Managing Automate Groups

Overview

This page shows you how to edit a group, edit the groups a computer belongs to, edit group monitors, as well as how to schedule a script and use extra data fields with groups.

Note: If you are looking for information on how to manually add members to a group, please refer to our Configuring Groups article for more information.

Edit a Group

To edit a group:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**.
2. Make any necessary changes and click **Save**. Any changes made to the group will cascade down to the child groups, if applicable.

Following is a short description of each tab and a link to information for that tab:

- Computers: Displays the sub-tabs for managing computers in this group.
  - Main: The main configuration screen for the group. Set the group type, agent template, auto-join searches, maintenance windows and group permissions. Refer to Configuring Groups for more information.
  - Computers: Displays the sub-tabs for managing computers in this group.Members List: Lists all computers that are members of this group. Double-clicking on any of these computers will open the Computer Management screen. Refer to View the Computers Associated with a Group for more information.
  - Scheduled Scripts: Displays a list of scripts currently scheduled for computers in the group. Additionally, scripts can be scheduled on the group from this screen. Refer to Schedule Scripts by Groups for more information.
  - Internal monitors: Displays a list of the internal monitors available. Monitors and their alert templates can be viewed and/or edited from this screen. It is important that monitors always be edited at the group level. Refer to View/Edit Group Internal Monitors for more information.
  - Remote monitors: Displays a list of the remote monitors associated with the group. The configuration, alert template, alert message, ticket category, report category, interval, etc can be viewed and/or edited from this screen. Refer to View/Edit Group Remote Monitors for more information.
  - Patches: Displays the detected patches and the patch status of each patch for this group. Refer to Patch Management for more information on patch management.
- Network Devices: Displays sub-tabs for managing network devices in this group.
  - Members List: Lists all network devices that are members of this group. Double-clicking on any of these network devices will open the Network Device screen. Refer to View Network Devices Associated with a Group for more information.
  - Scheduled Scripts: Displays a list of scripts currently scheduled for network devices in the group. Additionally, scripts can be scheduled on the group from this screen. Refer to Schedule Scripts

by Groups for more information.
  - Monitors: Displays a list of remote network monitors associated with the group. All of the configuration and scheduling settings can be configured from this screen. Refer to View/Edit Network Device Monitors for more information.
- Contacts: Displays the sub-tabs for managing contacts in this group.
  - Members List: Lists all contacts that are members of this group. Double-clicking on any of these contacts will open the Contacts screen. Refer to View Contacts Associated with a Group for more information.
  - Scheduled Scripts: Displays a list of scripts currently scheduled for contacts in the group. Additionally, scripts can also be scheduled on the group from this screen. Refer to Schedule Scripts by Groups for more information.
- Info: The Info tab is used to store extra data fields that have been assigned to groups. The extra data fields' values will vary by group and by what plugins are installed. The extra data fields can be linked with scripts to allow you to have settings on a group that are used by the scripts assigned to the group. Refer to the Default Extra Data Fields, Using Extra Data Fields with Group Scripts or the plugin's documentation for more information.
- Status: Status gauges give you an overview of a group's alerts, failed patch installs, missing patches, total alerts and other various statistics to help you identify potential problems, quickly at a glance. These status gauges are based on monitor report categories that can be set on internal and remote monitors so information provided by both monitors can be grouped together. Refer to Using Status Gauges for more information.
- Managed Services: The Managed Services tab on the Group configuration screens are used for applying services to a group. When a service is applied to the group, the assigned count of the service will increase for each object (e.g., computer) as it is added to the group. These counts can then be passed to your PSA (e.g., ConnectWise®) for billing. Refer to Managed Services for more information.

Delete a Group

From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Delete**. You will asked to confirm removal. Click **DELETE** to continue or **CANCEL** to cancel.

Move a Group

From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Send To** > **Group**. From the **Send To Group** window, select the new group location and click **SEND**.

Schedule Scripts on Groups

Refer to Scheduling Scripts for more information on scheduling scripts on groups.

Exclude Group Members from a Group Scheduled Script

Refer to Scheduling Scripts for more information on excluding group members from a scheduled group script.

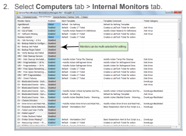
Monitor Groups

Both internal and remote monitors can be applied to groups. Once a monitor is applied to a group, it will then be applied to all computers in that group. Monitors can be added, viewed, configured and managed from the Groups screen.

Assign Monitors to Groups

To assign internal monitors to groups:

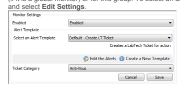
1. From the **Control Center**, click on **Browse** > **Groups** tab > right-click on the desired group (e.g., Service Plans) and select **Open** to open the **Group** screen.
2. Select **Computers** tab > **Internal Monitors** tab.



The **Enabled** column indicates if a monitor has been assigned to the selected group.

Enabled Status	Description
Global	Indicates that the monitor is a global monitor. Global monitors monitor every system reporting to the LabTech server.
Disabled	Indicates that the monitor is disabled for this group.
Enabled	Indicates that the monitor is enabled for this group.

3. To change a monitors' current **Enabled** status, right-click and select **Enable** or **Disable** depending on the current setting. If the monitor is currently set to **Global**, you cannot disable it without assigning it to a group first. If you enable a monitor that is currently set to **Global**, it will enable the monitor for this group only and will disable it for all other groups.
Tip: To change a monitor back to a global monitor, it must be in the **Enabled** status; then right-click and select **Disable**.
4. The **Alert Template** indicates what alert template is currently assigned to the monitor for the selected group. If **Obsolete Alert** is displayed, then there is not an alert template currently associated to this global monitor (if it is a global monitor) or for this group. To select an alert template, double-click on the monitor or right-click and select **Edit Settings**.



5. Select the appropriate alert template from the drop-down. You can also edit existing alert templates or create new alert templates from this window, if necessary. Refer to Configuring Alert Templates for more information. Click **Save** when finished.

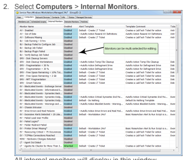
View/Edit Group Internal Monitors

Internal Monitors are operated from the ConnectWise® Automate™ server through SQL statements and database queries. These monitors should correspond with your SLAs and business needs (e.g., AV-Out of Date, BU-Backup Job Failed, etc.). Internal Monitors assigned to a Group are accessed by double-clicking on the Group; whereas, the Internal Monitors tab of the Monitors screen will show a global list of Internal Monitors.

Important: If you make changes to any Internal Monitors, you must always edit the monitor at the group level. Clicking on Internal Monitors from the Monitors tab will show the global settings (e.g., alert template). If you change the alert template at the global level it will change the alert template for that monitor on ALL groups.
For descriptions of each default Internal Monitor, refer to Default Internal Monitors.

To view a group's assigned Internal Monitors:

1. If you are editing an existing group, from the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**. Otherwise, add the new group using the steps in Configuring Groups.
2. Select **Computers** > **Internal Monitors**.

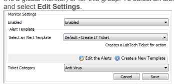


All internal monitors will display in this window.

