Cireson Portal for Configuration Manager

ADMINISTRATION GUIDE

Version: 1.0
PUBLISHED: 3-APR-17

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Introduction

The Cireson Portal for Configuration Manager is an easy to use, web-based experience for access anywhere, anytime. Our intuitive Portal delivers increases productivity and efficiency for both admins and other IT team members, whilst minimizing risk and improving security with role-based administration.

Listed below are some of the many ways the Portal complements and enhances the native Configuration Manager Console.

Area	**Enhancements provided by the Cireson Portal for Configuration Manager**
User Experience	• No installation required; web Portal accessible. • Designed specifically for admins and non-admin IT roles alike.
Security	• Simpler and more intuitive security setup. • Enhance security and reduce risk by setting how many applications, packages, and/or task sequences can be deployed concurrently. • Control targeted groups and govern size of deployments for non-administrators, to include notifications for awareness.
Training	• Intuitive training experience for non-admins, saving time and money. • Non-admins can get up and running quickly and easily.
Data Accessibility	• Fewer clicks to find relevant information. • Single pane of glass gives you and your team easy access to relevant information and tasks, including: browse computers, browse users, deploy packages, deploy images, create packages, run reports.
Inventory Data Visibility	• The Inventory Summary tab surfaces most relevant information including hardware, software, network, client information, and updates applied.
Availability	• Access anywhere, anytime via web console.
External Tools	• Activate webhooks from the context menu, triggering automated workflows. • Launch local applications with Cireson App Launcher including Remote Manage, Remote Desktop, User Device Affinity, and Ping.
Templates and Targeted Deployments	• Create custom deployment templates to standardize settings, schedules, user experience, and alerts, to ensure consistency and efficiency. • Enhance security and reduce risk by setting how many applications, packages and/or task sequences can be deployed concurrently.

Area	Enhancements provided by the Cireson Portal for Configuration Manager
Software Deployment	• End users can begin to get software in minutes, not hours. • Analysts can decide to push software deployments to targeted users or computers immediately. • Easier access and less manual configuration to target software to end users, resulting in more controlled experience for Analysts and other IT team members.
Operating System Deployments	• Easier access and less manual configuration to target software to end users, resulting in a more controlled experience for Analysts and other IT team members.
MDT Integration	• Easily create, manage, and use MDT Roles to help provide standard configurations of software to be installed as part of new computer deployments. • Customize the deployment of operating system images to new computers by integration with MDT attributes.
Reporting	• Built-in report viewer provides quick and easy access to reports, putting relevant information at your fingertips. • Set permissions so only approved individuals or groups have access to certain reports.
Application and Package Creation	• Streamline application and package creation by customizing templates with pre-configured settings. • Assign templates to non-admins for improved efficiency and consistency.

NOTE: To avoid duplication, the various tasks covered by this Administration Guide are only covered once in the most relevant topic, and then cross-references are used to link to topics and sub-topics accordingly.

Purpose and Audience

The purpose of this document is to explain how to perform administration tasks in the Cireson Portal for Configuration Manager, referred to as the Portal from here on.

Version History

Version	Date	Author	Description
1.0	2nd Apr 2017	Cliff Hobbs	Final

Related Documentation

Ref	Document	Author	Status	Version
[1]	Cireson Portal for Configuration Manager Installation Guide	Cliff Hobbs	Final	1.0
[2]	Cireson Portal for Configuration Manager Troubleshooting Guide	Cliff Hobbs	Draft	0.0.a

Prerequisites and Assumptions

It is assumed that any readers of this document are competent with installing, configuring and using the various software components mentioned throughout this guide.

This Administration Guide assumes that the Portal has already been installed as detailed in the Cireson Portal for Configuration Manager Installation Guide [1].

NOTE: Installation and Troubleshooting of the Portal are covered in the Installation [1] and Troubleshooting [2] Guides.

Feedback

We are constantly looking to improve everything we do. If you have any feedback on this document or the Portal, please email team@cireson.com.

Likewise, if you have any Feature Suggestions, please submit them in the Configuration Manager Portal area of the Feature Requests section at https://community.cireson.com

Main Areas of the Cireson Portal for Configuration Manager

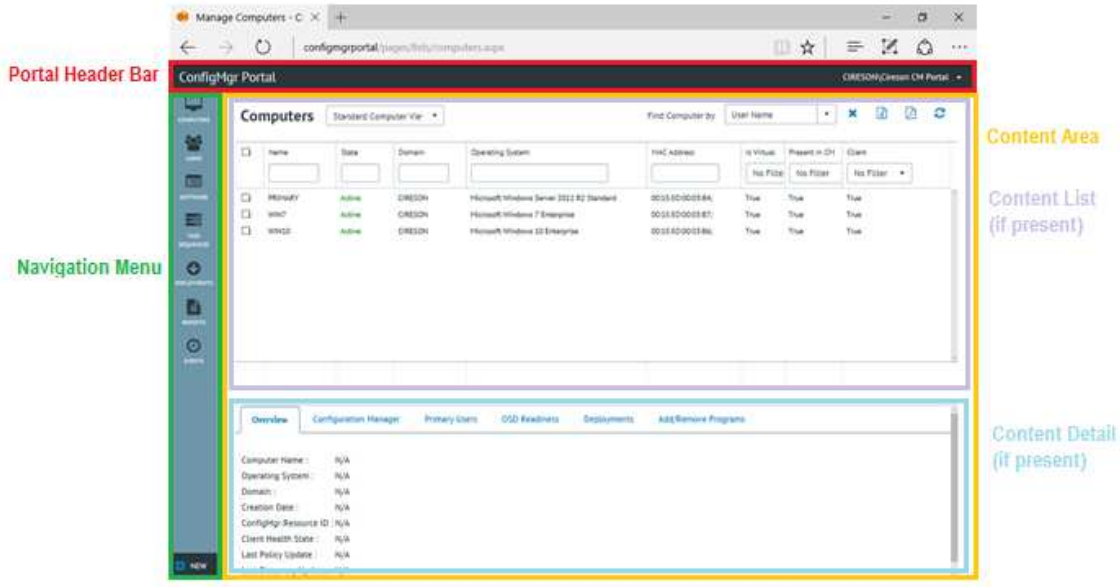
The primary interface for using and configuring the Portal is through a modern browser such as Microsoft Edge/Internet Explorer, or Google Chrome, running on a workstation.

To access the Portal enter the following URL in the address field:

> **http://<*configmgr_portal_name*>/**
>
> where **<*configmgr_portal_name*>** matches one of the IIS bindings for the ConfigMgr Web site.
>
> For example:
>
> http://configmgrPortal/

The **Home** page of the Portal is split into the following key areas:

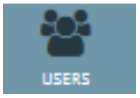
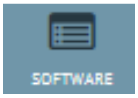
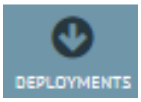
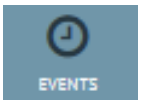
- **Navigation Menu –** Used to access the various areas grouping related functions of the Portal together.
- **Portal Header Bar –** Tells you which user you are currently logged into the Portal as plus provides access to the **Settings** menu via the dropdown arrow after the username.
- **Content Area –** Contains the results based on the option chosen from the **Navigation Menu** and varies depending on the option chosen and the task performed.
- **Content List –** Where appropriate the **Content List** is shown. It provides a list of objects matching certain criteria that are configurable.
- **Content Detail –** Where appropriate the **Content List** displays more information relating to the object selected in the **Content List** area.



Navigation Menu

The **Navigation Menu** down the left-hand side of the Portal contains the following items:

NOTE: A full Portal administrator will see all items in the Portal. As the Portal allows you to control who has access to which items, if you are not a full administrator some menu, items and other items in the Portal may not visible to you. If you are in any doubt, please contact your Portal administrator.

Menu	Description
	Clicking the **Computers** menu opens the **Computers** page that allows you to perform the computer-related management tasks detailed in Managing Computers section.
	Clicking the **Users** menu opens the **Users** page that allows you to perform the user-related management tasks detailed in the Managing Users section.
	Clicking the **Software** menu opens the **Software** page that allows you to perform the software-related management tasks detailed in the Managing Software section.
	Clicking the **Task Sequences** menu opens the **Task Sequences** page that allows you to perform the task sequence-related management tasks detailed in the Managing Task Sequences section.
	Clicking the **Deployments** menu opens the **Deployments** page that allows you to perform the deployment-related management tasks detailed in the Managing Deployments section.
	Clicking the **MDT Roles** menu opens the **MDT Roles** page that allows you to perform the software sequencing-related Operating System Deployment tasks detailed in the Managing MDT Roles section. **NOTE:** MDT integration is optional. If the Portal has not been integrated with MDT you will not see this menu item.
	Clicking the **Reports** menu opens the **Reports** page that allows you to perform the report-related management tasks detailed in the Managing Reports section.
	Clicking the **Events** menu opens the **Events** page that allows you to perform the report-related management tasks detailed in the Managing Events section.

Menu	Description
NEW	Clicking the **New** menu allows you to create a new instance of the following objects: • **Computer –** Allows you to add, pre-register, or import a computer. • **Deployment –** Allows you to create a new deployment for an Application, Package or Task Sequence to a new or existing collection. • **Software –** Allows you to add new software (packages and applications) to the Portal which can then be deployed. • **Task Sequence –** Allows you to create either a new software or OSD Task Sequence. • **MDT Role –** Allows you to add a new MDT Role from within the Portal. Details of how to create new instances of these objects is detailed in the Creating New Objects section.

Settings Menu

The **Settings Menu** (accessed by hovering over your username in the Portal header bar), contains the following items.

NOTE: Depending on your security rights, you may see all, none or a subset of these items. If you are in any doubt, please contact your Portal administrator.

See the Managing SettingsManaging Settings section for details of how to perform settings-related tasks.

Menu	Description
General Settings	Clicking the **General Settings** menu opens the **General Settings** page that allows you to see and configure general settings for the Portal.
Configuration Manager Settings	Clicking the **Configuration Manager Settings** menu opens the **Configuration Manager Settings** page that allows you to see and configure settings related to ConfigMgr integration.
OS Deployment Settings	Clicking the **OS Deployment Settings** menu opens the **OS Deployment Settings** page that allows you to see and configure settings related to Operating System Deployment (OSD).
Software Settings	Clicking the **Software Settings** menu opens the **Software Settings** page that allows you to see and configure settings related to software.

Service Settings	Clicking the **Service Settings** menu opens the **Service Settings** page that allows you to see and configure settings related to services.

Menu	Description
Security Settings	Clicking the **Security Settings** menu opens the **Security Settings** page that allows you to see and configure settings related to security.

Appendix A – Location of Settings contains an alphabetically sorted list of all the available settings in the Portal and where to find each one.

Appendix B – Settings Menu Reference provides a list sorted by Settings menu, then tab, then group (where applicable) of all available settings in the Portal. For each setting, the name, description, default and possible values are provided.

Details on performing tasks related to the **Settings** menu and the items it contains can be found in the Managing Settings section.

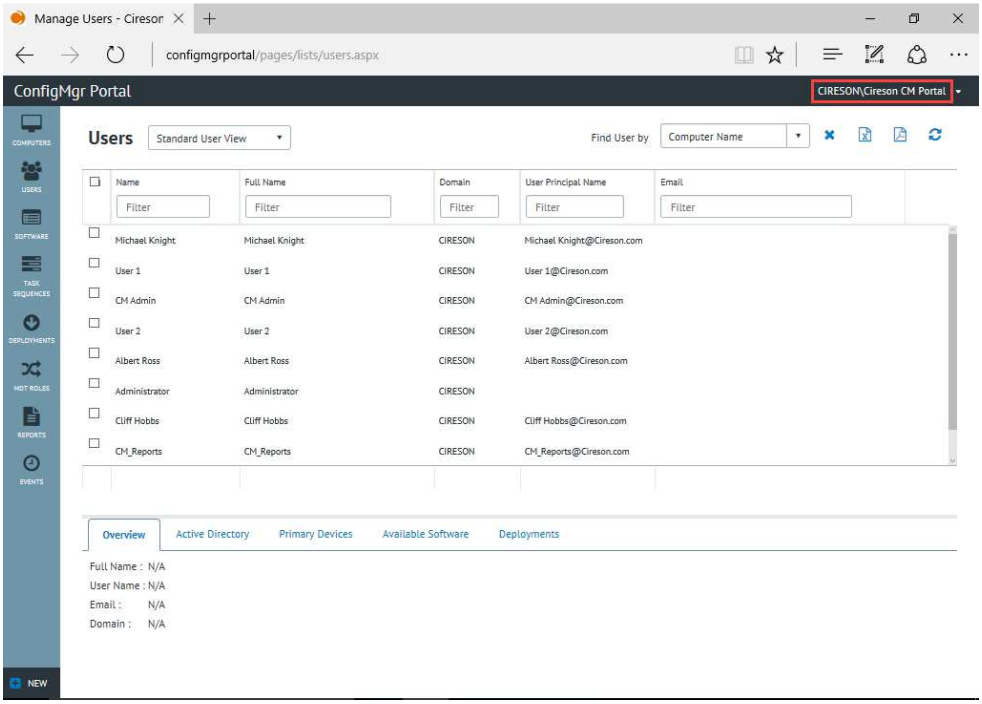
Clicking on items such as **Computers**, **Users**, **Software** or **Task Sequences** on the **Navigation Menu** displays the data previously retrieved from the configured ConfigMgr site database by the Cireson ConfigMgr Portal Hosting Service.

Navigating the Portal

The section provides information to help you familiarize yourself with navigating the Portal.

How do I know which account I used to login to the Portal?

If you look on the right side of the **Portal Header Bar** it tells you which account you are currently logged into the Portal as.



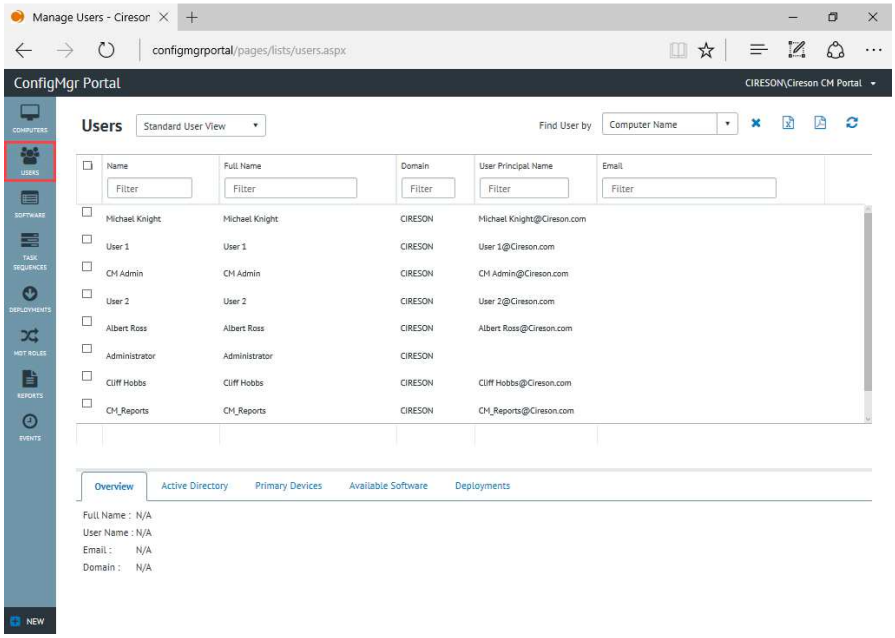
How do I export data from the Portal?

You can export data from the Portal either to a **.CSV** file or a **.PDF**

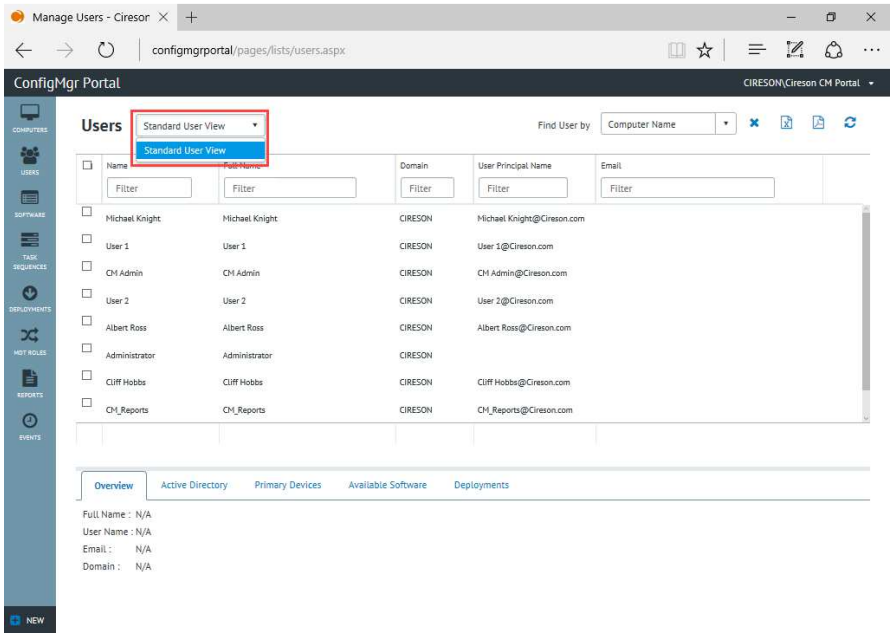
How do I export data from the Portal to a .CSV file?

To export data to a **.CSV** file:

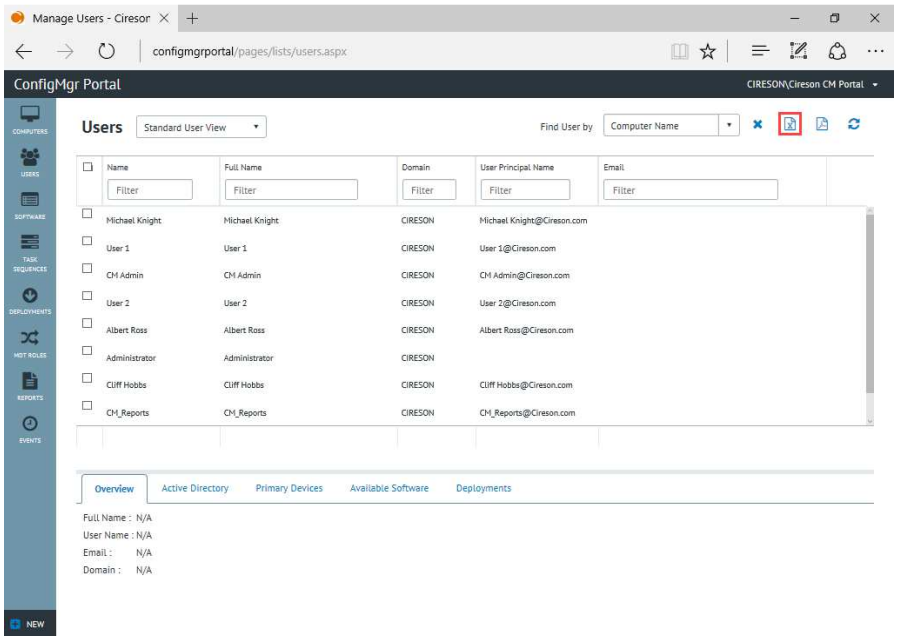
1. Navigate to the relevant page in the Portal containing the data you wish to export (such as **Computers** or **Users**).



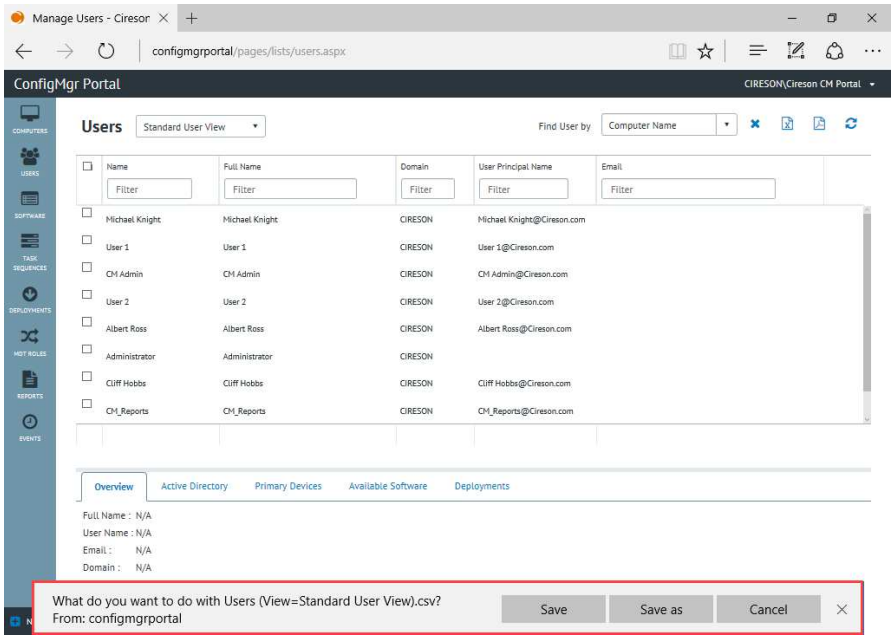
2. Select the relevant view from the dropdown that appears after the page name.



3. Click the **Export to CSV** button in the top right-hand corner of the **Content Area**.



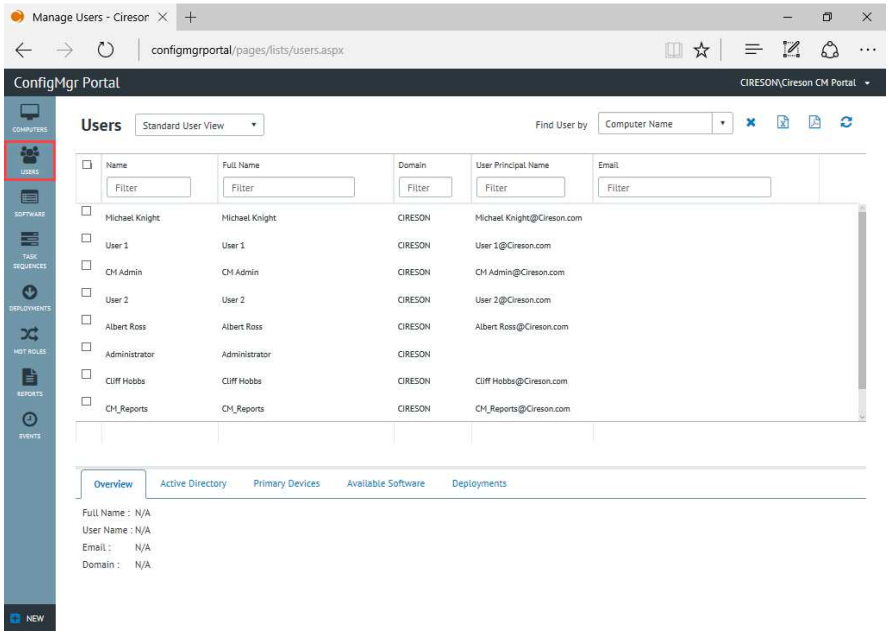
4. When prompted decide if you want to open or save the **.CSV** file.



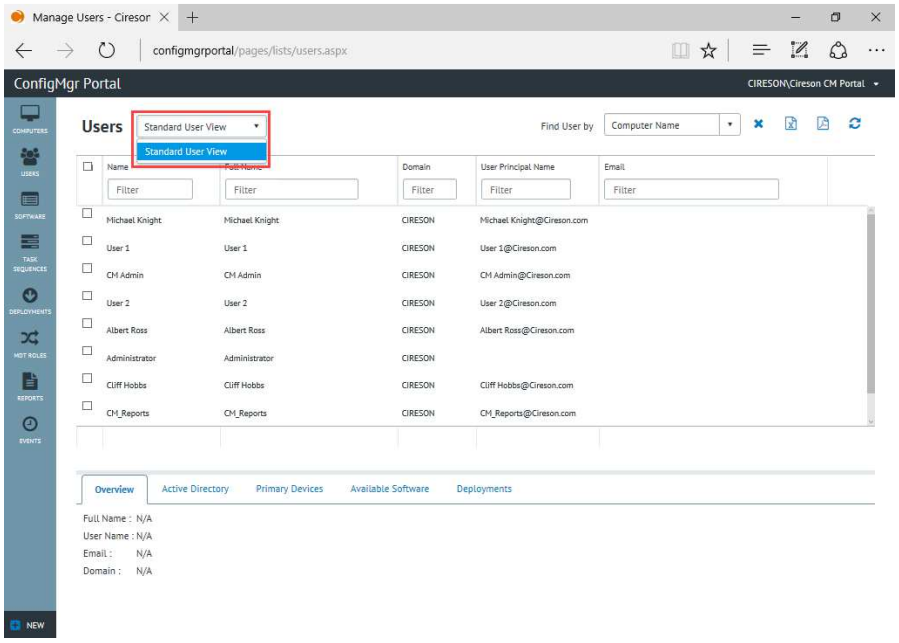
How do I export data from the Portal to a .PDF file?

To export data to a **.PDF** file:

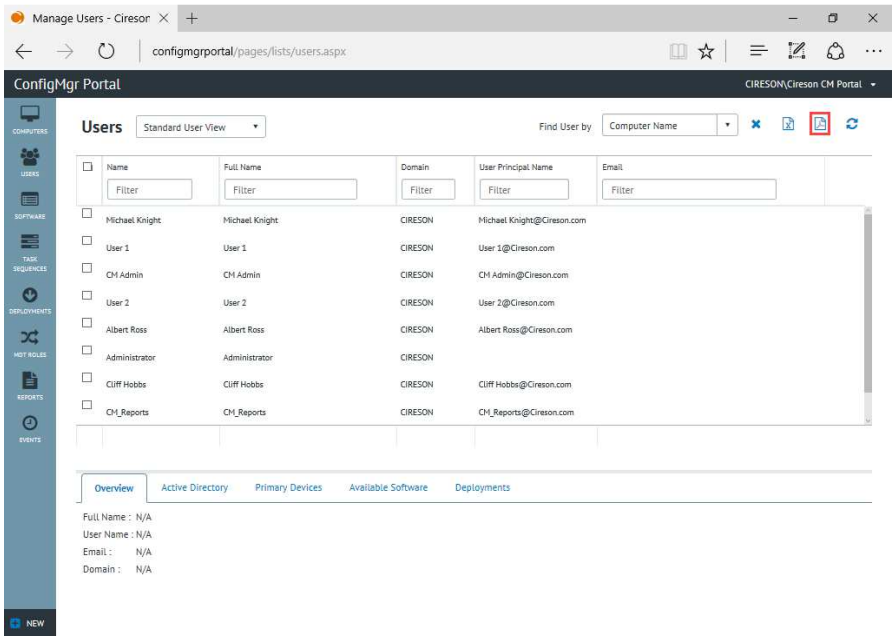
1. Navigate to the relevant page in the Portal containing the data you wish to export (such as **Computers** or **Users**).



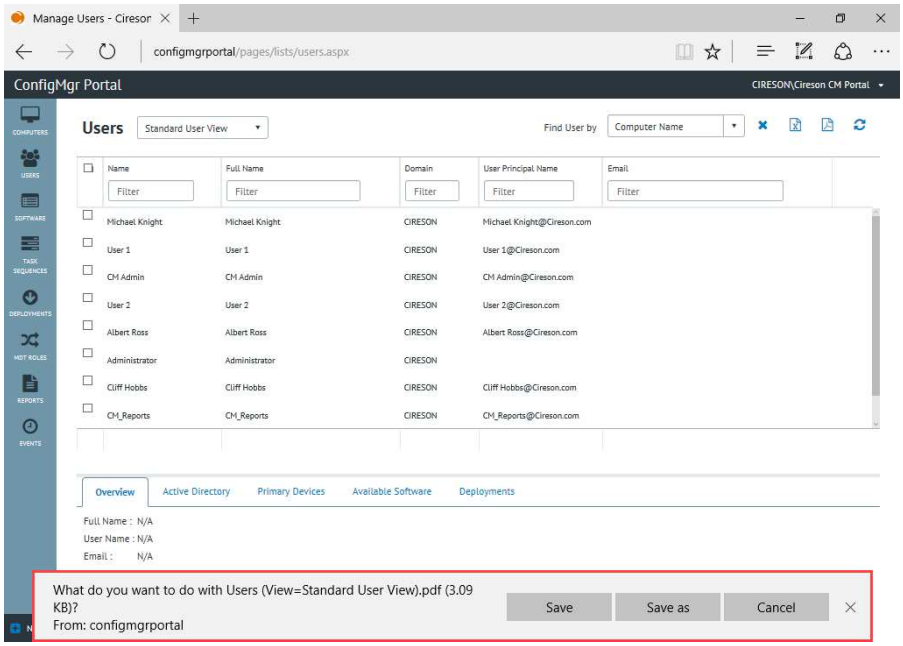
2. Select the relevant view from the dropdown that appears after the page name.



3. Click the **Export to PDF** button in the top right-hand corner of the **Content Area**.



4. When prompted decide if you want to open or save the **.PDF** file.



How do I refresh the page/view in the Portal?

There are two different ways of refreshing the Portal depending on what it is you want to refresh:

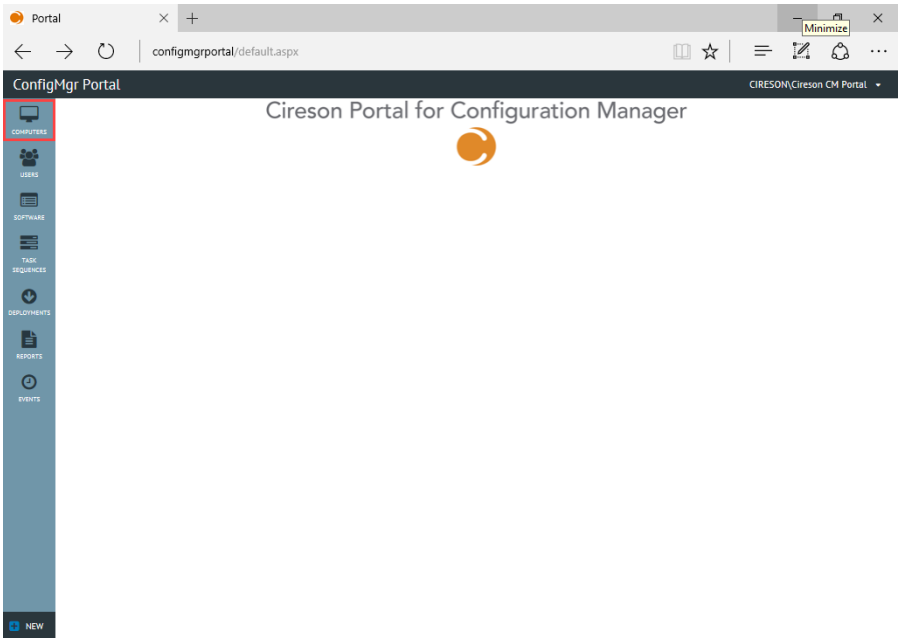
- Press the **Refresh** button on your browser (such as **F5**) to refresh just the current page/view in the Portal without forcing a reload of the cache.
- Click the **Refresh** button ( ) in the top right-hand corner of the **Content Area** to force a reload of the cache and refresh the current page/view in the Portal. Obviously, the refresh takes longer using this option as the cache needs to be refreshed first.

How do I filter lists in the Portal?

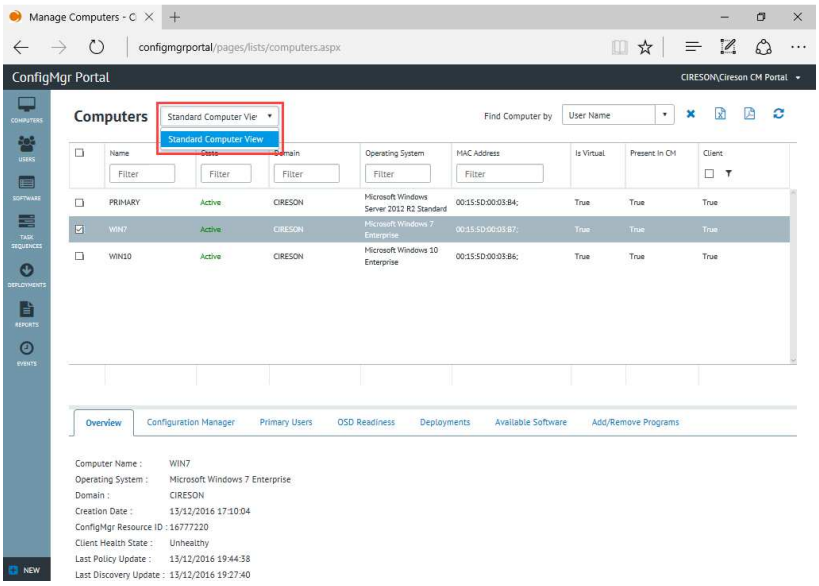
To filter lists of items in the Portal simply enter the result you are looking for in the box containing the word **Filter** under the relevant field.

For example, to filter for a specific computer name:

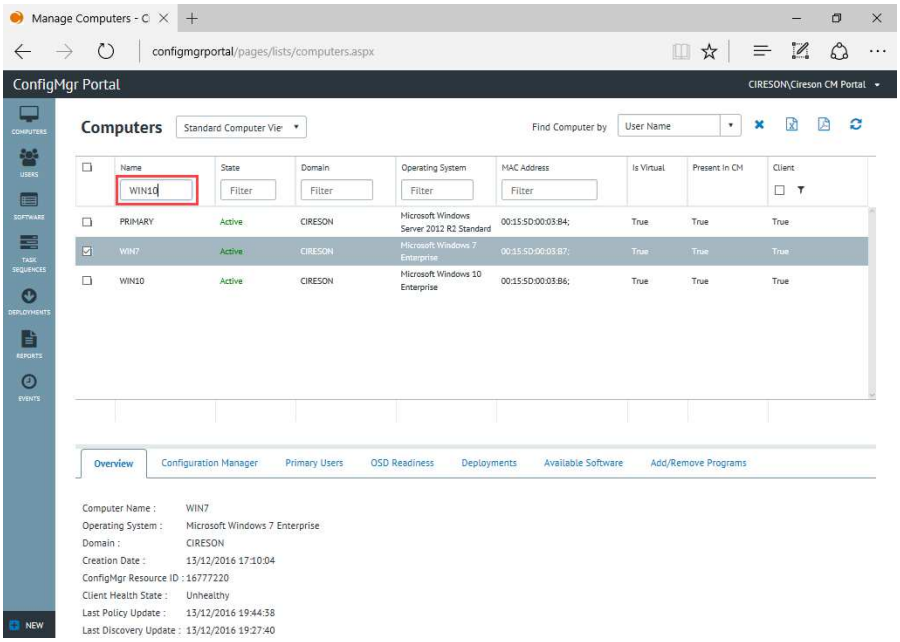
1. Click **Computers** in the **Navigation Menu**



2. Select the appropriate view from the dropdown list.



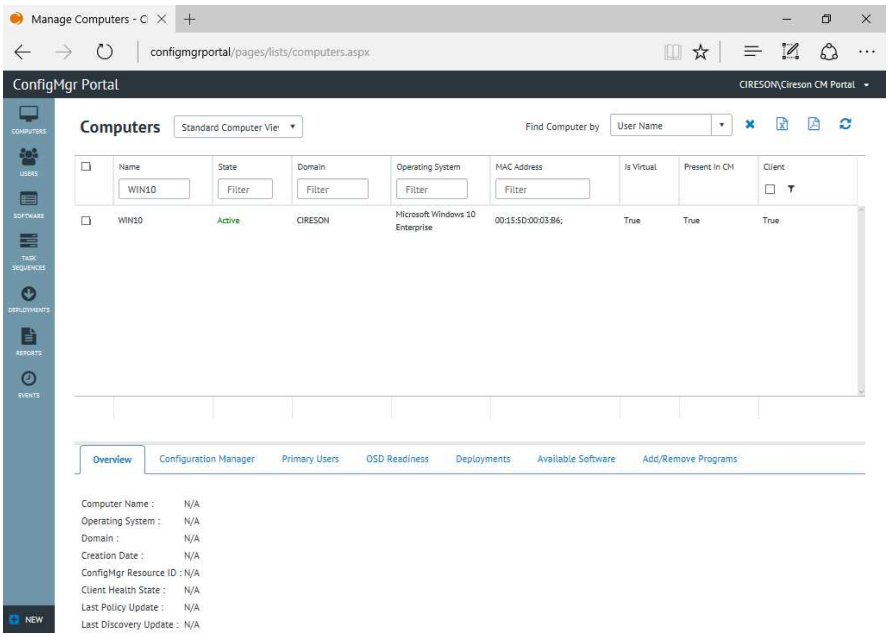
3. In the box containing the word **Filter** under the **Name** field, type the name of the computer you are looking for.



4. Press **ENTER**

NOTE: To clear a filter, clear the relevant filter then press **ENTER** to refresh the Portal.

A list of matching results is returned.



How different Personas can use the Cireson Portal for Configuration Manager

This section details some of the various personas that can take advantage of the Cireson Portal for Configuration Manager, including a description of each and links to the various activities each persona would typically perform.

Of course, some of these personas may not exist in your organization, or you may have additional personas that can use the Portal for various tasks, but hopefully this section gives you a starting point in your use of the Portal.

ConfigMgr Admin

Although the ConfigMgr Admin may need to continue to use the ConfigMgr console to perform administrative tasks not currently available in the Portal, they can use the Portal to perform specific daily tasks instead of using the ConfigMgr console. Primarily, the ConfigMgr Admin will most likely be the person responsible for controlling who has access to the Portal and which actions they can perform with it.

The beauty of the Portal is once the ConfigMgr Admin has set someone up to use it, all they need is a browser. They do not need to install (and maintain) a local installation of the ConfigMgr Console, nor do they need to be trained how to use it. Another benefit is that the ConfigMgr Admin does not need to configure (and maintain) any security for the user in the ConfigMgr Console as everything is controlled from within the Portal using Role-Based Access Control (RBAC).

The responsibilities and Portal-related tasks we see as applicable to this role are:

Responsibility	**How to perform this in the Portal**
Software Packaging	• How do I create a new Software Application? • How do I create a new Software Package?
Software Deployment	• How do I deploy software to a computer? • How do I deploy software to a user? • How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection?
Manage Role Based Administration from within the Portal	• How do I manage the security rights of a Security Group? • How do I add a new Security Group? • How do I edit a Security Group? • How do I delete a Security Group?

Responsibility	How to perform this in the Portal
Image Deployment	• How do I create a new OSD Task Sequence? • How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection? • How do I reinstall the operating system on a computer? • How do I view the Status of a Deployment?
Deployment Status	• How do I view the Status of a Deployment?
Reporting	• How do I view a Report?

Service Desk Analyst

The Service Desk Analyst is typically the first point of contact for end users when they have a problem. Their primary role is to initially triage the end user's support request and then to create and assign a ticket to the relevant support team.

