

Information Portal User Guide

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Introduction

The ReSOFT - 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 ReSOFT information portal. This makes it an important tool for communicating to your customers the tangible value delivered by ReSOFT. You can give key personnel at your customers' access to the ReSOFT information portal without giving them access to other facilities in the ReSOFT server.


Each report entry in the ReSOFT 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 ReSOFT 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 ReSOFT Asset Management Report Module User Guide, and ReSOFT Event Log Management Report Module User Guide guides for detailed instructions.

Logging on

To access the ReSOFT information portal from any device with Internet access, start-up your browser and enter the following URL in the address box: *http://resoftservername/main*

Substitute ReSOFT "servername" with the URL of the ReSOFT server your sites log to.

After you press enter, the logon screen will appear. Enter your user name and password, and click on the  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 ReSOFT information portal.

Welcome

dashboard: [display](#)
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assets: [queries](#) | [console](#) | [changes](#) | [reports](#)
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user: hfn [[log in as new user](#)]
site filter: off [[set site filter](#)]
 March 29, 2004

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](#)
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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 ReSOFT 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 ReSOFT information portal, you will find the following navigation bar allowing you to easily move among the modules in the portal:

- information portal: [event](#) | [asset](#) | [change](#) | [meter](#)

All published report pages (currently event, asset, change, meter) and the ReSOFT Information Portal - Index page in the ReSOFT 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:

- [[index](#) | [top](#) | [bottom](#) | [control](#) | [reports](#)]

On the ReSOFT Information Portal - Index page you will not see control and reports links.

On the ReSOFT Information Portal – Edit Report page, the reports link is replaced with the back link, and there is no control 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 index link on any ReSOFT information portal page, will take you to the ReSOFT Information Portal - Index page shown below.

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ASI Information Portal - Index

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 September 06, 2003

[[index](#) | [top](#) | [bottom](#)]

220 Reports Published.

- [205 Event reports](#)
- [14 Asset reports](#)
- [1 Change report](#)

[[index](#) | [top](#) | [bottom](#)]

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 <number of event reports> Event Reports link will take you to the ReSOFT Information Portal - Event Reports page.

Event reports

Clicking on the event link that you find to the right of the information portal label on the upper Right-hand corner of every page of the ReSOFT information portal will take you to the ReSOFT Information Portal - Event Reports page shown below.

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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) ▾ |
| <input type="button" value="submit"/> | <input type="button" value="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 | corp dvs | 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 ReSOFT Information Portal - Event Reports page. It lets you select ReSOFT 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 ReSOFT information portal content selection by owner. By default, an administrative user can see ReSOFT 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 ReSOFT information portal, and accessible by the logged in user, is listed on the ReSOFT Information Portal - Event Reports page.

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

The Page size parameter lets you control the number of entries displayed on each ReSOFT 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 ReSOFT 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 ReSOFT Information Portal-Edit Report page.
- **Action**–
 - Clicking on the [view] link of an ReSOFT 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 ReSOFT Information Portal - Event Reports page entry takes you to that report's ReSOFT Information Portal – Edit Report page shown below.

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ASI Information Portal - Edit Report

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

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| | |
|--|--|
| 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 | <input type="text"/> |
| View | [view] |
| Note | <div style="border: 1px solid gray; height: 100px;"></div> |
| <input type="button" value="submit"/> <input type="button" value="reset"/> | |


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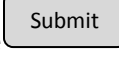
The actions on this page are self-explanatory. The notes function provides a simple and straight-forward two-way communication channel with your users. Other than viewing, it's the only function non-restricted users have access to.

On the ReSOFT 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 ReSOFT 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 ReSOFT Information Portal – Edit Report page, will open the report in a new browser window.

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

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

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ASI Information Portal - Updating Report

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

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

Go [back](#) to report page.

- Action
 - Clicking on the [delete] link of a ReSOFT Information Portal - Event Reports page entry takes you to the ReSOFT 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.

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ASI Information Portal - Confirm Report Delete

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

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 ReSOFT Information Portal – Deleting Report page shown below. From there you can go back to the ReSOFT Information Portal - Event Reports page, or other modules of the ReSOFT information portal.

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[assets: queries](#) | [console](#) | [changes](#) | [reports](#)
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[microsoft update: wizard](#) | [status](#) | [advanced](#)
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ASI Information Portal - Deleting Report

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

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

Go [back](#) to report page.

Asset reports

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

Change reports

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

Meter reports

The ReSOFT Information Portal – Metering Reports page is an exact copy of the ReSOFT 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 ReSOFT information portal that contain information on sites he/she has access to, and modify the notes filed associated with any report published on the ReSOFT 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 ReSOFT server, the first page displayed is the ReSOFT Information Portal - Index page. From there, a restricted user can access all the reports published on the ReSOFT information portal as described above.

Restricted user set-up

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

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

<https://resoftservername/main/acct/admin.php>

Substitute resoftservername with the URL of the ReSOFT server your sites log

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 ReSOFT server pages.

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

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Admin

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

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| 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] |
| hfn demo | Corporate Ink | (none) | | | [edit] [delete] |
| hfn guest | 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] |

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| Update User | |
|--|--|
| Change Password: | Old Password: <input type="text"/> New Password: <input type="text"/> Confirm New Password: <input type="text"/> |
| Notifications default email recipients: | <input type="text" value="adonnini@handsfreenetworks.com"/> Enter all the recipients' e-mail addresses separated by commas. |
| Reports default email recipients: | <input type="text" value="adonnini@handsfreenetworks.com"/> Enter all the recipients' e-mail addresses separated by commas. |
| <input type="button" value="update"/> <input type="button" value="reset"/> | |

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

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

Create User

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

- Enter the information for the user id for accessing the ReSOFT information portal. Enter only the information, and modify the configuration settings, described below:
 - Name:
 - This is the user id for gaining access to the ReSOFT 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 ReSOFT server manually
- If there is no site name record on the ReSOFT server (not to be confused with the site record defined on the ReSOFT installation server before installation of the ReSOFT client at a site) for one or more of the sites you want to give the new user access to, you will need to create the site name record(s). Click 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).

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Create Site

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 ReSOFT installation server.

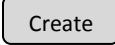
Click on the  button. The Creating Site page will be displayed (See figure below).

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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  button. The Creating User page will be displayed (See figure below).

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Creating User

[user: hfn](#) [[log in as new user](#)]
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 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 ReSOFT server had not been created (either manually or automatically when ReSOFT client at the site started logging events and actions onto the ReSOFT 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.

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Edit User

user: hfn [[log in as new user](#)]
 site filter: off [[set site filter](#)]
 March 29, 2004

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

- Scroll down the list next to the Sites label until you locate the entry for the new site, and select it by clicking on it. 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 name(s) of the site(s) you want to give the restricted user access to.
- Click on the button to complete the process. The Admin Updating User page will be displayed (See figure below).

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Admin Updating User

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

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

Go [back](#) to admin page.

Help system

The ReSOFT 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 ReSOFT server.

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 November 16, 2003

[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

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 ReSOFT Information Portal User Guide will take you to a copy of this ReSOFT 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, ReSOFT Pre-defined Notifications, ReSOFT Predefined Reports, documents, which are downloadable in Microsoft Word format. The ReSOFT DART (Scrip) Index is a link that takes you to the DART (Scrip) Index page where all user configurable DARTs (Scrips) are listed in table format. Clicking on the button in the right-most column of DARTs (Scrips) entry in the table, takes you that that DARTs (Scrips) detail log help file.

To learn more about HandsFree Networks and our solution, visit www.handSFreenetworks.com



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