3. The **Enabled** column indicates if a monitor has been assigned to the selected group. To change a monitor's current **Enabled** status, right-click and select **Enable** or **Disable** depending on the current setting. If the monitor is currently set to Global, you cannot disable it without assigning it to a group first. If you enable a monitor that is currently set to Global, it will enable the monitor for this group only and will disable it for all other groups.
   - Global indicates that this is a global monitor. Global monitors monitor every computer reporting to the Automate server.
   - Disabled indicates that the monitor is disabled for this group.
   - Enabled indicates that the monitor is enabled for this group.

- Inherited indicates that the monitor is inherited from a parent group.
Tip: To change a monitor back to a global monitor, it must be in the Enabled status; then right-click and select **Disable**.

4. The **Alert Template** indicates what alert template is currently assigned to the monitor for the selected group. If Obsolete Alert is displayed, then there is not an alert template currently associated to this global monitor (if it is a global monitor) or for this group. To select an alert template, double-click on the monitor or right-click and select **Edit Settings**.



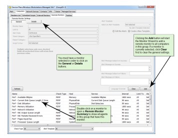
5. Select the appropriate alert template from the drop-down. If there is not an alert template that is appropriate, you can create a new alert template. For instructions on how to create a new alert template, refer to Create New Alert Templates.
6. Ticket categories are used to classify tickets and when tickets are generated by the monitor, the ticket will be routed to your PSA software (currently ConnectWise and Autotask plugins) to different service boards/ queues based on the ticket category. Most monitors have already been assigned a default ticket category but you can select a different category from the **Ticket Category** drop-down.
7. Click **Save** when finished.

View Group Remote Monitors

Remote Monitors are the System and Remote Network Monitors that run external from the Automate server on an agent-enabled computer (e.g., Perf-Network Bandwidth, Perf-Total CPU Processor Time, etc.). These monitors should correspond with your SLAs and business needs. Remote Monitors assigned to a group are accessed by double-clicking on the group; whereas, the Remote Agent Monitors and System Monitors tab of the Monitors screen will show a list of all Remote Monitors by agent. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.

Note: When a computer joins or is removed from the group, the monitor is installed or removed. These monitors are controlled by the server and will automatically be recreated if they are deleted or changed. As with scripts, you can determine what computer type to run the monitor on. This allows you to define exchange monitors that only monitor exchange servers.
To view the group remote monitors:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**. Otherwise, add the new group using the steps in Creating and Populating Groups. New groups that you create will not have any remote monitors assigned and will have to be created.
2. Select **Computers** > **Remote Monitors**.



All Remote Monitors associated with the group will display. For descriptions of each column, refer to Remote Agent Monitors.

3. Select a monitor from the list of monitors. The general settings will populate based on the selected monitor. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.
4. Click on the **Details** tab to view the monitor configuration.
Tip: Clicking the **Add** button will start the Monitor Wizard to add a remote monitor to all computers in this group. If a monitor is currently selected, click **Clear** first to clear the general settings.
Tip: You can filter the results based on the check type, alert template or both. For example, if you want to limit the results to only remote monitors with the PERF check type and using the Default - Create LT Ticket alert template, you select those values in the **Check Type** and **Alert Template** drop-downs.

Remote Monitors

Column	Description
Name	Displays the descriptive name of the monitor. This is the name that will display on the Remote Network Monitors tab of the Monitors screen.
Check Type	Displays the check action of the monitor (e.g., perf, system, ping, etc.)
Host	Displays the performance category of the monitor (e.g., memory, physical disk, service, etc.)
Service	Displays the service (e.g., HTTP, Disk Transfers/sec, % Idle Time, etc.)
Interval	Displays the amount of time in between monitor checks (in seconds)
Limit to	Displays the search, if any, that will limit the computers that this monitor is installed on. For example, an ESET antivirus search would limit the monitor to only those computers in the group that meet the ESET search criteria.
Alert Template	Displays the alert template associated with the monitor.
Alert Script	Displays the alert script associated with the monitor, if any.
Monitors	Displays the number of computers in this group that have the monitor

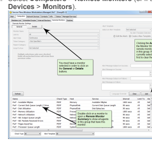
Column	Description
Installed	
Ticket Category	Displays the ticket category associated with the monitor
Report Category	Displays the report category associated with the monitor

Edit Group Remote Monitors

Remote Monitors run external from the Automate server on an agent-enabled computer or network device (e.g., Perf-Network Bandwidth, Perf-Total CPU Processor Time, etc.). These monitors should correspond with your SLAs and business needs. Remote Monitors assigned to a group are accessed by double-clicking on the group; whereas, the Remote Network Monitors, Remote Agent Monitors and System Monitors tab of the Monitors screen will show a list of all remote monitors by device.

Note: When a computer joins or is removed from the group, the monitor is installed or removed. These monitors are controlled by the server and will automatically be recreated if they are deleted or changed. As with scripts, you can determine what computer type to run the monitor on. This allows you to define exchange monitors that only monitor exchange servers.
To edit the group remote monitors:

1. From the **Groups** node, double-click on the **Group** to open the **Group** screen. Otherwise, add the new group using the steps in Configuring Groups. New groups that you create will not have any remote monitors assigned and will have to be created.
2. Select **Computers** > **Remote Monitors** (or if the group is managing network devices, select **Network Devices** > **Monitors**).



All Remote Monitors associated with the group will display.

Column	Description
Name	Displays the descriptive name of the monitor. This is the name that will display on the Network and System tabs of Monitors.
Check Type	Displays the check action of the monitor (e.g., perf,

Column	Description
	system, ping, etc.).
Host	Displays the performance category of the monitor (e.g., memory, physical disk, service, etc.). This is available on the Computers tab only.
Service	Displays the service (e.g., HTTP, Disk Transfers/ sec, % Idle Time, etc.).
Interval	Displays the amount of time in between monitor checks (in seconds).
Limit to	Displays the search, if any, that will limit the computers that this monitor is installed on. For example, an ESET® antivirus search would limit the monitor to only those computers in the group that meet the ESET search criteria.
Alert Template	Displays the alert template associated with the monitor.
Alert Script	Displays the alert script associated with the monitor, if any.
Monitors Installed	Displays the number of computers in this group that have the monitor.
Ticket Category	Displays the ticket category associated with the monitor.
Report Category	Displays the report category associated with the monitor.

Tip: You can filter the results based on the check type, alert template or both. For example, if you want to limit the results to only remote monitors with the 'PERF' check type and using the 'Default - Create LT Ticket' alert template, you select those values in the **Check Type** and **Alert Template** drop-downs.

