HandsFree
N E T W O R K S

Automated Support Infrastructure Information Portal User Guide

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Introduction

The Automated Support Infrastructure (ASI) information portal is a repository of event, asset, and asset change reports.

You can create user logins with read-only access, only to the ASI information portal. This makes it an important tool for communicating to your customers the tangible value delivered by ASI. You can give key personnel at your customers' access to the ASI information portal without giving them access to other facilities in the ASI server.

Each report entry in the ASI information portal includes a notes field. Any user has write access to the notes field. It can be a simple and convenient two-way communication channel between you and your customers.

In order to publish a report on the ASI information portal, when defining or editing an event, asset, or change report, you should select the Publish on information portal option for the Report output parameter. Please refer to the **ASI Asset Management Report Module User Guide**, and **ASI Event Log Management Report Module User Guide** guides for detailed instructions.

Logging on

To access the ASI information portal from any device with Internet access, start-up your browser and enter the following URL in the address box:

■   http://asiservername/main

> Substitute asiservername with the URL of the ASI server your sites log to.

After you press enter, the logon screen will appear. Enter your user name and password, and click on the   OK   button or press the Enter key on your keyboard.

This will take you to the Welcome page shown below. You are now ready to start using the ASI information portal.

Welcome

Event Management

- **ad-hoc query**: create and run a one-time ad-hoc query based on a filter.
- **filters**: manage query filters.
- **notifications**: manage notifications.
- **console**: view notifications.
- **reports**: manage reports.

Asset Management

- **queries**: manage and run queries.
- **console**: manage assets.
- **changes**: view changes to assets.
- **reports**: manage reports.

Site Management

- **configuration**
- **updates**

Information Portal

- **event reports**
- **asset reports**
- **asset change reports**

Provisioning

- **products**
- **sites**
- **metering**
- **audit trail**

Tools

- **admin**
- **census**
- **help**

Information portal navigation

You can access information portal modules by clicking on the links under the **Information Portal** heading on the Welcome page (see above), or to the right of the information portal: label at the upper right-hand corner on any page on the ASI information portal.

The event log management facility modules include:

- **event**: to view published event reports

- **asset**: to view published asset reports

- **change**: to view published asset change reports

- **meter** to view published metering reports

At the top right-hand corner of every page in the ASI information portal, you will find the following navigation bar allowing you to easily move among the modules in the portal:

- **information portal:** <u>event</u> | <u>asset</u> | <u>change</u> | <u>meter</u>

All published report pages (currently event, asset, change, meter) and the ASI Information Portal - Index page in the ASI information portal have the same basic structure. Under the page title, there is a sub-header specifying the number and type of reports listed in the page. Under the sub-header at the beginning of each section, and at the bottom of each page, you will see four links to help you navigate the page:

- [<u>index</u> | <u>top</u> | <u>bottom</u> | <u>control</u> | <u>reports</u>]

On the ASI Information Portal - Index page you will not see <u>control</u> and <u>reports</u> links.

On the ASI Information Portal – Edit Report page, the <u>reports</u> link is replaced with the <u>back</u> link, and there is no <u>control</u> link.

After the navigation links, on all published report pages (currently event, asset, change), you will find a control panel followed by the list of currently published reports in table format.

Clicking on the <u>index</u> link on any ASI information portal page, will take you to the ASI Information Portal - Index page shown below.

dashboard: <u>display</u>
events: <u>ad-hoc query</u> | <u>filters</u> | <u>notifications</u> | <u>console</u> | <u>reports</u>
assets: <u>queries</u> | <u>console</u> | <u>changes</u> | <u>reports</u>
sites: <u>wizard</u> | <u>status</u> | <u>configuration</u> | <u>updates</u>
microsoft update: <u>wizard</u> | <u>status</u> | <u>advanced</u>
provisioning: <u>products</u> | <u>sites</u> | <u>metering</u> | <u>audit</u>
information portal: <u>event</u> | <u>asset</u> | <u>change</u> | <u>meter</u>
tools: <u>admin</u> | <u>audit</u> | <u>census</u> | <u>groups</u> | <u>remote control</u> | <u>help</u>

ASI Information Portal - Index

user: hfn [<u>log in as new user</u>]
site filter: on [<u>set site filter</u>]
September 06, 2003

[<u>index</u> | <u>top</u> | <u>bottom</u>]

220 Reports Published.

- **205 Event reports**
- **14 Asset reports**
- **1 Change report**

[<u>index</u> | <u>top</u> | <u>bottom</u>]

In the body of this page you will find entries specifying the number of published reports of each type (currently event, asset, change). Clicking on an entry will take you to the page listing published reports of that type, e.g. clicking on the **<u><number of event reports> Event Reports</u>** link will take you to the ASI Information Portal - Event Reports page.