Leveraging the Portal gives Service Desk Analysts the tools they need to gather and analyze the information they need to do their jobs more efficiently.

The responsibilities and Portal-related tasks we see as applicable to this role are:

Responsibility	How to perform this in the Portal
User Device Affinity Lookup	• How do I view the User Device Affinity relationships for a computer? • How do I edit the User Device Affinity relationships for a computer? • How do I find out which computers a user has a UDA relationship with?
View Inventory	• How do I see an Inventory Summary for a computer?
Software Deployment	• How do I deploy software to a computer? • How do I deploy software to a user? • How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection?

Responsibility	How to perform this in the Portal
Image Deployment	• How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection? • How do I reinstall the operating system on a computer?
Deployment Status	• How do I view the Status of a Deployment?
Reporting	• How do I view a Report?

Desktop Support

The Desktop Support Team typically provides on-site services that cannot be provided remotely such as hardware-based incident resolution, and computer deployment services such as operating system imaging and migrations. Unlike Service Desk Analysts, Desktop Support staff spend much of their time away from their assigned workstations resolving issues and providing services at the end user's location.

Having to access a locally installed ConfigMgr Console can add unnecessary time when needing to get the end user back to being productive as quickly as possible. This is where the Portal provides value for increased efficiency as the Desktop Support Analyst can access the Portal from anywhere.

The responsibilities and Portal-related tasks we see as applicable to this role are:

Responsibility	How to perform this in the Portal
User Device Affinity Lookup	• How do I view the User Device Affinity relationships for a computer? • How do I edit the User Device Affinity relationships for a computer? • How do I find out which computers a user has a UDA relationship with?
View Inventory	• How do I see an Inventory Summary for a computer?
Software Deployment	• How do I deploy software to a computer? • How do I deploy software to a user? • How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection?

Responsibility	How to perform this in the Portal
Image Deployment	• How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection? • How do I reinstall the operating system on a computer?
Deployment Status	• How do I view the Status of a Deployment?
Computer Migration	• How do I see the OSD Readiness information for a computer?
MDT Deployment	• How do I see the MDT Role assignments for a computer?
Reporting	• How do I register a Report with the Portal? • How do I view a Report?

Server Support

The Server Support Team needs quick access to information and remediation tools for a server or servers either from their desk or in the Data Center, and sometimes at an office location directly. The Portal gives them that flexibility to begin diagnosing server issues from anywhere they happen to be when they get the alert that something has gone wrong.

The responsibilities and Portal-related tasks we see as applicable to this role are:

Responsibility	How to perform this in the Portal
View Inventory	• How do I see an Inventory Summary for a computer?
Software Deployment	• How do I deploy software to a computer? • How do I deploy software to a user? • How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection?
Bare Metal Operating System Deployment	• How do I see the OSD Readiness information for a computer? • How do I reinstall the operating system on a computer? • How do I Clone a computer? • How do I clear any PXE Advertisements to a computer?

Responsibility	How to perform this in the Portal
Deployment Status	• How do I view the Status of a Deployment?
Reporting	• How do I register a Report with the Portal? • How do I view a Report?

Security/Application Support

Over the last several years, cyber-threats have increased dramatically for businesses of all sizes and in all industries. As a response, companies are investing more and more in IT Security technology and staff. Also, Microsoft Operating Systems (OS), continue to be the prevalent business-level standard for workstations and servers. While there are many tools "out there" designed specifically to help ITSEC professionals monitor and remediate operating system vulnerabilities, ConfigMgr using WSUS is still the benchmark standard in assessing Microsoft OS and application vulnerabilities and deploying the security updates to patch those vulnerabilities.

The Portal can provide ITSEC Analysts with an easily accessible tool to monitor OS and Microsoft application patch levels throughout the business.

The responsibilities and Portal-related tasks we see as applicable to this role are:

Responsibility	How to perform this in the Portal
View Inventory to monitor for unauthorized software	• How do I see an Inventory Summary for a computer?
Software Deployment	• How do I deploy software to a computer? • How do I deploy software to a user? • How do I create a new Deployment to a new collection? • How do I deploy software to an existing collection?
Manage Role Based Administration from within the Portal	• How do I manage the security rights of a Security Group? • How do I add a new Security Group? • How do I edit a Security Group? • How do I delete a Security Group?
Deployment Status	• How do I view the Status of a Deployment?
Report on OS Patch levels	• How do I register a Report with the Portal? • How do I view a Report?

Manager/Director/CIO

The number one role of IT Management from the Team Lead level, to Chief Information Officer (CIO), is to maximize the business' investment in technology to aid in revenue generation with minimal required overhead. While the ConfigMgr Console can provide some visibility into the areas it manages, it is generally not practical to install a console on every level of Management in the IT organization.

The Portal provides the kind of infrequent, on-demand visibility for Management via a browser they are already familiar with.

The responsibilities and Portal-related tasks we see as applicable to this role are:

Responsibility	**How to perform this in the Portal**
Role Based Administration	• How do I manage the security rights of a Security Group? • How do I add a new Security Group? • How do I edit a Security Group?
Reporting	• How do I view a Report?
Various Statuses	• How do I view the Status of a Deployment? • How do I filter the list of Deployments?

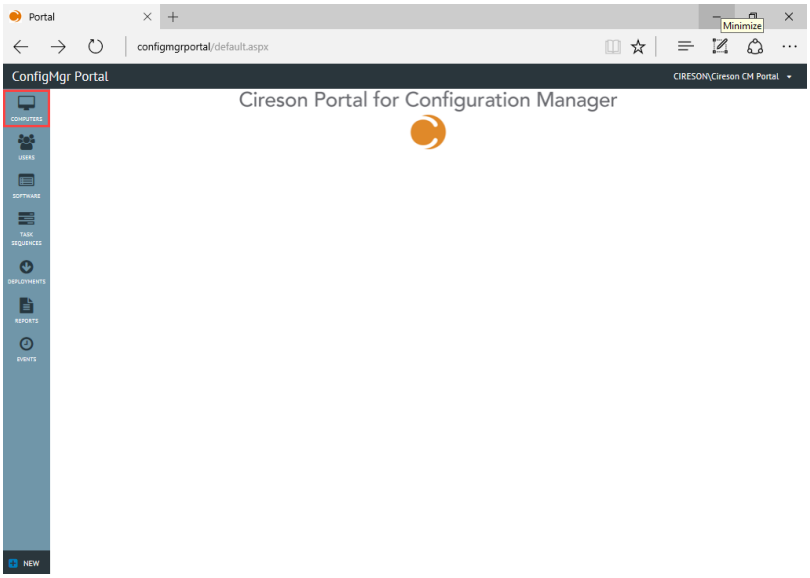
Quick Start Guide to Getting Started with the Cireson Portal for Configuration Manager

This section provides a Quick Start Guide for getting you up and running with the Cireson Portal for Configuration Manager as quickly as possible.

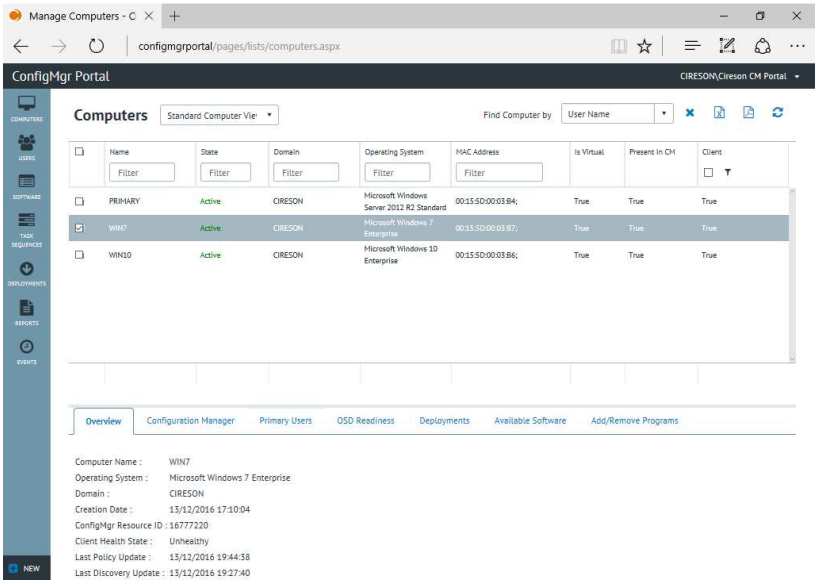
Verifying that the Portal is Working Correctly

To verify that the Portal can successfully retrieve data from the ConfigMgr database:

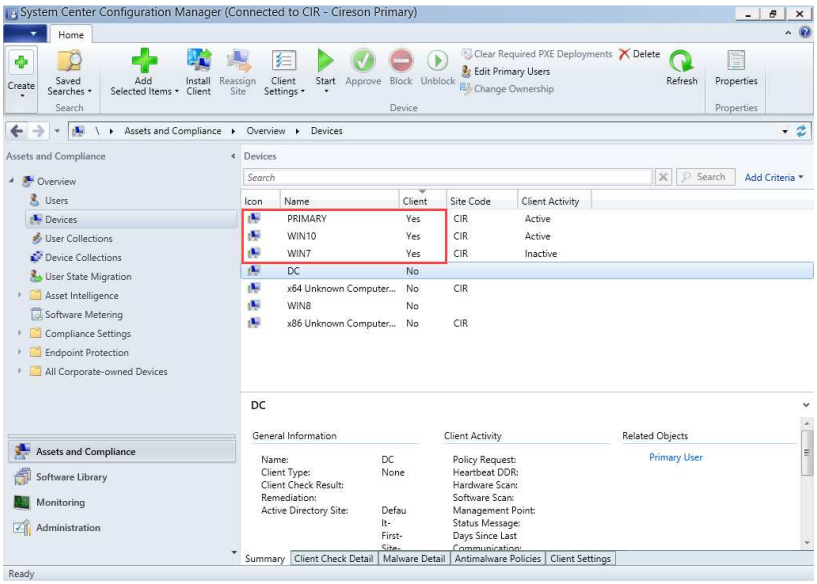
1. Start a supported browser and connect to the Portal (i.e. http://configmgrportal/default.aspx).
2. Click **Computers** on the **Navigation Menu**



This will display the list of computers retrieved from the ConfigMgr database by the Portal. All computers on which the ConfigMgr Client has been installed are displayed.



3. Verify the data returned by the Portal matches the list of clients that are visible in ConfigMgr Console.

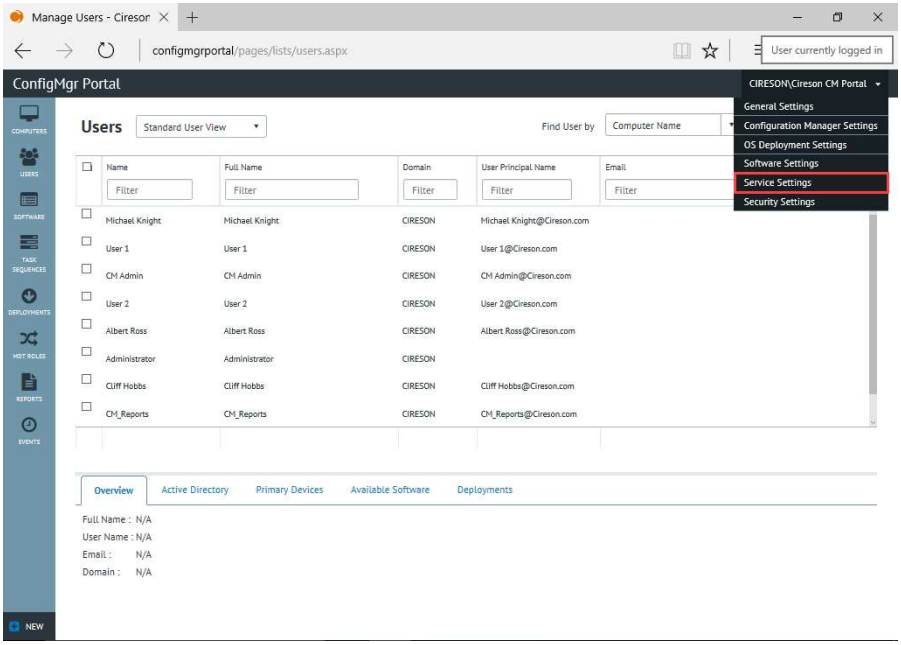


Check the frequency that the Portal queries the ConfigMgr database is set correctly

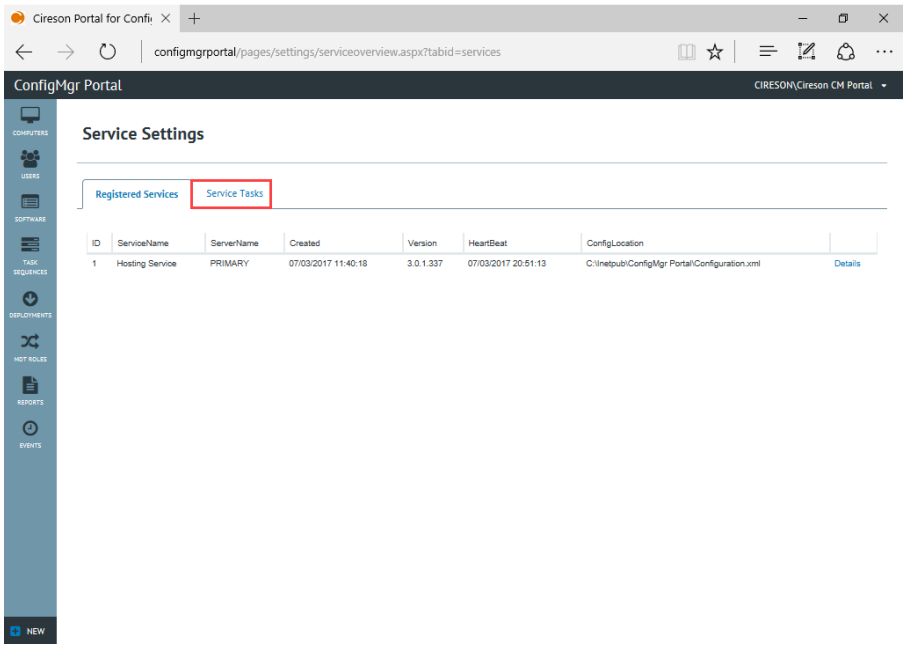
Although covered in the **Post Installation Configuration** section of the **Installation Guide [1]**, it is worth just checking how often the Portal has been configured for querying the ConfigMgr database for the various items.

To check how often the Portal queries the ConfigMgr database:

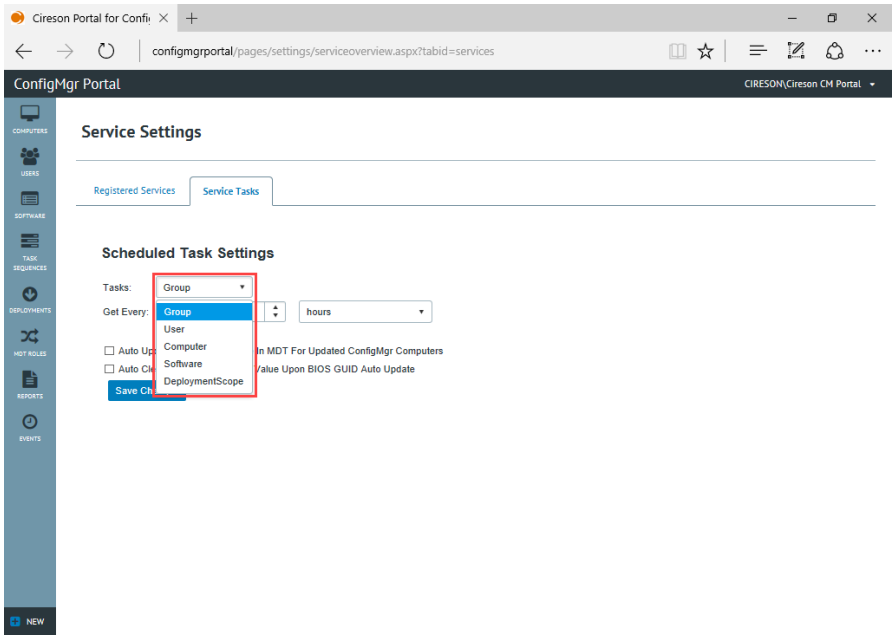
1. From the settings menu, select **Service Settings**



2. Click the **Service Tasks** tab.



3. Select the required setting you wish to configure from the **Tasks** dropdown.

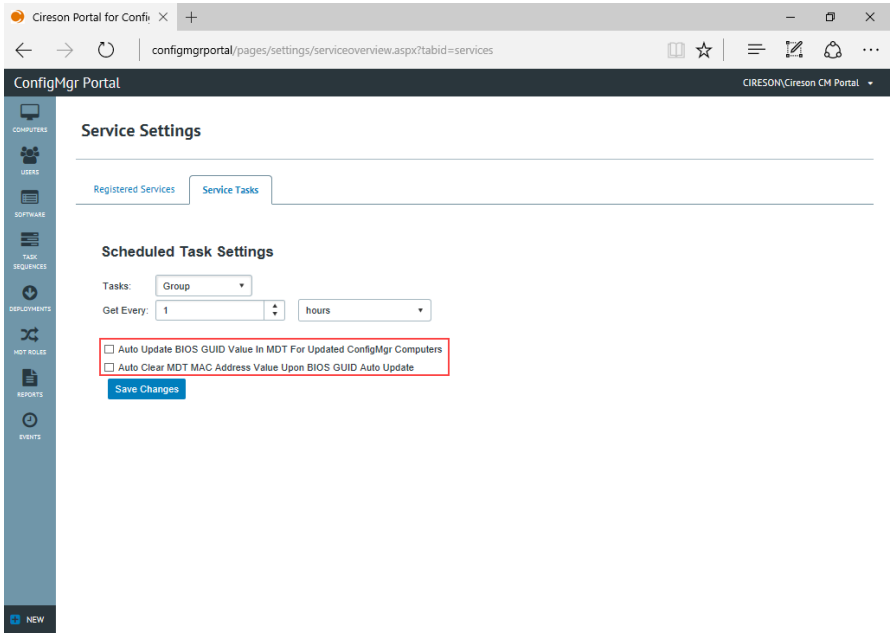


4. Configure how often the Portal should query the ConfigMgr database for the relevant data.

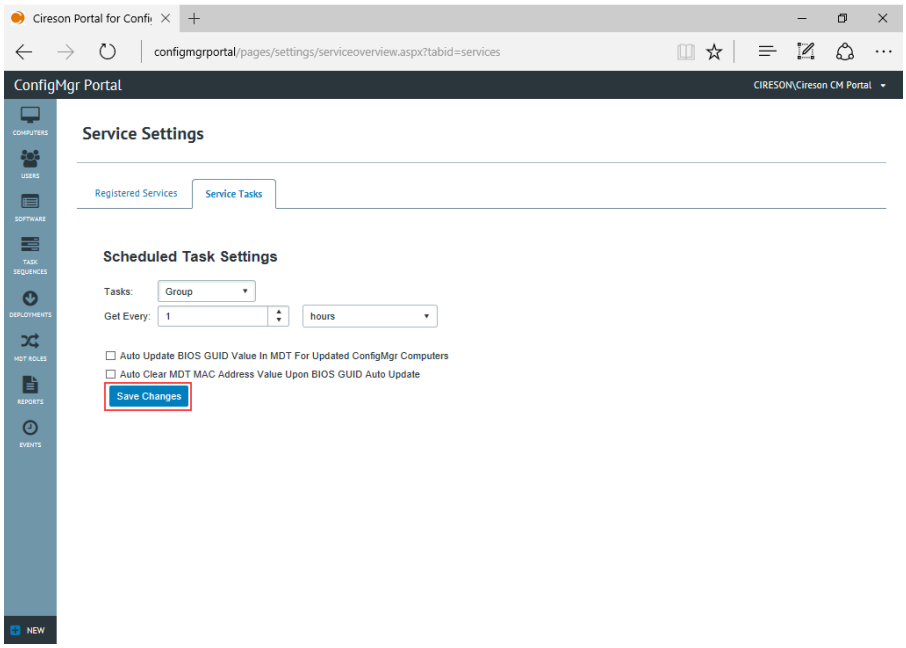
   The table below shows the default frequencies:

Task	Default Frequency of Every
Group	1 Hour
User	20 minutes
Computer	10 minutes
Software	24 hours
DeploymentScope	4 hours

5. If MDT has been integrated with the Portal, select the **Auto Update BIOS GUID Value In MDT For Updated ConfigMgr Computers** and **Auto Clear MDT MAC Address Value Upon BIOS GUID Auto Update** checkboxes as required.



6. Click **Save Changes**



7. Repeat Steps 3 - 6 as required for the other objects you wish to configure.

Create some Views

Views allow you to control which objects are shown in the Portal based on configured criteria (like a ConfigMgr query). The Portal comes with default standard views, for Computers, Users, and Software.

As the primary purpose of the Portal is for deployment, the default Standard View for Computers only shows computers that have the ConfigMgr client installed.

You can, of course, create custom views to meet your needs for example to only show:

- Workstations
- Servers
- Systems that don't have the ConfigMgr client installed

Not only can you create views, but like most of the objects in the Portal, you can use Role Based Administration to control who can use specific views. For example, only your server administrators should be able to access the **Servers** view which displays only servers. Likewise, only your workstation administrators can access the **Workstations** view which only displays workstations.

To create a new view, see How do I create a new View?

After creating a view, you then need to give people permission to use the view as detailed in How do I manage the permissions on a View?

To manage existing views, see How do I edit a View?

Create some Security Groups

Access to the Portal, the objects within it, and the actions that can be performed on those objects is controlled through security rights. As the Portal supports Role Based Administration, the first task should be to add the relevant Active Directory Users/groups into the Portal and then assign them the relevant permissions.

NOTE: Anyone that is a member of the **Global Administrator Group** defined during the Portal installation process has full permissions to all objects within the Portal. In line with Microsoft best practice, we recommend creating Security Groups for each unique security role requiring access to the Portal. Then assign the relevant permissions to each group.

The Portal supports adding both Active Directory users and groups as Security Groups. Our recommendation is only to use Active Directory groups. Initially, this may take longer to setup, but using groups simplifies ongoing management. For example, when groups are used, adding a new user is simply a case of adding them to the appropriate group rather than having to add them individually and then grant them the relevant permissions. Likewise, if groups are used, removing a user is simply a case of removing them from the appropriate group, rather than having to remember to delete a user from the Portal to revoke their access when no longer required.

To add a new user/group, see How do I add a new Security Group?

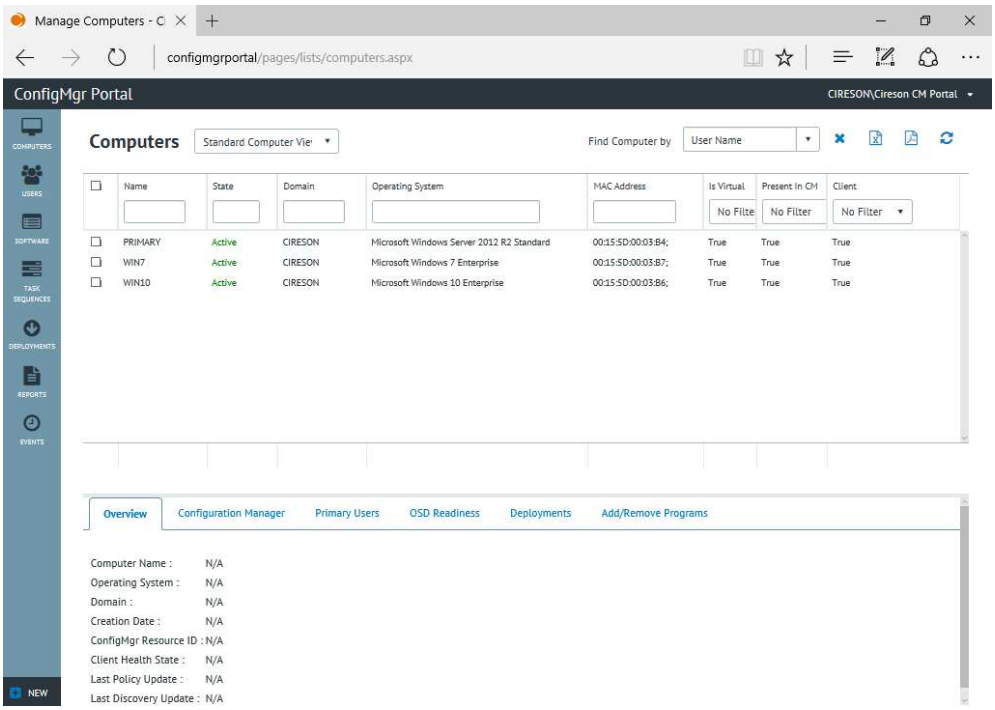
After adding a Security Group, you need to assign it the relevant rights the objects within the Portal as detailed in How do I manage the security rights of a Security Group?

To manage existing Security Groups, see How do I edit a Security Group?

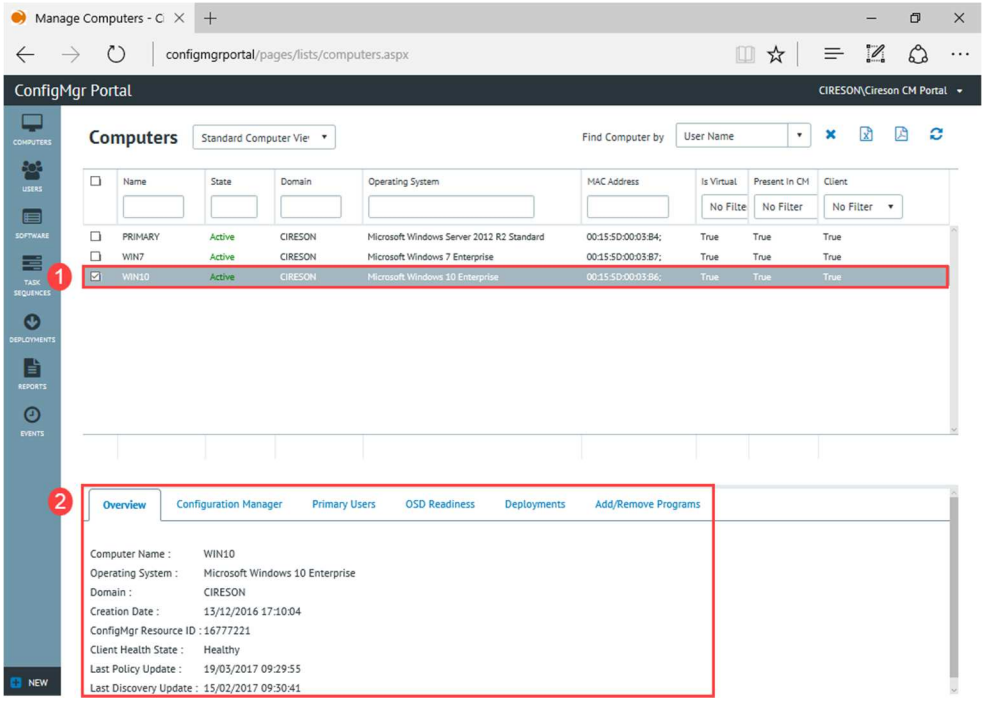
Managing Computers

Overview

When you click **Computers** on the **Navigation Menu**, the **Computers** page is displayed.



When you select a computer in the **Content List** area, the **Content Detail** pane shows a series of tabs that contain more detailed information that is relevant to the selected computer.



NOTE: By default, the **Content List** area on this page shows only computers that you can deploy to (or **Active** ConfigMgr clients which in this context is any machine on which the ConfigMgr client has been installed, not to be confused with ConfigMgr's concept of "active" clients.).

Computer Management-Related Tasks

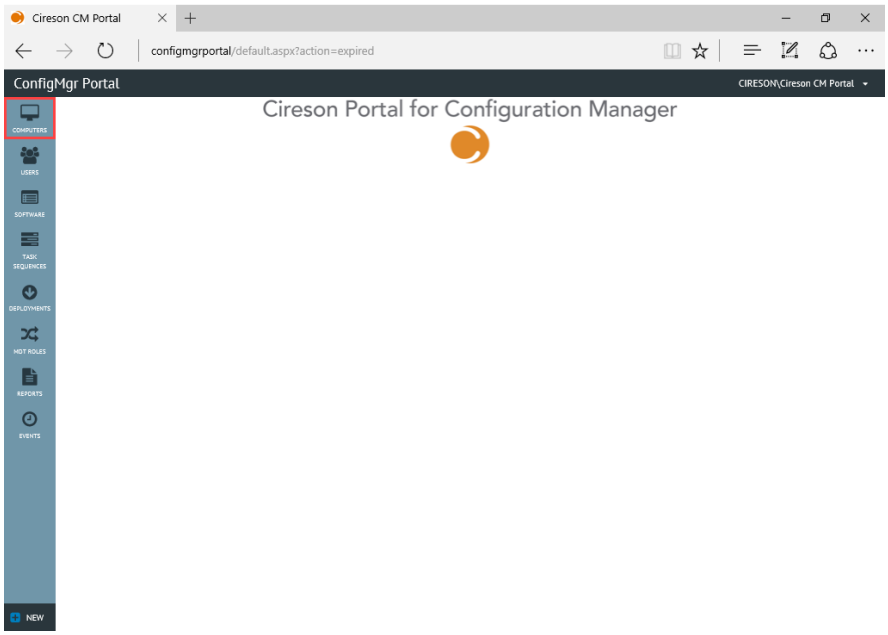
This section details the tasks related to managing Computers in the Portal. A list of tasks is presented first which can be used to navigate to the relevant part of the document that contains the details for performing the actual task.

- How do I Add a new computer?
- How do I Pre-Register a computer?
- How do I Import a computer?
- How do I see an Inventory Summary for a computer?
- How do I deploy software to a computer?
- How do I reinstall the operating system on a computer?
- How do I Edit a computer?
- How do I view the User Device Affinity relationships for a computer?
- How do I edit the User Device Affinity relationships for a computer?
- How do I find out which computers a user has a UDA relationship with?
- How do I Clean Deployments targeted to a computer?
- How do I Clone a computer?
- How can I see if the process to clone a computer was successful?
- How do I clear any PXE Advertisements to a computer?
- How do I Delete a computer?
- How do I Delete a computer's DNS Records?
- How do I run an External Tool on a computer?
- How do I see the basic information for a computer?
- How do I see the MDT computer-related information for a computer?
- How do I see the Configuration Manager-related information for a computer?
- How do I see the Primary Users for a computer?
- How do I see the OSD Readiness information for a computer?
- How do I see the MDT Role assignments for a computer?
- How do I see the Deployments targeted to a computer?
- How do I see the Add/Remove Programs information for a computer?

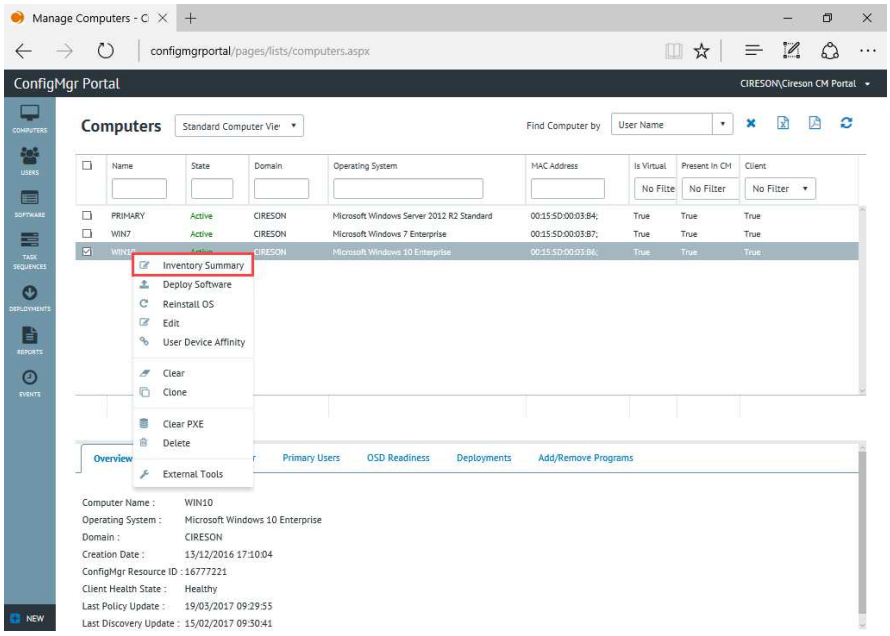
How do I see an Inventory Summary for a computer?

To see an Inventory Summary for a computer:

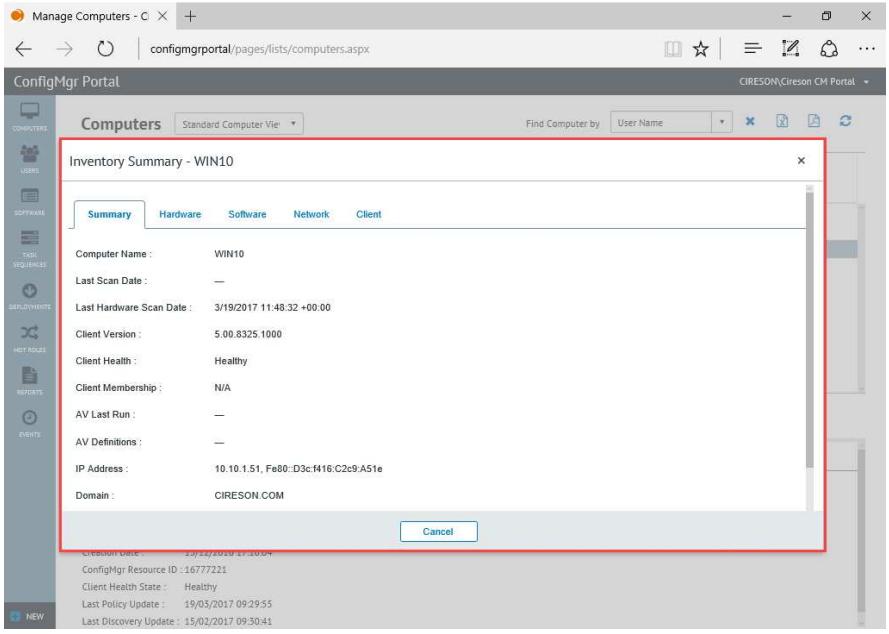
1. Click **Computers** in the **Navigation Menu**



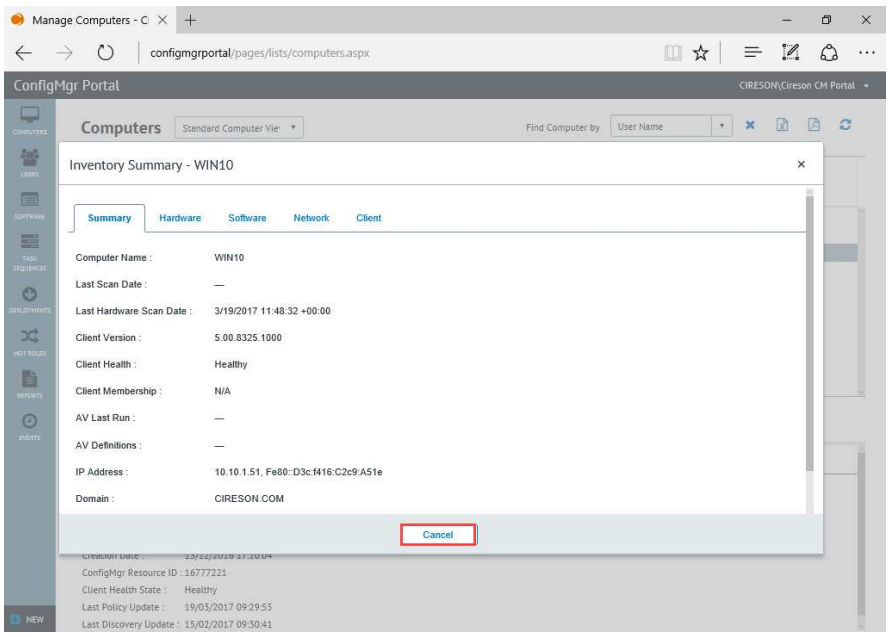
2. Right-click the relevant computer and select **Inventory Summary**



The **Inventory Summary - <*computer_name*>** page is shown which consists of multiple different tabs.



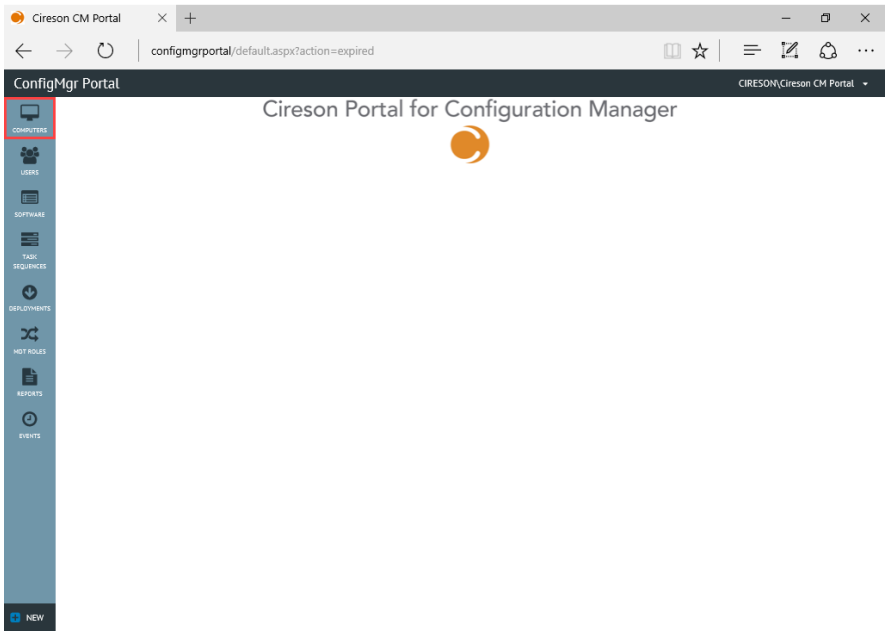
3. Click **Cancel** once you have finished viewing the Inventory Summary to close the **Inventory Summary - <*computer_name*>** page.