3. Select a monitor from the list of monitors. The general settings will populate based on the selected monitor.
Tip: You can multi-select multiple monitors to make bulk changes. Simply highlight the monitors you want to change. A checkmark will display next to the field to indicate which fields will be saved. If the field does not have a checkmark, the unchecked item will retain its original value. Select or deselect desired fields. Make the desired changes and click **Update**.
4. The **Monitor Name** is the descriptive name of the monitor that appears in the Network Monitors or System Monitors tab of the Monitors screen. Make any desired changes.
5. The **Limit to** field allows you limit the group to run this monitor on, by only those computers that meet the search criteria. Select **All** from the drop-down to run this monitor on all agents in this group; otherwise, select the appropriate search to limit the group to only agents that meet the search criteria.
6. Select the **Alert Style** from the drop-down.
   - **Continuous:** The alert action will occur every time the monitor checks and fails with the exception of the ticket alert action. Only one ticket will be created and will not get another ticket until the first one is resolved or deleted.
   - **Once:** This will perform the alert action defined in the alert template one time until the monitor returns a success message.

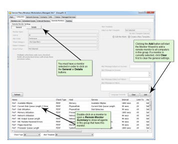
- **Second thru Tenth:** This will perform the alert action defined in the alert template on a specific fail count until the monitor returns a success message. For example, if this is set to 'Third', the alert action will be performed after the third consecutive failure.

7. The **Ticket Category** is used to classify tickets and when tickets are generated by the monitor, the ticket will be routed to your PSA software (currently ConnectWise® and Autotask® plugins) to different service boards/ queues based on the ticket category. Most monitors have already been assigned a default ticket category but you can select a different category from the drop-down.
8. The **Report Category** is used to separate this monitor into a group for reporting and used by the status gauges. Most monitors have already been assigned a default report category but you can select a different category from the drop-down.
9. Select a script from the **Script To Run** drop-down to run a script when the monitor fails (e.g., select 'Monitor Restart Service' to automatically correct a failed service monitor).
Important: If you select a script from the **Script To Run** drop-down, you must use an alert template that has the **Script Error** alert action checkbox selected as well as **Not Selected** selected from the **Script Action** drop-down. Refer to Configuring Alert Templates for more information on alert actions.
10. Select the desired **Alert Template** from the drop-down. If an appropriate template does not currently exist, click on **Create a New Template** to create a new template. If you need instructions on how to create an alert template, please refer to Configuring Alert Templates.
Note: Alert templates can be edited from this screen; however, please note that any changes you make to existing alert templates will affect all monitors that are associated with that alert template.
11. Enter a subject for successful alert messages sent via email in the **Alert Message Subject on Success**. When used with a custom failure message, this subject will only be used for the successes. Leave blank for a default subject.
Tip: To embed ticket comments when a normal ticket update is posted, simply place a tag <COMMENT></COMMENT> and this will put the text in the tags into a comment attached to the ticket. This will make the 'Ticket' alert action create two entries: one client facing and one technician facing.
12. A generic success alert message is created for you. Make any desired changes. Press **[F2]** for available Automate replacements.
13. Enter a subject for failure alert messages sent via email in the **Alert Message Subject on Failure**. Press **[F2]** for available variables. Leave this blank to use the success message instead.
Note: If the alert action will be used to create an alert or to open a ticket, the **Alert Message Subject on Success** and **Alert Message Subject on Failure** should be the same. If not, the alerts will not be cleared correctly and the tickets will not auto-close as expected. The subject string can be copied and pasted from one subject field to the other to ensure consistency.
14. Make any desired changes and click the **Update** button. To view the monitor configuration details, refer to the next section.

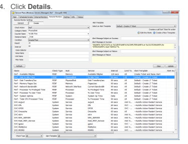
Edit Remote Monitor Configuration Details

To view/edit the remote monitor configuration details:

1. From the **Groups** node, double-click on the **Group** to open the **Group** screen.
2. Select **Computers** > **Remote Monitors**.



3. Select a monitor from the list of monitors. The general settings will populate based on the selected monitor.
4. Click **Details**.



5. There are different check actions that can be performed from a monitor. Each of the check actions require different parameters. Select the desired **Check Action** from the drop-down. For a description of each check action and the required parameters, refer to Monitor Types and Parameters. Depending on the type of monitor you are creating, some monitor types may not be available from the **Details** tab.
6. Select the **Condition** from the drop-down. This is the condition that must be met (e.g., equals, not equals, less than, etc.). If using 'Between' as a check condition, the result should be entered in lower case as, 'value x and value x' (e.g., 2 and 5).
7. Enter the **Result** to compare.
8. Enter the **Interval** between monitor checks. The default value is 300 seconds (5 minutes).
9. The **Data Collector** section is used to create data collector monitors. These keep a history of every check performed and the results for the past 90 days. If you want to keep the history for more than 90 days, you will need to add a 'RetentionDataCollector' property. Refer to Using Properties for Advanced Configuration for more information on how to add properties. A data collector monitor is only created if the Value, Unit and Max are all set.
   - **Value:** the name of the value you are graphing (e.g., 'Memory Avail' or 'Latency').
   - **Unit:** the type of the measurement being collected (e.g., KB, MB or ms).

- **Max:** the maximum value this monitor can reach. This is used for scaling on the graph on the **Monitor** > **Data Collector** screen. For example, if you have a Max of 100 but all your values are 200+, then your graph will be maxed out and show no definition.
Note: When setting up Data Collector monitors, it will take up to 30 minutes for any data to appear and data is updated every 30 minutes.

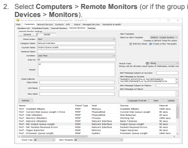
10. Select the desired **Alert Template** from the drop-down.
Tip: If you are using the Ignite® plugin for configuration, you can change the alert template for multiple monitors at once in (**Dashboard** > **Config** > **Integration** > **Ignite** > **Group Monitor Management**).
11. Make any desired changes to the alert message subject and body for both success messages and failure messages.
Note: If the alert action will be used to create an alert or to open a ticket, the **Alert Message Subject on Success** and **Alert Message Subject on Failure** should be the same. If not, the alerts will not be cleared correctly and the tickets will not auto-close as expected. The subject string can be copied and pasted from one subject field to the other to ensure consistency.
Note: The **Language Override** button allows for localization of the monitor. If configuring a monitor to use in varying language cultures, please proceed to Localize Monitors for assistance.
12. Click **Update**. This remote monitor will be updated for all agents in the selected group.

Implementing Result Data Types for Remote Monitoring (Group Monitors)

Remote monitor localization can be set on the group level to enable a wider range of granularity.

To set the group level remote monitor localization:

1. From the **Groups** node, double-click on the **Group** to open the **Group** screen. Otherwise, add the new group using the steps in Configuring Groups. New groups that you create will not have any remote monitors assigned and will have to be created.
2. Select **Computers** > **Remote Monitors** (or if the group is managing network devices, select **Network Devices** > **Monitors**).



3. Use the **Result Type** drop-down to select either **Numeric** or **String**.
   - **Numeric**: The remote monitor will require the value to be considered a number mathematically against different remote agent locales. Any value that adhere's to en-US number formatting as determined by Microsoft. For example, 70.000 would be considered to be 70,000 by most European formats, while it would incorrectly be considered as 70 by the standard en-US format.
   - **String**: The remote monitor will process it in the old/default monitor style where strings are

processed strictly as strings and anything that parses as a number will attempt to be compared numerically for certain conditions. Examples of strings are text results, IP addresses, or often Executable outputs. String is the default data type for all result field values.