Event reports

Clicking on the <u>event</u> link that you find to the right of the **information portal** label on the upper right-hand corner of every page of the ASI information portal will take you to the ASI Information Portal - Event Reports page shown below.

ASI Information Portal - Event Reports

user: hfn [log in as new user]
site filter: on [set site filter]
August 19, 2003

[index | top | bottom | control | reports]

Type	Event Report
Owner	
Earliest publication date	
Latest publication date	
Page size	50
Page	Page 1 (1 through 50)
submit	reset

251 Event Reports Published, 50 Displayed.

[index | top | bottom | control | reports]

Reports 1 through 50 (of 251)

←Previous   Next→

Name	Owner	Publication Date	Expires	Size (Bytes)	Notes	Action
Monthly Printer Out of Paper Report	corpdvs	08/17/03 17:06:35	12/15/03 16:06:35	3804		[view] [edit] [delete]
Monthly Printer Out of Paper Report	viewer	08/17/03 17:06:34	12/15/03 16:06:34	3802		[view] [edit] [delete]
Monthly Printer Out of Paper Report	amherst	08/17/03 17:06:34	12/15/03 16:06:34	3804		[view] [edit] [delete]

Only non-restricted users have access to the control panel on the ASI Information Portal - Event Reports page. It lets you select ASI information portal content by:

■ Type – You can select event, asset, or change reports. By default, the corresponding type of report, event, asset, or change report, is selected on the event, asset, and change pages, respectively.

■ Owner – Only administrative users, those who can create and modify user accounts, have access to ASI information portal content selection by owner. By default, an administrative user can see ASI information portal content produced by all non-restricted users.

■ Earliest publication date – By default no earliest publication date is selected. This means that all content published on the ASI information portal, and accessible by the logged in user, is listed on the the ASI Information Portal - Event Reports page.

■ Latest publication date – BY default no latest publication date is selected. This means that all content published on the ASI information portal, and accessible by the logged in user, is listed on the ASI Information Portal - Event Reports page.

The Page size parameter lets you control the number of entries displayed on each ASI Information Portal - Event Reports page, and determines the total number of pages containing event reports.

The Page parameter lets you jump to any one of the pages containing event reports.

By default, entries in the event report table are sorted in descending order by publication date. Each row in the table corresponds to an event report and consists of the following:

- **Name** – You can sort entries in the event report table by name by clicking on the column header, once to order the entries in ascending order, twice in descending order.

- **Owner**– This is the user that created the event report. This information appears only if the user logged in has administrative privileges, or is the publisher of the report. You can sort entries in the event report table by owner by clicking on the column header, once to order the entries in ascending order, twice in descending order.

- **Publication Date** – Here you will find the date on which the event report was published. You can sort entries in the event report table by publication date by clicking on the column header, once to order the entries in ascending order, twice in descending order.

- **Expires** – Here you will find the date on which the event report will be automatically removed from the ASI Information Portal - Event Reports page. By default, it is set to 120 days from a report's publication date. You can sort entries in the event report table by expiration date by clicking on the column header, once to order the entries in ascending order, twice in descending order.

- **Size (Bytes)** – This field contains the size of each published event report measured in bytes.

- **Notes** – Here you will find the notes recorded by any user in the ASI Information Portal – Edit Report page.

- **Action**

    - Clicking on the [view] link of an ASI Information Portal - Event Reports page entry opens a new browser window displaying the event report whose view link you clicked on

    - Clicking on the [edit] link of an ASI Information Portal - Event Reports page entry takes you to that report's ASI Information Portal – Edit Report page shown below.

ASI Information Portal - Edit Report

[index | top | bottom | back]

Name	Weekly Printer Out of Paper Report
Owner	hfn
Size (bytes)	40512
Published	08/17/03 08:05:18
Select expiration date	12/15/03 07:05:18 ▼
Enter expiration date	
View	[view]
Note	
submit	reset

[index | top | bottom | back]

The actions on this page are self-explanatory. The notes function provides a simple and straightforward two-way communication channel with your users. Other than viewing, it's the only function non-restricted users have access to.