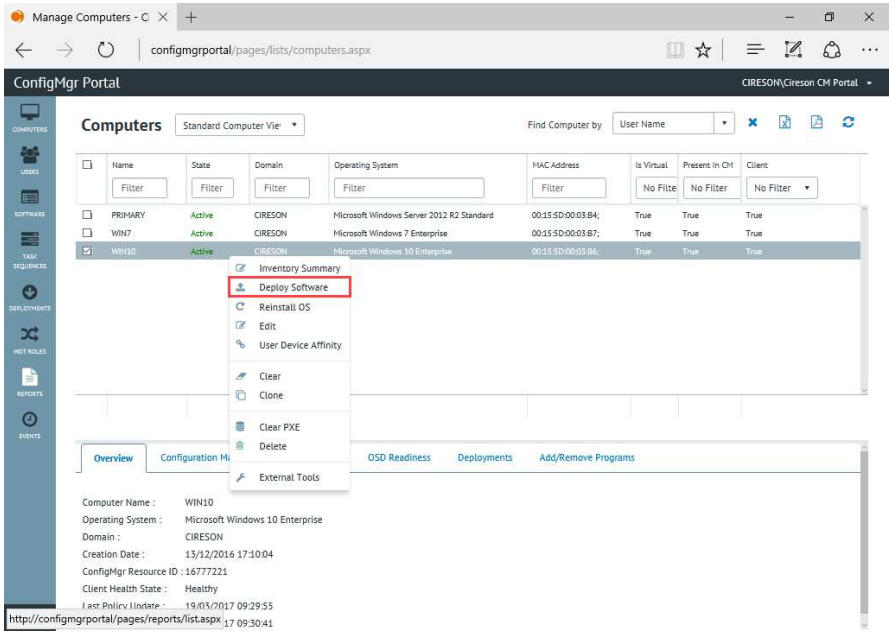
How do I deploy software to a computer?

To deploy software to a computer:

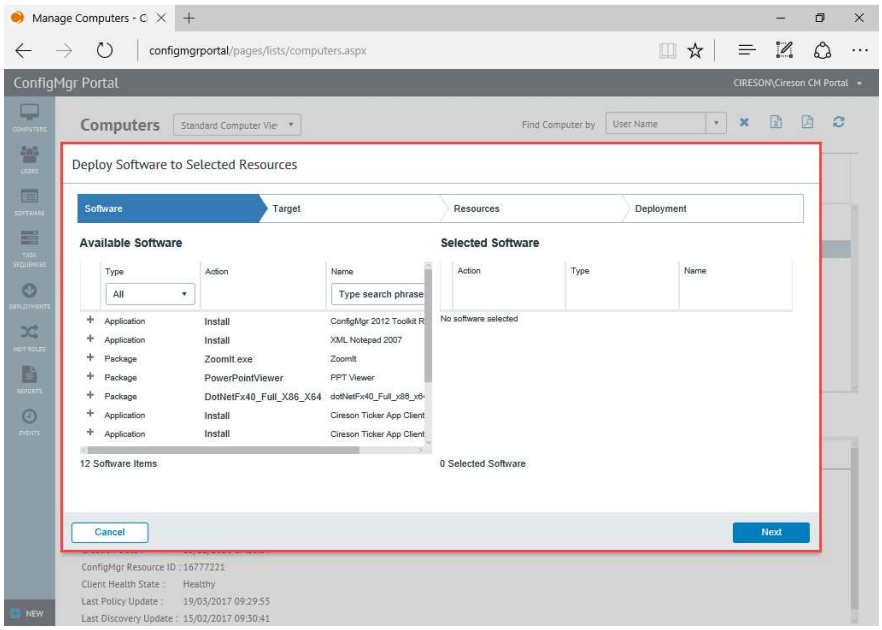
1. Click **Computers** in the **Navigation Menu**



2. Right-click the relevant computer and select **Deploy Software**



The **Deploy Software to Selected Resources** wizard will be loaded.

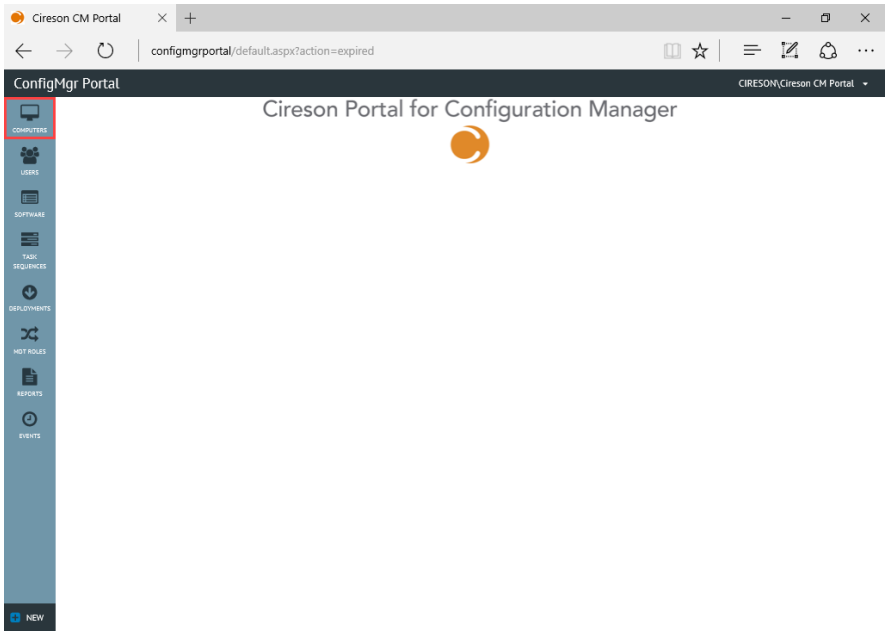


3. Work your way through the wizard following the relevant procedure below:
    - How do I create a new Deployment to a new collection?
    - How do I deploy software to an existing collection?

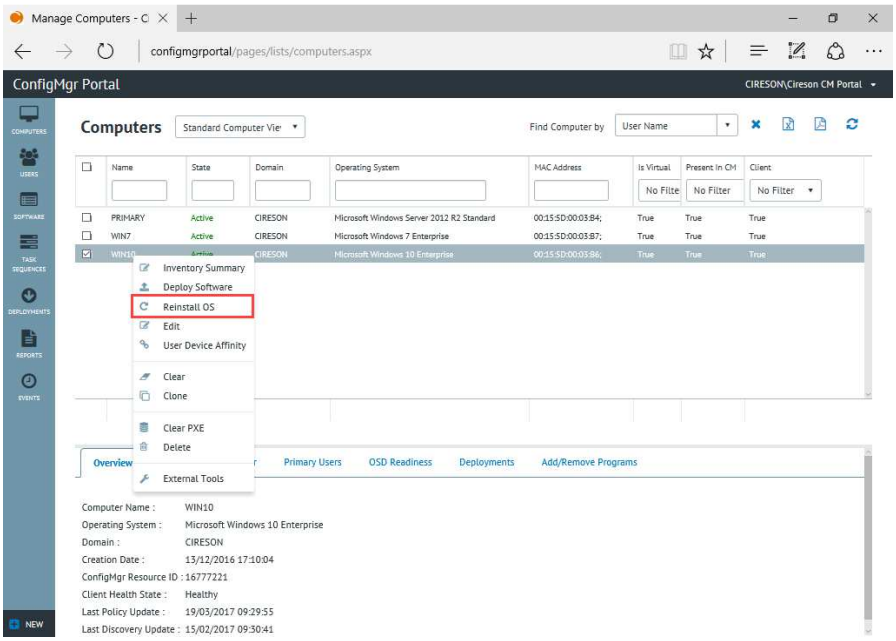
How do I reinstall the operating system on a computer?

To reinstall the operating system on a computer:

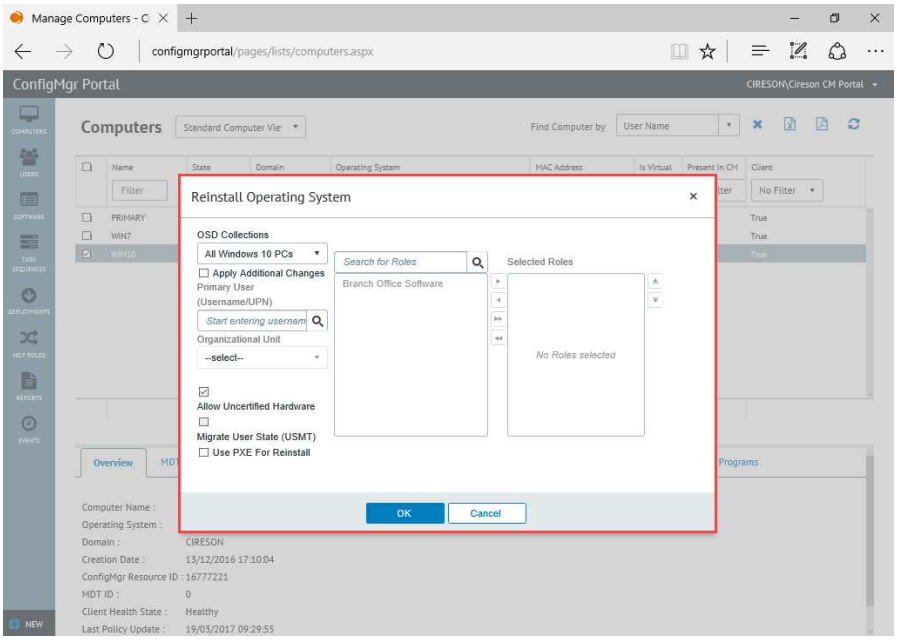
1. Click **Computers** in the **Navigation Menu**



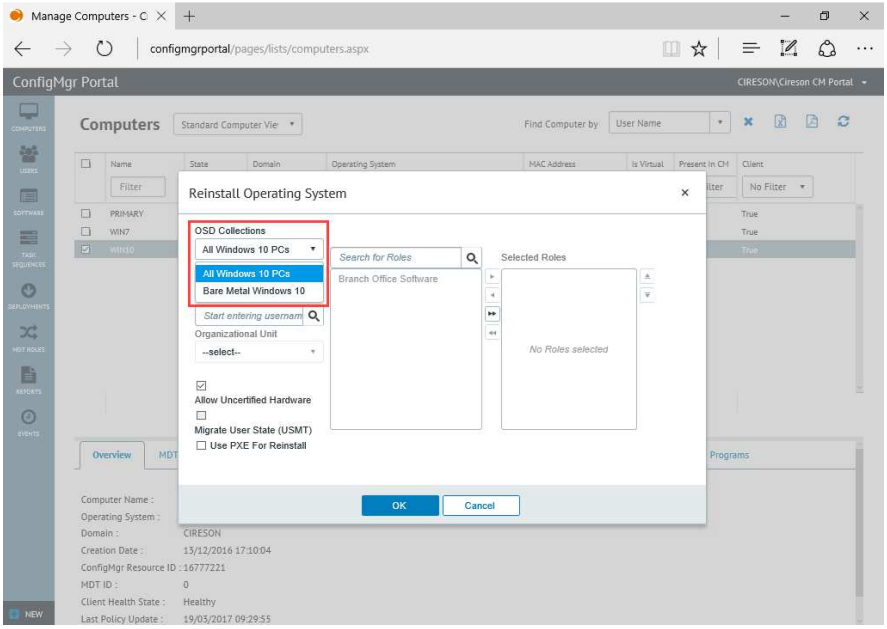
2. Right-click the relevant computer and select **Reinstall OS**



The **Reinstall Operating System** dialog box is displayed.

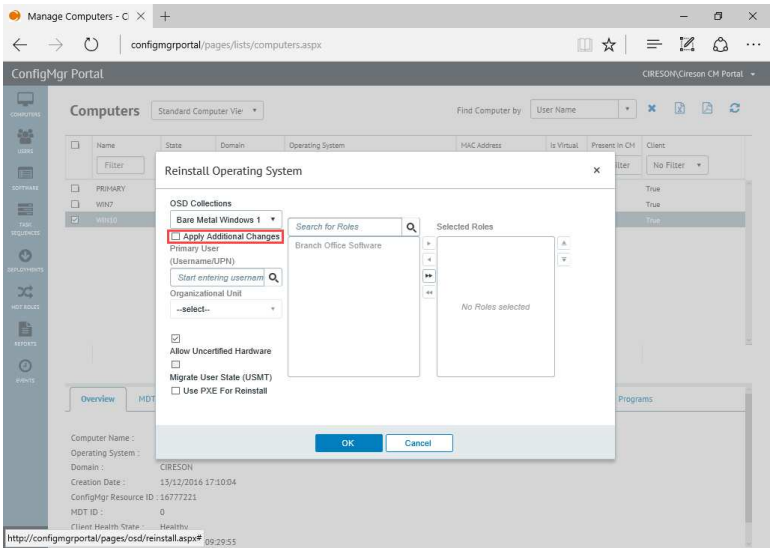


3. From the **OSD Collections** dropdown, select the relevant collection that the OSD Task Sequence has been deployed to.

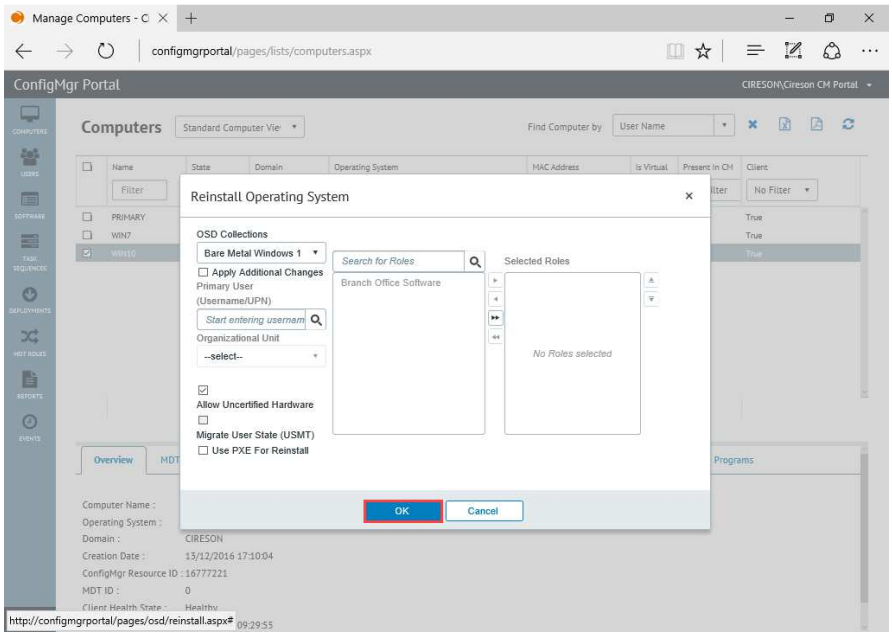


4. Select the relevant checkboxes to meet your requirements.

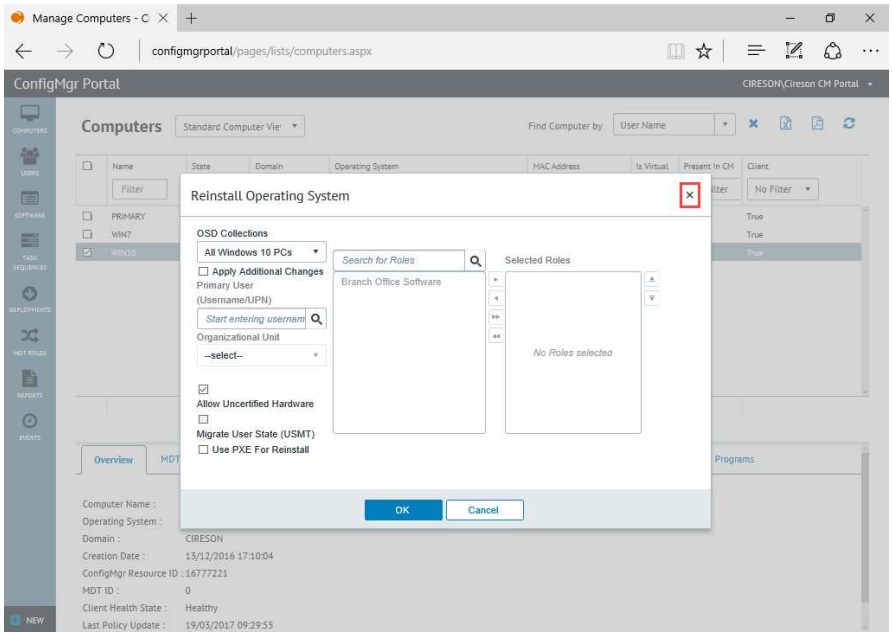
NOTE: To be able to define a Primary User, Organizational Unit, Migration of USMT data, or to add MDT Roles you will need check the **Apply Additional Changes** checkbox.



5. Click **OK**



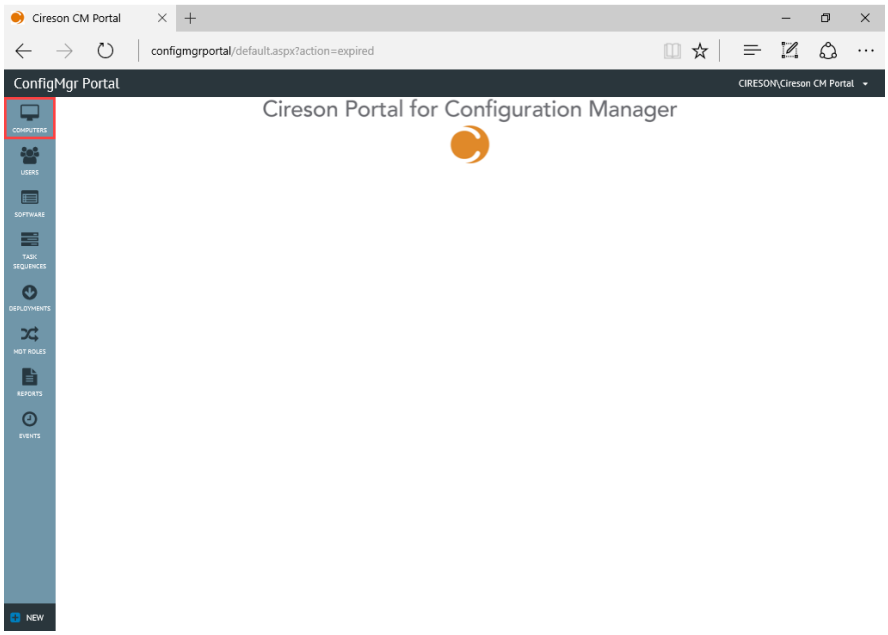
6. Click the **x** in the top right-hand corner to close the **Reinstall Operating System** dialog box.



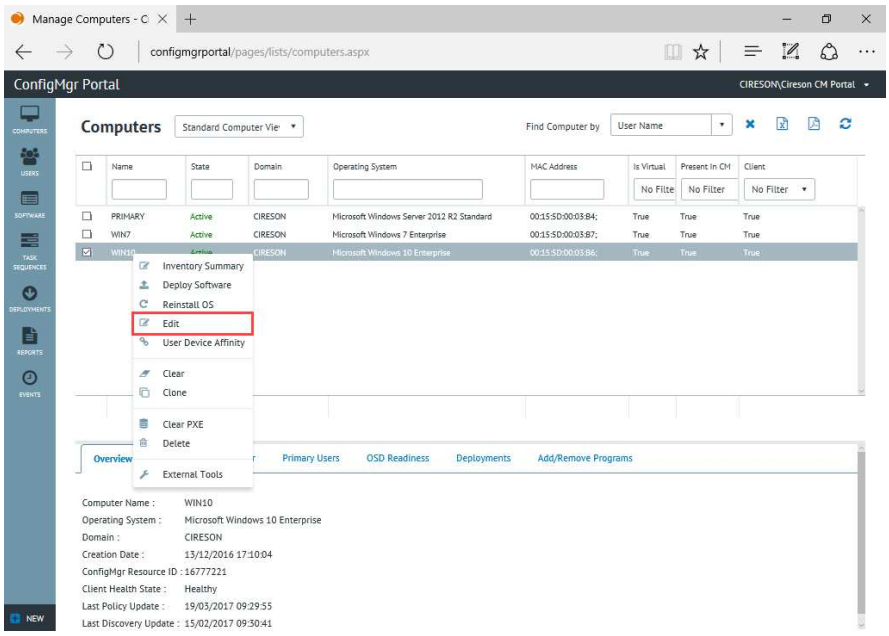
How do I Edit a computer?

To edit a computer:

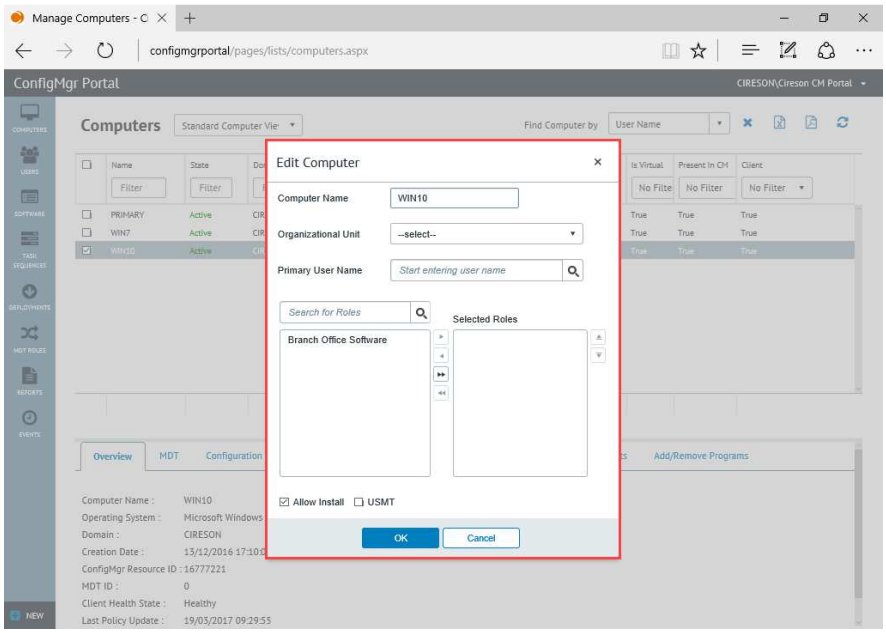
1. Click **Computers** in the **Navigation Menu**



2. Right-click the relevant computer and select **Edit**



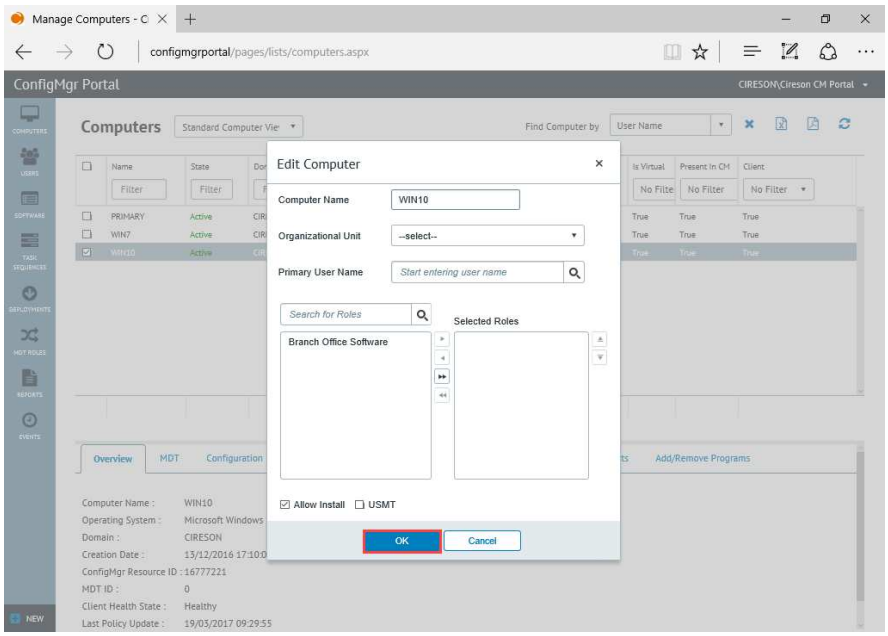
The **Edit Computer** dialog box is displayed.



3. Make the required changes, such as selecting an **Organizational Unit, Primary User Name, Adding MDT Roles,** etc.

   NOTE: You cannot change the **Computer Name**

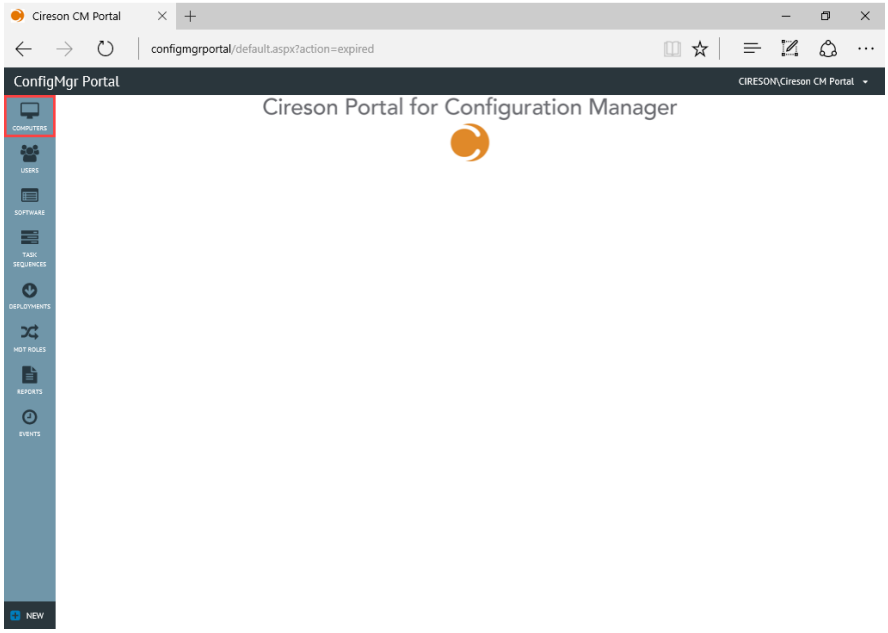
4. Click **OK** to save your changes.



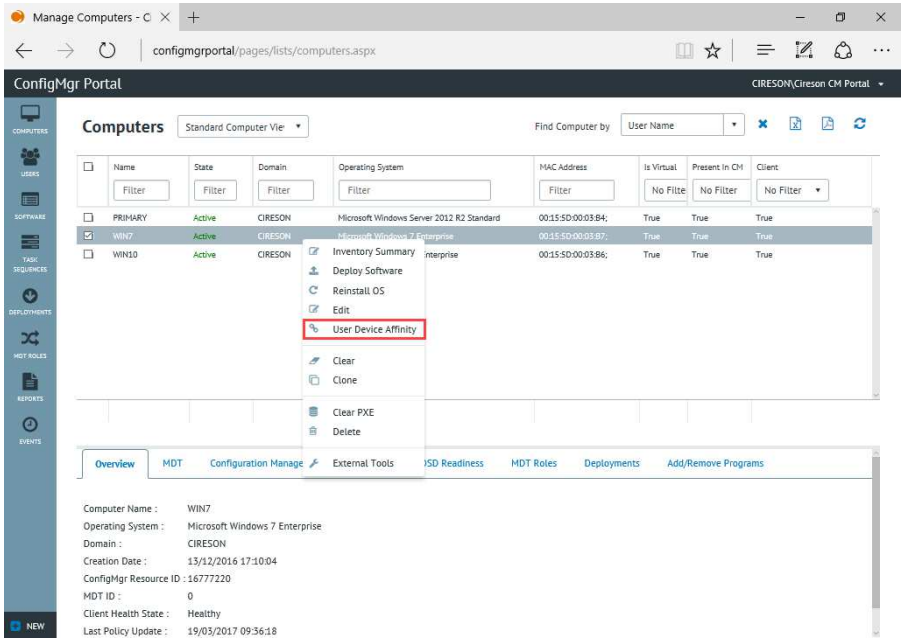
How do I view the User Device Affinity relationships for a computer?

To view the User Device Affinity relationships for a computer:

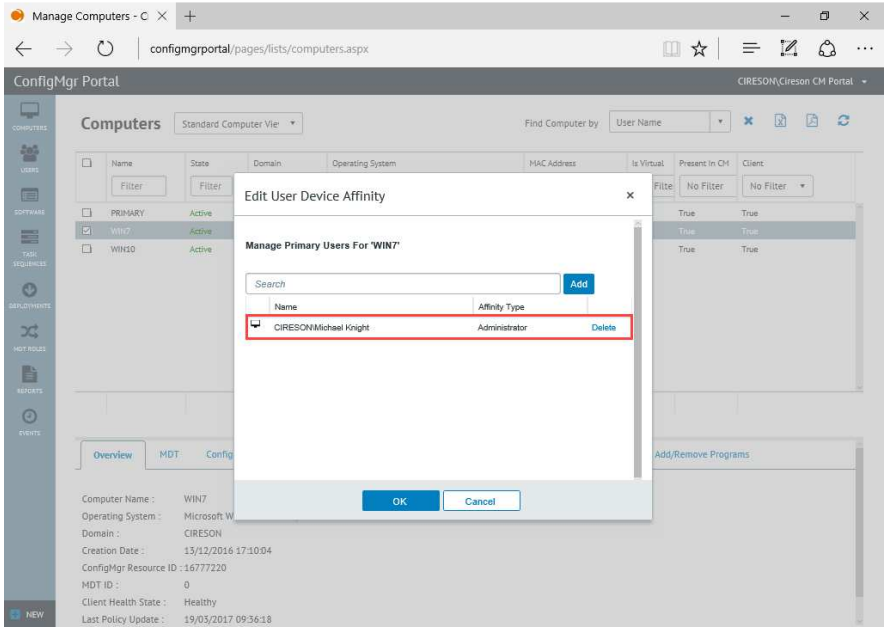
1. Click **Computers** in the **Navigation Menu**



2. Right-click the relevant computer and select **User Device Affinity**

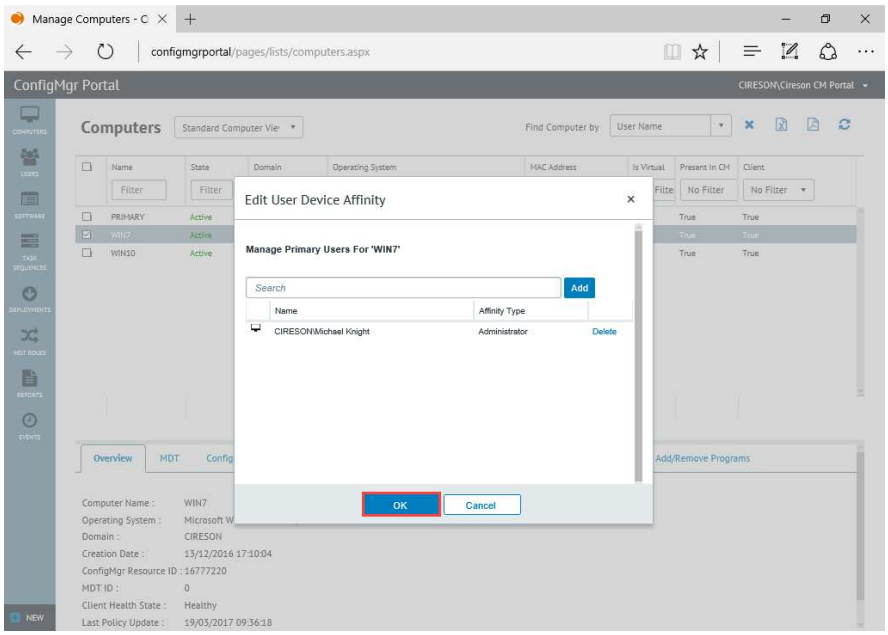


The **Edit User Device Affinity** dialog box is displayed showing any User Device Affinity relationships for the selected computer.



NOTE: The Primary Users for a computer can also be viewed from the **Primary Users** tab as detailed in How do I see the Primary Users for a computer?

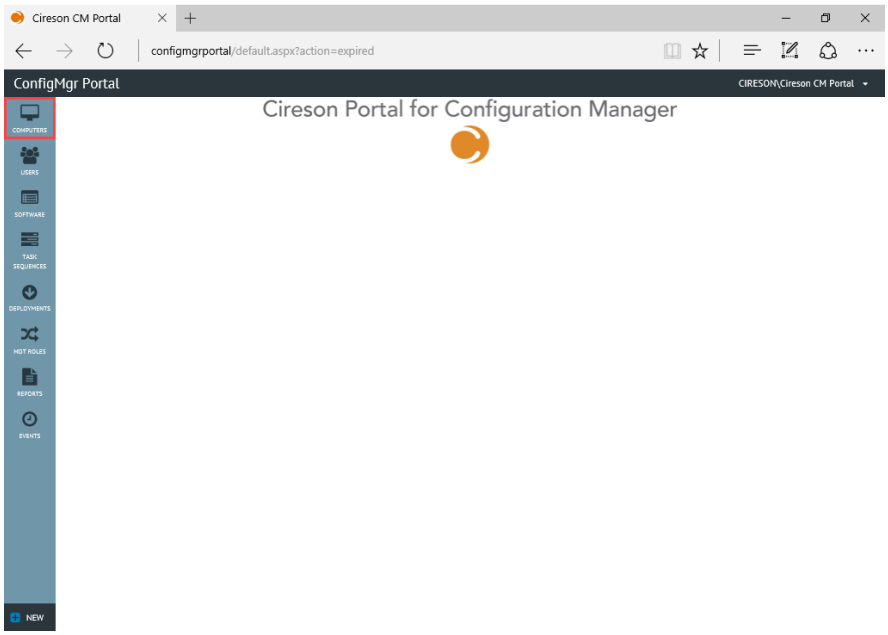
3. Click **OK** to close the **Edit User Device Affinity** dialog box.



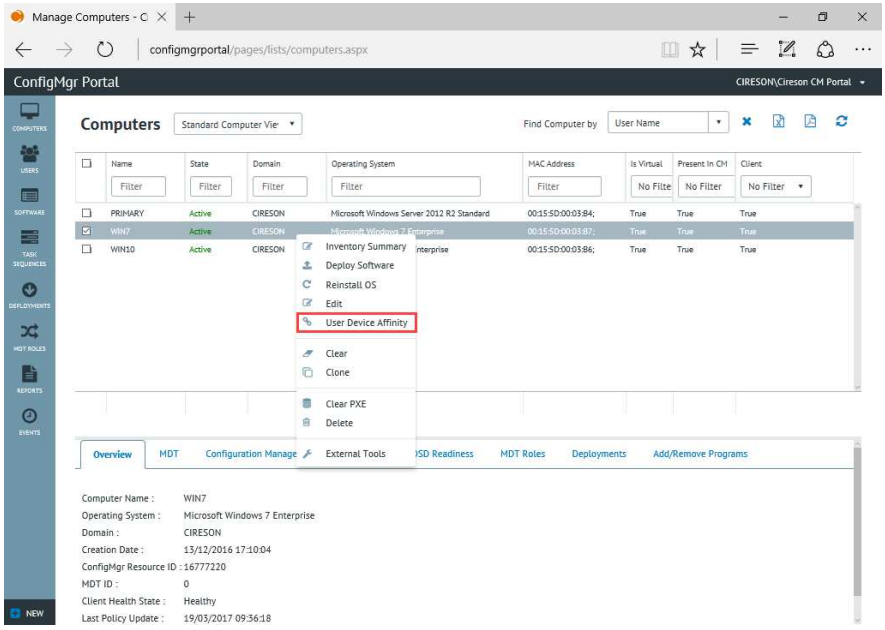
How do I edit the User Device Affinity relationships for a computer?

To edit the User Device Affinity relationships for a computer:

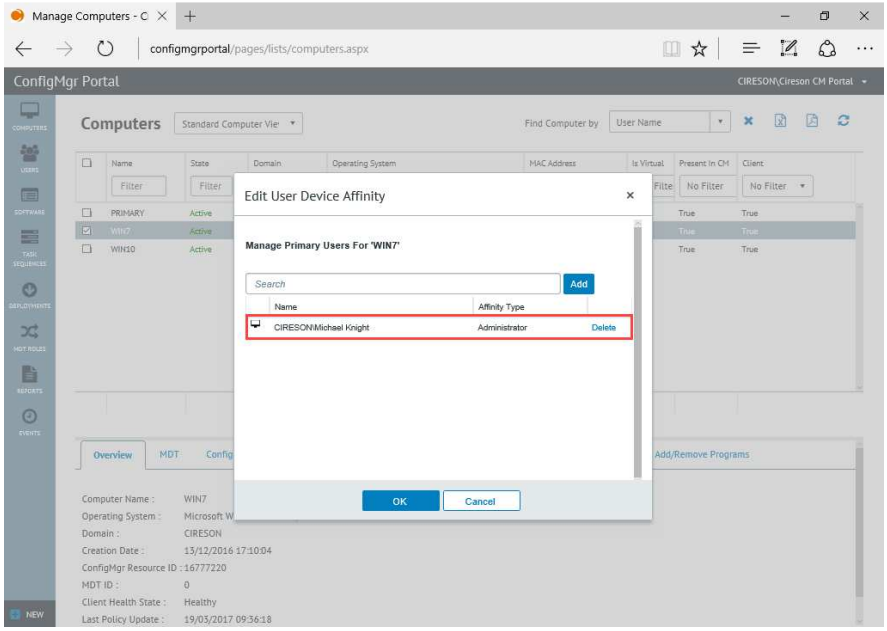
1. Click **Computers** in the **Navigation Menu**



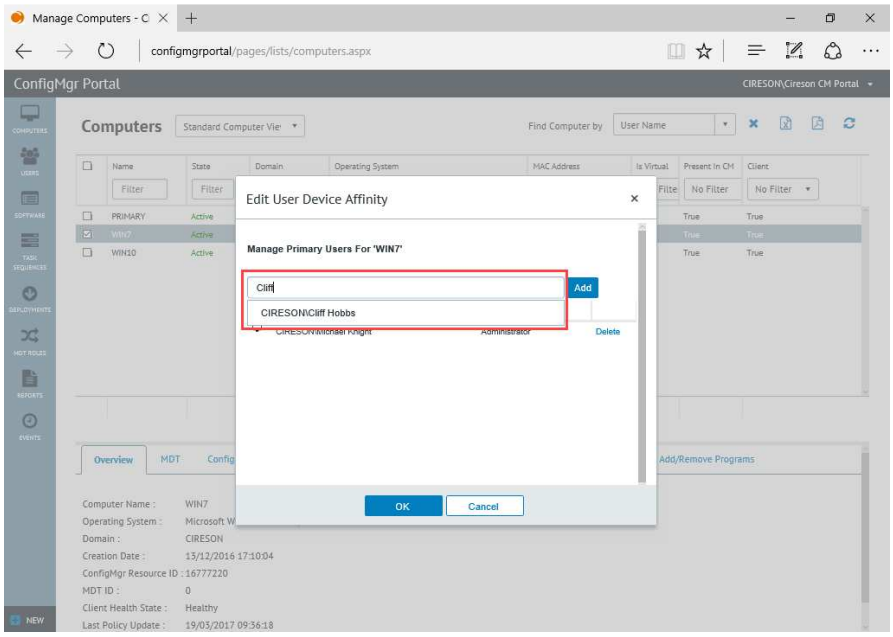
2. Right-click the relevant computer and select **User Device Affinity**



The **Edit User Device Affinity** dialog box is displayed showing any User Device Affinity relationships for the selected computer.