The Result Type drop-down is not applicable to all type of monitors and conditions. Refer to Condition Type Compatibility for a list of comparison compatibility.

Condition Type Compatibility

The following table lists the compatibility for the different conditions.

Condition	Numeric	String (Default/Legacy)
Exists	N/A	N/A
=	Yes	Yes
<	Yes	Yes
>	Yes	Yes
=<	Yes	Yes
=>	Yes	Yes
<>	Yes	Yes
Between A and B	Yes	Yes
In set	Yes	Yes
Not In Set	Yes	Yes
Contains	N/A	Yes
Not Contains	N/A	Yes
Regex Like	N/A	Yes
Not Regex Like	N/A	Yes
Anything	N/A	Yes
Missing	N/A	N/A
State Based	Based on selected comparers	Based on selected comparers
Data Collection Only (Never Match)	N/A	Yes

View Network Device Monitors

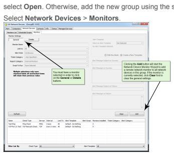
Network device monitors run on the probe computer and monitor network communication of network devices. Once scheduled on a group, these monitors can be used to monitor a device's ping, send network checks, send SNMP OID checks, etc. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.

To view network device monitors at the group level:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and

select **Open**. Otherwise, add the new group using the steps in Configuring Groups.

2. Select **Network Devices** > **Monitors**.



All Remote Monitors associated with the group will display. For descriptions of each column, refer to Remote Monitors table earlier in this article.

3. Select a monitor from the list of monitors. The general settings will populate based on the selected monitor. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.
4. Click on the **Details** tab to view the monitor configuration.
Tip: Clicking the **Add** button will start the Monitor Wizard to add a remote monitor to all computers in this group. If a monitor is currently selected, click **Clear** first to clear the general settings.
Tip: You can filter the results based on the check type, alert template or both. For example, if you want to limit the results to only remote monitors with the PERF check type and using the Default - Create LT Ticket alert template, you select those values in the **Check Type** and **Alert Template** drop-downs.

View Group Members

All of the members of a group can be viewed from the Members List tab of their respective parent tabs (Computers, Network Devices or Contacts) once they have been added to a group. Refer to Configuring Groups for more information on the various ways a group can be populated.

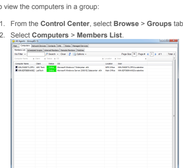
- Computers: The computer's name, associated client, status, etc. can all be viewed from this screen. Double-clicking on a specific computer will open the Computer Management screen. Right-clicking on the computer will allow you to run various commands and scripts against the computer.
- Network Devices: The name of network device and probe computer, status, device IP, etc. can all be viewed from this screen. Double-clicking on a specific network device will open the Network Device screen. Right-clicking on any of the network devices will allow you to set the device type, set the external sync, etc.
- Contacts: The contact's name, associated client, email address, etc. can all be viewed from this screen. Double-clicking on a specific contact will open the Contact screen. Right-clicking on any of the contacts will allow you to run scripts, run reports, etc.

View the Computers Associated with a Group

All of the computers that are currently a member of a group can be viewed from the Members List tab.

To view the computers in a group:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**.
2. Select **Computers** > **Members List**.



Column	Description
Computer Name	Displays the name of the agent computer.
Client	Displays the name of the client associated with the agent computer.
Status	Displays the current status of the agent computer (e.g., Online or Offline). A red background indicates that the computer is currently offline and a green background indicates that the computer is currently online.
OS	Displays the operating system of the computer.
Location	Displays the location that this agent computer has been assigned to.
User	Displays the current logged in user.

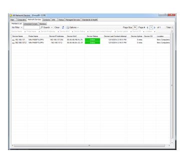
Tip: Double-clicking on any of the agent computers will open the Computer Management screen for that computer. Right-clicking on any of the computers will allow you to run commands, schedule scripts, view the client/location this computer belongs to, create a new ticket, view a report, etc. Refer to Computer Management for more information.

View Network Devices Associated with a Group

All of the network devices that are currently a member of a group can be viewed from the Members List tab.

To view the network devices in a group:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**.
2. Select **Network Devices** > **Members List**.



Column	Description
Device Name	Displays the detected name of the device.
Probe Name	Displays the name of the probe computer associated with this device.
Device IP Address	Displays the local IP address of the device.
Device MAC	Displays the MAC address of the device.
Device Status	Displays the current status of the device (e.g., online or offline).
Device Last Contact Attempt	Displays the date and time of the last attempted contact with the Automate server.
Device Uptime	Displays the uptime of the device.
Device OS	Displays the OS of the device, if applicable.
Location	Displays the location that this device is associated with.

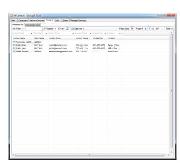
Tip: Double-clicking on any of the network devices will open the Network Device screen for that device. Right-clicking on any of the network devices will allow you to set the device type, set the external sync, create a new ticket for the device, etc. Refer to Network Devices - Control Center for more information.

View Contacts Associated with a Group

All of the contacts that are currently a member of a group can be viewed from the Members List tab.

To view the contacts in a group:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**.
2. Select **Contacts** > **Members List**.



Column	Description
Contact Name	Displays the contact's last name and first name.
Client Name	Displays the client that the contact is associated with, if applicable.
Contact Email	Displays the email address associated with the contact, if applicable.
Contact Phone	Displays the phone number associated with the contact, if applicable.
Contact Cell	Displays the cell phone number associated with the contact, if applicable.
Location	Displays the location that the contact is associated with, if applicable.

Tip: Double-clicking on any of the contacts will open the Contacts screen for that contact. Right-clicking on any of the contacts will allow you to view the client/location associated with the contact, run client scripts, run reports, etc. Refer to Contact Management for more information on contacts.

Remove Members from Groups

Computers, contacts and network devices can be removed from groups.

To remove a member from a group:

1. From the **Control Center**, select **Browse** > **Groups** and then right-click the **Member** and select **Remove from Group** or simply highlight the **Member** and press **[Delete]**. You will be asked to confirm the deletion. Click **REMOVE** to remove the group or click **CANCEL** to cancel the operation.

Use Extra Data Fields with Groups

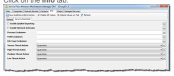
The Info tab of a group is used to store extra data fields that have been assigned to the group. The extra data fields' values can be different by group. Link the extra data fields with scripts and it allows you to have settings on a group that are used by the scripts assigned to the group. For example, a virus scanner installation group has a tab full of settings for the scanner and the script uses these settings to set up the scanner on the member of the group. This can be repeated with different settings to make multiple install groups. The script engine will pass

@groupid@ to the script and this can be used in the ExtraData Get Value function to retrieve these values.

For additional information on extra data fields, please refer to Extra Data Fields.

To access the Info tab of a group:

1. If you are editing an existing group, from the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**. Otherwise, add the new group using the steps in Configuring Groups.
2. Click on the **Info** tab.



