



Create Groups

Streamline your installation by creating a hierarchy of Customers, Groups, and Computers.

- Customers: From your portal home page, click the green “Add Customer” button.
- Groups: Select your company name at the top left, and in the Account Setup dropdown, click Edit Groups. Here you can add one or more groups to assign to a customer. Viewing the customer’s home page, click “Edit Customer Info” and check use groups. Then, assign groups to the customer at the bottom of the window.

Install

Now it's time to install the software agent to your endpoints. From a customer’s home page, click installer. You can elect to email the installer to the endpoints and install from the endpoint or you can download the installer package, store it in a shared directory, or put it on a thumb drive and walk it to the endpoint for installation.

Start Scanning

The third and final step is to schedule and run a scan. There are three options for scheduling.

1. Customer Master Scheduler – Scans all customer endpoints.
2. Group Scheduler – Scans the selected group of endpoints.
3. Individual Scheduler – Scans the selected endpoint only.

We suggest you create group level scheduled scans to take advantage of policy-based management of your endpoints. Enter the date, frequency, and time of the scan. Notice that you can elect to receive an email notification of the scan after it completes with a report. It is from this location that you will choose the options you wish to include in the scan. Read the User Guide section on scanning for a more in depth look at scans.