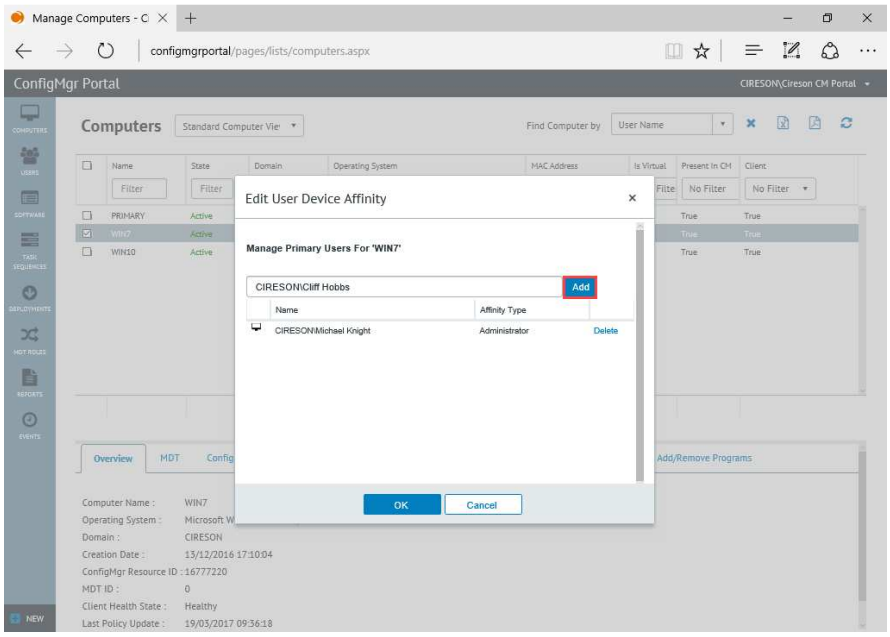


3. To add a new User Device Affinity relationship, type the name of the user in the **Search** field. A matching list of users will be displayed as you type.

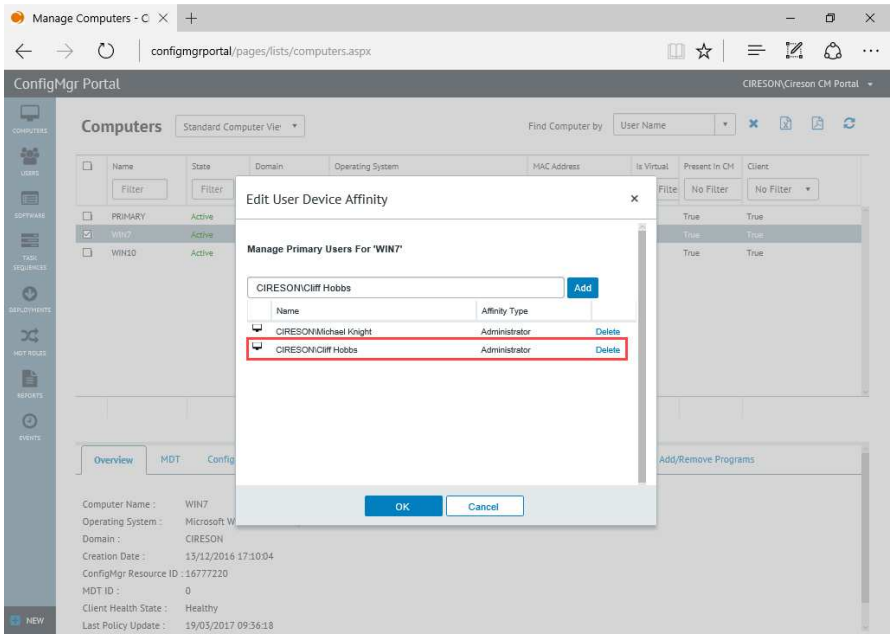


4. Select the relevant User(s).

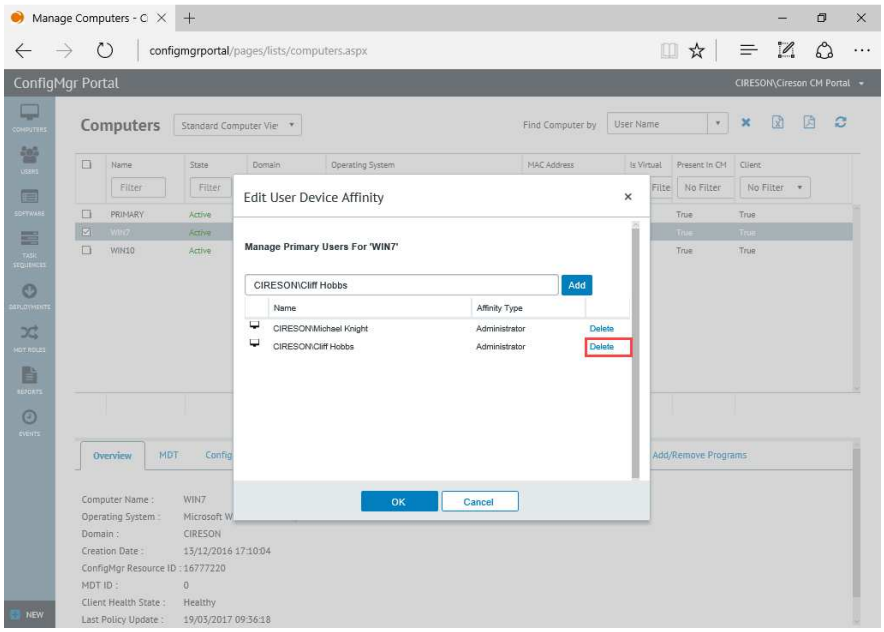
5. Click **Add** to add the selected user as Primary User of the computer.



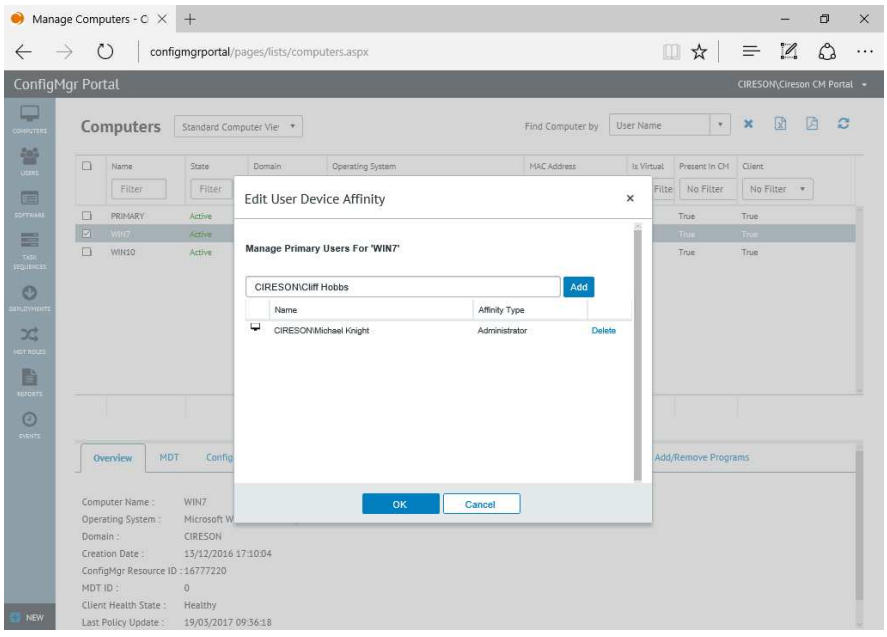
The newly added user is shown as a Primary User.



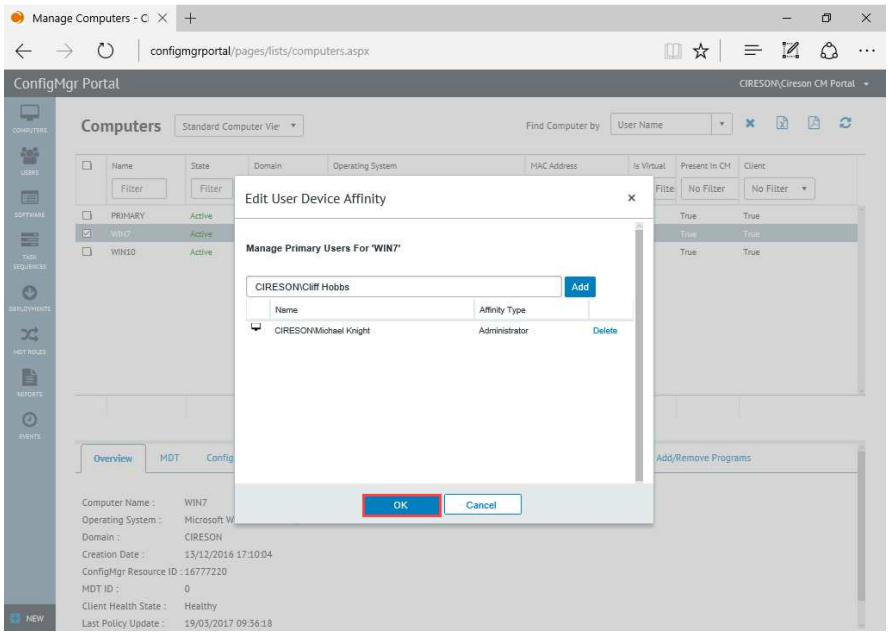
6. If you want to delete a Primary user, click **Delete** beside the relevant user.



The selected user is deleted from the list of Primary Devices for the computer.



7. Click **OK** to close the **Edit User Device Affinity** dialog box.



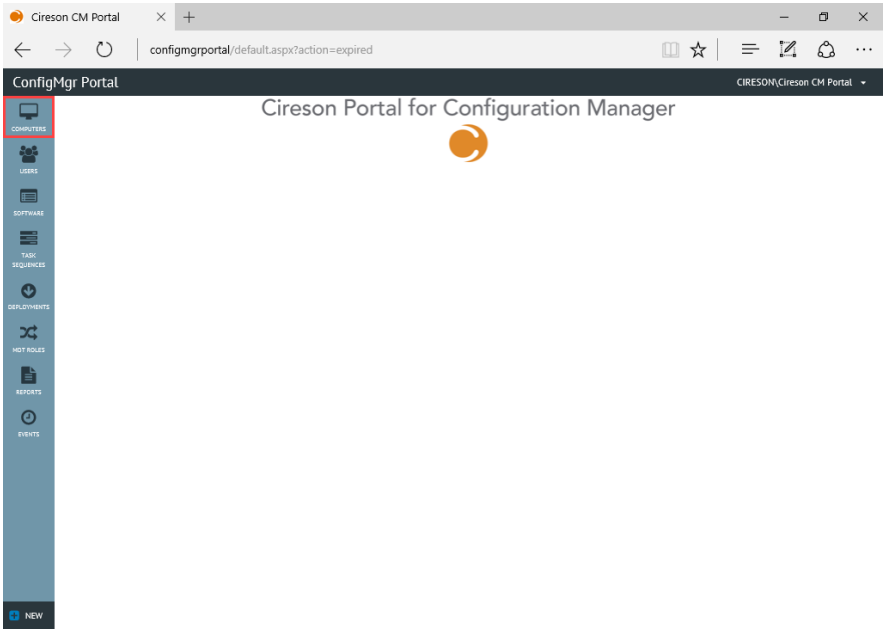
How do I find out which computers a user has a UDA relationship with?

You can view all of the computers a user has a User Device Affinity (UDA) relationship from within either the **Computers** or **Users** menu.

NOTE: To see the UDA relationships from the **Users** menu see How do I view the User Device Affinity relationships for a computer?

To see all computers a user has a User Device Affinity relationship established with, from the **Computers** menu:

1. Click **Computers** in the **Navigation Menu**

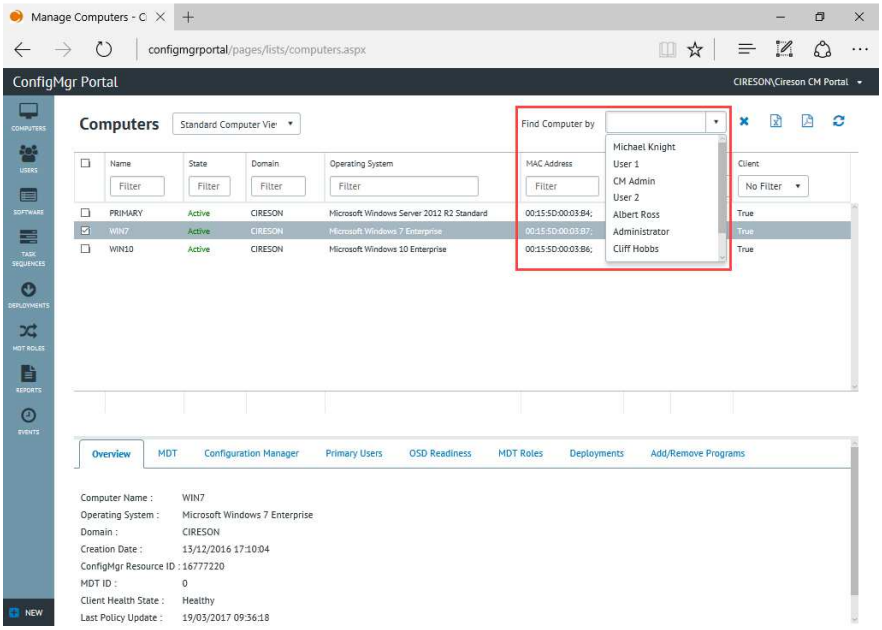


2. On the **Computers** page either:

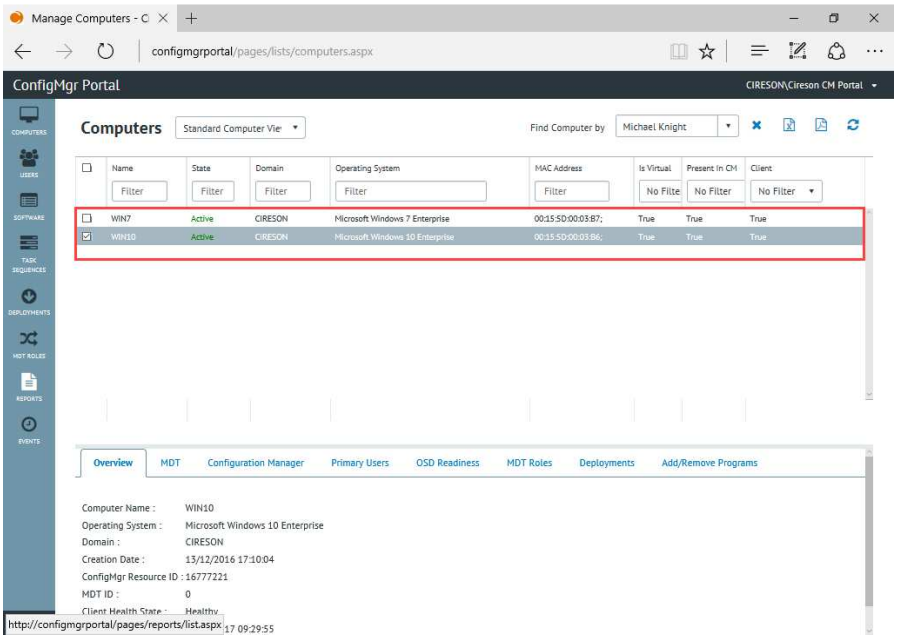
   - Select the name of user you require from the **Find Computer by** dropdown list

   or

   - Start typing the name of the user (notice that as you type a list of matching names is automatically displayed for you to choose from) and press **ENTER**



The **Computers** page automatically updates to only show those computers on which the user has a UDA relationship.

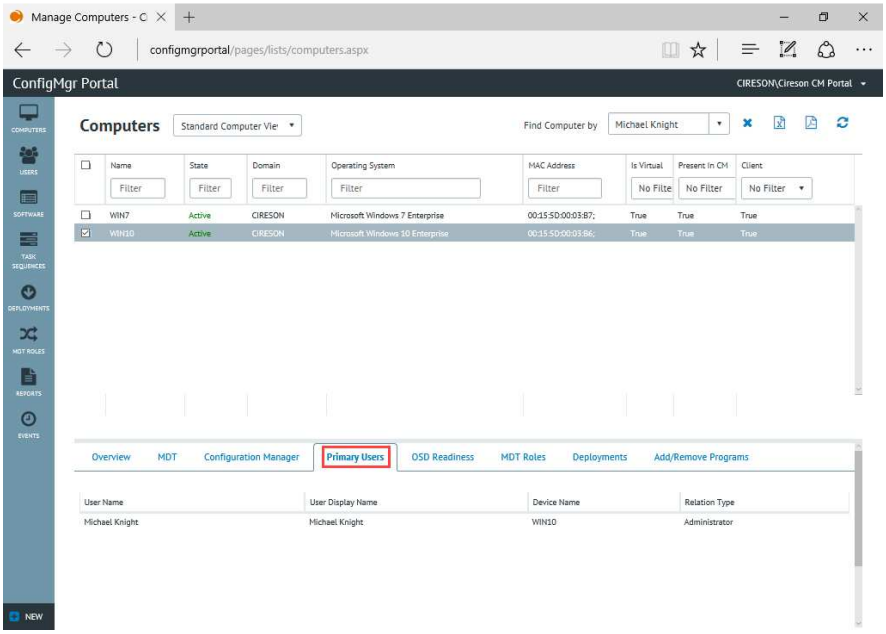


Once you have selected the required computer, to see the UDA relationships you can either:

- Right-click the computer and select **User Device Affinity** as detailed in How do I view the User Device Affinity relationships for a computer?

or

- Click the **Primary Users** tab.

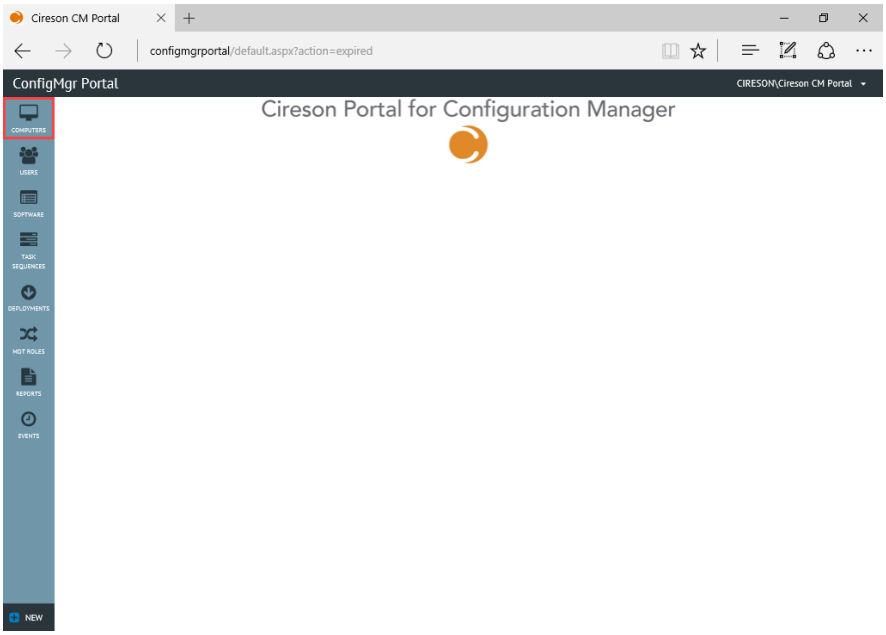


How do I Clean Deployments targeted to a computer?

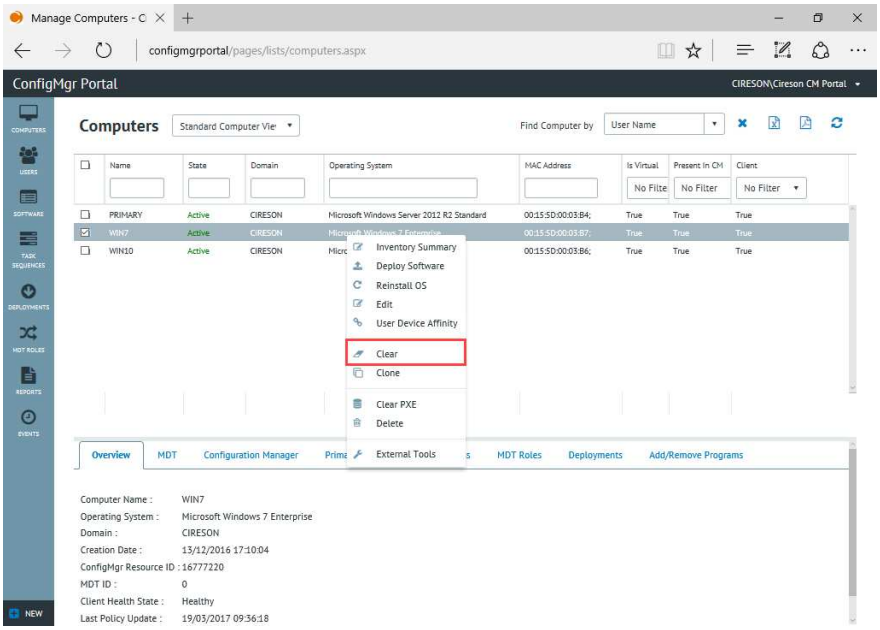
When you clean a deployment targeted to a computer, all you are doing is removing the computer from the collection that was used to deploy the software. If the software has already been installed on the computer, this process does not remove it.

To clean deployments targeted to a computer (i.e. remove installed software):

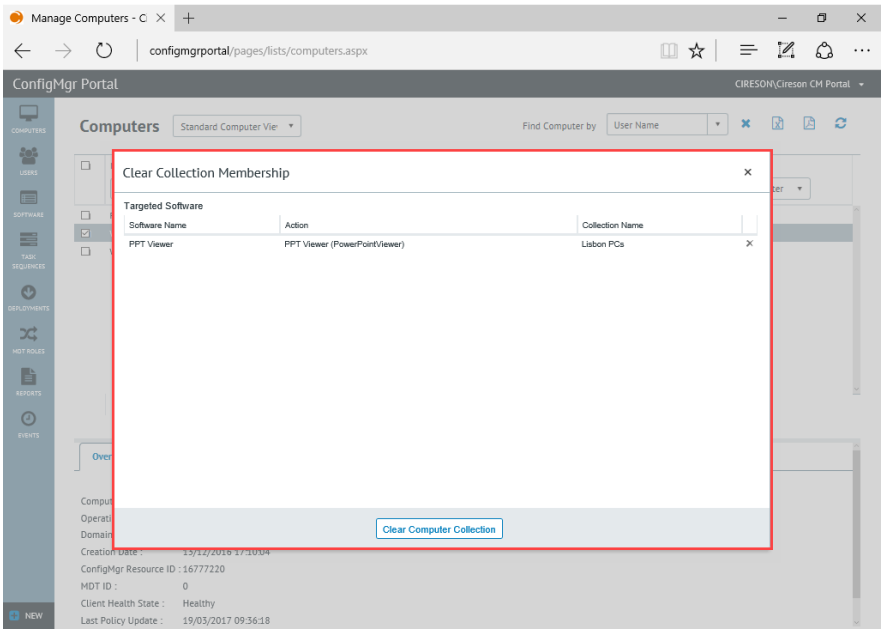
1. Click **Computers** in the **Navigation Menu**



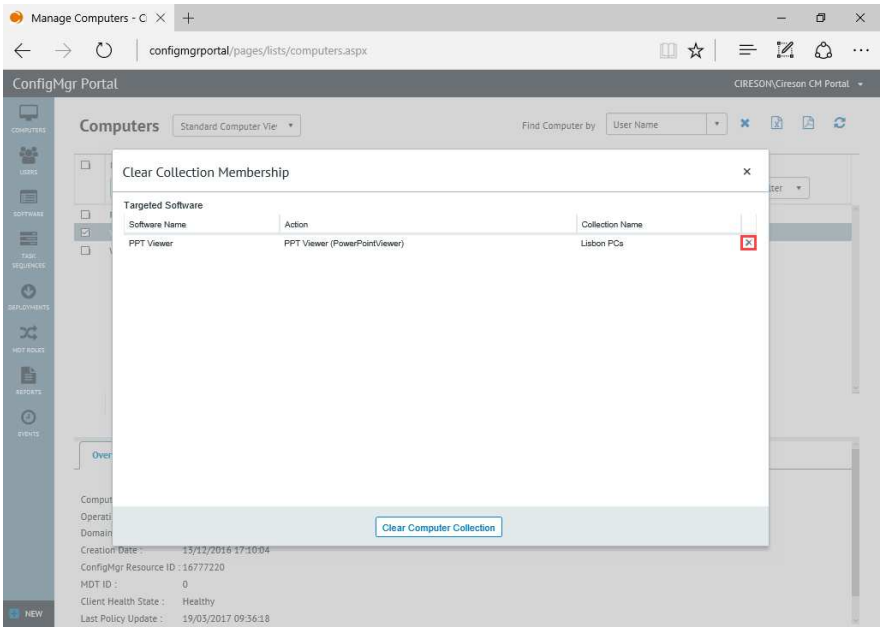
2. Right-click the relevant computer and select **Clear**



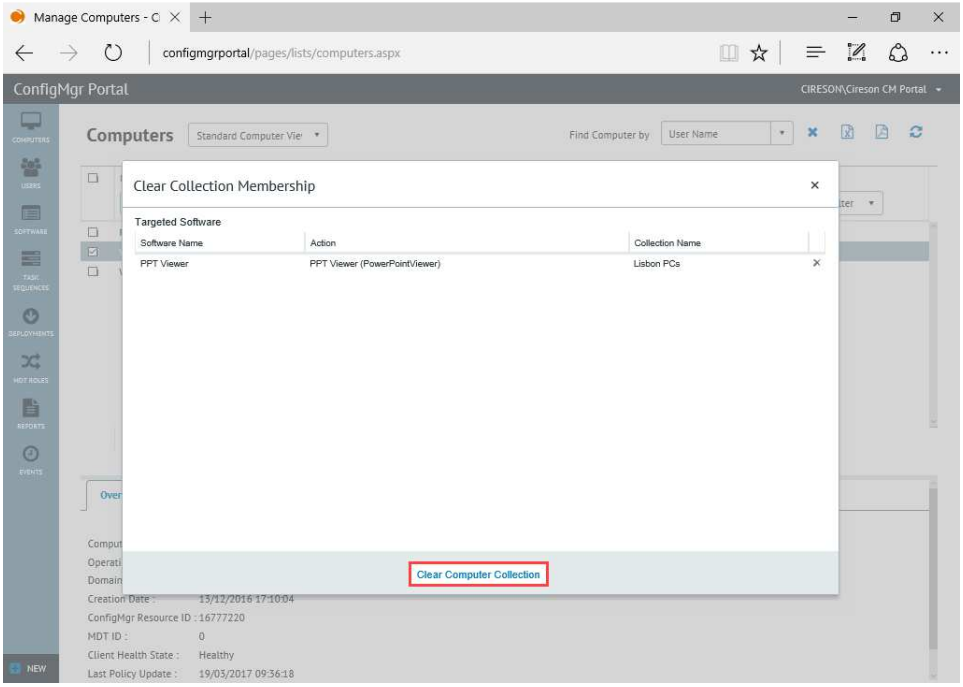
The **Clear Collection Membership** page is displayed.



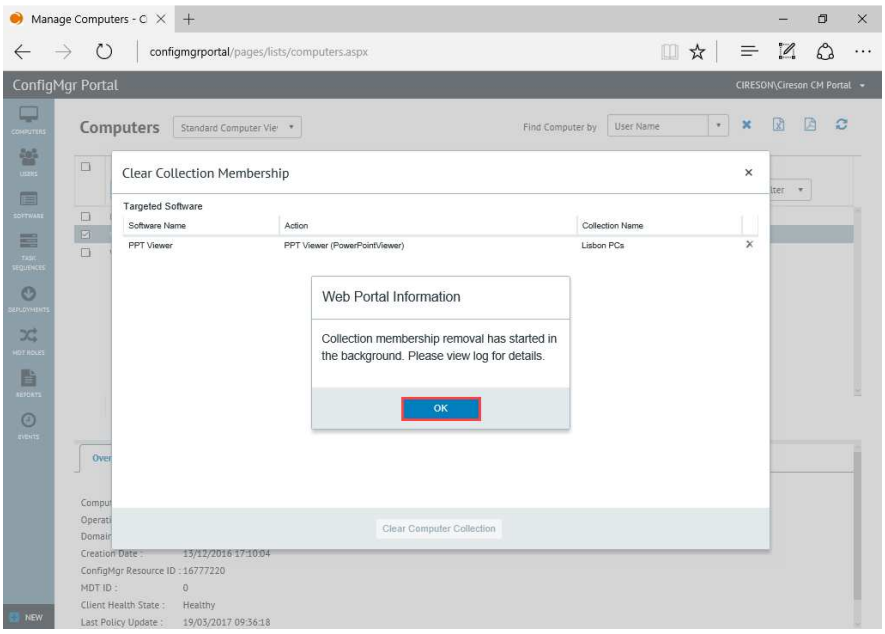
3. Click the **x** beside any items of software you don't want to remove, which will remove them from the list as well as the cleaning process (leaving that deployment targeted to the computer).



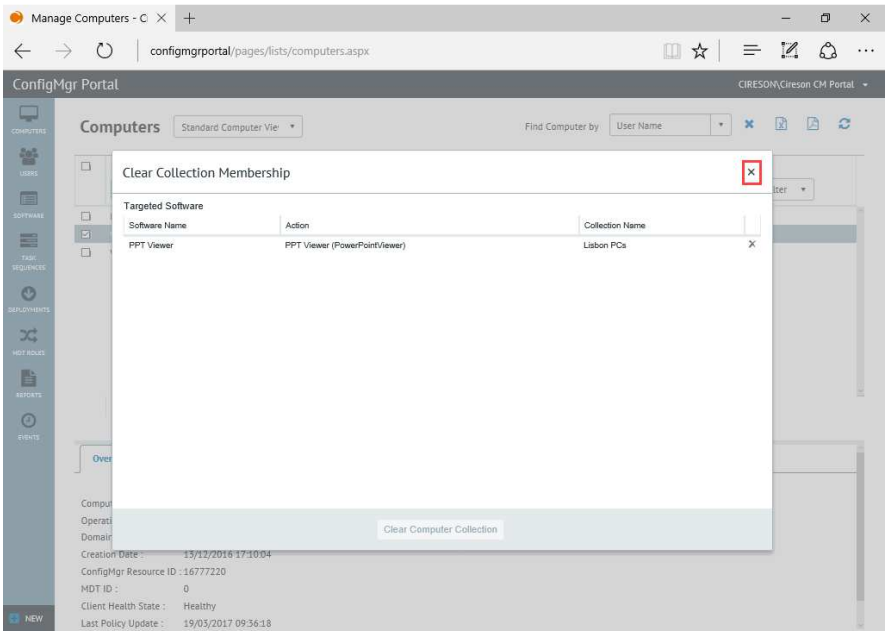
4. Click **Clear Computer Collection** to have the selected computer removed from the list of Collections.



5. Click **OK** on the **Web Portal Information** dialog box stating **Collection membership removal has started in the background. Please view log for details.**



6. Click the **x** to close the **Clear Collection Membership** dialog box.

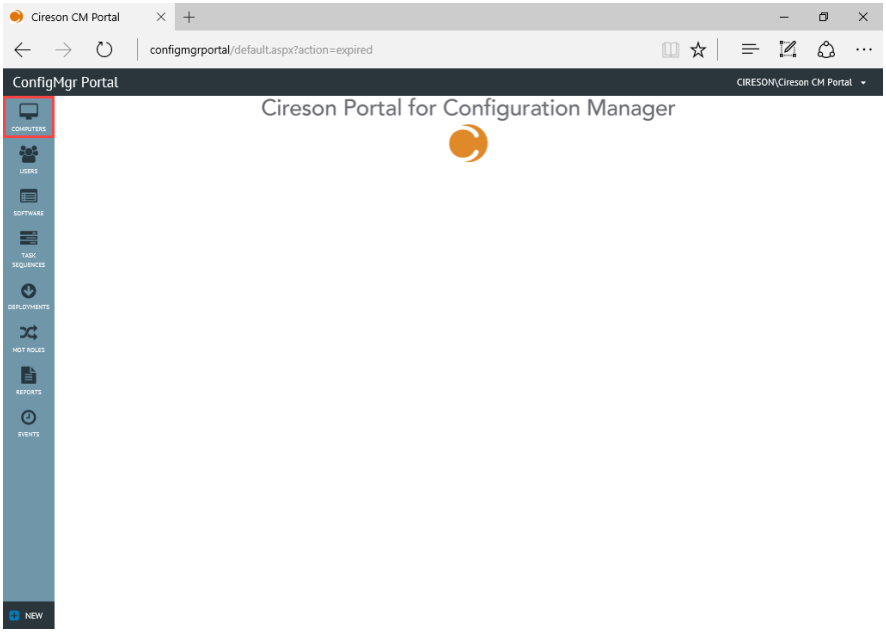


How do I Clone a computer?

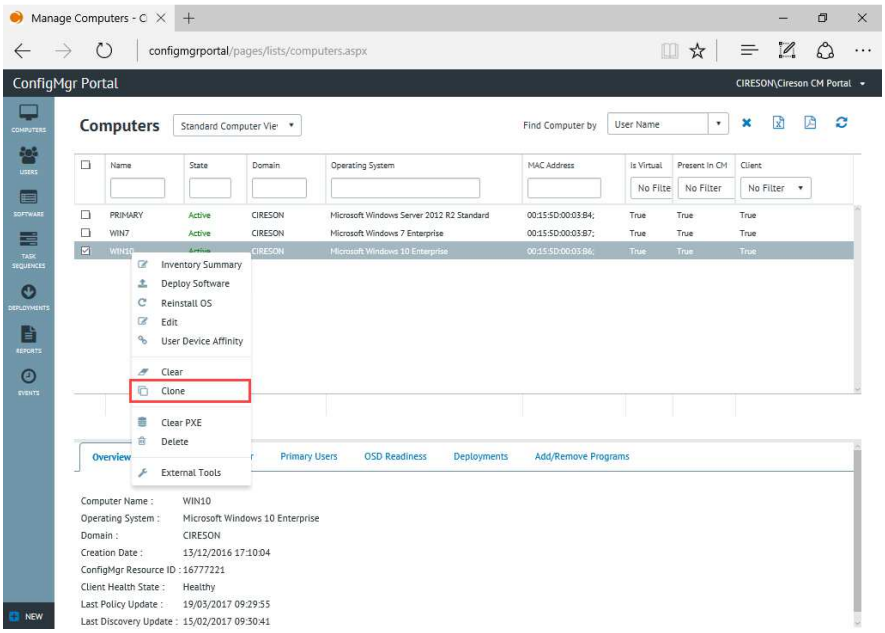
To clone a computer (i.e. deploy software already deployed to one computer to another):

NOTE: If you plan to use this feature, you should take into consideration any requirements on Programs or Deployment Types that may be met by the source computer but not on the destination computer.

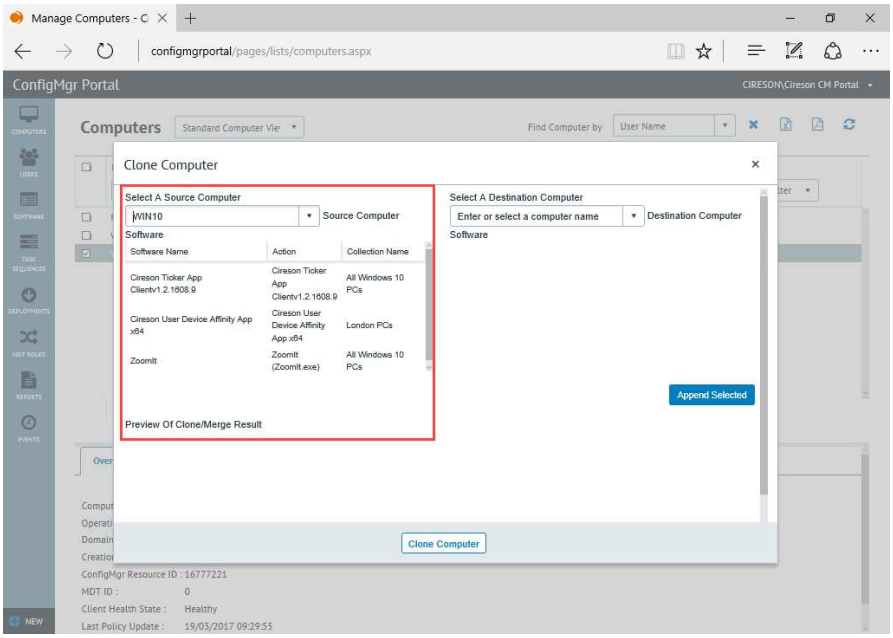
1. Click **Computers** in the **Navigation Menu**



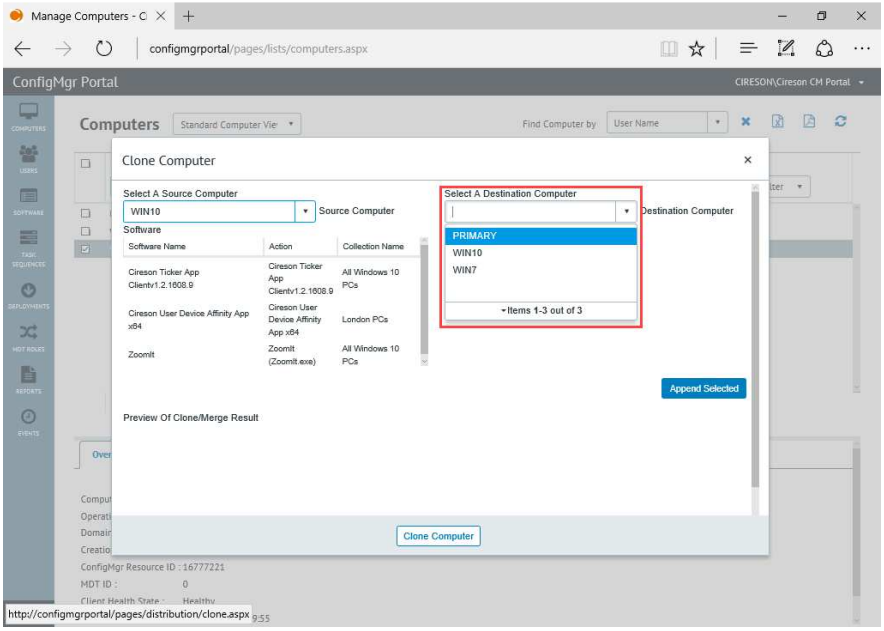
2. Right-click the relevant source computer and select **Clone**



The **Clone Computer** page is displayed showing the source computer and a list of the software that will be cloned.