On the ASI Information Portal – Edit Report page, the user that created the report, and users with administrative rights can modify a reports expiration date. This is the date on which the report and any associated notes will be removed from the ASI information portal. By default, a report's expiration date is set to 120 days from the day on which it was published.

Clicking on the [view] link on the ASI Information Portal – Edit Report page, will open the report in a new browser window.

Clicking on the back navigation link on the ASI Information Portal – Edit Report page, will take you back to the ASI Information Portal - Event Reports page.

Clicking on the Reset button on the ASI Information Portal – Edit Report page, will reset the expiration date, and the content of the notes field to their value before you made changes in the current editing session (since the last time you submitted changes).

Clicking on the Submit button on the ASI Information Portal – Edit Report page, will take you to the ASI Information Portal – Updating Report page shown below.

ASI Information Portal - Updating Report

Entry for **Weekly Printer Out of Paper Report** has been updated.

Go back to report page.

■ Action

- ■ Clicking on the [delete] link of an ASI Information Portal - Event Reports page entry takes you to the ASI Information Portal – Confirm Report Delete page shown below. This link is present only if an administrative user or the publisher of the report is logged in.

ASI Information Portal - Confirm Report Delete

Are you sure you want to delete report **Monthly Printer Out of Paper Report**?

Yes No

Confirmation of a report deletion action will take you to ASI Information Portal – Deleting Report page shown below. From there you can go back to the ASI Information Portal - Event Reports page, or other modules of the ASI information portal.

ASI Information Portal - Deleting Report

Report **Monthly Printer Out of Paper Report** has been removed.

Go back to report page.

Asset reports

The ASI Information Portal - Asset Reports page is an exact copy of the ASI Information Portal - Event Reports page, except that the report table contains a listing of asset reports instead of event reports.

Change reports

The ASI Information Portal – Asset Change Reports page is an exact copy of the ASI Information Portal - Event Reports page, except that the report table contains a listing of asset change reports instead of event reports.

Meter reports

The ASI Information Portal – Metering Reports page is an exact copy of the ASI Information Portal - Event Reports page, except that the report table contains a listing of metering reports instead of event reports.

Restricted users

A user with restricted access can only view reports published on the ASI information portal that contain information on sites he/she has access to, and modify the notes filed associated with any report published on the ASI information portal.

A restricted user cannot view reports containing both information from sites he/she has access to and sites he/she cannot access.

When a user with restricted access logs onto the ASI server, the first page displayed is the ASI Information Portal - Index page. From there, a restricted user can access all the reports published on the ASI information portal as described above.

Restricted user set-up

To set up a restricted user, perform the following steps:

1) Log onto your ASI server's administration facility as a user with administrative rights (e.g. the master user). Open a browser window and type:

https://asiservername/main/acct/admin.php

> Substitute asiservername with the URL of the ASI server your sites log to.

Please note that you can access the Admin page by clicking on the admin link to the right of the **tools:** label at the top right-hand corner of any of the ASI server pages.

2) Enter your user id and password. After successfully logging on, the Admin page will be displayed (See figure below).

Admin

user: hfn [log in as new user]
site filter: off [set site filter]
April 05, 2004

[top | bottom | users | sites | update | new user | new site]

Name	Sites	Privileges	Notifications Default Email Recipients	Reports Default Email Recipients	Action
admin	Alaska CI default Corporate Ink Dormant Eric's House HFN Allan	Administrate Configure Machines Control Provision Remove Assets Control Downloads Control Updates			[edit] [delete]
corpink	Corporate Ink	Configure Machines Control Provision Remove Assets Control Downloads Control Updates	adonnini@handsfreenetworks.com	adonnini@handsfreenetworks.com	[edit] [delete]
hfn	Alaska CI default Corporate Ink Dormant Eric's House HFN Allan	Administrate Global Event Searches Global Notifications Global Event Reports Global Asset Queries Global Asset Reports Configure Machines Control Provision Remove Assets Control Downloads Control Updates	adonnini@handsfreenetworks.com	adonnini@handsfreenetworks.com	[edit] [delete]
hfndemo	Corporate Ink	(none)			[edit] [delete]
hfnguest	Corporate Ink	(none)			[edit] [delete]