   Any extra data fields that have been created for groups (**Dashboard** > **Config** > **Configurations** > **Additional Fields**: **Data Screen** field set to **Group**) will appear on the Group's **Info** tab as shown by the above example. You may have multiple tabs, depending on how you configured the additional fields.
3. Make any configuration changes to the extra data fields based on what you set up.
4. Click **Save Additional Information** to save your changes.

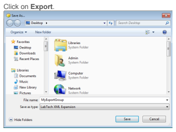
Note: To delete all values on the selected tab click **Delete Values on Tab**. To delete all values on all of the extra data field tabs, click **Delete All Values**.

Export/Import Groups

Export a Group

To export a group:

1. From the **Control Center**, select **Browse** > **Groups** tab, right-click on the desired group and select **Open**.
2. Click on **Export**.



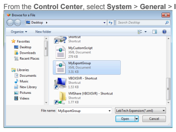
3. Select the location of where you want to save the group and enter the desired **File Name** and click **Save**.

4. A prompt will display informing you that the export was successful. Click **OK** to clear this message and then close the group window.

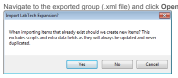
Import a Group

To import a previously exported group:

1. From the **Control Center**, select **System** > **General** > **Import** > **XML Expansion**.



2. Navigate to the exported group (.xml file) and click **Open**. You may see the following prompt.



3. If the group already exists in the system and you click **Yes**, a new group will be created creating a duplicate group. If the group does not exist, clicking **Yes** will add the group and its sub-groups to the group structure. Clicking **No** will still add the group to your group structure; however, if there were any sub-groups they will not be imported.

Overview

This page shows you how to edit a group, edit the groups a computer belongs to, edit group monitors, as well as how to schedule a script and use extra data fields with groups.

Edit a Group

To edit a group:

1. From the **Groups** node, right-click on the desired **Group** and select **Edit Group**.
2. Make any necessary changes and click **Save**. Any changes made to the group will cascade down to the child groups, if applicable.

Following is a short description of each tab and a link to information for that tab:

- Computers: Displays the sub-tabs for managing computers in this group.
  - Main: The main configuration screen for the group. Set the group type, agent template, auto-join searches, maintenance windows and group permissions. Refer to Configuring Groups for more information.
  - Computers: Displays the sub-tabs for managing computers in this group.Members List: Lists all computers that are members of this group. Double-clicking on any of these computers will open the Computer Management screen. Refer to View the Computers Associated with a Group for more information.
  - Scheduled Scripts: Displays a list of scripts currently scheduled for computers in the group. Additionally, scripts can be scheduled on the group from this screen. Refer to Schedule Scripts by Groups for more information.
  - Internal monitors: Displays a list of the internal monitors available. Monitors and their alert templates can be viewed and/or edited from this screen. It is important that monitors always be edited at the group level. Refer to View/Edit Group Internal Monitors for more information.
  - Remote monitors: Displays a list of the remote monitors associated with the group. The configuration, alert template, alert message, ticket category, report category, interval, etc can be viewed and/or edited from this screen. Refer to View/Edit Group Remote Monitors for more information.
  - Patches: Displays the detected patches and the patch status of each patch for this group. Refer to Patch Management for more information on patch management.
- Network Devices: Displays sub-tabs for managing network devices in this group.
  - Members List: Lists all network devices that are members of this group. Double-clicking on any of these network devices will open the Network Device screen. Refer to View Network Devices Associated with a Group for more information.
  - Scheduled Scripts: Displays a list of scripts currently scheduled for network devices in the group. Additionally, scripts can be scheduled on the group from this screen. Refer to Schedule Scripts by Groups for more information.
  - Monitors: Displays a list of remote network monitors associated with the group. All of the configuration and scheduling settings can be configured from this screen. Refer to View/Edit Network Device Monitors for more information.
- Contacts: Displays the sub-tabs for managing contacts in this group.
  - Members List: Lists all contacts that are members of this group. Double-clicking on any of these contacts will open the Contacts screen. Refer to View Contacts Associated with a Group for more information.
  - Scheduled Scripts: Displays a list of scripts currently scheduled for contacts in the group. Additionally, scripts can also be scheduled on the group from this screen. Refer to Schedule Scripts by Groups for more information.
- Info: The Info tab is used to store extra data fields that have been assigned to groups. The extra data fields' values will vary by group and by what plugins are installed. The extra data fields can be linked with scripts to allow you to have settings on a group that are used by the scripts assigned to the group. Refer to the Default Extra Data Fields, Using Extra Data Fields with Group Scripts or the plugin's documentation for more information.
- Status: Status gauges give you an overview of a group's alerts, failed patch installs, missing patches, total alerts and other various statistics to help you identify potential problems, quickly at a glance. These status gauges are based on monitor report categories that can be set on internal and remote monitors so information provided by both monitors can be grouped together. Refer to Using Status Gauges for more information.
- Managed Services: The Managed Services tab on the Group configuration screens are used for applying services to a group. When a service is applied to the group, the assigned count of the service will

increase for each object (e.g., computer) as it is added to the group. These counts can then be passed to your PSA (e.g., ConnectWise®) for billing. Refer to Managed Services for more information.

Rename a Group

From the **Groups** node, slow-click on the desired **Group** type the new name and press **[Enter]** or right-click the **Group** and select **Rename Group**. Enter the desired name and press **[Enter]**.

Delete a Group

From the **Groups** node, right-click on the desired **Group** to delete and select **Delete Group**. You will asked to confirm removal. Click **Yes** to continue or **No** to cancel.

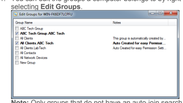
Move a Group

To move a group, drag the group to the new **Group**. All settings from the parent group will be applied.

Edit a Computer's Groups

To edit the groups a computer belongs to:

1. You can edit the groups a computer belongs to by right-clicking on the **Computer** from the **Clients** node and selecting **Edit Groups**.



   Note: Only groups that do not have an auto-join search set will be displayed. To view all of the groups a computer belongs to, navigate to the **Computer Management** screen, click on the **Automation** workspace and then click on the **Effective Policy** tile.
2. A checkmark to the right of the group indicates what groups the computer is a member of. To add the computer to a group, select the group's checkbox. To remove the computer from a group, deselect the checkbox.
3. You will be prompted to confirm. Select **Yes** to continue with the removal or addition or **No** to cancel.

Schedule Scripts on Groups

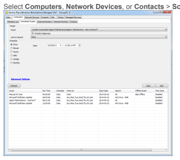
Group scripts can be applied to a group and then scheduled in various places throughout Connectwise Automate®. However, if you are scheduling a script on multiple computers, it is recommended to use the group's Scheduled Scripts tab. If the computer is removed from the group, then the script will stop running. This allows you to quickly turn managed services off for a client, if necessary. To schedule a script on a group, double-click on the group, select Computers > Scheduled Scripts, and then select the appropriate script.

Business Case

The Senior Technician has a specific antivirus solution that a client wants to have run on their computers. The Senior Technician creates a group specifically for these computers and schedules a script to run the antivirus software on the schedule that works best for the client.