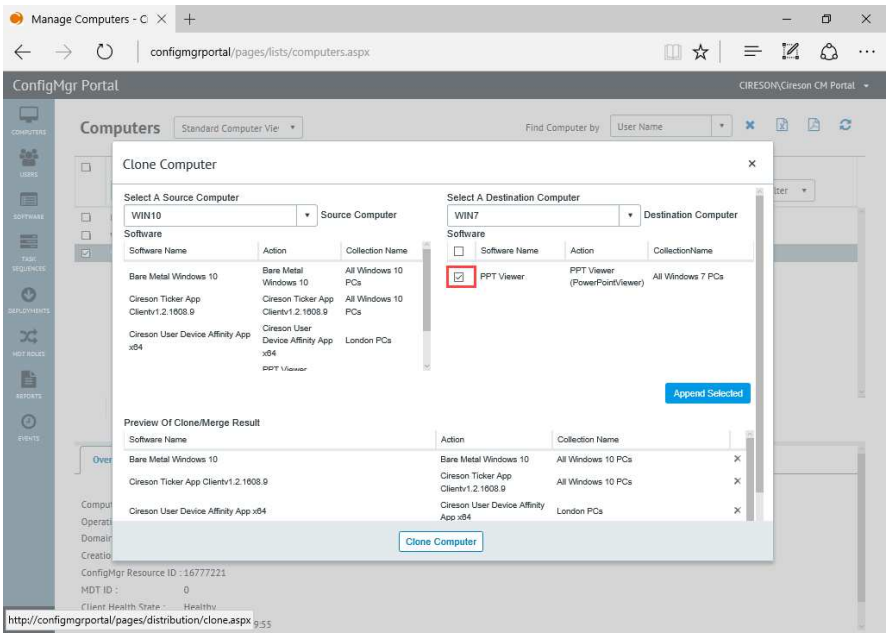


3. In the **Select A Destination Computer** field, either start typing the name of the target computer or use the dropdown to see a list of computers.

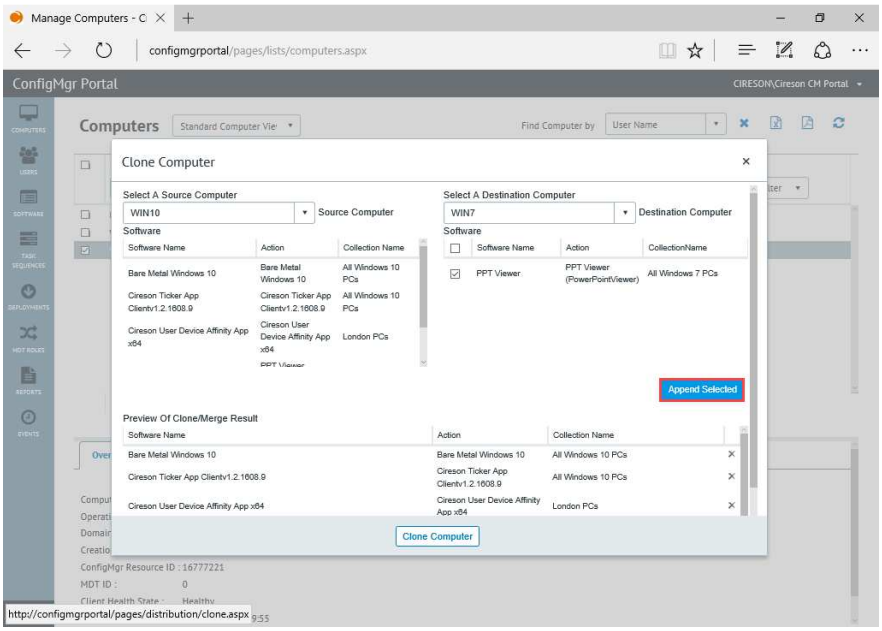


4. If there is any software already deployed to the destination computer that you wish to keep, select the relevant checkbox.

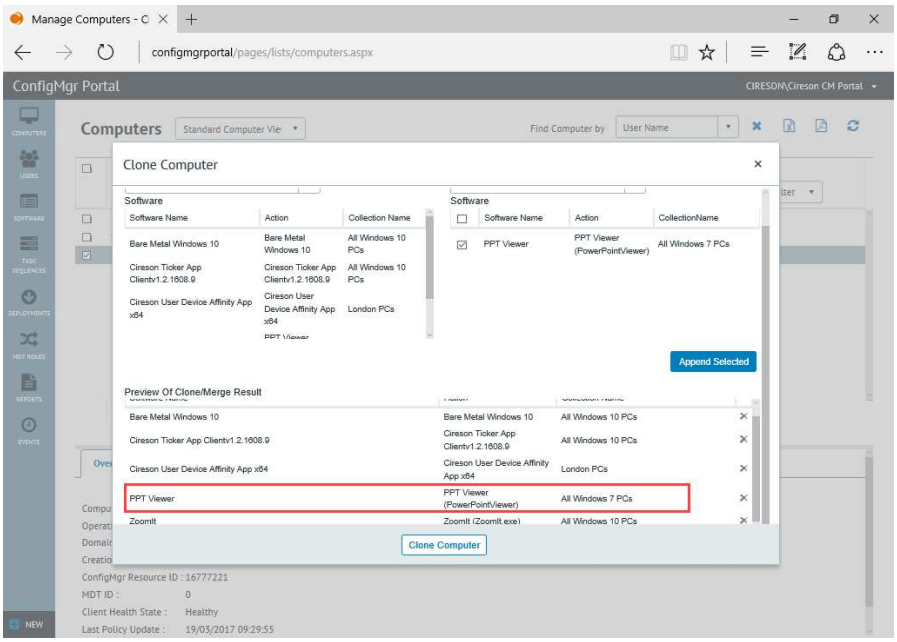
NOTE: If you don't want to keep any of the software targeted to the destination computer, don't select any of the checkboxes. The Portal will then remove the collection membership for the destination computer for any software that is not appended.



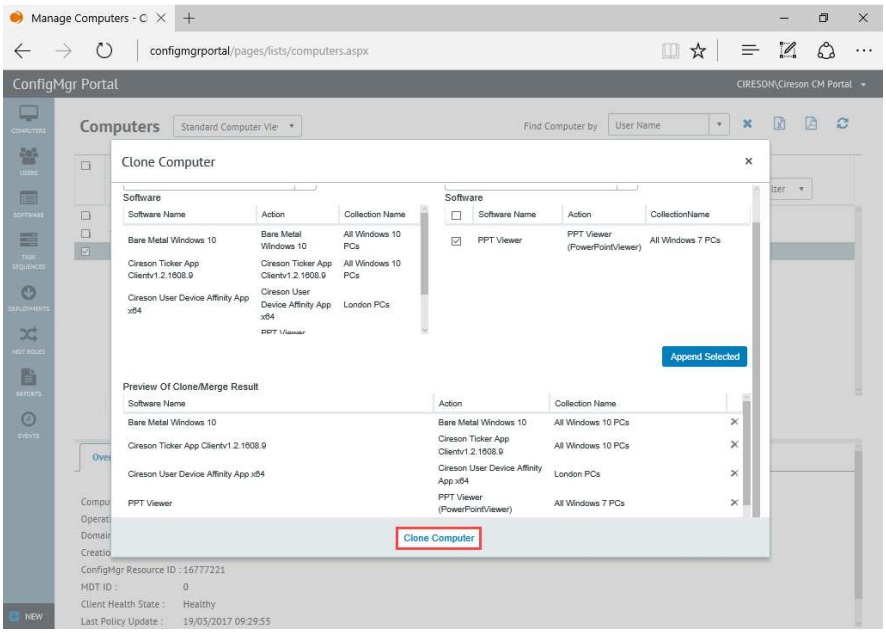
5. Click **Append Selected**



The appended software is added to the **Preview Of Clone/Merge Result** section.

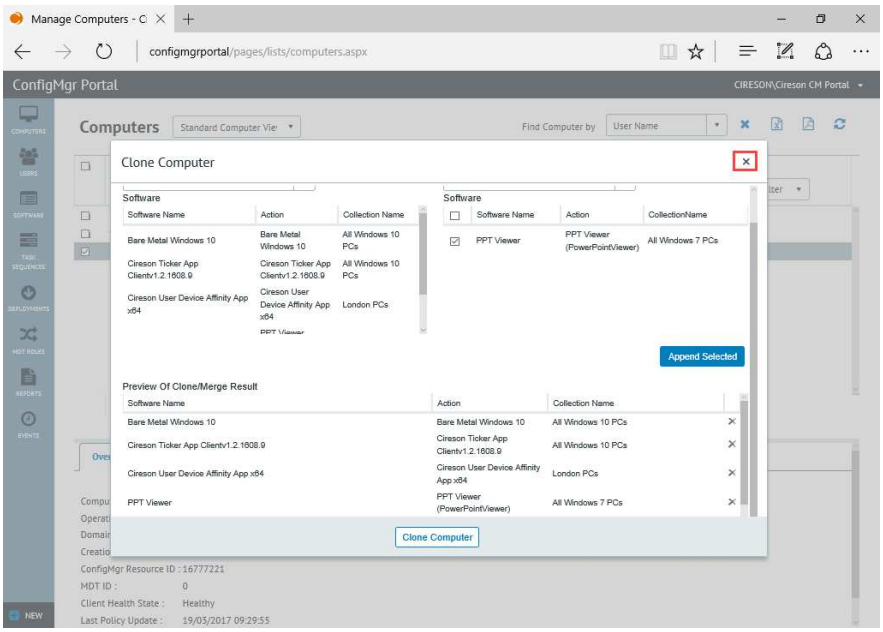


6. Click **Clone Computer**



The cloning process will begin in the background.

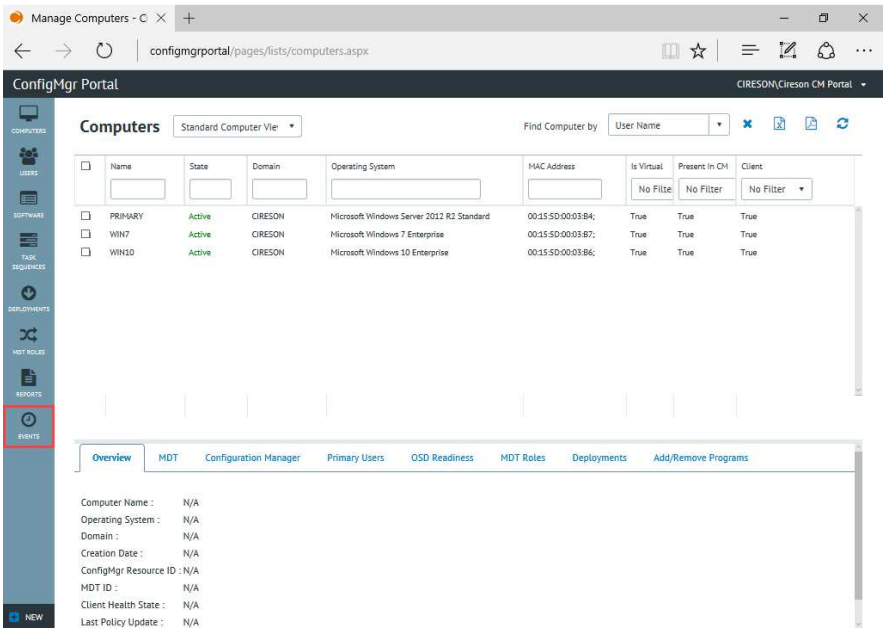
7. Click the **x** to close the **Clone Computer** dialog box.



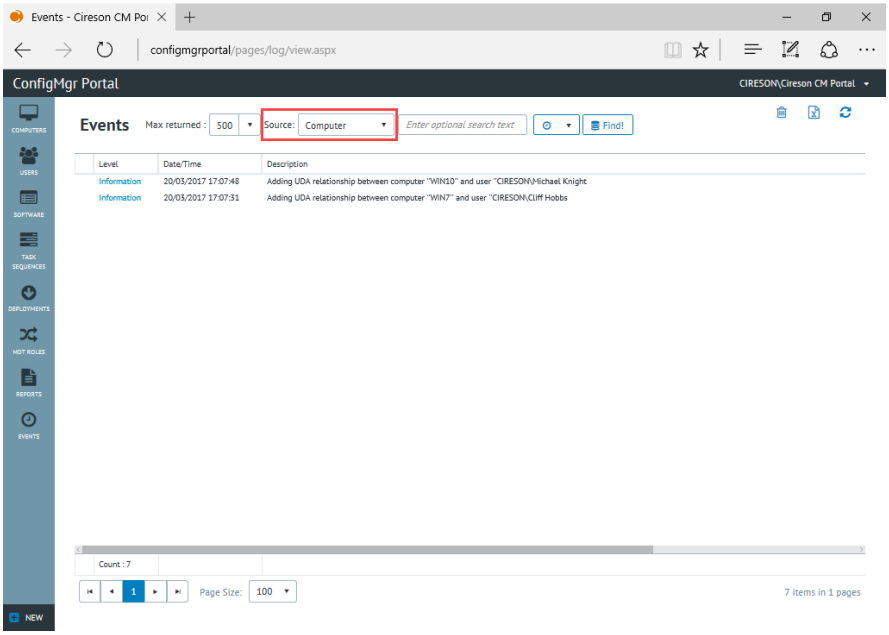
How can I see if the process to clone a computer was successful?

To see if the process to clone a computer was successful:

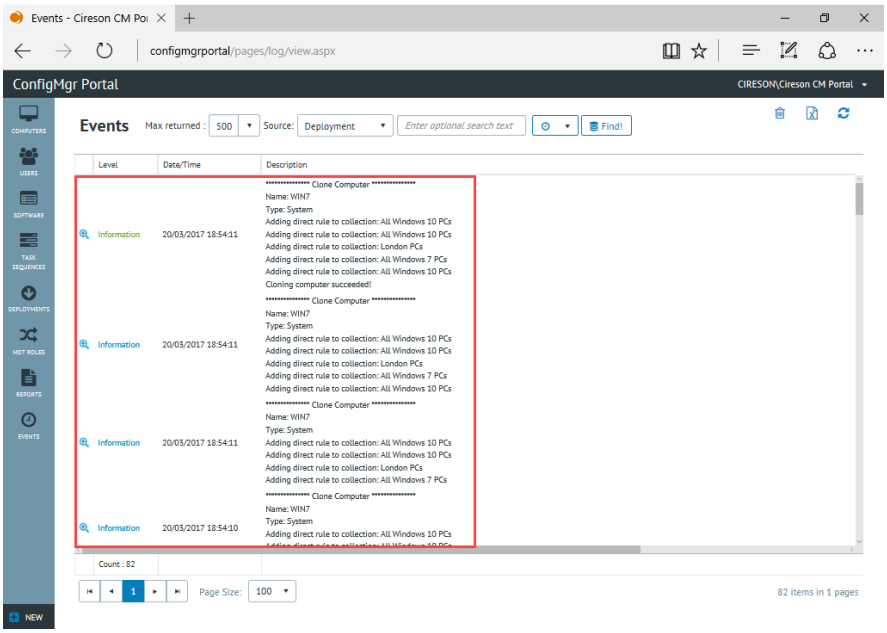
1. Click **Events** in the **Navigation Menu**



2. From the **Source** dropdown, select **Deployment**



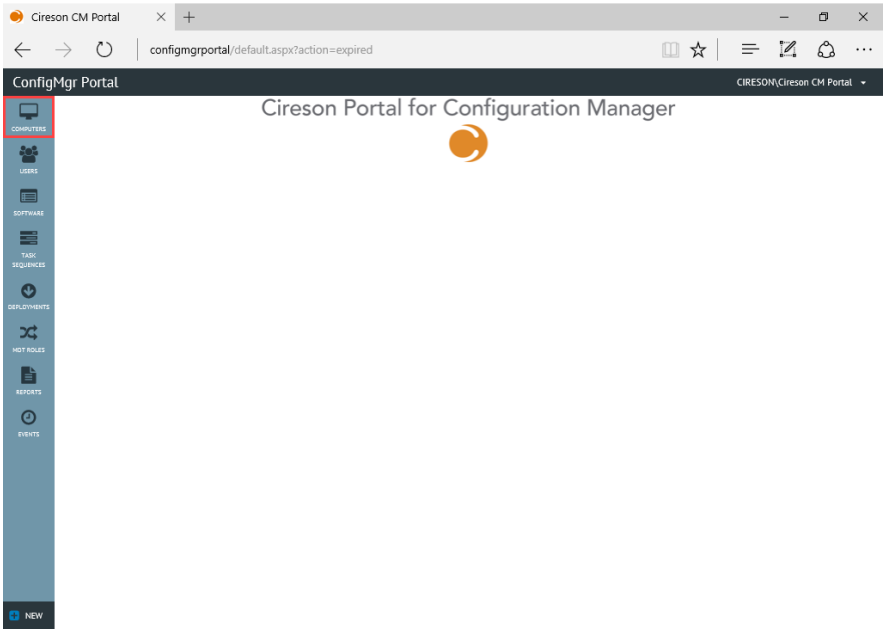
Messages relating to the computer cloning are then displayed.



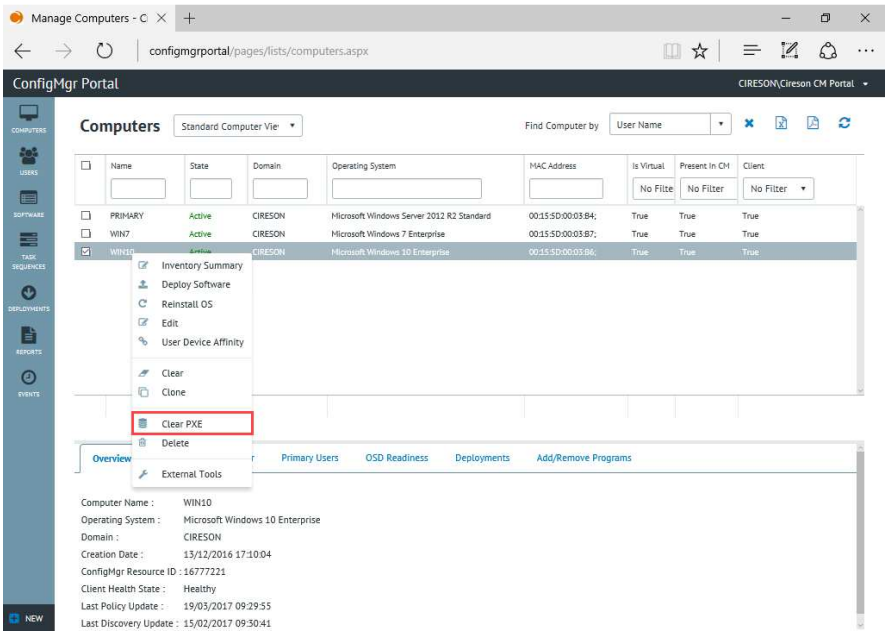
How do I clear any PXE Advertisements to a computer?

To clear any PXE Advertisements targeted to this computer:

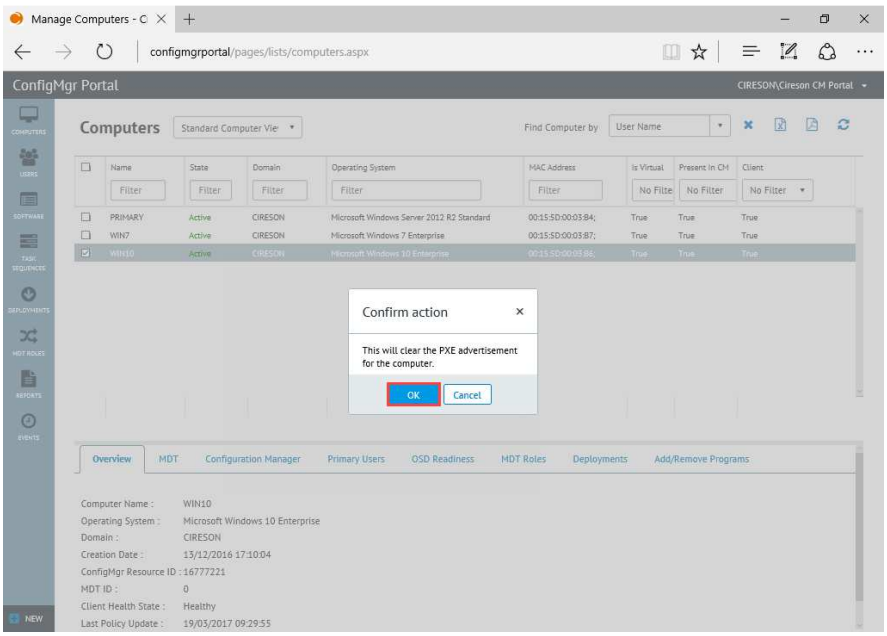
1. Click **Computers** in the **Navigation Menu**



2. Right-click the relevant computer and select **Clear PXE**

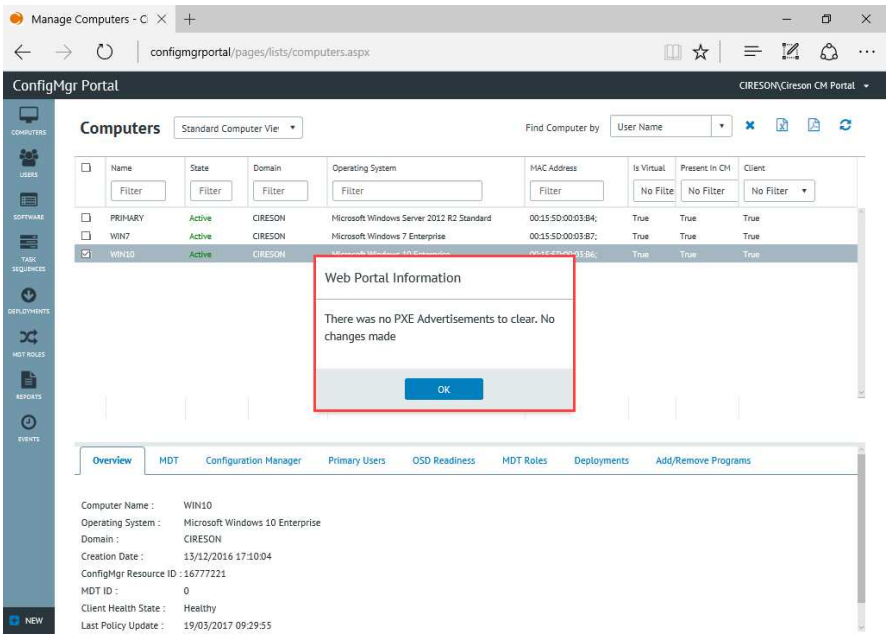


3. Click **OK** on the **Confirm action** dialog box stating **This will clear the PXE advertisement for this computer.**



4. Click **OK** on the **Web Portal Information** dialog box stating the PXE advertisement has been cleared.

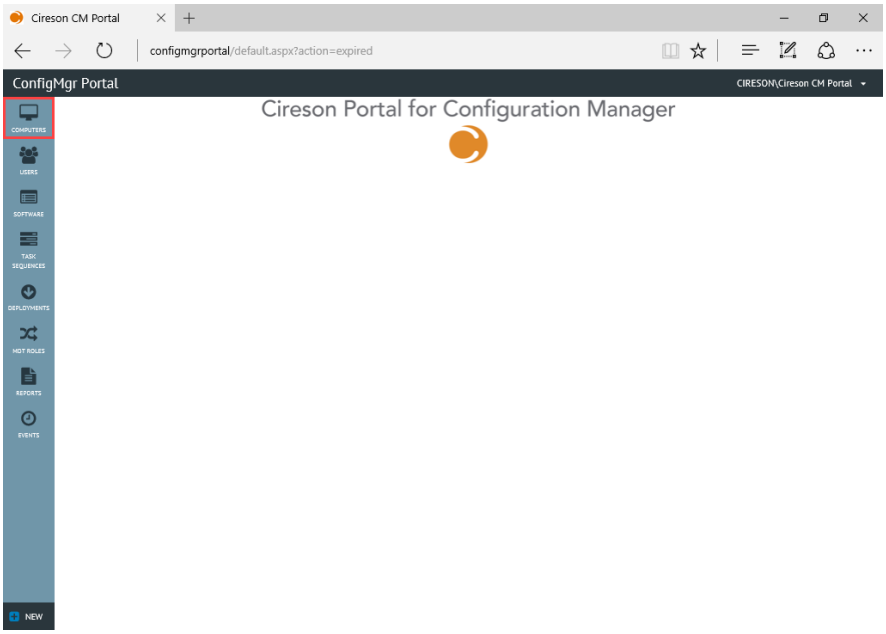
   If there were no PXE Advertisements to clear, click **OK** on the **Web Portal Information** dialog box stating **There was no PXE Advertisements to clear. No changes made.**



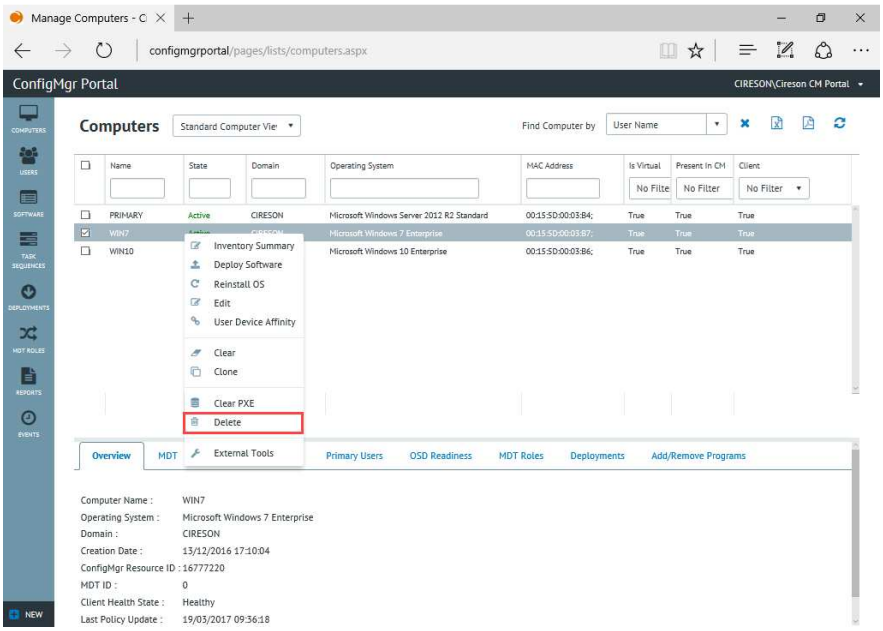
How do I Delete a computer?

To delete a computer:

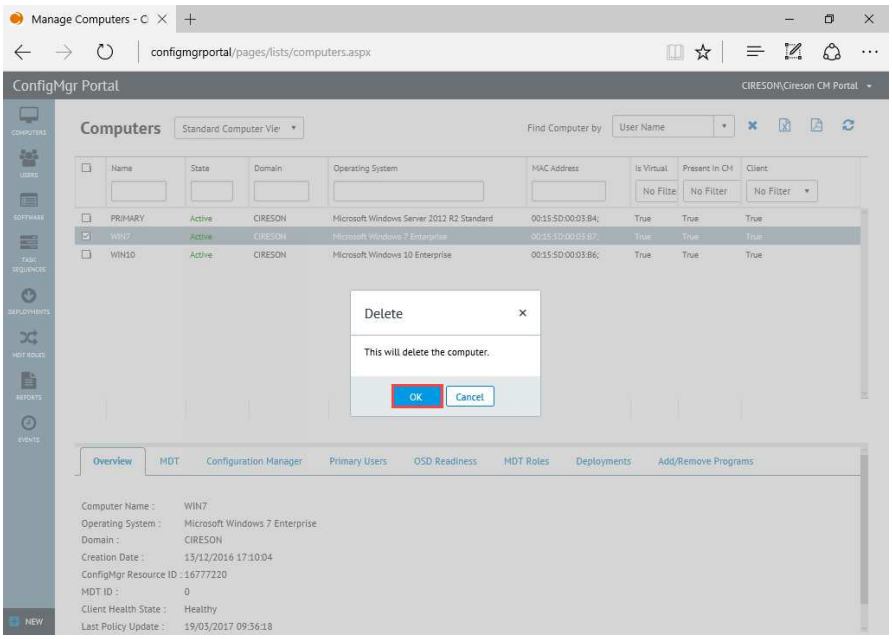
1. Click **Computers** in the **Navigation Menu**



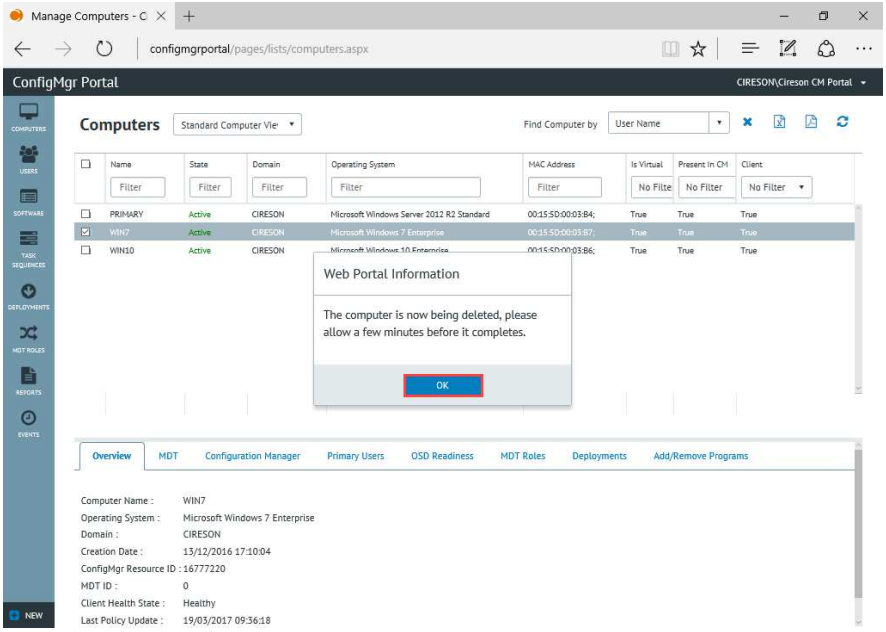
2. Right-click the relevant computer and select **Delete**



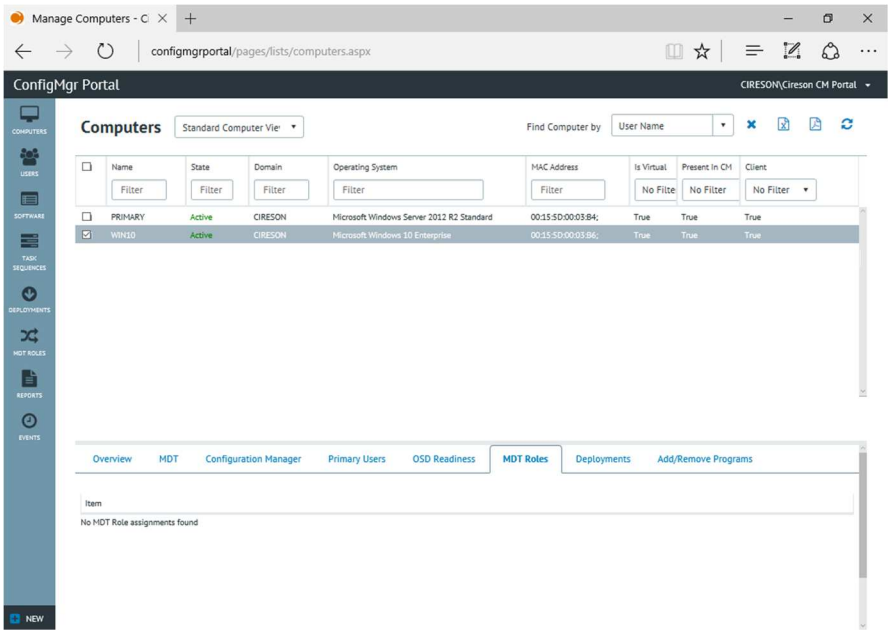
3. Click **OK** on the **Delete** dialog box stating **This will delete the computer.**



4. Click **OK** on the **Web Portal Information** dialog box stating **The computer is now being deleted, please allow a few minutes before it completes.**



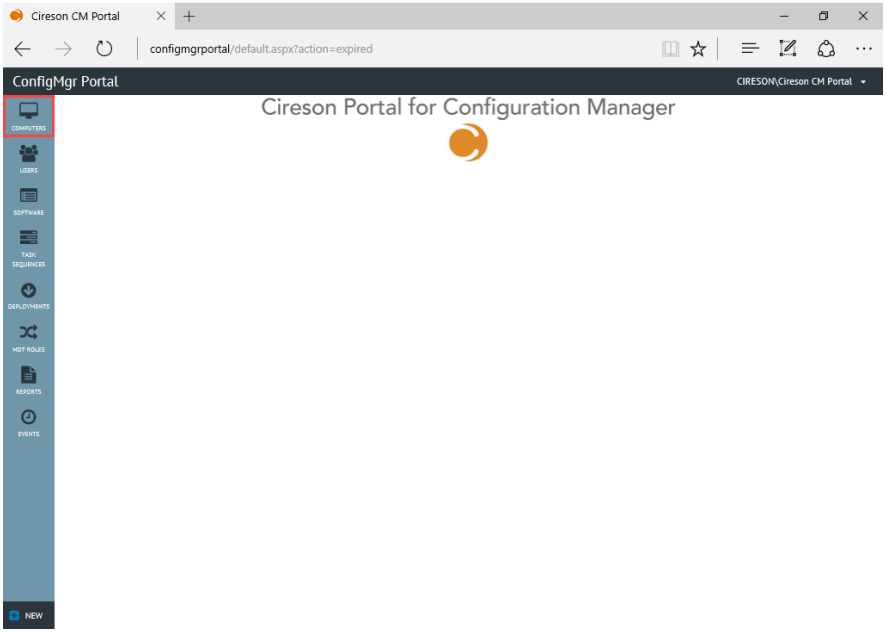
5. Periodically refresh the **Computer** page until the computer is no longer visible.



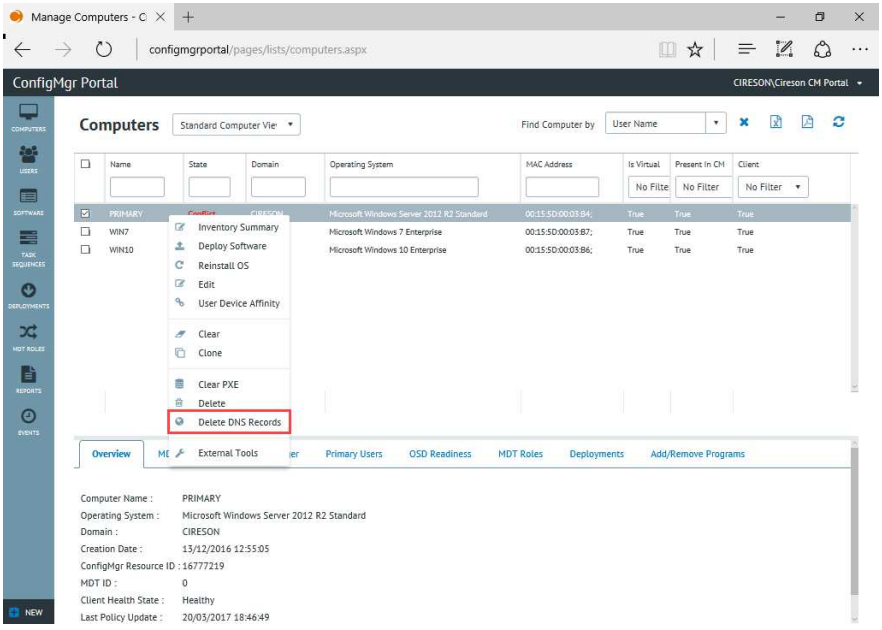
How do I Delete a computer's DNS Records?

To delete a computer's DNS record:

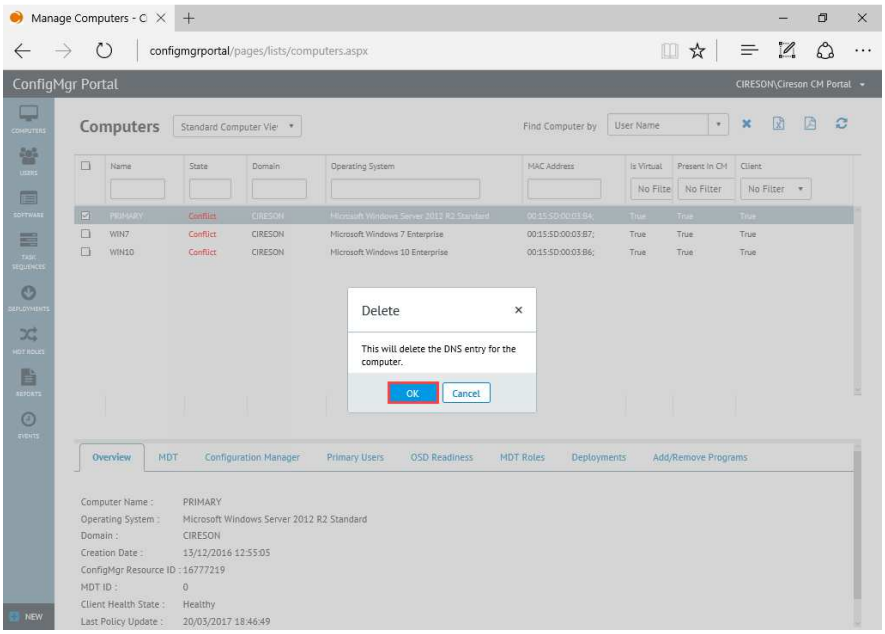
1. Click **Computers** in the **Navigation Menu**



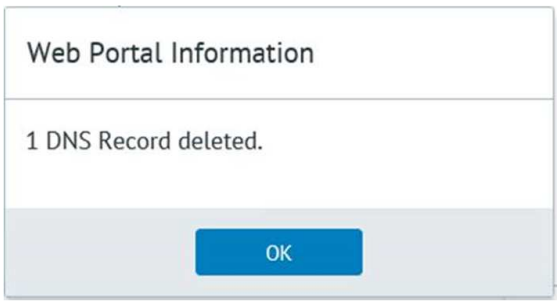
2. Right-click the relevant computer and select **Delete DNS Records**



3. Click **OK** on the **Delete** dialog box stating **This will delete the DNS entry for the computer.**



4. Click **OK** on the **Web Portal Information** dialog box stating **1 DNS Record deleted.**

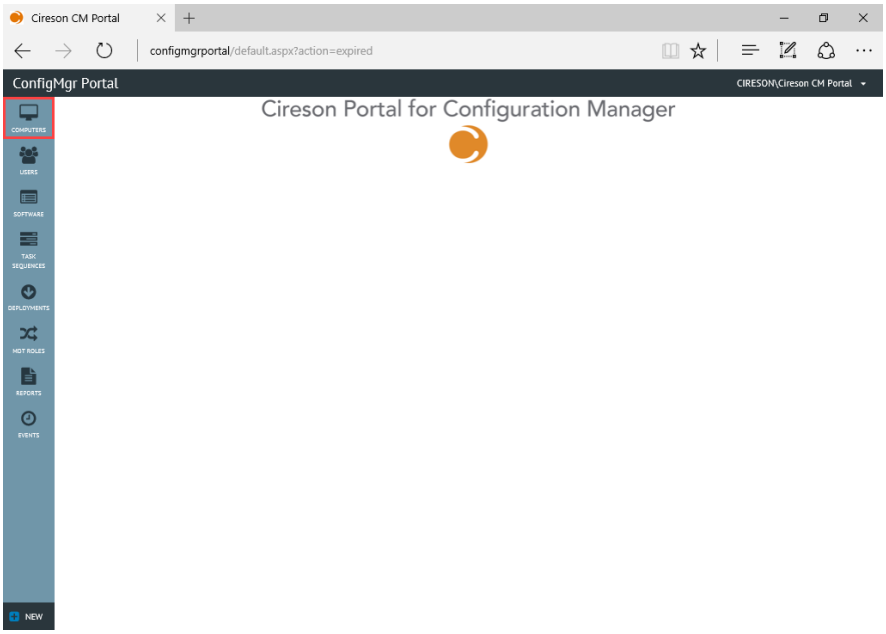


How do I run an External Tool on a computer?