Site Name	Active	Owner	Action
Alaska	Yes	admin	[delete] [assign]
CI default	No	hfn	[delete] [assign]
Corporate Ink	Yes	corpink	[delete] [assign]
Dormant	No	admin	[delete] [assign]
Eric's House	No	admin	[delete] [assign]
HFN Allan	No	hfn	[delete] [assign]

[top | bottom | users | sites | update | new user | new site]

Update User	
Change Password:	Old Password: [ ] New Password: [ ] Confirm New Password: [ ]
Notifications default email recipients:	adonnini@handsfreenetworks.com Enter all the recipients' e-mail addresses separated by commas.
Reports default email recipients:	adonnini@handsfreenetworks.com Enter all the recipients' e-mail addresses separated by commas.
update reset	

[top | bottom | users | sites | update | new user | new site]

3) Clicking on the new user link at the top of the Admin page, right under the ASI Server page logo, will take you to the Create User page shown below.

Create User

user: hfn [log in as new user]
site filter: off [set site filter]
August 12, 2003

Create User		
Name:		enter new user account name
Password: Confirm:		enter the same password twice
Notify mail:		enter comma-separated list of email addesses
Report mail:		enter comma-separated list of email addesses
Privileges:	Normal	controls account type
Global Event Notify:	No	can create and edit global notifications
Global Event Report:	No	can create and edit global reports
Global Event Search:	No	can create and edit global searches
Global Asset Query:	No	can create and edit global queries
Global Asset Report:	No	can create and edit global asset reports
Configure Machines:	No	can configure client machines
Remove Assets:	No	can remove machine assets
Control Downloads:	No	can control downloads
Control Updates:	No	can control updates
Sites:	Corporate Ink Dormant HandsFree Networks HFN Development HFN Max	specify sites this user is allowed to access

[create]   [reset]

4) Enter the information for the user id for accessing the ASI information portal. Enter only the information, and modify the configuration settings, described below:

■ Name:

This is the user id for gaining access to the ASI information portal

■ Password: and Confirm:

In these two fields you enter the password assigned to the new user. You can use any combination of letters and numbers. We recommend that a password be at least six characters long.

■ Privileges – Restricted

■ Sites:

Here select the name of the site whose published reports you want to give the new user access to. If you want to give the new user access to more than one site's published information, press the `ctrl` key while clicking with the mouse on the names of the desired sites.

Adding a site name record on the ASI server manually

If there is no site name record on the ASI server (not to be confused with the site record defined on the ASI installation server before installation of the ASI client at a site) for one ore more of the sites you want to give the new user access to, you will need to create the site name record(s). Clicking on the new site link at the top of the Admin page right under the page title. Doing this, will take you to the Create Site page (See figure below).

dashboard: display
events: ad-hoc query | filters | notifications | console | reports
assets: queries | console | changes | reports
sites: wizard | status | configuration | updates
microsoft update: wizard | status | advanced
provisioning: products | sites | metering | audit
information portal: event | asset | change | meter
tools: admin | audit | census | groups | remote control | help

Create Site

Create Site	
Name:	
create	reset

Enter the name of the site making sure that it is **exactly the same as the name of the site entered in the site's site record on the ASI installation server**.

Click on the Create button. The Creating Site page will be displayed (See figure below).

dashboard: display
events: ad-hoc query | filters | notifications | console | reports
assets: queries | console | changes | reports
sites: wizard | status | configuration | updates
microsoft update: wizard | status | advanced
provisioning: products | sites | metering | audit
information portal: event | asset | change | meter
tools: admin | audit | census | groups | remote control | help

Creating Site

user: hfn [log in as new user]
site filter: on [set site filter]
April 27, 2004

Site **ACME Corporation** has been created.

5) After you finish entering the desired values for the above parameters on the Create User page you will have successfully created a new restricted user. Click on the Create button. The Creating User page will be displayed (See figure below).

dashboard: display
events: ad-hoc query | filters | notifications | console | reports
assets: queries | console | changes | reports
sites: wizard | status | configuration | updates
microsoft update: wizard | status | advanced
provisioning: products | sites | metering | audit
information portal: event | asset | change | meter
tools: admin | audit | census | groups | remote control | help

Creating User

user: **hfn** [log in as new user]
site filter: off [set site filter]
April 27, 2004

New user **ACMEuser** created.
User **ACMEuser** has access to **Alaska**.