To schedule a script on a group:

1. If you are editing an existing group, from the **Groups** tab, double-click on the **Group** or right-click on the **Group** and select **Open**. Otherwise, add the new group using the steps in Configuring Groups.
2. Select **Computers**, **Network Devices**, or **Contacts** > **Scheduled Scripts**.



   Any script that is currently assigned to this group will display in this window. If this is a newly created group, your Scheduled Scripts screen will be blank. In the above example, these four scripts are default scripts for the 'Windows Workstations.Managed 24x7' service plan group.
   Note: Most of the default group scripts control system automation and should not be changed. For information on the default group scripts, please refer to Default Scheduled Group Scripts for more information.
   Tip: You can duplicate scripts by right-clicking on the script and selecting **Duplicate**. For example, you may want to run the script on servers at a different time than the workstations. Limit the script to servers, then duplicate the script and limit the duplicated script to workstations. The default groups in Automate and their associated scripts already differentiate between servers and workstations.
3. Select the **Script** from the drop-down to apply to this group (e.g., Service Plans.WindowsWorkstations.Managed 24x7).
4. The **Include Subgroups** checkbox controls whether the script will also be applied to any sub-groups of the selected group. By default, this is checked and any script that is scheduled will also be automatically added to the sub-groups.
5. The **Limit To Search** is populated with your saved searches. The search will only be applied to group members. This allows you to limit your script to the computers that meet the criteria in the search. For

   example, the script could be limited to only run on machines that do not have antivirus installed.
6. Select the frequency in which to run the selected script. Available options are: Once, Minute, Hourly, Daily, Weekly and Monthly. Based on your selection, various options such as exclusions and repeat settings are available.
   - **Once:** Enter the **Start** date and time.
   - **Minute:** Enter the **Start** date and time to begin and the interval (in minutes) at which the script should run. To enter exclusions, select the **Enable** checkbox and enter the **Start** and **End Times** of when the script should not run.
   - **Hourly:** Enter the **Start** date and time to begin and the interval (in hours) at which the script should run. To enter exclusions, select the **Enable** checkbox and enter the **Start** and **End Times** of when the script should not run.
   - **Daily:** Enter the **Start** date and time to begin and the interval (in days) at which the script should run. To enter specific days of the week select the **Days** button and then select each day the script should run. To repeat the script, enter the interval to repeat in seconds, minutes or hours and enter the number of times to repeat in the **Repetitions** field. The script will only repeat the specified number of times for that day.
   - **Weekly:** Enter the **Start** date and time to begin. Select the **Weeks of the Month** and the **Days of the Week** the script should run.
   - **Monthly:** Enter the **Start** date and time to begin and the interval (in months) at which the script should run. To run the script on a specific day of the month, enter the **Day of Month** (1-31).
     Tip: To run scripts on a quarterly basis, use the 'Monthly' option and set the **Run Every** field to 3.
7. Click on **Advanced Settings** for additional options. Each option is explained in the Script Advanced Scheduling Options section of this document.
8. Click **Add** to add the script to the schedule. Scripts will not show up in the **Scheduled Scripts** screen immediately, it will take several minutes for them to appear.
   Tip: Group scripts also pass a @GroupID@ to the script for group detection. This allows scripts to know which group scheduled them. This can be very beneficial if you link it with group extra data fields. It allows you to have settings on a group that are used by the scripts for that specific group. For example, a virus scanner install group has a tab full of settings for the scanner and the scripts use these settings to set up the scanner on the member of the group. This can be repeated with different settings to make multiple install groups. Please refer to the Using Extra Data Fields with Group Scripts for additional information.

Exclude Group Members from a Group Scheduled Script

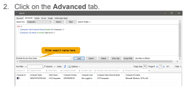
When a computer, network device or contact belongs to a group and a script is scheduled on the group, the script will run on all of the members in the group that are of the same type. However, you may have one or more members in that group that you do not want to run this script on. You can exclude members from group scheduled scripts without having to move the member from the group.

This is done by creating a search that excludes the member(s). This can be as simple as creating a search that just excludes the computer(s) based on computer ID or more complex, such as excluding servers that have a specific extra data field selected. These searches can be created to exclude computers, network devices or contacts. Refer to the following example for detailed instructions on excluding computers from a group script:

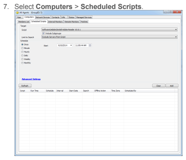
Tip: The steps below can be repeated for network devices and contact scripts. Simply create a search that excludes the desired network devices or contacts. Once the search has been saved, it can be applied to these scripts by selecting it in the Limit to Search drop-down. However, the searches can only be applied to scripts of the same type.
To exclude computers from a group scheduled script:

1. From the **Control Center**, select **Automation** > **Searches** > **Advanced Searches**.

2. Click on the **Advanced** tab.



3. Enter the desired search criteria. For example, the above search example will retrieve all machines that do not have an OS similar to 'server' that belong to the client XYZ Computers.
4. Click **Search**. The search results will display in the bottom half of the screen. For this example, XYZ Computers only has one computer that is not a server.
5. Enter the name to save the search as (e.g., Exclude Servers from Script) and click Save. The search will display at the root level of the Searches node on the navigation tree.
6. From the **Groups** tab, double-click on the group that the script is scheduled for or should be scheduled for (e.g., All Agents).
7. Select **Computers** > **Scheduled Scripts**.



8. If it is a new script to be scheduled on the group, proceed to step 9. Otherwise, if it is an existing script that is already scheduled on the group, select the script in the bottom half of the screen and then select the search you created from the **Limit to Search** drop-down and click **Update**.
9. If it is a new script to be scheduled, select the script from the **Script** drop-down, select the search you created from the **Limit to Search** drop-down, set the script schedule and click **Add**.

When the script runs, it will run on all computers in the group that meet the limit to search criteria (e.g., all computers that do not have a server OS). Those computers that are detected by the search will not have the script run on them.

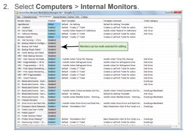
Group Monitors

Both internal and remote monitors can be applied to groups. Once a monitor is applied to a group, it will then be applied to all computers in that group. Monitors can be added, viewed, configured and managed from the Groups screen.

Assign Monitors to Groups

To assign internal monitors to groups:

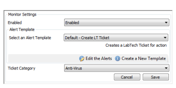
1. From the **Groups** node, right-click on the desired **Group** (e.g., Service Plans) and select **Edit Group** to open the **Group** screen.
2. Select **Computers** > **Internal Monitors**.



   The **Enabled** column indicates if a monitor has been assigned to the selected group.

Enabled Status	Description
Global	Indicates that the monitor is a global monitor. Global monitors monitor every system reporting to the LabTech server.
Disabled	Indicates that the monitor is disabled for this group.
Enabled	Indicates that the monitor is enabled for this group.

