this policy.
Set New Patch Product Default Approval Status in this policy: Approved

- Navigate to Patch Management – Patch Policy – Approval by Policy
- Select each Policy from the drop-down list
- Select any classification from the Pending Approval column, select all patches from the approval window, and either approve or deny as per the Default Approval Status column. These are patches that have been discovered on agents after the auto-approval period and require manual approval or denial.
- Select the classifications where the default status is 'Pending Approval"
    - Review the updates, looking for any that should be denied. Select these and click Deny.
    - Select All remaining updates and click Approve
- Repeat for each policy in the drop-down list that has pending approvals.

Use the filter to focus on what you need to select. Set the "Published" field to something like < "20180430" to exclude updates from the current month (set to the end of the prior month) – giving you time to listen for problematic updates before you approve them. The Security Bulletin field can also be filtered to look for things like ".Net" or "IE" depending on the policy you are validating. Search for .NET in the Block DotNET policy and deny all updates found , then you can safely clear the filter and approve all remaining updates for that policy.

Spot Checks

- Review the steps for new customer or site and insure that all settings are defined properly, particularly for Managed Variables and Monitor – New Agent Check-In as these are particularly important to automation. These are easy to spot and will indicate which customers or groups might not have been fully configured when created and need further validation.
- Confirm monitoring via spot-checks
    - Navigate to Monitor – Agent Monitoring – Assign Monitoring
        - Select an "All Servers – Windows" view
        - Verify that appropriate monitors are applied – several monitors will usually be present on servers, as shown here.



        - Service monitors are optional on workstations and may or may not be present. This is MSP-specific and should be noted as part of your specific checks.
    - Navigate to Monitor – Agent Monitoring – Event Log Alerts
        - Verify that all agents have appropriate monitors applied.

    Note that agents in a special, audit, or unm group will not have monitors applied. Monitors can also be suppressed via Policy Control settings. Verify that systems without monitors have these controls in place or determine why monitors are not applying as expected. Request support if needed to ensure that effective monitoring is being performed.

Creating a New Customer or Customer Site

These steps are needed to ensure that all automation functions after adding a new customer or a new location (site) to an existing customer.

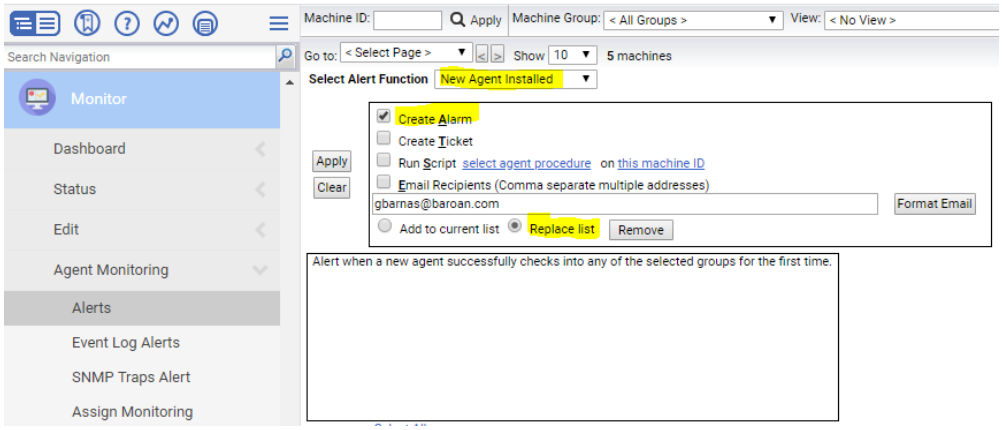
New Customer

Use the Offline Management tool to automatically create the customer organization and site group(s) – this will automate the first 4 steps below.

- Create the root group – "m" for managed or "unm" for unmanaged or break/fix.
- Create the servers, wkstns, and special machine groups below the customer root.
- Use the LOCODE.XLSX spreadsheet to determine the Site ID, create the Site ID group(s) under wkstns and, if necessary, servers. Use the optional offline tools for automated management.
- Assign the proper Set-up Type to define the coverage hours for monitoring/alerting.
- Optional – define the MSP Identity in the Org Custom Fields / MSP field to use custom ITP processing and notification via Tenancy. If this is done, the alerts will be sent to an alternate PSA as defined by ITP.
- Add the organization to the Personal scope; optionally create a Customer-name scope to restrict customer access to this specific organization.
- Optional – If the customer wants to be notified of priority events, create a Staff Member for that customer; define the Function field as "PriNotify", and (due to a VSA bug), enter the notification email address into the Email Address, Phone Number, and Text fields.
- Complete the New Site(s) tasks below when creating a new org.

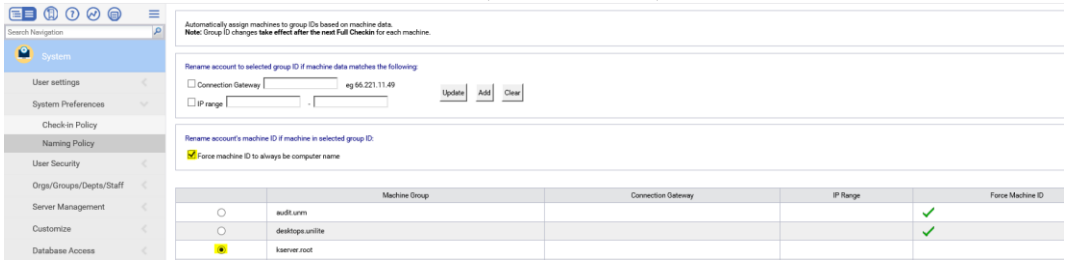
New Site(s)

- Define the New Agent Installed action as "Create Alarm"



  - Navigate to **Monitor – Agent Monitoring – Alerts**
  - Select **New Agent Installed**
  - Select **Create Alarm**
  - Select **Replace list**
  - Choose **Select All**
  - Click **Apply**

- Define the Managed Variables for the new customer and site group(s). Other variables may be required by the client for local customer credentials and various application licensing used by installation procedures.
    - Navigate to **Agent Procedures – Manage Procedures – Schedule/Create**
    - Click the **Manage Variables** menu
    - Define the following required variables:
        - KaseyaVsaId copy the existing value – this is the same for all clients
        - RAUserID The local admin user ID used by the MSP
        - RAPassword The local admin account password used by the MSP
        - Define the CA user ID and Password if required by customer request
- Force Machine ID to Follow HostName (recommended)



    - Navigate to **System – System Preferences – Naming Policy**
    - Select the machine group
    - Check **Force machine ID to always be computer name**
    - Click **Update**
    - Repeat for each machine group
- Verify that the agent init process has run
    - Navigate to **Agent Procedures – Manage Procedures – Schedule/Create**
    - Expand the **_MSP Builder/Core Automation/Agent Init** folder
    - Check the Last Exec Time for **ALL-Agent Onboarding - 1 – Init**
    - If the procedure has not run, invoke it manually. The procedure may not run automatically if the agent previously checked into the system