Go back to admin page.

If you were not able to select a site for the new restricted user to access because the site name record on the ASI server had not been created (either manually or automatically when ASI client at the site started logging events and actions onto the ASI server), you should proceed to step **6)** below.

6) If you created new site(s) by using the new site link as described above after you created the profile for the new restricted user, you will need to give the new restricted user access to the site as follows:

- Clicking on the users link at the top of the Admin page, will take you to the Users area on the Admin page.

- Clicking on the [edit] link in the rightmost column entry corresponding to the name of the new restricted user (the user just created), will take you to the Edit User page shown below.

Edit User

user: **hfn** [<u>log in as new user</u>]
site filter: off [<u>set site filter</u>]
March 29, 2004

Edit User		
Name:	**corpink**	*user names can not be changed*
Password:	New: [ ] Confirm: [ ]	*enter the same password twice*
Notify mail:	adonnini@handsfreenetworks.com	*enter comma-separated list of email addesses*
Report mail:	adonnini@handsfreenetworks.com	*enter comma-separated list of email addesses*
Privileges:	Normal ▼	*controls account type*
Global Notify:	No ▼	*can create and edit global notifications*
Global Event Report:	No ▼	*can create and edit global event reports*
Global Event Search:	No ▼	*can create and edit global searches*
Global Asset Query:	No ▼	*can create and edit global queries*
Global Asset Report:	No ▼	*can create and edit global asset reports*
Configure Machines:	Yes ▼	*can configure client machines*
Configure Provision:	Yes ▼	*can provision client machines*
Remove Assets:	Yes ▼	*can remove machine assets*
Control Downloads:	Yes ▼	*can control downloads*
Control Updates:	Yes ▼	*can control updates*
Sites:	Alaska CI default Corporate Ink Eric's House HFN Allan	*specify sites this user is allowed to access*
[update] [reset]		

■ Scroll down the list next to the Sites label until you locate the entry for the new site, and se-lect it by clicking on it. If you want to give the new user access to more than one site's pub-lished information, press the `ctrl` key while clicking with the mouse on the name(s) of the site(s) you want to give the restricted user access to.

■ Click on the [Update] button to complete the process. The Admin Updating User page will be displayed (See figure below).

Admin Updating User

User **ACMEuser** updated.
User **ACMEuser** has access to **Dormant**.

Go back to admin page.

Help system

The ASI help function is implemented as a two-level system. You can reach the Help Index page, shown below, by clicking on the help link under the **Tools** heading on the Welcome page, or to the right of the **tools:** label on the upper right-hand corner on any page on the ASI server.

Help Index

ASI Event Log Management User Guide
General information about using the event log management facility, in PDF form

ASI Support Query Module User Guide
General information about using automated knowledge base queries, in PDF form

ASI Event Log Management Report Module User Guide
General information about using the event log management facility report module, in PDF form

ASI Asset Management User Guide
General information about using the asset management facility, in PDF form

ASI Asset Management Report Module User Guide
General information about using the asset management facility report module, in PDF form

ASI Site Management User Guide
General information about using the ASI site management facility, in PDF form

ASI Information Portal User Guide
General information about using the ASI Information Portal facility, in PDF form

Filter Examples
Listing of currently available event filters, in Microsoft Word form

ASI Pre-defined Notifications
Listing of currently available event notifications, in Microsoft Word form

ASI Pre-defined Reports
Listing of currently available event reports, in Microsoft Word form

ASI Scrip Index
Listing of currently available scrips ordered by number with links to Scrip detail log help pages

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From here, clicking on any of the links will take you to the help system section corresponding to the label of the link. For example, the link **ASI Information Portal User Guide** will take you to a copy of this ASI information portal user guide in Adobe Acrobat PDF file format.

This guide and all the other documents listed under the help system are available for download in PDF format except for the **Filter Examples**, **ASI Pre-defined Notifications**, **ASI Pre-defined Reports**, documents, which are downloadable in Microsoft Word format. The **ASI Scrip Index** is a link that takes you to the Scrip Index page where all user configurable Scrips are listed in table format. Clicking on the **Detail** button in the right-most column of a Scrip's entry in the table, takes you that that Scrip's detail log help file.