3. To change a monitors' current **Enabled** status, right-click and select **Enable** or **Disable** depending on the current setting. If the monitor is currently set to **Global**, you cannot disable it without assigning it to a group first. If you enable a monitor that is currently set to **Global**, it will enable the monitor for this group only and will disable it for all other groups.
   Tip: To change a monitor back to a global monitor, it must be in the **Enabled** status; then right-click and select **Disable**.
4. The **Alert Template** indicates what alert template is currently assigned to the monitor for the selected group. If **Obsolete Alert** is displayed, then there is not an alert template currently associated to this global monitor (if it is a global monitor) or for this group. To select an alert template, double-click on the monitor or right-click and select **Edit Settings**.



5. Select the appropriate alert template from the drop-down. You can also edit existing alert templates or create new alert templates from this window, if necessary. Refer to Configuring Alert Templates for more information. Click **Save** when finished.

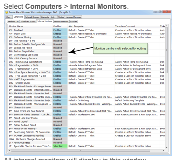
View/Edit Group Internal Monitors

Internal Monitors are operated from the ConnectWise® Automate™server through SQL statements and database queries. These monitors should correspond with your SLAs and business needs (e.g., AV-Out of Date, BU-Backup Job Failed, etc.). Internal Monitors assigned to a Group are accessed by double-clicking on the Group; whereas, the Internal Monitors tab of the Monitors screen will show a global list of Internal Monitors.

Important: If you make changes to any Internal Monitors, you must always edit the monitor at the group level. Clicking on Internal Monitors from the Monitors tab will show the global settings (e.g., alert template). If you change the alert template at the global level it will change the alert template for that monitor on ALL groups.
For descriptions of each default Internal Monitor, refer to Default Internal Monitors.

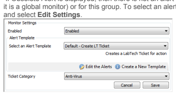
To view a group's assigned Internal Monitors:

1. If you are editing an existing group, from the **Groups** node, right-click on the desired **Group** and select **Edit Group**. Otherwise, add the new group using the steps in Configuring Groups.
2. Select **Computers** > **Internal Monitors**.



   All internal monitors will display in this window.
3. The **Enabled** column indicates if a monitor has been assigned to the selected group. To change a monitor's current **Enabled** status, right-click and select **Enable** or **Disable** depending on the current setting. If the

   monitor is currently set to Global, you cannot disable it without assigning it to a group first. If you enable a monitor that is currently set to Global, it will enable the monitor for this group only and will disable it for all other groups.
   - Global indicates that this is a global monitor. Global monitors monitor every computer reporting to the Automate server.
   - Disabled indicates that the monitor is disabled for this group.
   - Enabled indicates that the monitor is enabled for this group.
   - Inherited indicates that the monitor is inherited from a parent group.
     Tip: To change a monitor back to a global monitor, it must be in the Enabled status; then right-click and select **Disable**.
4. The **Alert Template** indicates what alert template is currently assigned to the monitor for the selected group. If Obsolete Alert is displayed, then there is not an alert template currently associated to this global monitor (if it is a global monitor) or for this group. To select an alert template, double-click on the monitor or right-click and select **Edit Settings**.



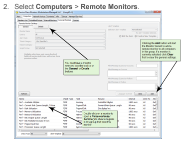
5. Select the appropriate alert template from the drop-down. If there is not an alert template that is appropriate, you can create a new alert template. For instructions on how to create a new alert template, refer to Create New Alert Templates.
6. Ticket categories are used to classify tickets and when tickets are generated by the monitor, the ticket will be routed to your PSA software (currently ConnectWise and Autotask plugins) to different service boards/ queues based on the ticket category. Most monitors have already been assigned a default ticket category but you can select a different category from the **Ticket Category** drop-down.
7. Click **Save** when finished.

View Group Remote Monitors

Remote Monitors are the System and Remote Network Monitors that run external from the Automate server on an agent-enabled computer(e.g., Perf-Network Bandwidth, Perf-Total CPU Processor Time, etc.). These monitors should correspond with your SLAs and business needs. Remote Monitors assigned to a group are accessed by double-clicking on the group; whereas, the Remote Agent Monitors and System Monitors tab of the Monitors screen will show a list of all Remote Monitors by agent. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.

Note: When a computer joins or is removed from the group, the monitor is installed or removed. These monitors are controlled by the server and will automatically be recreated if they are deleted or changed. As with scripts, you can determine what computer type to run the monitor on. This allows you to define exchange monitors that only monitor exchange servers.
To view the group remote monitors:

1. From the Groups node, right-click on the desired **Group** and select **Edit Group**. Otherwise, add the new group using the steps in Creating and Populating Groups. New groups that you create will not have any remote monitors assigned and will have to be created.
2. Select **Computers** > **Remote Monitors**.



   All Remote Monitors associated with the group will display. For descriptions of each column, refer to Remote Monitors.
3. Select a monitor from the list of monitors. The general settings will populate based on the selected monitor. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.
4. Click on the **Details** tab to view the monitor configuration.
   Tip: Clicking the **Add** button will start the Monitor Wizard to add a remote monitor to all computers in this group. If a monitor is currently selected, click **Clear** first to clear the general settings.
   Tip: You can filter the results based on the check type, alert template or both. For example, if you want to limit the results to only remote monitors with the PERF check type and using the Default - Create LT Ticket alert template, you select those values in the **Check Type** and **Alert Template** drop-downs.

Remote Monitors

Column	Description
Name	Displays the descriptive name of the monitor. This is the name that will display on the Remote Network Monitors tab of the Monitors screen.
Check Type	Displays the check action of the monitor (e.g., perf, system, ping, etc.).
Host	Displays the performance category of the monitor (e.g., memory, physical disk, service, etc.)
Service	Displays the service (e.g., HTTP, Disk Transfers/sec, % Idle Time, etc.)
Interval	Displays the amount of time in between monitor checks (in seconds)
Limit to	Displays the search, if any, that will limit the computers that this monitor is installed on. For example, an ESET antivirus search would limit the monitor to only those computers in the group that meet the ESET search criteria.
Alert Template	Displays the alert template associated with the monitor.

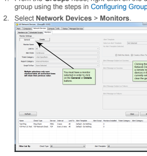
Column	Description
Alert Script	Displays the alert script associated with the monitor, if any.
Monitors Installed	Displays the number of computers in this group that have the monitor
Ticket Category	Displays the ticket category associated with the monitor
Report Category	Displays the report category associated with the monitor

View Network Device Monitors

Network device monitors run on the probe computer and monitor network communication of network devices. Once scheduled on a group, these monitors can be used to monitor a device's ping, send network checks, send SNMP OID checks, etc. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.

To view network device monitors at the group level:

1. From the **Groups** node, right-click on the desired **Group** and select **Edit Group**. Otherwise, add the new group using the steps in Configuring Groups.
2. Select **Network Devices** > **Monitors**.



   All Remote Monitors associated with the group will display. For descriptions of each column, refer to Remote Monitors table earlier in this article.
3. Select a monitor from the list of monitors. The general settings will populate based on the selected monitor. For information on editing group remote monitors, please refer to Edit Group Remote Monitors.
4. Click on the **Details** tab to view the monitor configuration.
   Tip: Clicking the **Add** button will start the Monitor Wizard to add a remote monitor to all computers in this group. If a monitor is currently selected, click **Clear** first to clear the general settings.
   Tip: You can filter the results based on the check type, alert template or both. For example, if you want to limit the results to only remote monitors with the PERF check type and using the Default - Create LT Ticket alert template, you select those values in the **Check Type** and **Alert Template** drop-downs.