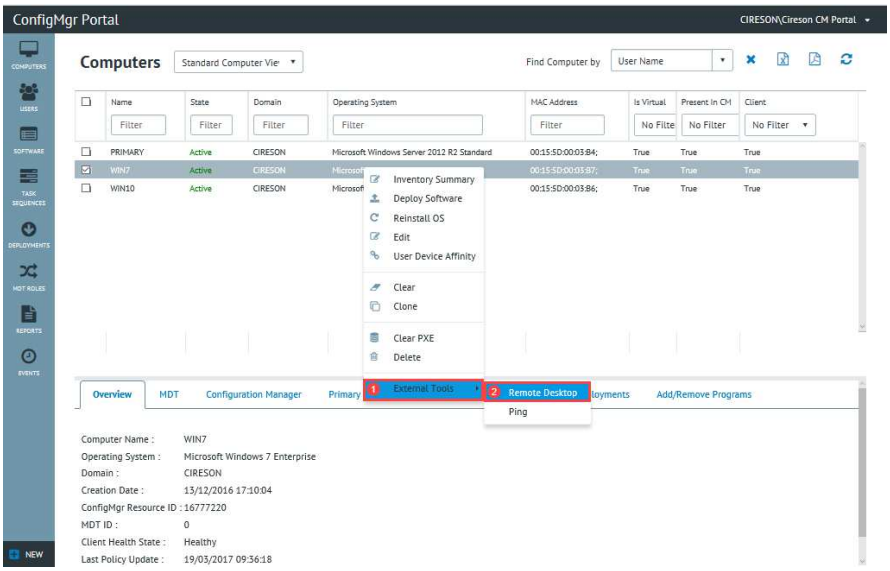
To run an External Tool on a computer:

NOTE: Any External Tools you plan to run need to have been previously added to the Portal as detailed in How do I add a new External Tool?

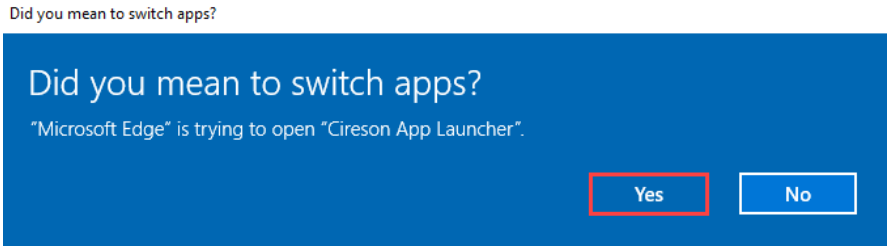
1. Click **Computers** in the **Navigation Menu**



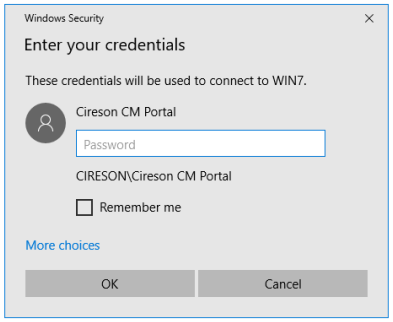
2. Right-click the relevant computer and select **External Tools | <*tool_name*>**



3. If the External Tool uses the Cireson App Launcher, if prompted click **Yes** on the **Did you mean to switch apps?** dialog box.



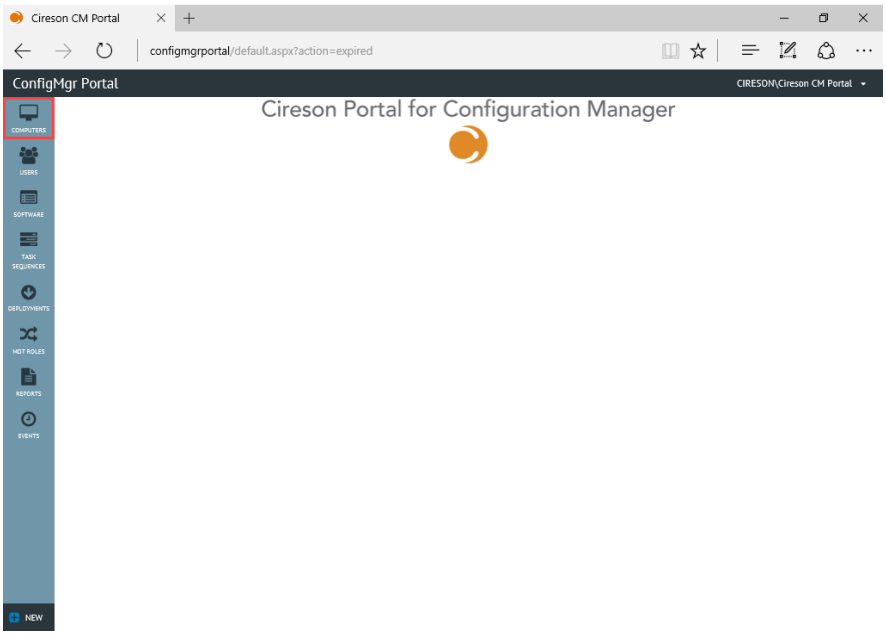
The relevant External Tool will then be run.



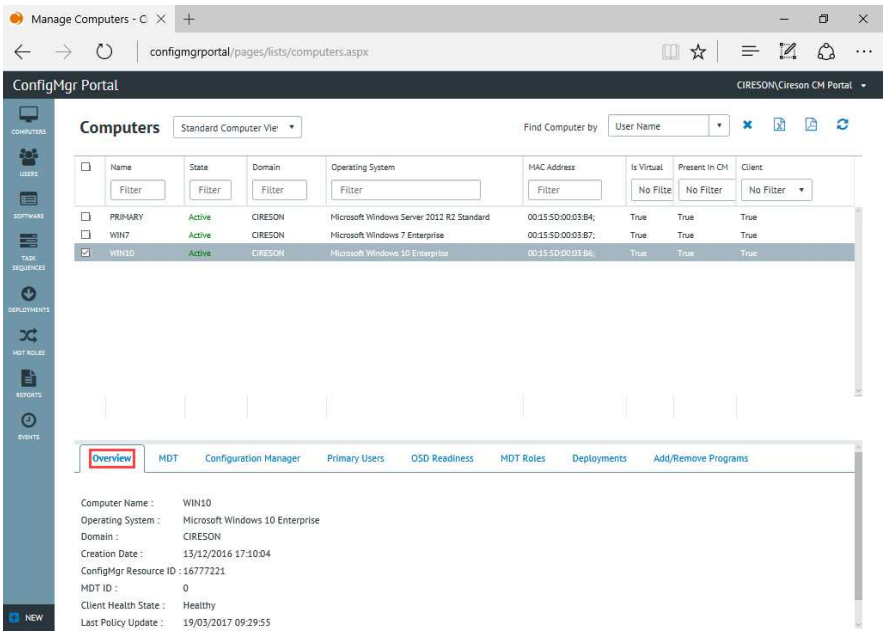
How do I see the basic information for a computer?

To see the basic information for a computer:

1. Click **Computers** in the **Navigation Menu**



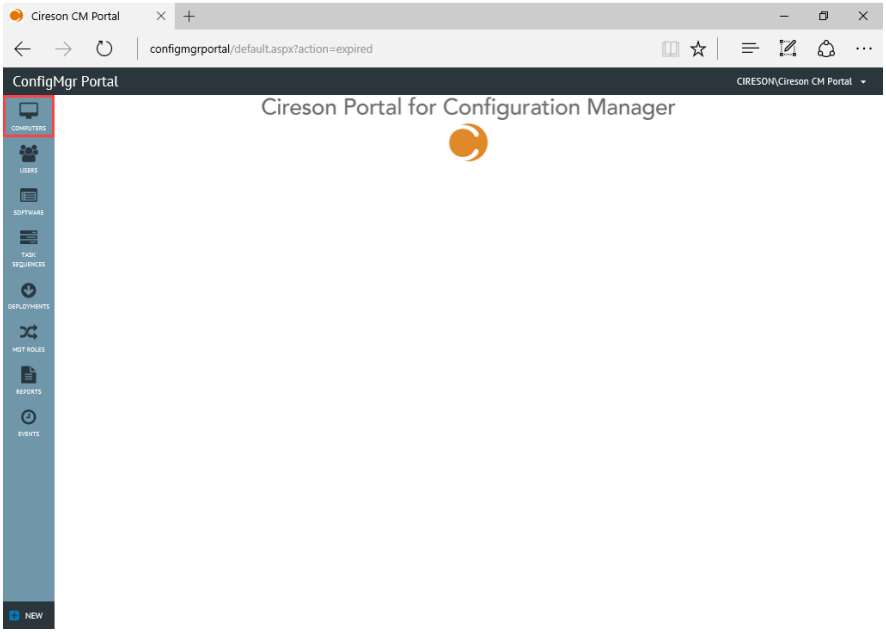
2. Click the relevant computer which will populate the **Overview** tab.



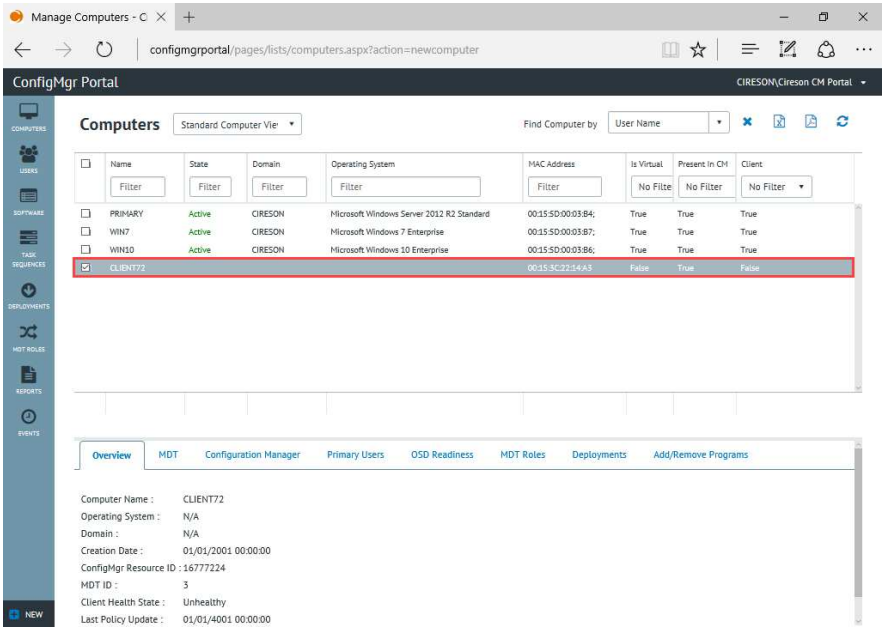
How do I see the MDT computer-related information for a computer?

To see the MDT computer-related information for a computer:

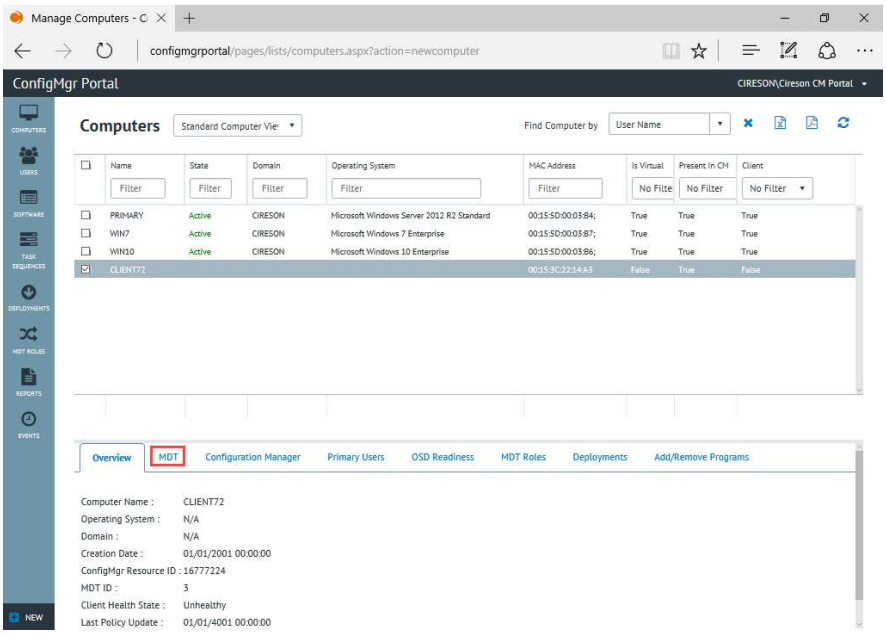
1. Click **Computers** in the **Navigation Menu**



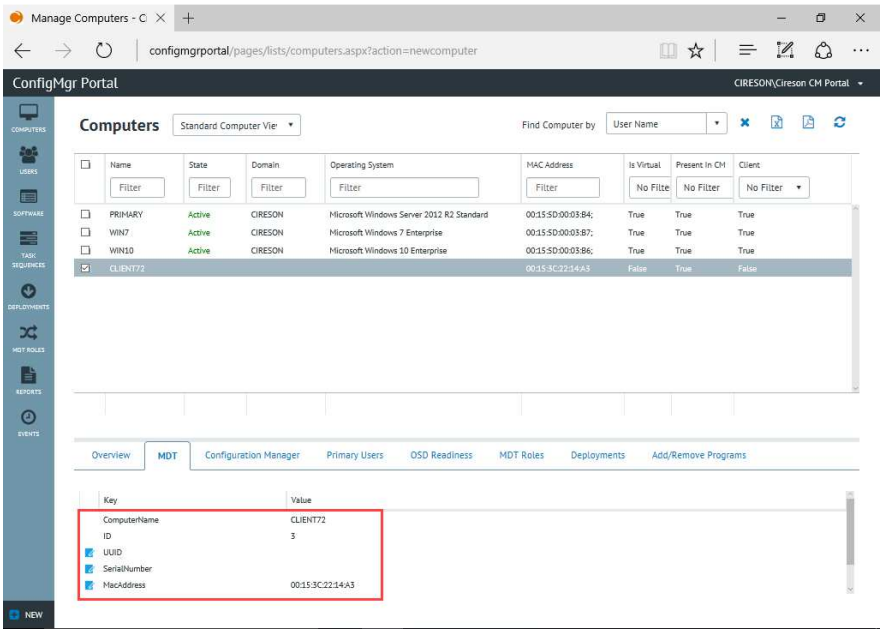
2. Click the relevant computer.



3. Click the **MDT** tab.



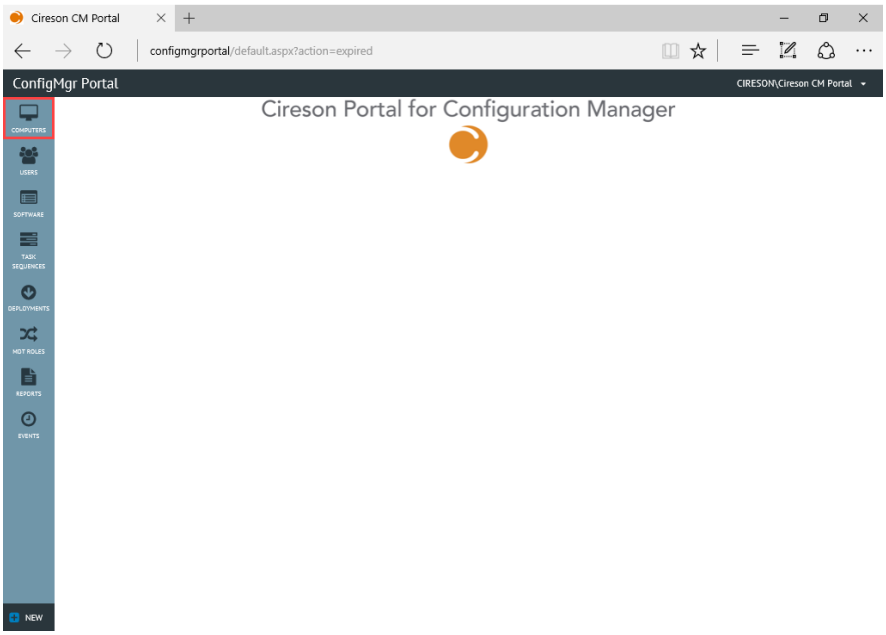
The **MDT** tab shows the information for the computer as it is stored in the MDT database.



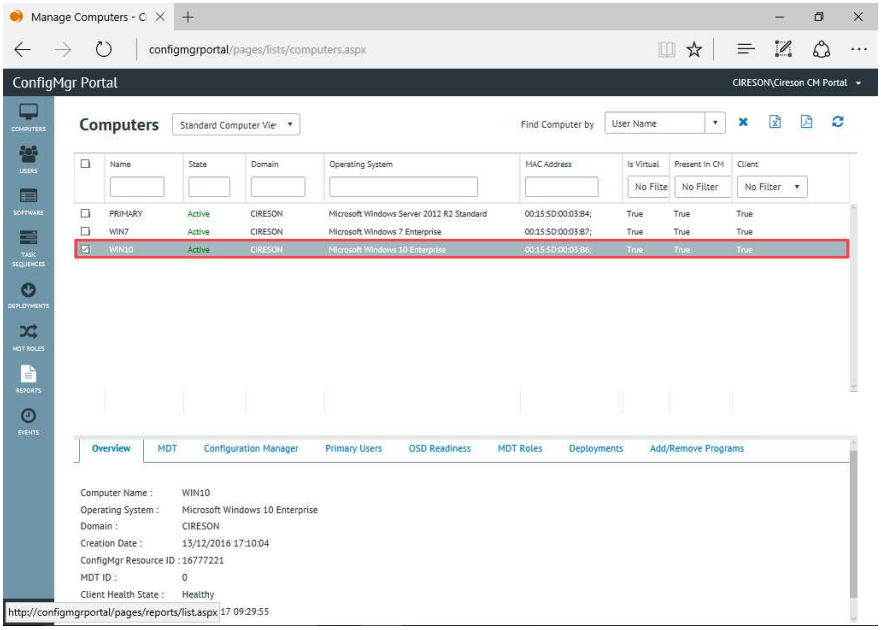
How do I see the Configuration Manager-related information for a computer?

To see the Configuration Manager-related information for a computer:

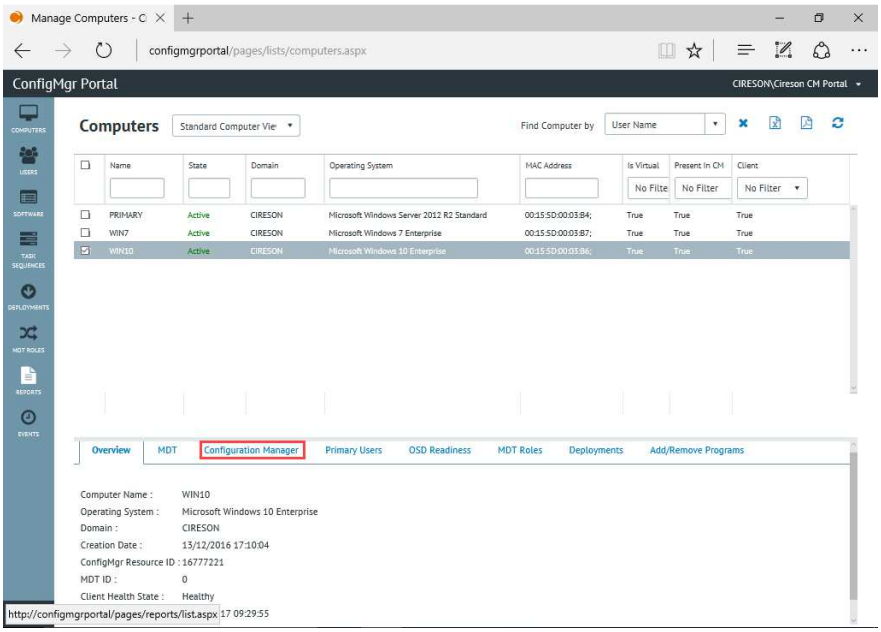
1. Click **Computers** in the **Navigation Menu**



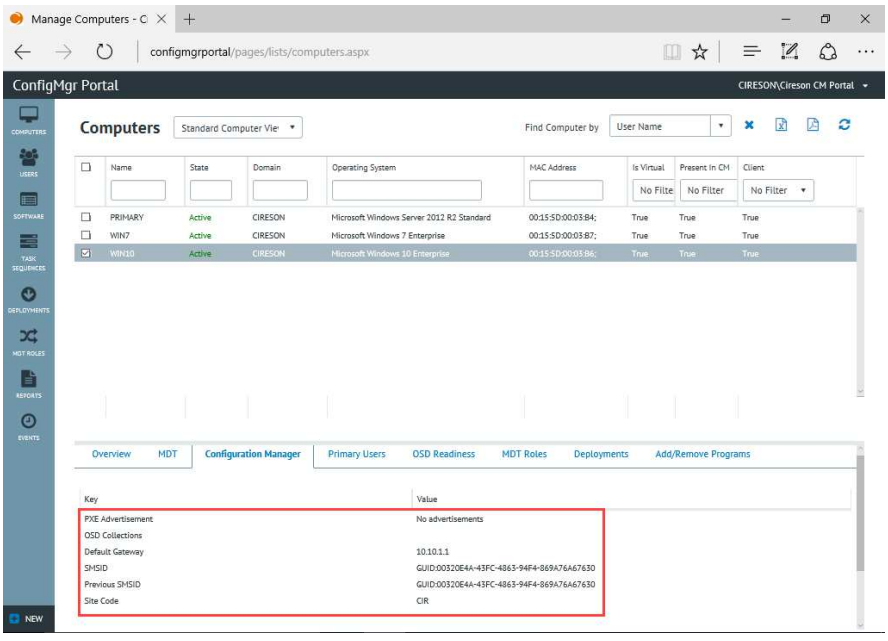
2. Click the relevant computer.



3. Click the **Configuration Manager** tab.



The ConfigMgr related information for the selected computer will be displayed.

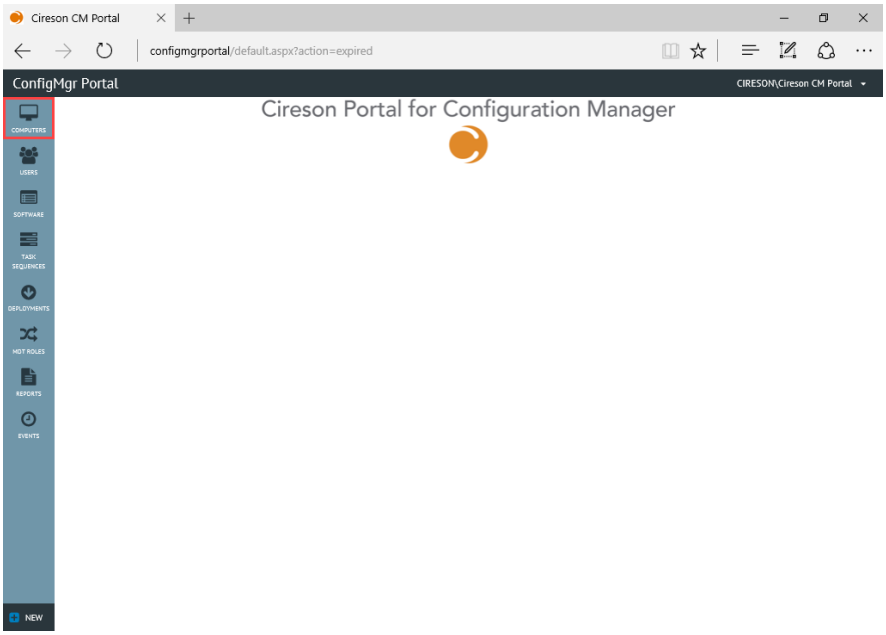


How do I see the Primary Users for a computer?

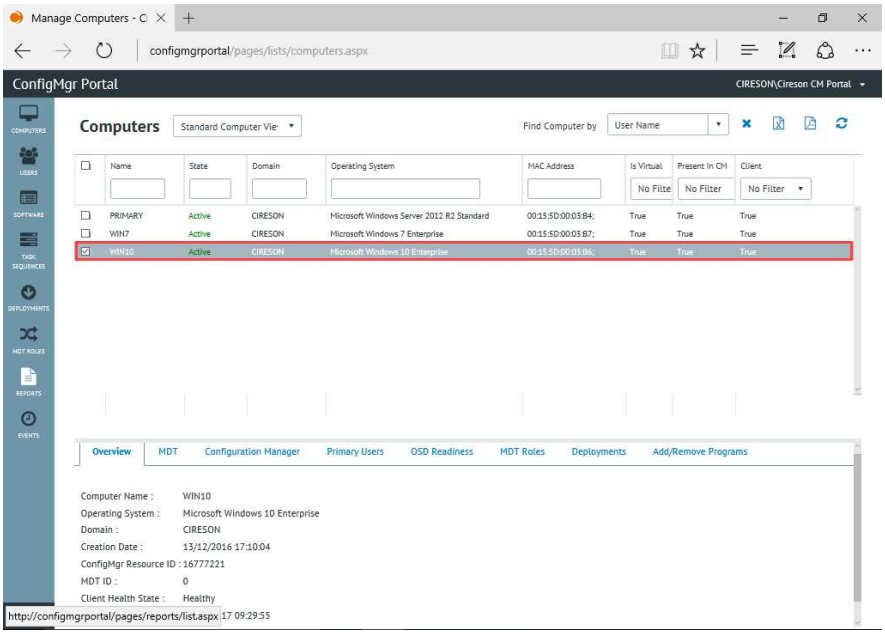
To see the Primary Users for a computer:

NOTE: You can also right-click on a computer and select **User Device Affinity** to see the Primary Users of a computer as detailed in How do I view the User Device Affinity relationships for a computer?

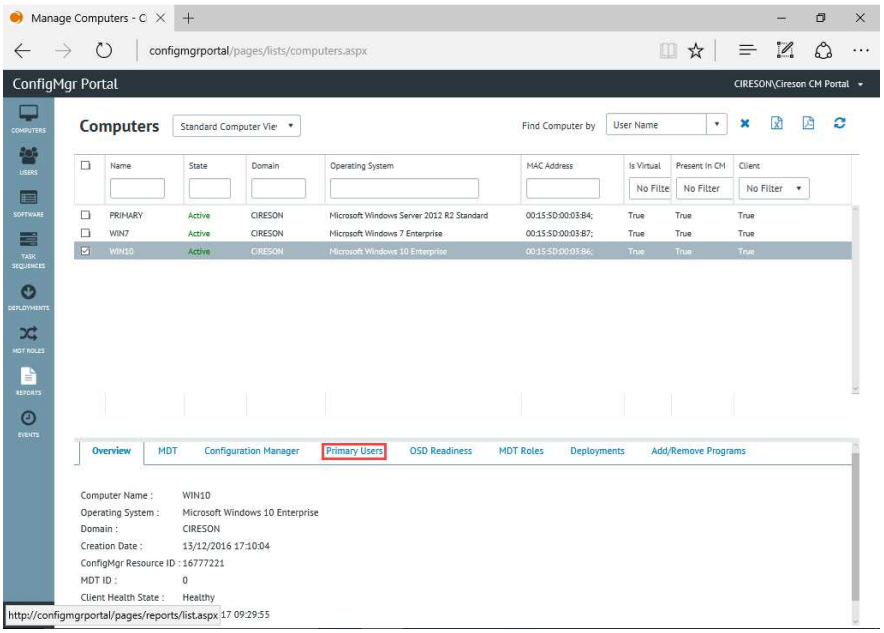
1. Click **Computers** in the **Navigation Menu**



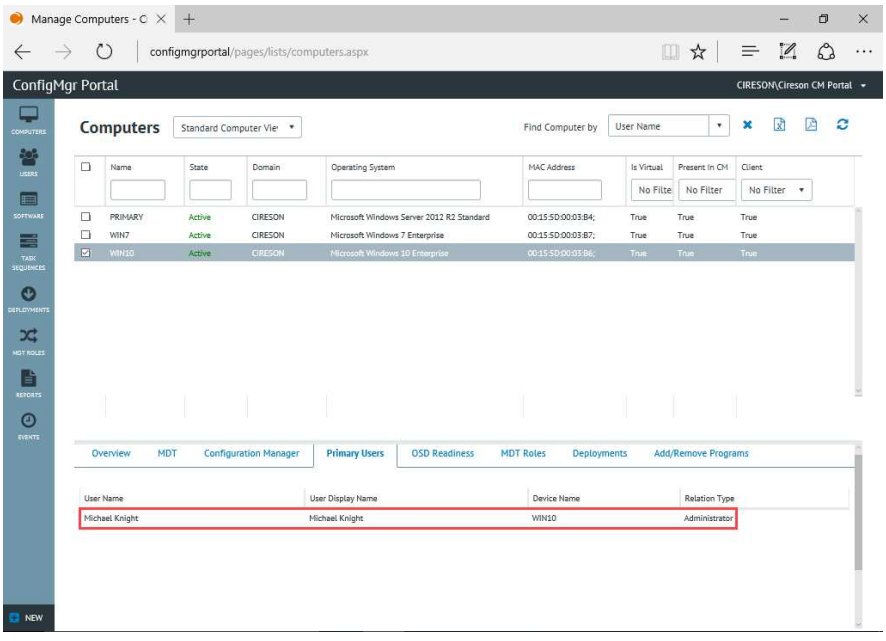
2. Click the relevant computer.



3. Click the **Primary Users** tab.



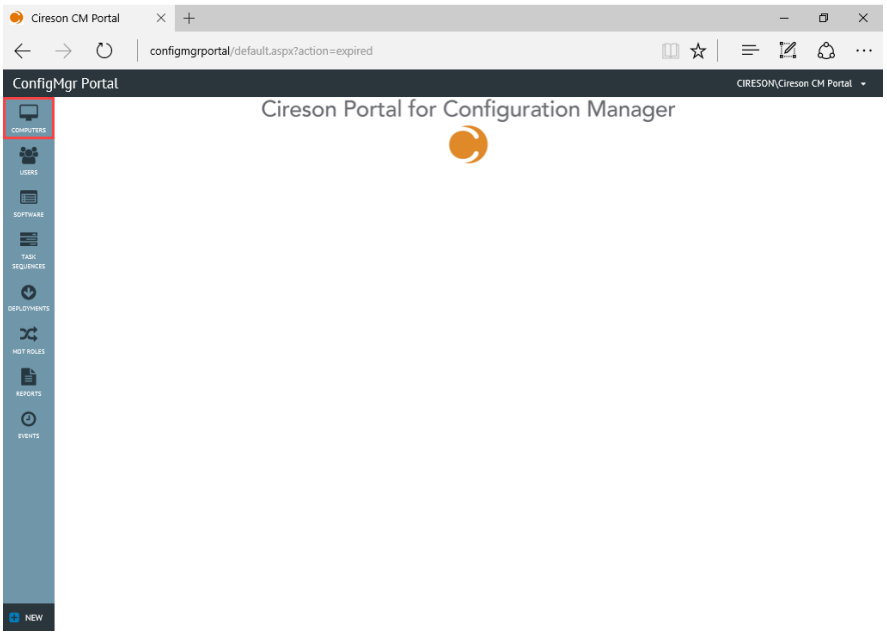
The Primary Users for the selected computer will be displayed.



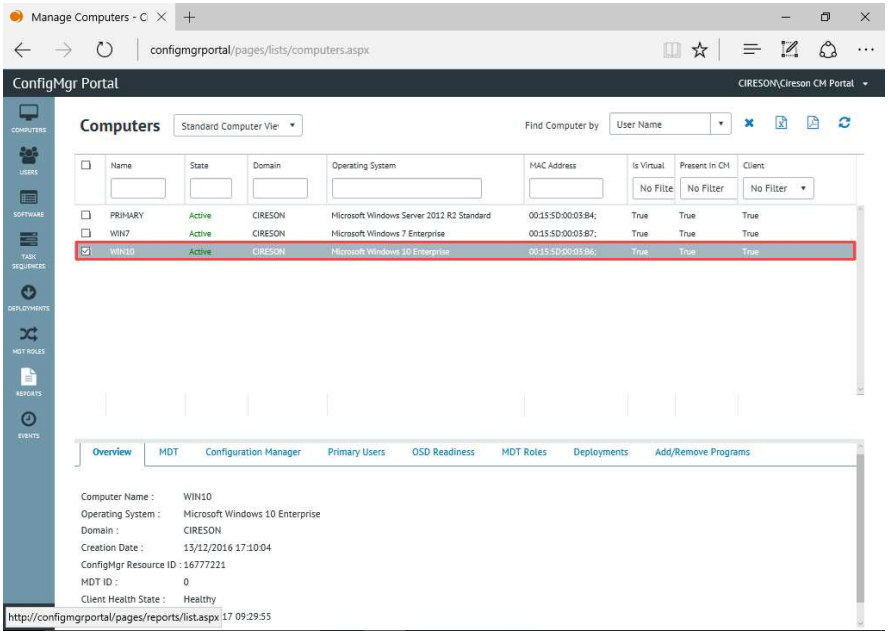
How do I see the OSD Readiness information for a computer?

To see the OSD Readiness information for a computer:

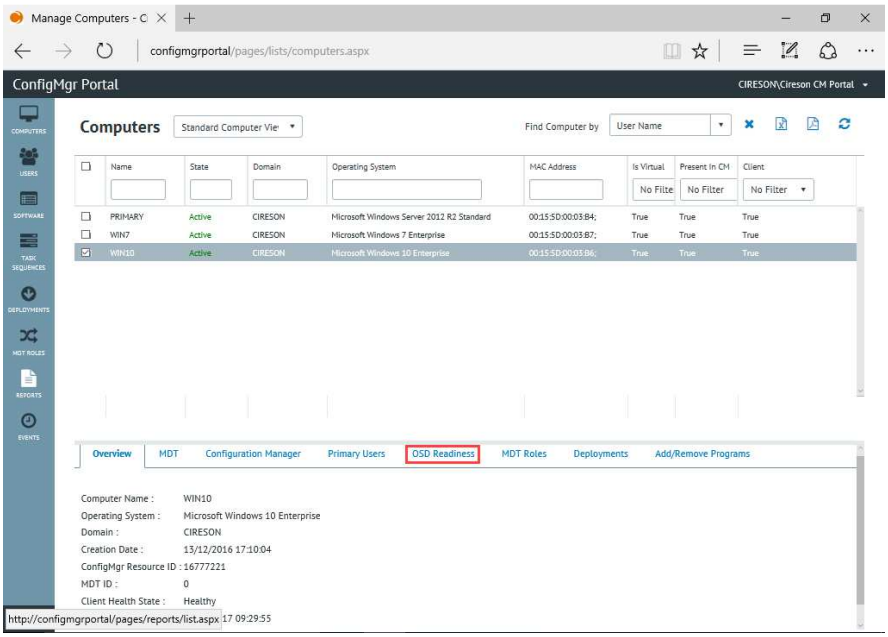
1. Click **Computers** in the **Navigation Menu**



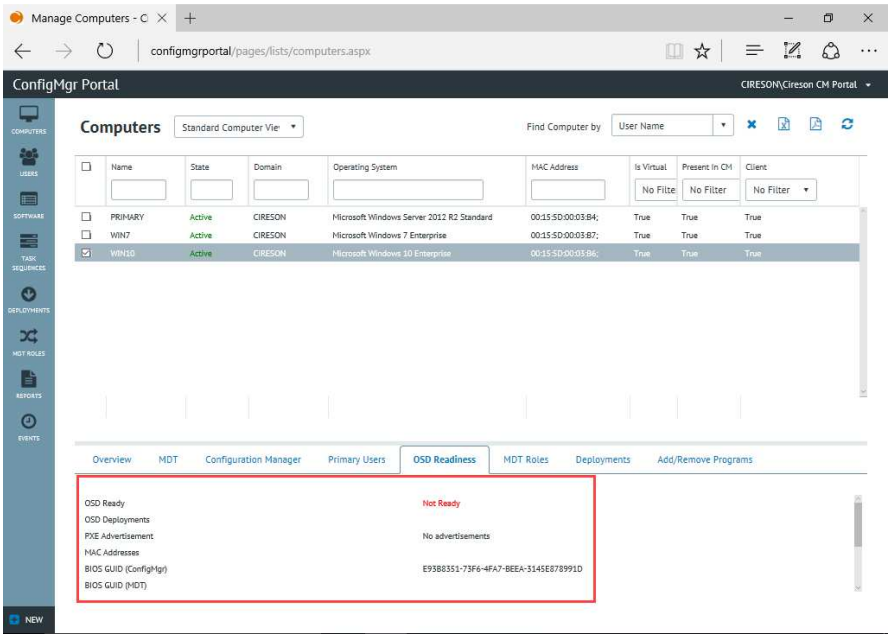
2. Click the relevant computer.



3. Click the **OSD Readiness** tab.



The OSD Readiness information for the selected computer will be displayed.



NOTE: Hovering your mouse over the result for the **OSD Ready** field will provide you additional information.

The principle fields on this tab are explained in the table below:

Field	Description
OSD Ready	Will either be **Ready** (green) or **Not Ready** (red) according to the computer's state. The value will be **Ready** when if the following are true: • The computer has a mandatory advertisement assignment of an OS Task Sequence. • No PXE Advertisements exists on the computer. • The MDT value **Allow Install** is true.
OSD Deployments	Displays any mandatory advertisements for an OS Task Sequence.
PXE Advertisement	Displays any PXE advertisement and their dates.

The data in this list is collected and calculated dynamically. As a result, the collection time can take several seconds.

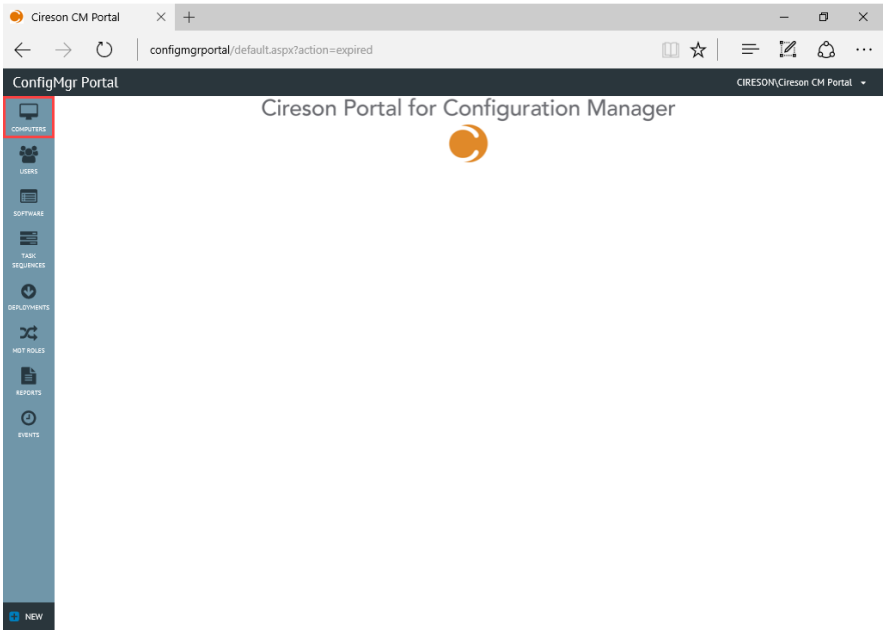
If your ConfigMgr environment has multiple sites, the **OSD Deployments**, **BIOS GUID** and **MAC Addresses** are displayed for both the Central/Central Administration Site and Primary Site the computer belongs to.

If any duplicates are found, these are displayed.

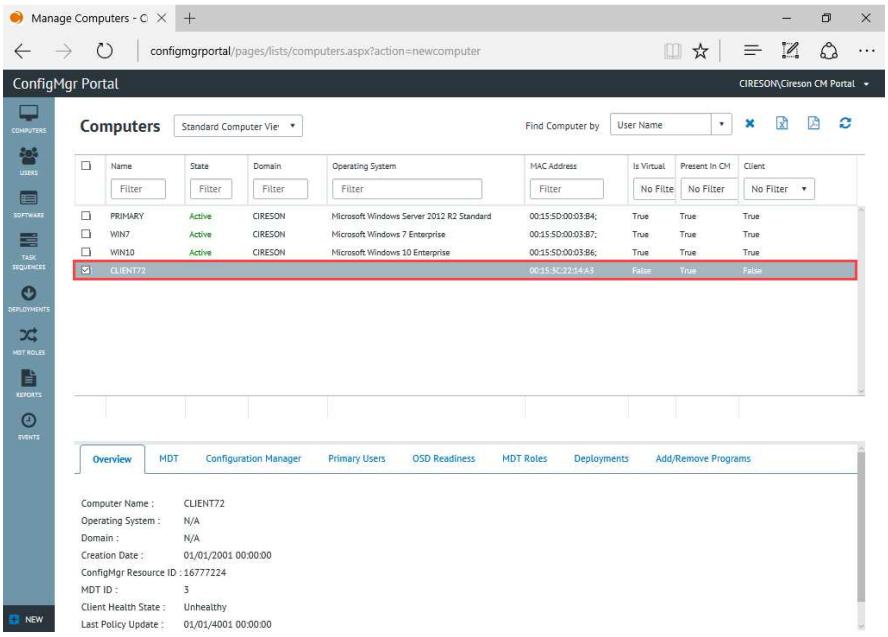
How do I see the MDT Role assignments for a computer?

To see the MDT Role assignments for a computer:

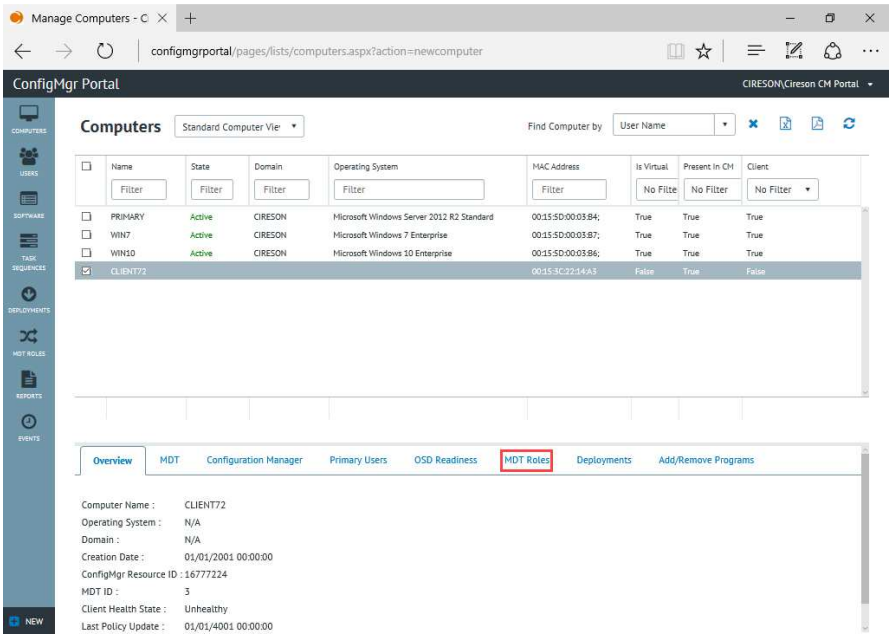
1. Click **Computers** in the **Navigation Menu**



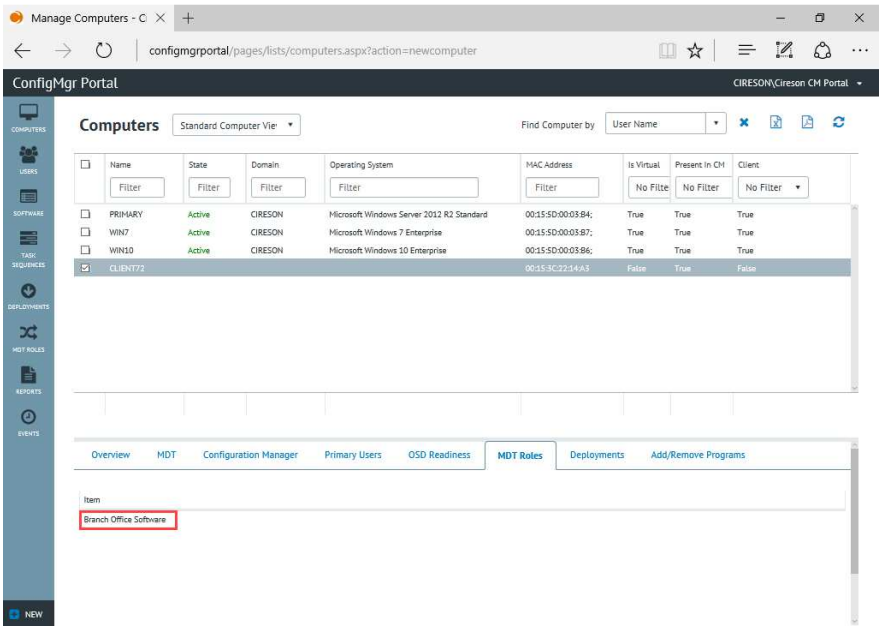
2. Click the relevant computer.



3. Click the **MDT Roles** tab.



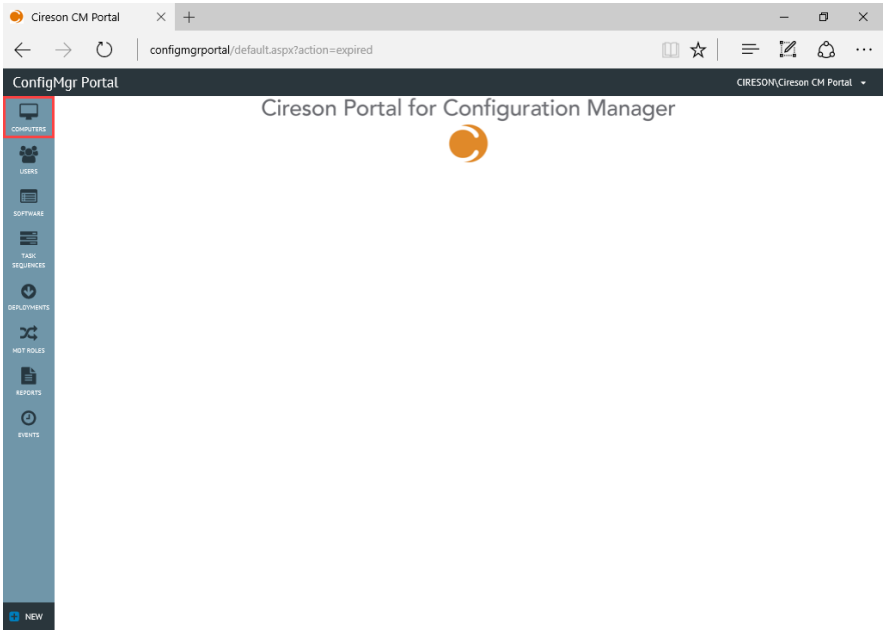
The MDT Role assignments for the selected computer will be displayed.



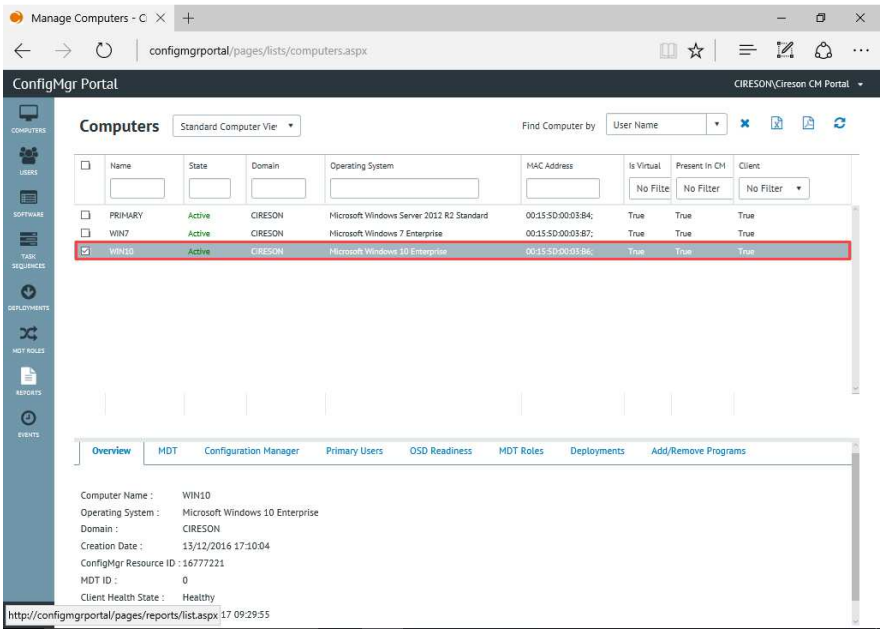
How do I see the Deployments targeted to a computer?

To see the deployments targeted to a computer:

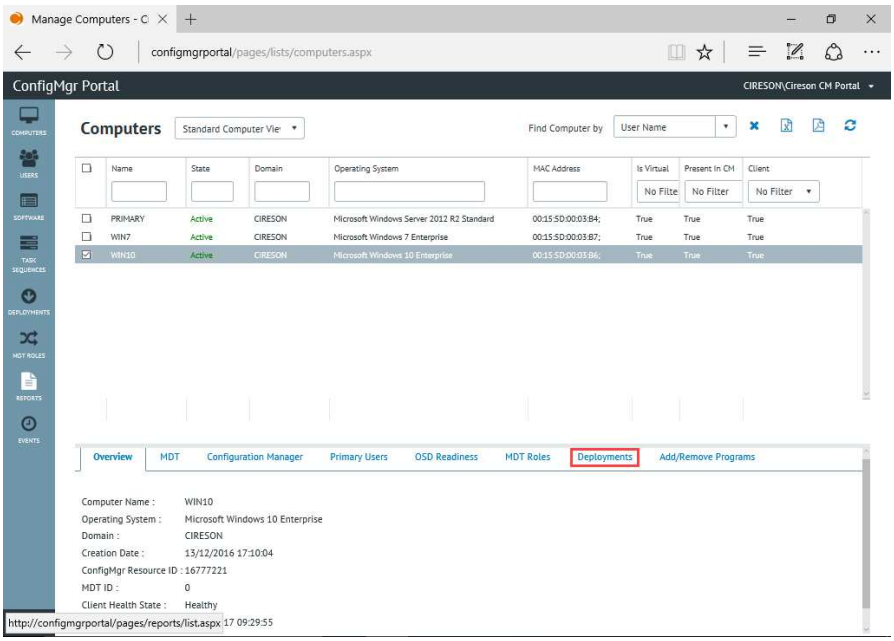
1. Click **Computers** in the **Navigation Menu**



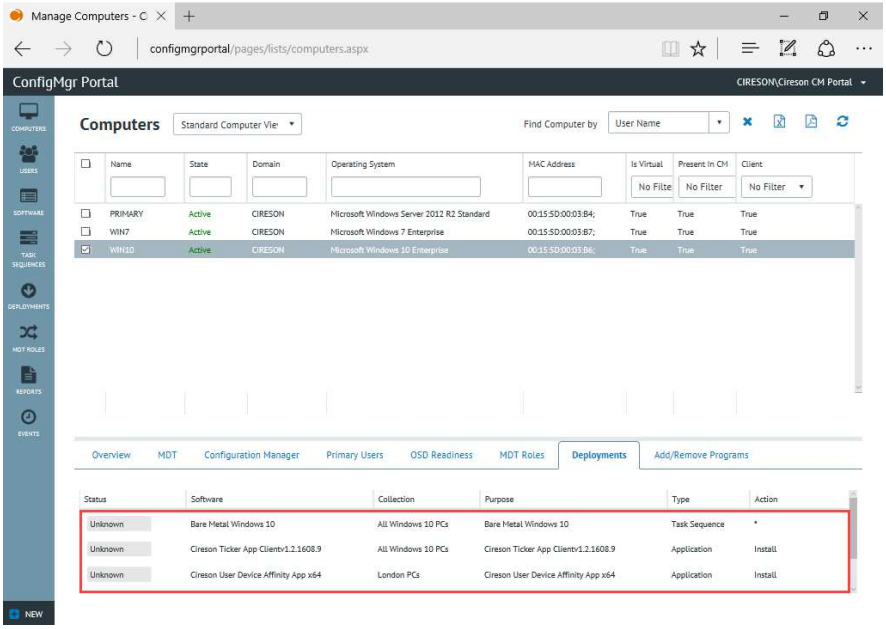
2. Click the relevant computer.



3. Click the **Deployments** tab.



The deployments targeted to the selected computer will be displayed along with the last reported status for each deployment for that computer.

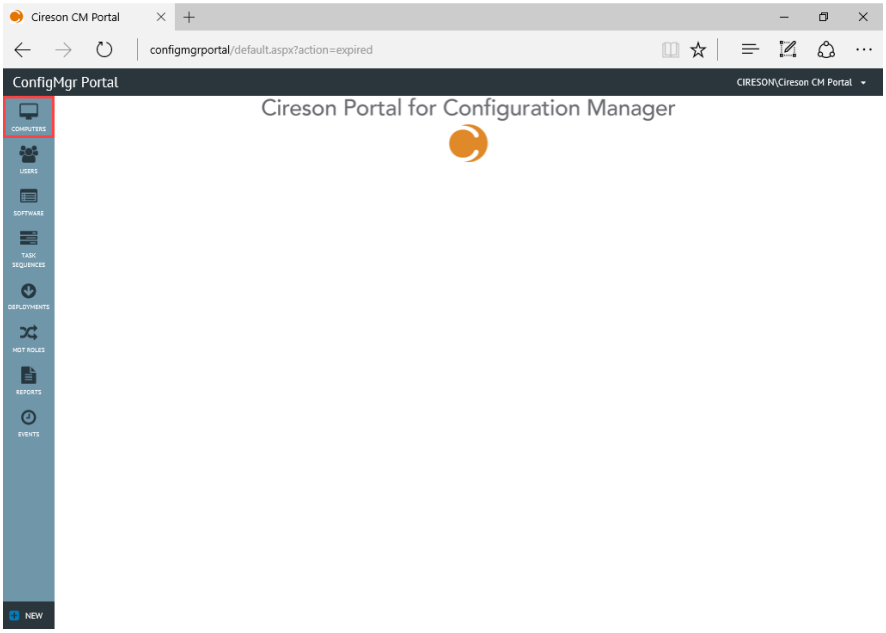


How do I see the Add/Remove Programs information for a computer?

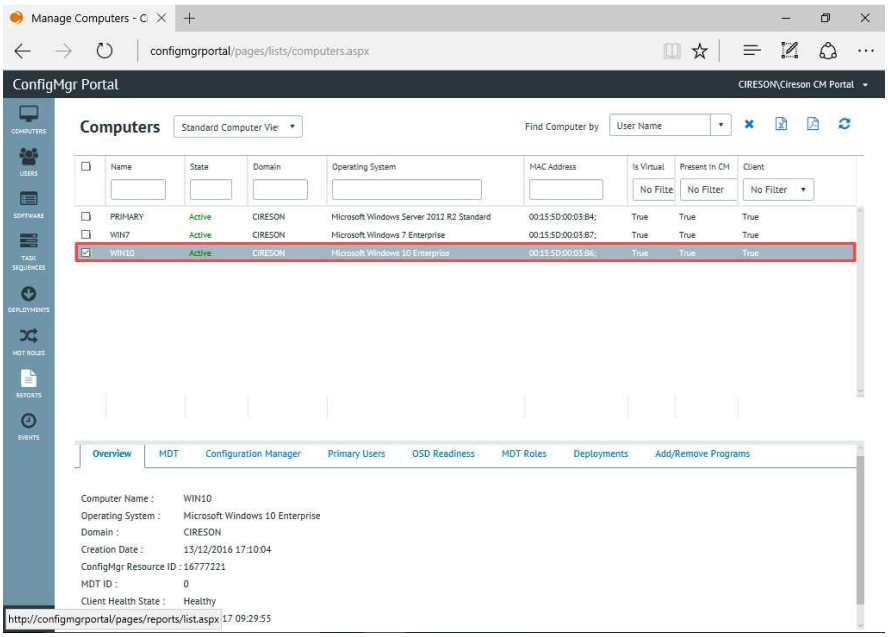
To see the Add/Remove Programs information for a computer:

NOTE: The same information is available from the **Software** tab of the Inventory Summary, as detailed in How do I see an Inventory Summary for a computer?

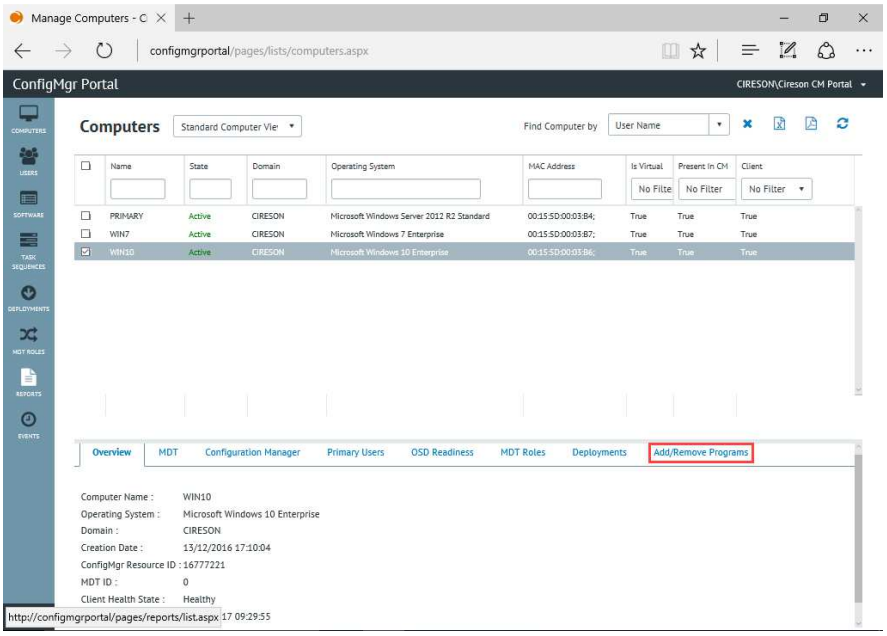
1. Click **Computers** in the **Navigation Menu**



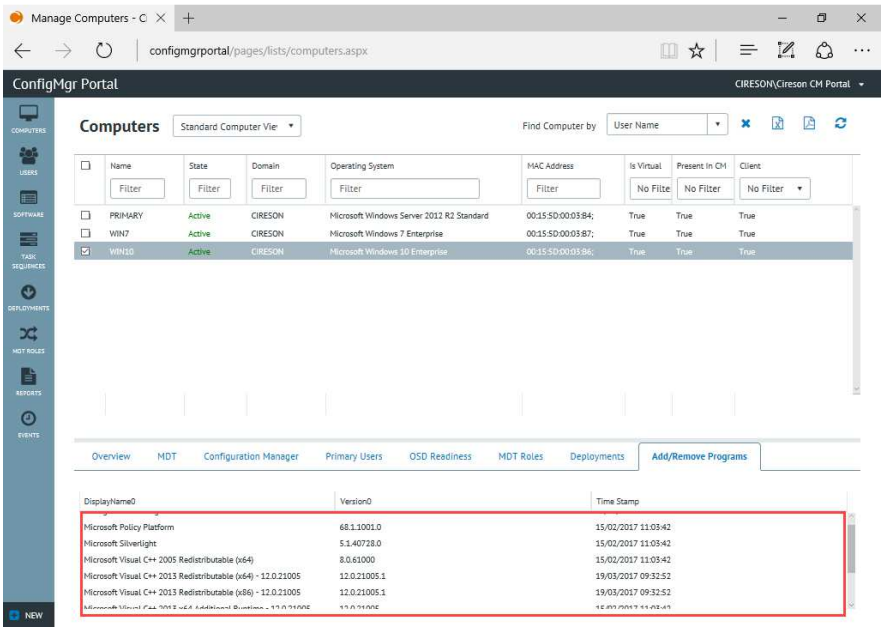
2. Click the relevant computer.



3. Click the **Add/Remove Programs** tab.



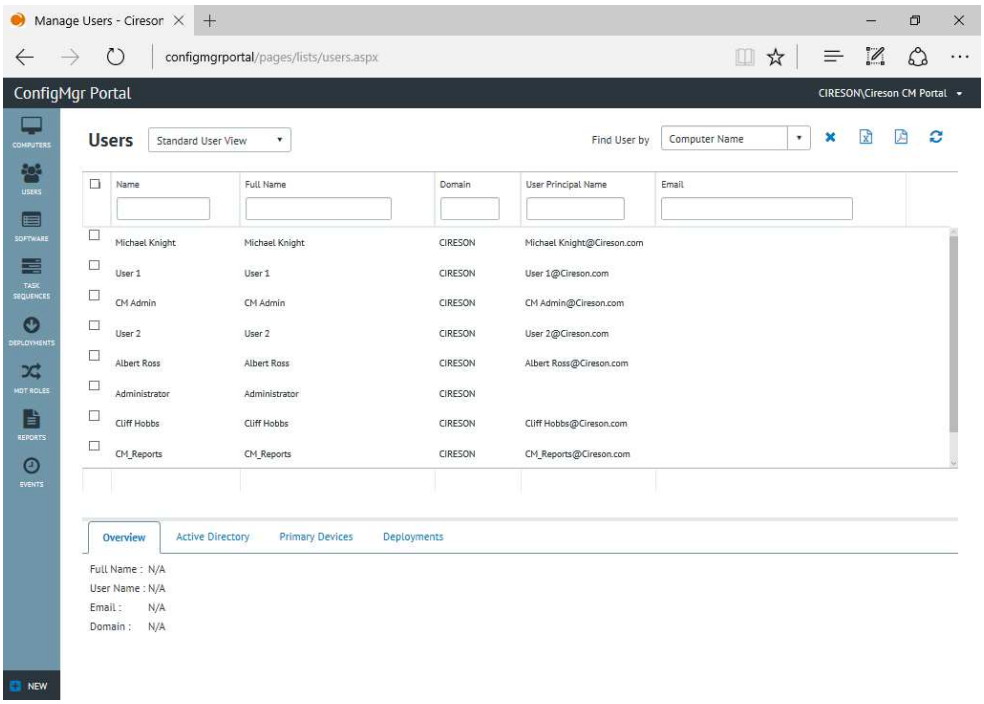
The data retrieved from Add/Remove Programs for the selected computer will be displayed.



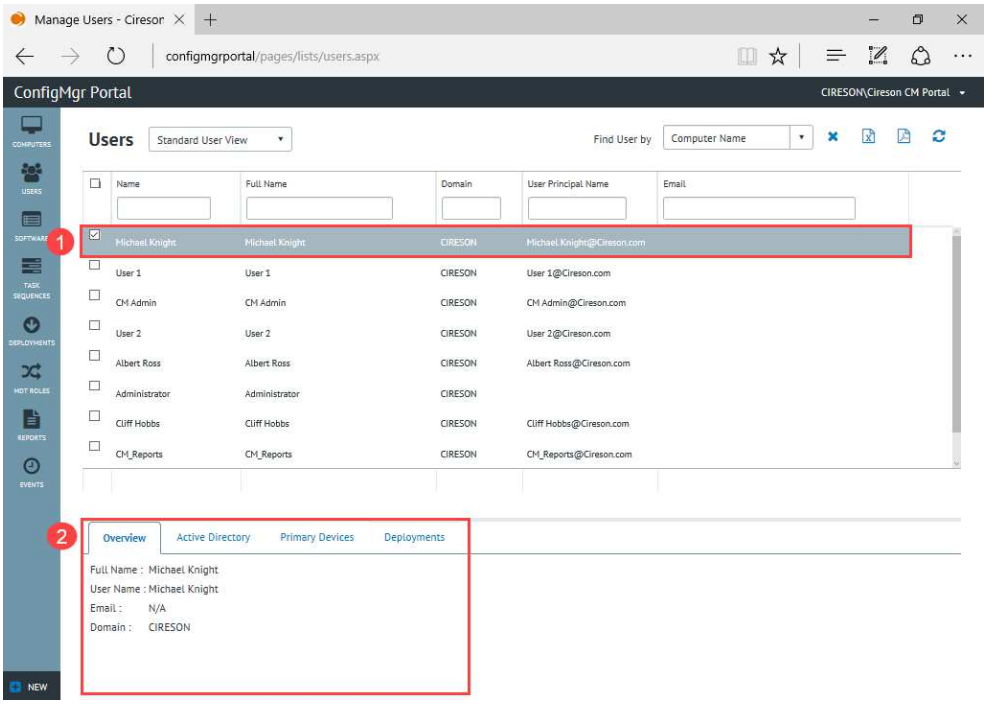
Managing Users

Overview

When you click **Users** on the **Navigation Menu**, the **Users** page is displayed.



When you select a user in the **Content List** area, the **Content Detail** pane populates the series of tabs that contain more detailed information that is relevant to the selected user.



User Management-Related Tasks

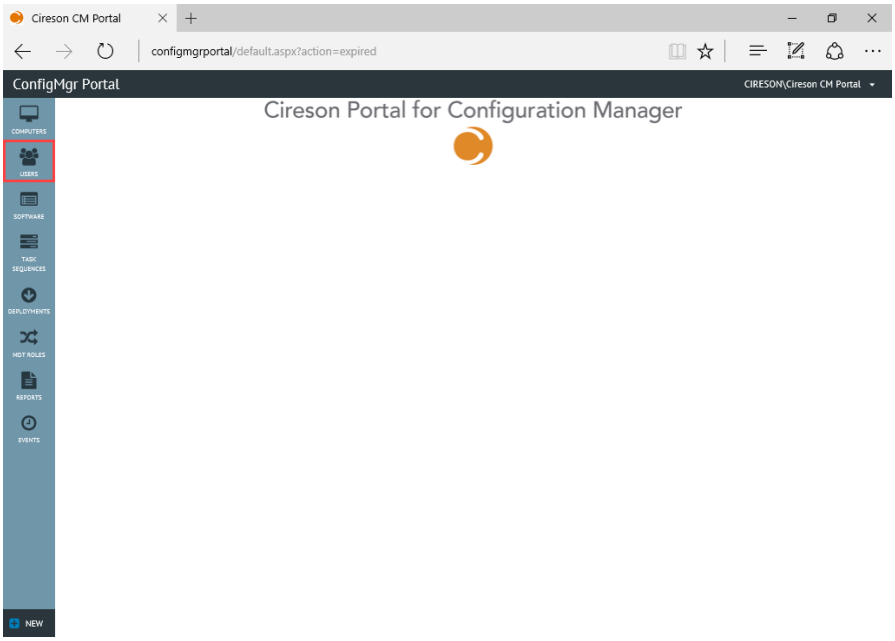
This section details the tasks related to managing Users in the Portal. A list of tasks is presented first which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

- How do I deploy software to a user?
- How do I see basic information for a user?
- How do I see Active Directory-related information for a user?
- How do I see a User's Primary Devices?
- How do I see the Deployments targeted to a user?
- How do I see the User Device Affinity relationships for a user?
- How do I add another device to a user's User Device Affinity?
- How do I delete a device from a user's User Device Affinity relationship?

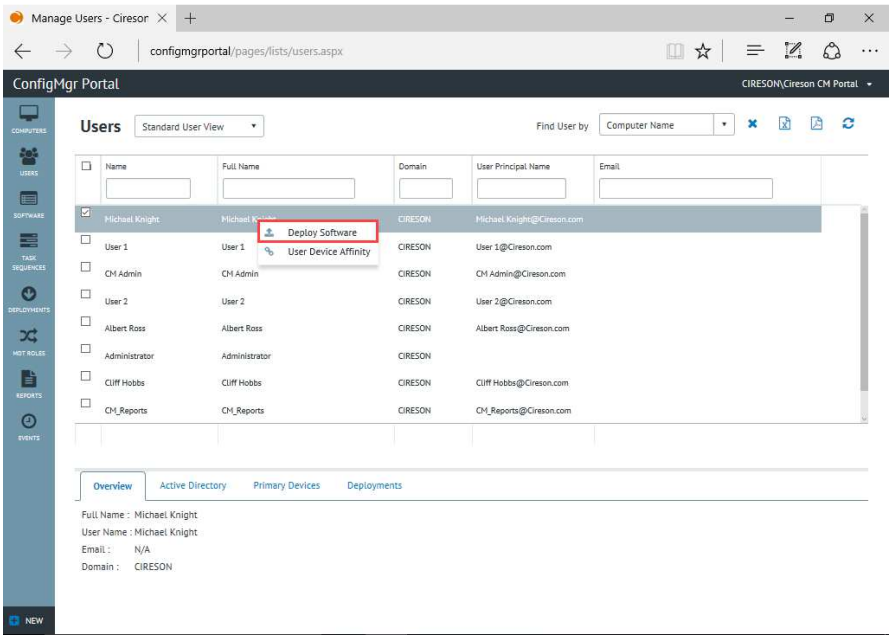
How do I deploy software to a user?

To deploy software to a user:

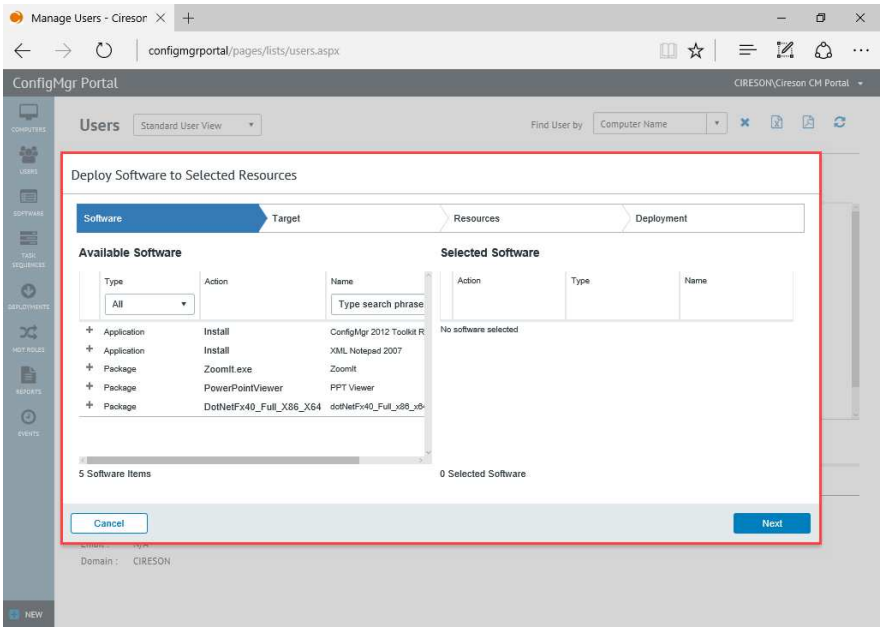
1. Click **Users** in the **Navigation Menu**



2. Right-click the relevant user and select **Deploy Software**



The **Deploy Software to Selected Resources** wizard will be loaded.



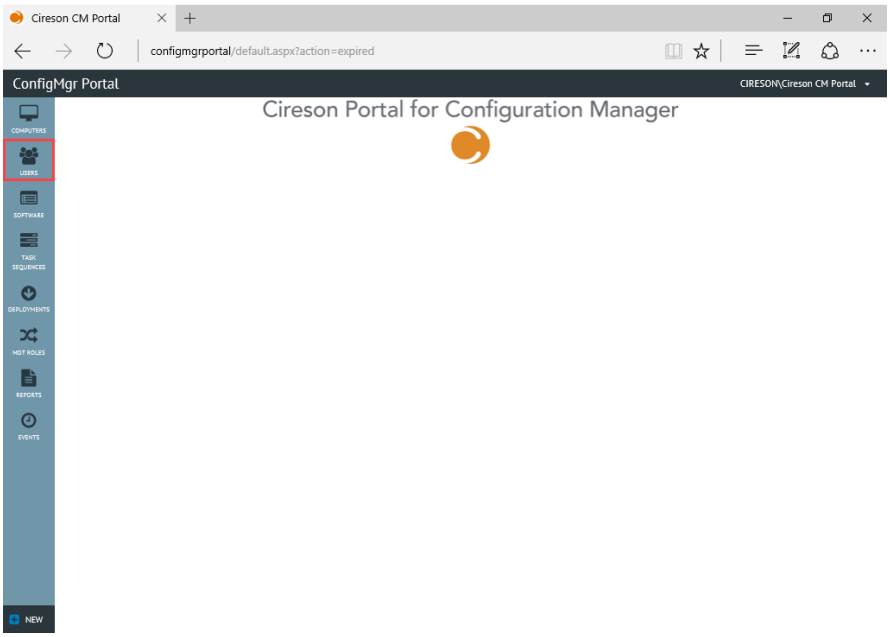
3. Work your way through the wizard following the relevant procedure below:

- How do I create a new Deployment to a new collection?
- How do I deploy software to an existing collection?

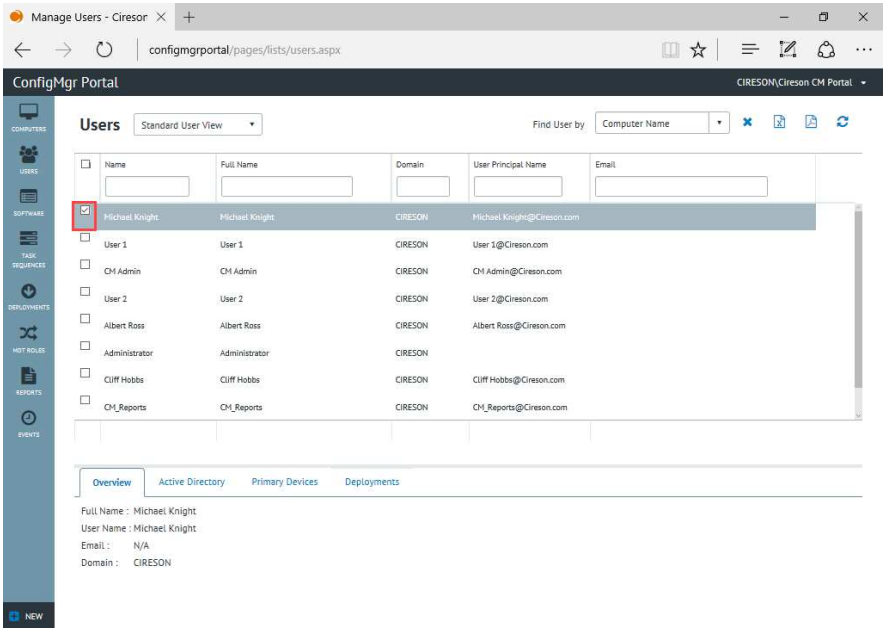
How do I see basic information for a user?

To see basic information for a user:

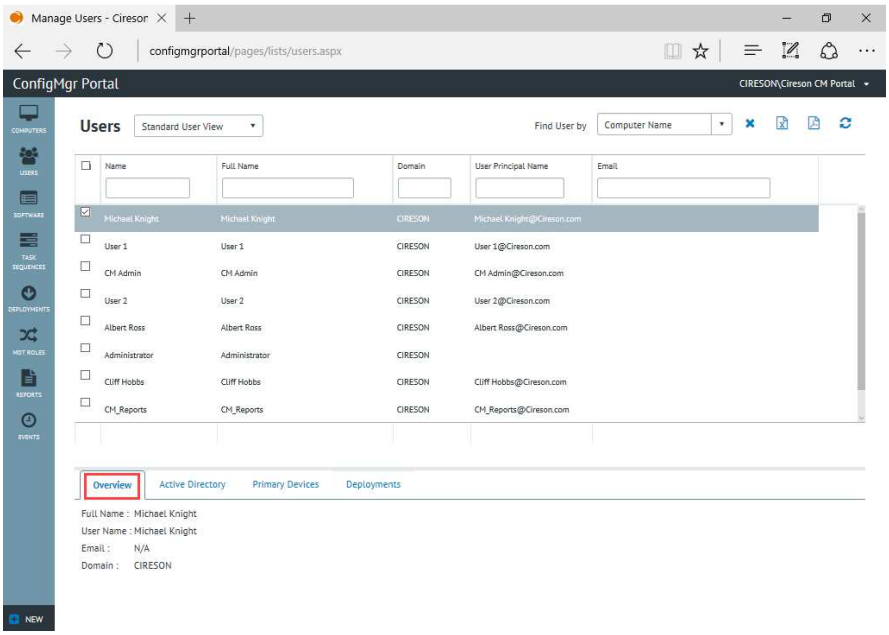
1. Click **Users** in the **Navigation Menu**



2. Select the relevant user.



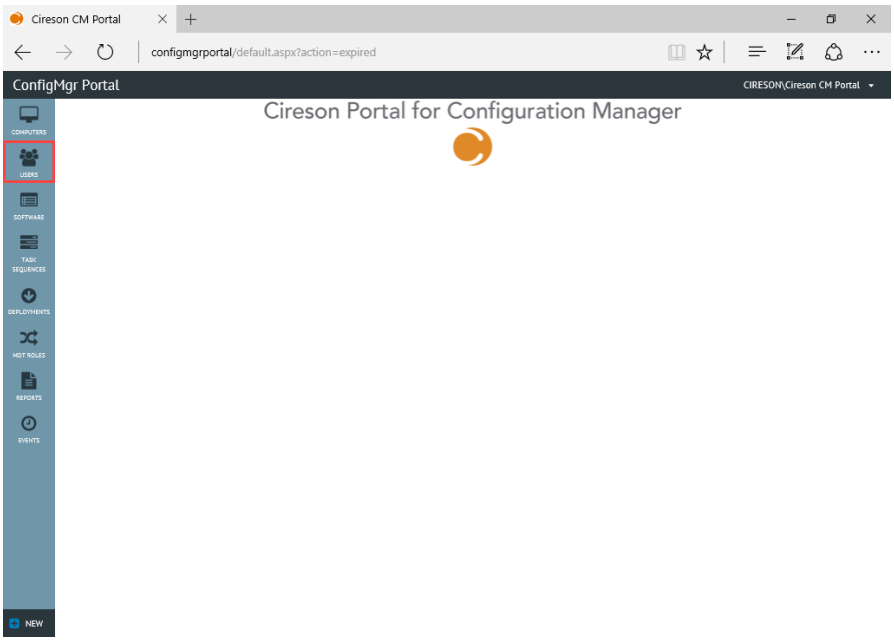
The **Overview** tab will be populated.