View Group Members

All of the members of a group can be viewed from the Members List tab of their respective parent tabs (Computers, Network Devices or Contacts) once they have been added to a group. Refer to Configuring Groups for more information on the various ways a group can be populated.

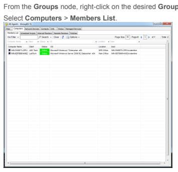
- Computers: The computer's name, associated client, status, etc. can all be viewed from this screen. Double-clicking on a specific computer will open the Computer Management screen. Right-clicking on the computer will allow you to run various commands and scripts against the computer.
- Network Devices: The name of network device and probe computer, status, device IP, etc. can all be viewed from this screen. Double-clicking on a specific network device will open the Network Device screen. Right-clicking on any of the network devices will allow you to set the device type, set the external sync, etc.
- Contacts: The contact's name, associated client, email address, etc. can all be viewed from this screen. Double-clicking on a specific contact will open the Contact screen. Right-clicking on any of the contacts will allow you to run scripts, run reports, etc.

View the Computers Associated with a Group

All of the computers that are currently a member of a group can be viewed from the Members List tab.

To view the computers in a group:

1. From the **Groups** node, right-click on the desired **Group** and select **Edit Group**.
2. Select **Computers** > **Members List**.



Column	Description
Computer Name	Displays the name of the agent computer.
Client	Displays the name of the client associated with the agent computer.
Status	Displays the current status of the agent computer (e.g., Online or Offline). A red background indicates that

Column	Description
	the computer is currently offline and a green background indicates that the computer is currently online.
OS	Displays the operating system of the computer.
Location	Displays the location that this agent computer has been assigned to.
User	Displays the current logged in user.

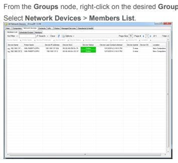
Tip: Double-clicking on any of the agent computers will open the Computer Management screen for that computer. Right-clicking on any of the computers will allow you to run commands, schedule scripts, view the client/location this computer belongs to, create a new ticket, view a report, etc. Refer to Computer Management for more information.

View Network Devices Associated with a Group

All of the network devices that are currently a member of a group can be viewed from the Members List tab.

To view the network devices in a group:

1. From the **Groups** node, right-click on the desired **Group** and select **Edit Group**.
2. Select **Network Devices** > **Members List**.



Column	Description
Device Name	Displays the detected name of the device.
Probe Name	Displays the name of the probe computer associated with this device.
Device IP Address	Displays the local IP address of the device.
Device MAC	Displays the MAC address of the device.
Device Status	Displays the current status of the device (e.g., online or offline).
Device Last Contact Attempt	Displays the date and time of the last attempted contact with the Automate server.
Device Uptime	Displays the uptime of the device.

Column	Description
Device OS	Displays the OS of the device, if applicable.
Location	Displays the location that this device is associated with.

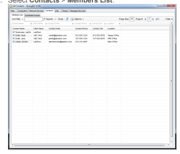
Tip: Double-clicking on any of the network devices will open the Network Device screen for that device. Right-clicking on any of the network devices will allow you to set the device type, set the external sync, create a new ticket for the device, etc. Refer to Network Devices - Control Center for more information.

View Contacts Associated with a Group

All of the contacts that are currently a member of a group can be viewed from the Members List tab.

To view the contacts in a group:

1. From the **Groups** node, right-click on the desired **Group** and select **Edit Group**.
2. Select **Contacts** > **Members List**.



Column	Description
Contact Name	Displays the contact's last name and first name.
Client Name	Displays the client that the contact is associated with, if applicable.
Contact Email	Displays the email address associated with the contact, if applicable.
Contact Phone	Displays the phone number associated with the contact, if applicable.
Contact Cell	Displays the cell phone number associated with the contact, if applicable.
Location	Displays the location that the contact is associated with, if applicable.

Tip: Double-clicking on any of the contacts will open the Contacts screen for that contact. Right-clicking on any of the contacts will allow you to view the client/location associated with the contact, run client scripts, run reports, etc. Refer to Contact Management for more information on contacts.

Remove Members from Groups

Computers, contacts and network devices can be removed from groups.

To remove a member from a group:

1. From the **Groups** node, expand the desired **Group** and then right-click the **Member** and select **Remove from Group** or simply highlight the **Member** and press **[Delete]**.

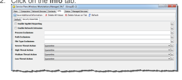
Use Extra Data Fields with Groups

The Info tab of a group is used to store extra data fields that have been assigned to the group. The extra data fields' values can be different by group. Link the extra data fields with scripts and it allows you to have settings on a group that are used by the scripts assigned to the group. For example, a virus scanner installation group has a tab full of settings for the scanner and the script uses these settings to set up the scanner on the member of the group. This can be repeated with different settings to make multiple install groups. The script engine will pass @groupid@ to the script and this can be used in the ExtraData Get Value function to retrieve these values.

For additional information on extra data fields, please refer to Extra Data Fields.

To access the Info tab of a group:

1. If you are editing an existing group, from the **Groups** node, right-click on the **Group** and select **Edit Group**. Otherwise, add the new group using the steps in Configuring Groups.
2. Click on the **Info** tab.



   Any extra data fields that have been created for groups (**Dashboard** > **Config** > **Configurations** > **Additional Fields**: **Data Screen** field set to **Group**) will appear on the Group's **Info** tab as shown by the above example. You may have multiple tabs, depending on how you configured the additional fields.
3. Make any configuration changes to the extra data fields based on what you set up.
4. Click **Save Additional Information** to save your changes.

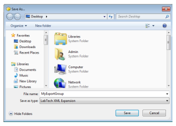
Note: To delete all values on the selected tab click **Delete Values on Tab**. To delete all values on all of the extra data field tabs, click **Delete All Values**.

Export/Import Groups

Export a Group

To export a group:

1. From the **Groups** node, right-click on the **Group** and select **Edit Group**.
2. Click on **Export**.

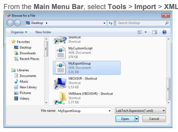


3. Select the location of where you want to save the group and enter the desired **File Name** and click **Save**.
4. A prompt will display informing you that the export was successful. Click **OK** to clear this message and then close the group window.

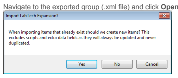
Import a Group

To import a previously exported group:

1. From the **Main Menu Bar**, select **Tools** > **Import** > **XML Expansion**.



2. Navigate to the exported group (.xml file) and click **Open**. You may see the following prompt.



3. If the group already exists in the system and you click **Yes**, a new group will be created creating a duplicate group. If the group does not exist, clicking **Yes** will add the group and its sub-groups to the group structure. Clicking **No** will still add the group to your group structure; however, if there were any sub-groups they will not be imported.