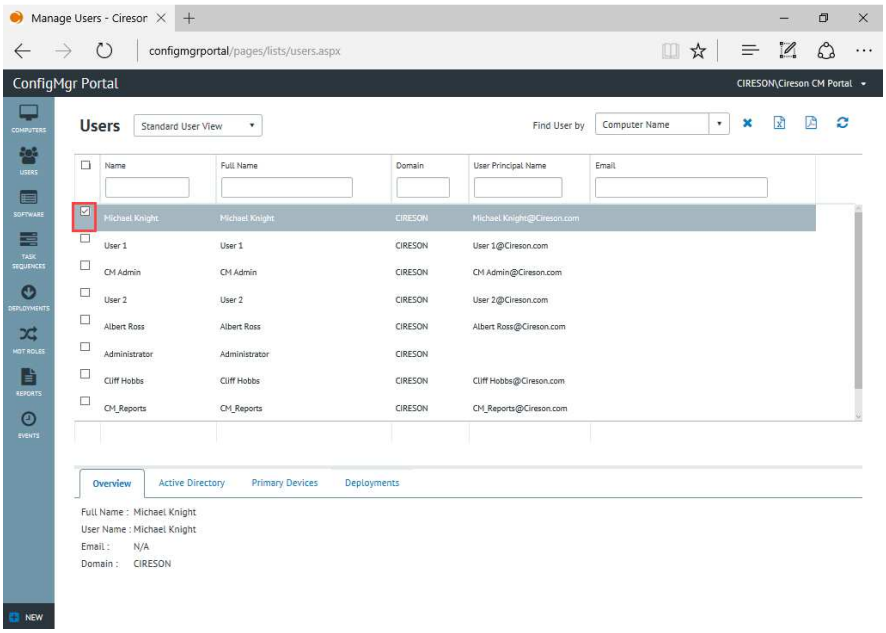
How do I see Active Directory-related information for a user?

To see Active Directory-related information for a user:

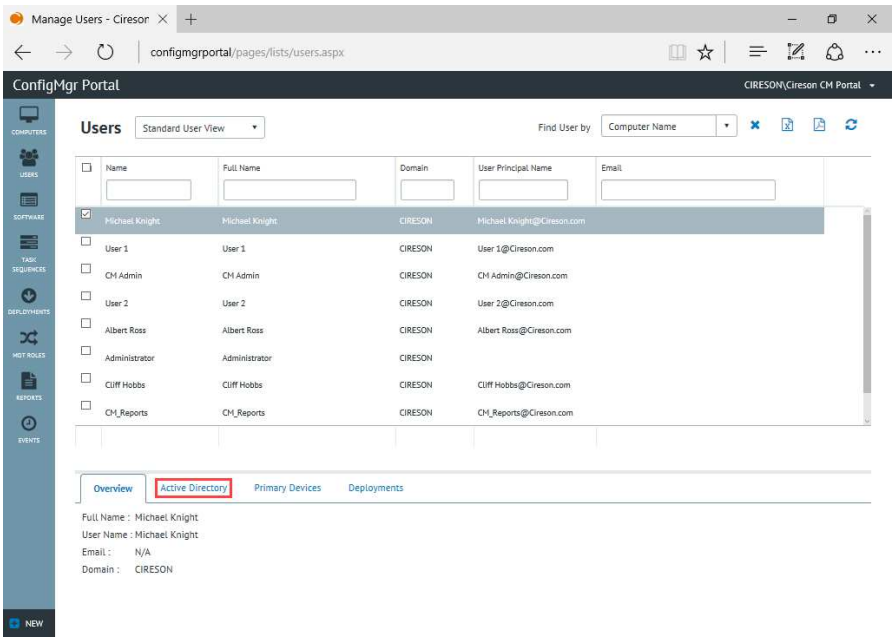
1. Click **Users** in the **Navigation Menu**



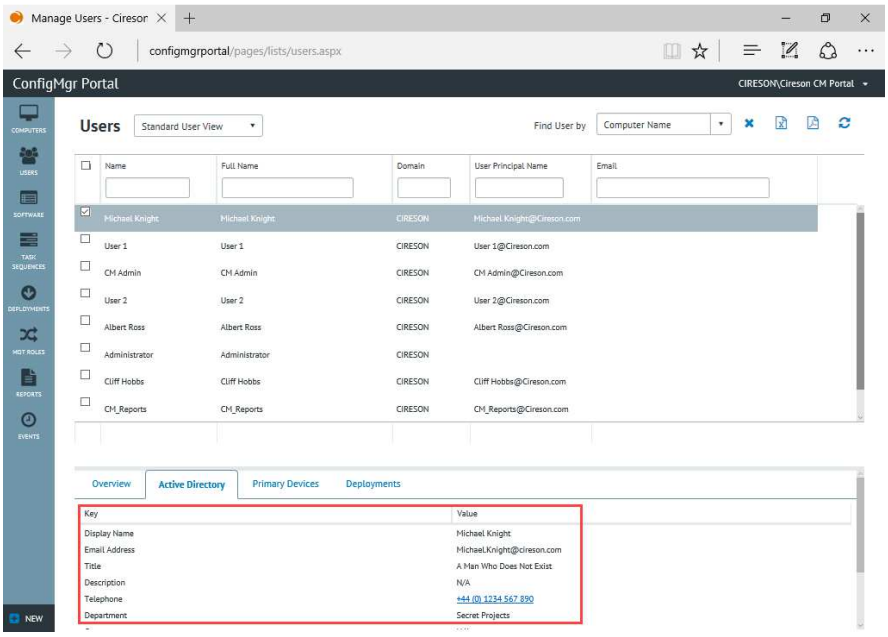
2. Select the relevant user.



3. Click the **Active Directory** tab.



The **Active Directory** tab will be populated.

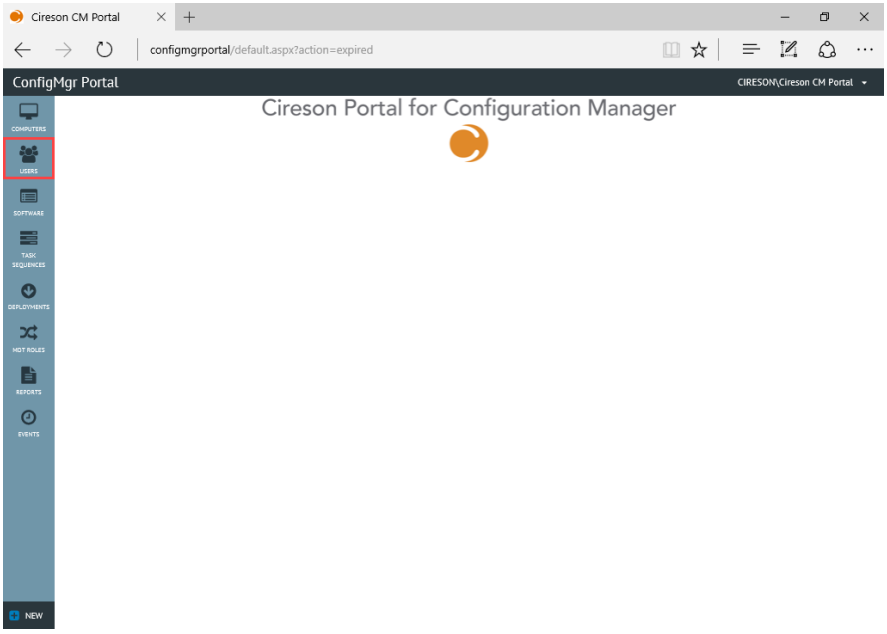


How do I see a User's Primary Devices?

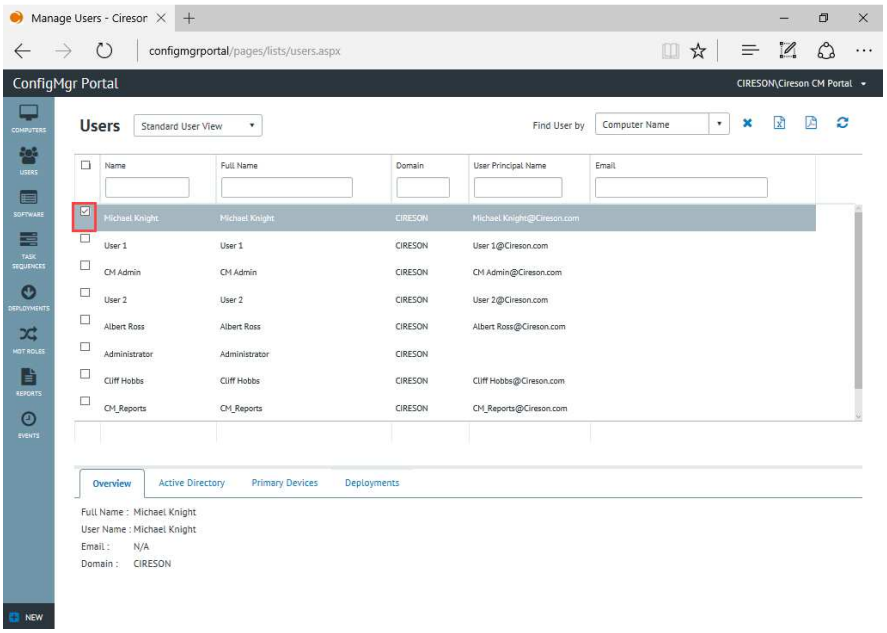
To see a User's Primary Devices:

NOTE: You can also right-click on a user and select **User Device Affinity** to see and manage the user device affinity relationships for a user as detailed in How do I view the User Device Affinity relationships for a computer?

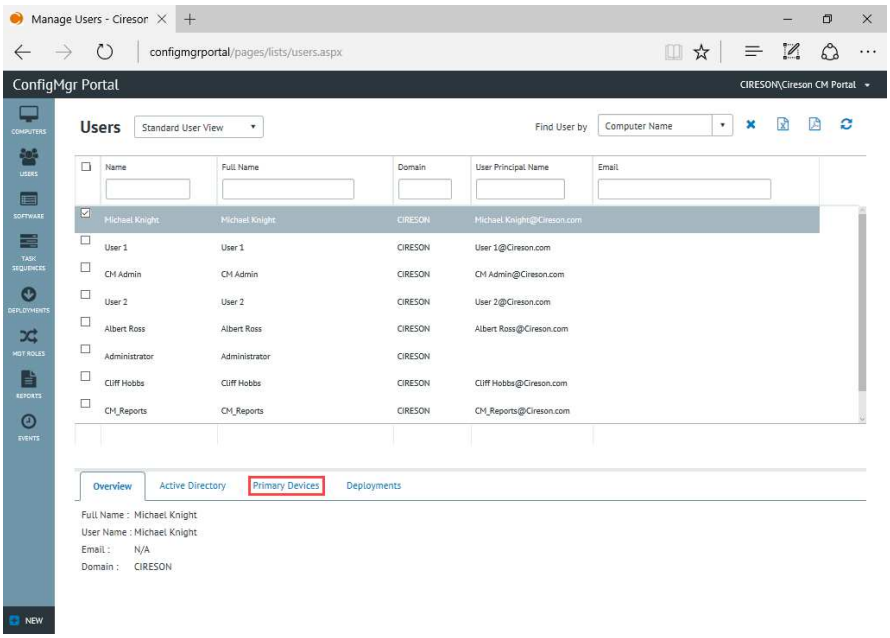
1. Click **Users** in the **Navigation Menu**



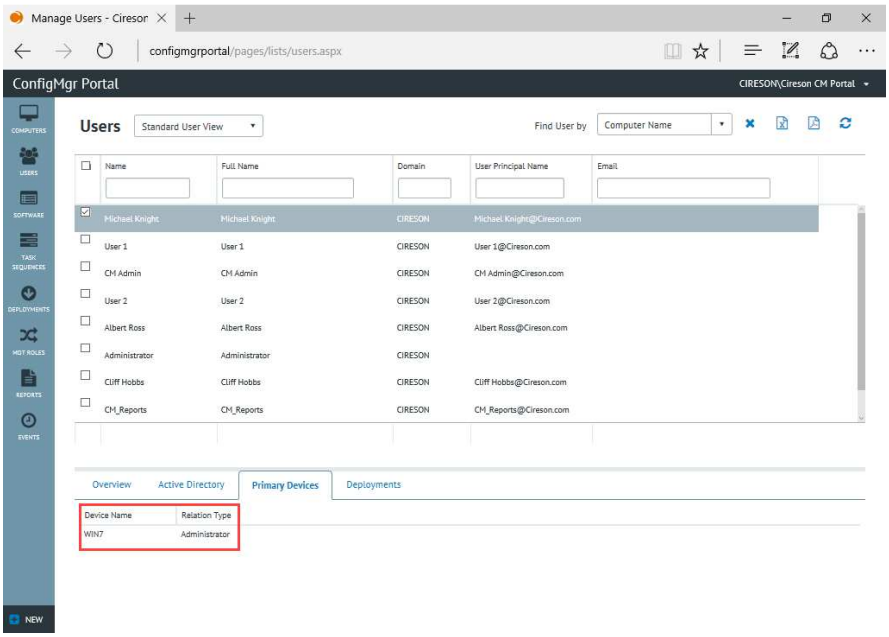
2. Select the relevant user.



3. Click the **Primary Devices** tab.



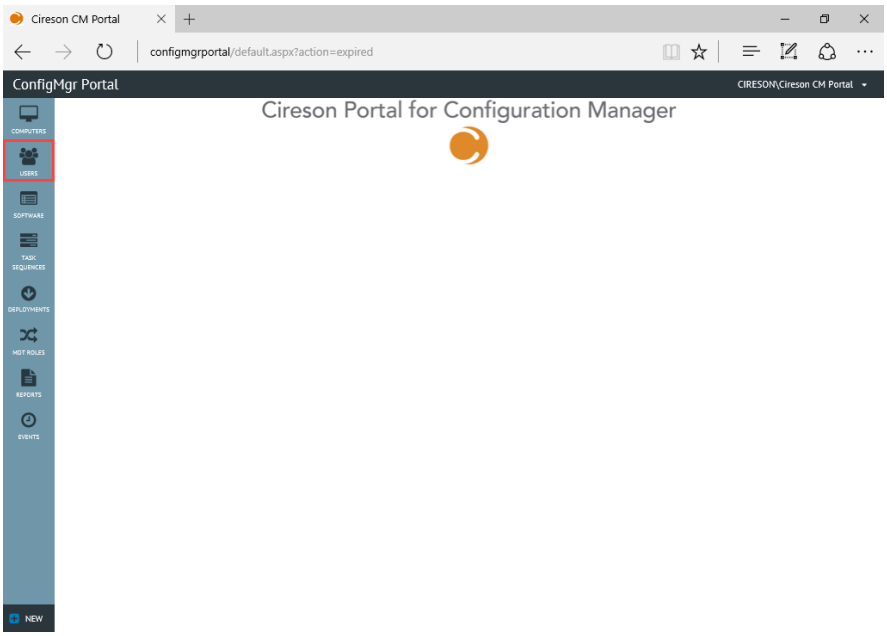
The **Primary Devices** tab will be populated.



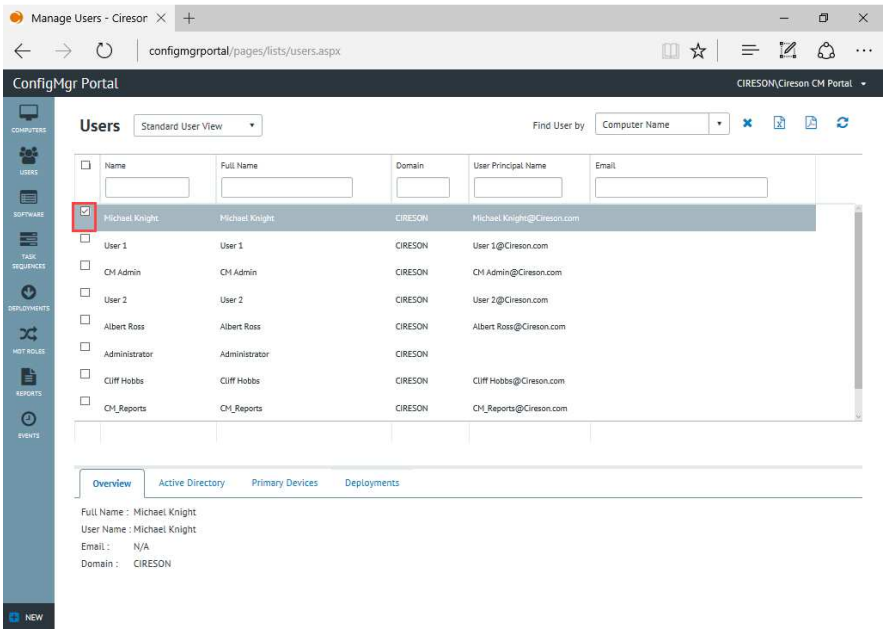
How do I see the Deployments targeted to a user?

To see the deployments targeted to a user:

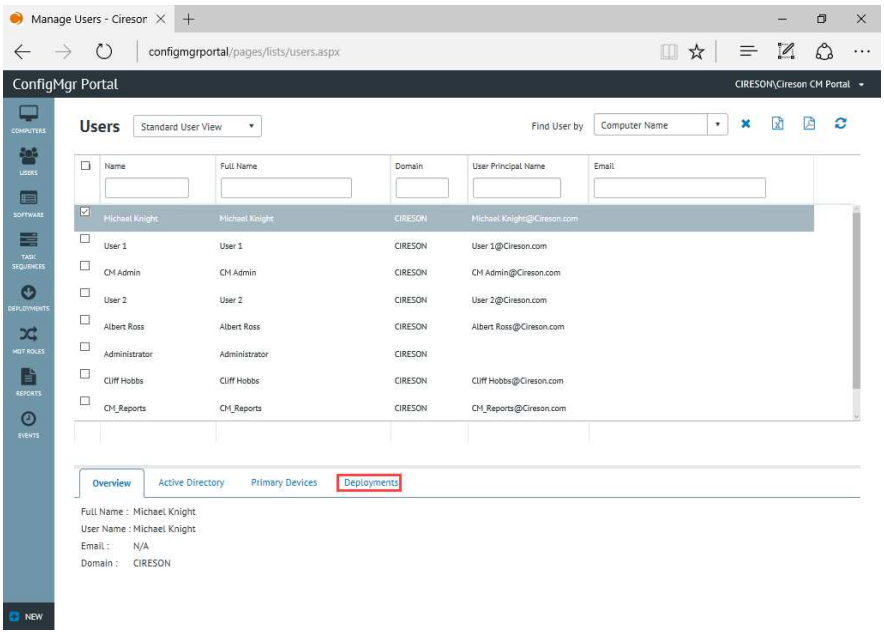
1. Click **Users** in the **Navigation Menu**



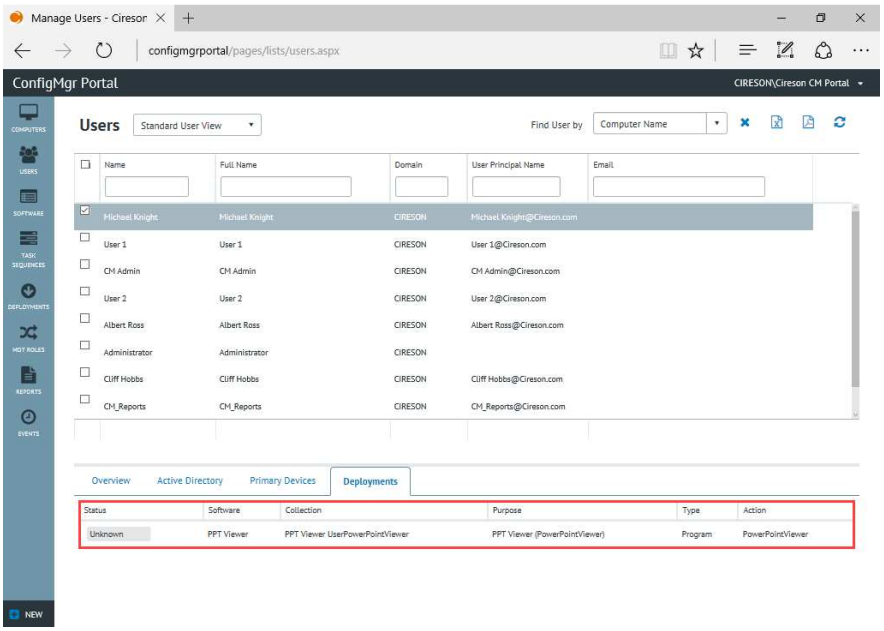
2. Select the relevant user.



3. Click the **Deployments** tab.



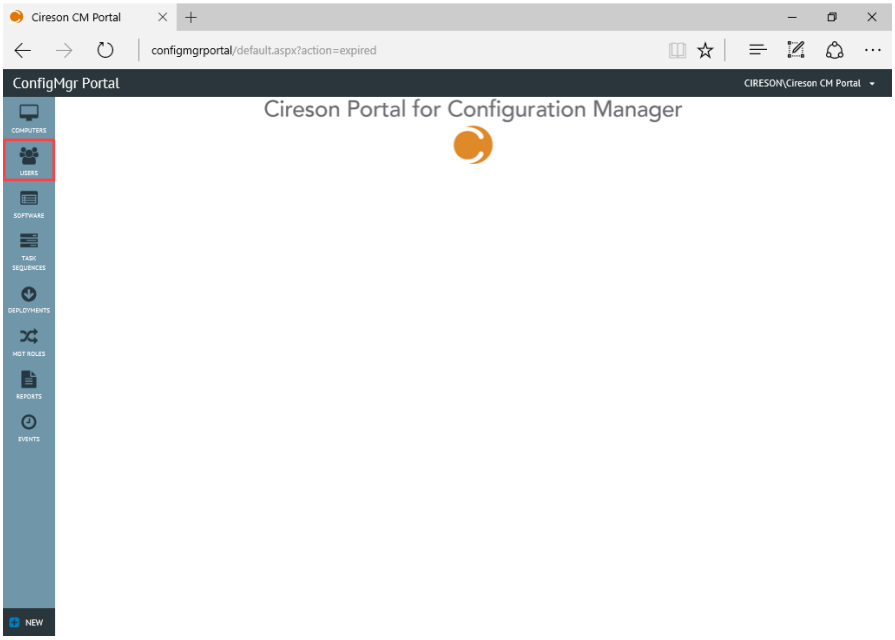
The **Deployments** tab will be populated.



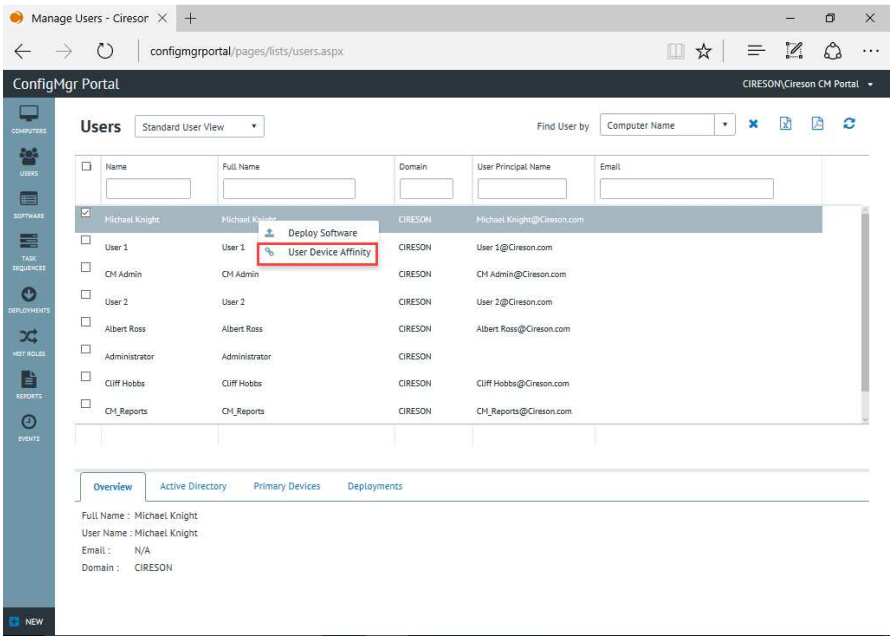
How do I see the User Device Affinity relationships for a user?

To see the user device affinity relationships for a user:

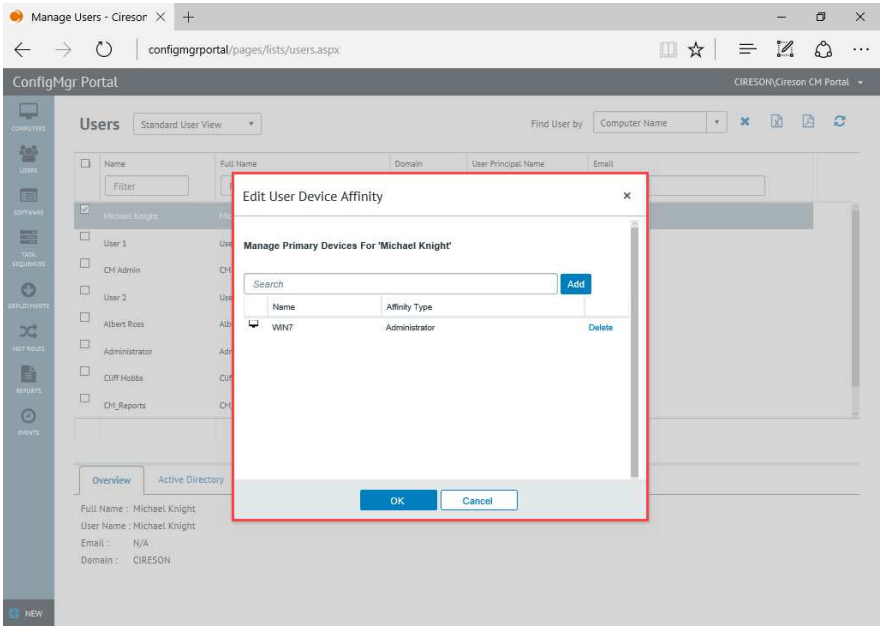
1. Click **Users** in the **Navigation Menu**



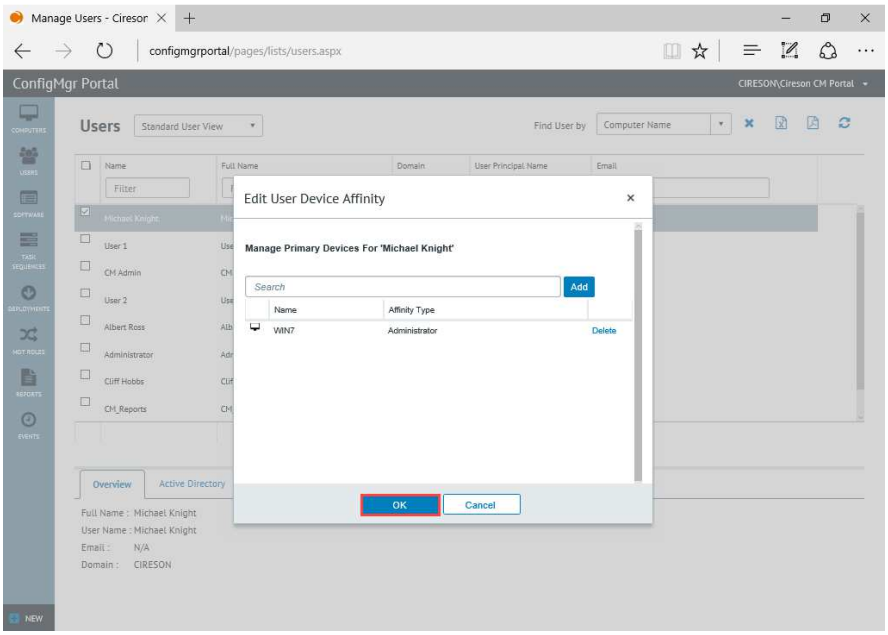
2. Right-click the relevant user and select **User Device Affinity**



The **Edit User Device Affinity** page will be shown displaying the list of primary devices for the selected user.



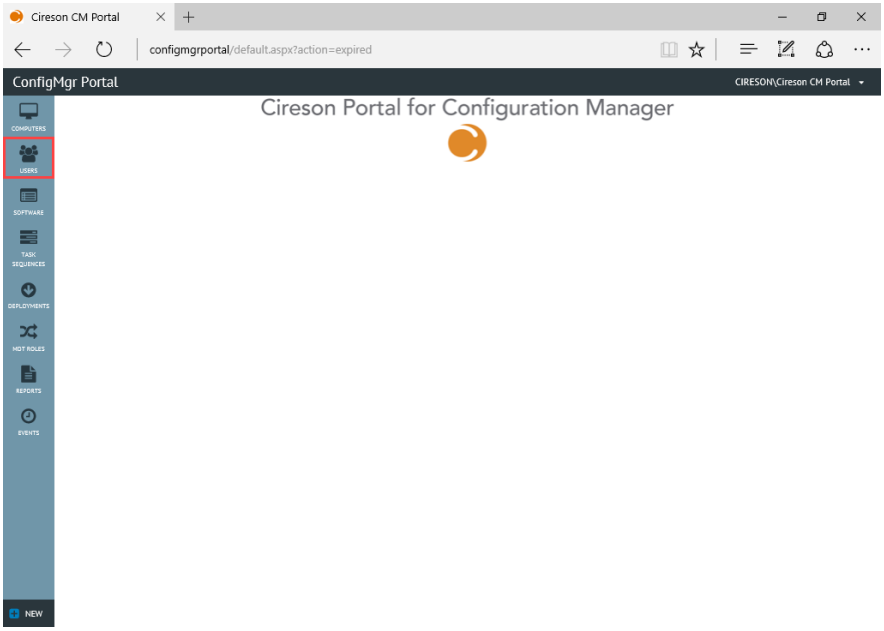
3. Click **OK** to close the **Edit User Device Affinity** page.



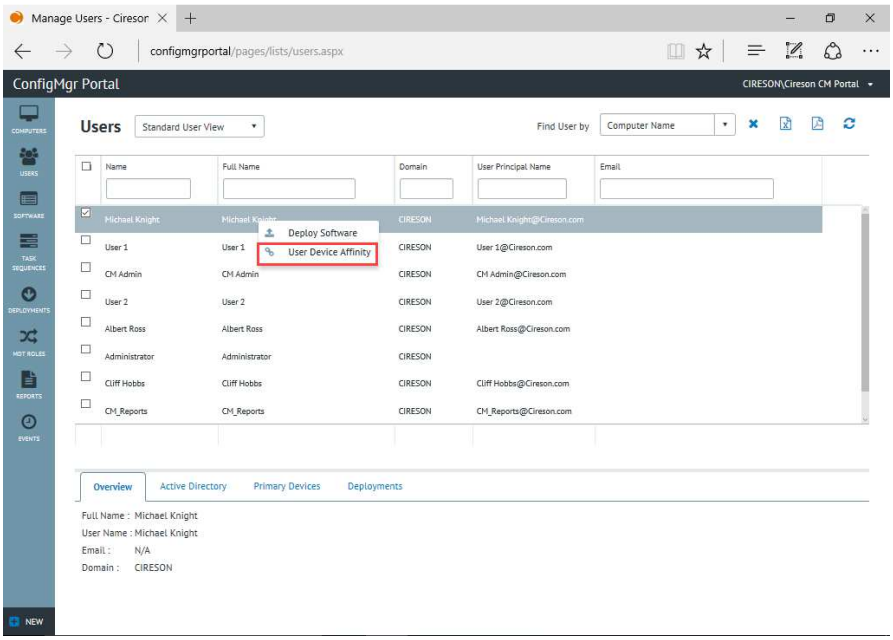
How do I add another device to a user's User Device Affinity?

To add another device to a user's User Device Affinity relationship:

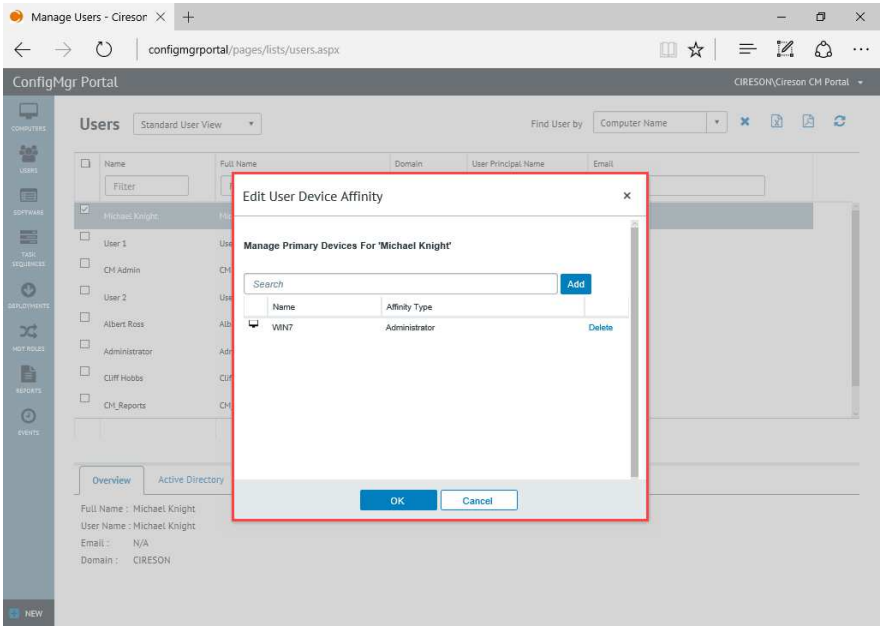
1. Click **Users** in the **Navigation Menu**



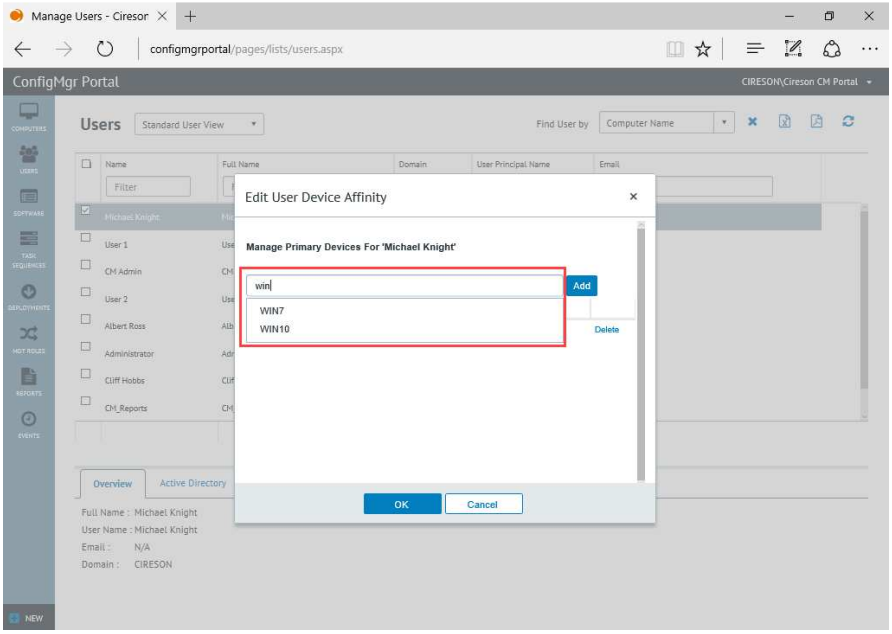
2. Right-click the relevant user and select **User Device Affinity**



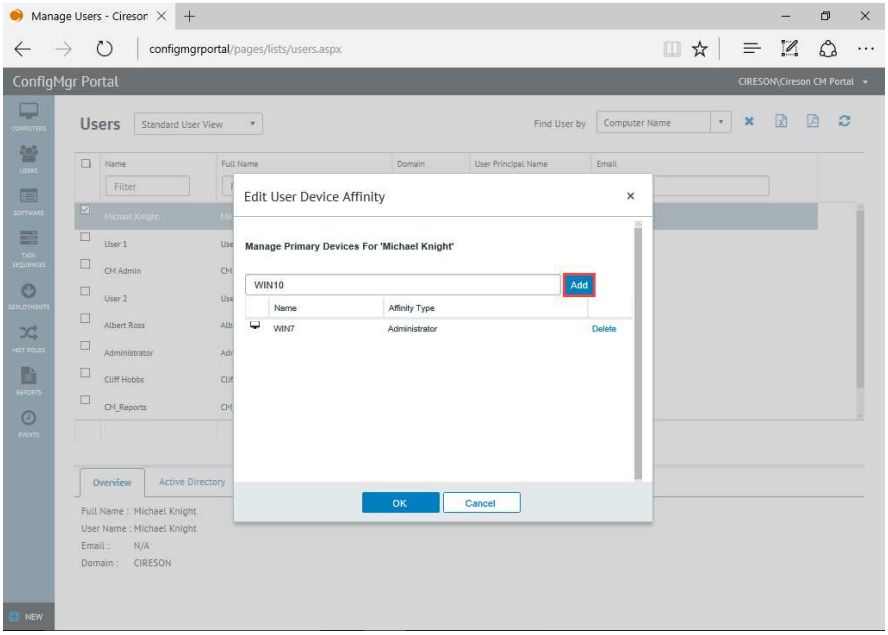
The **Edit User Device Affinity** page will be shown displaying the list of primary devices for the selected user.



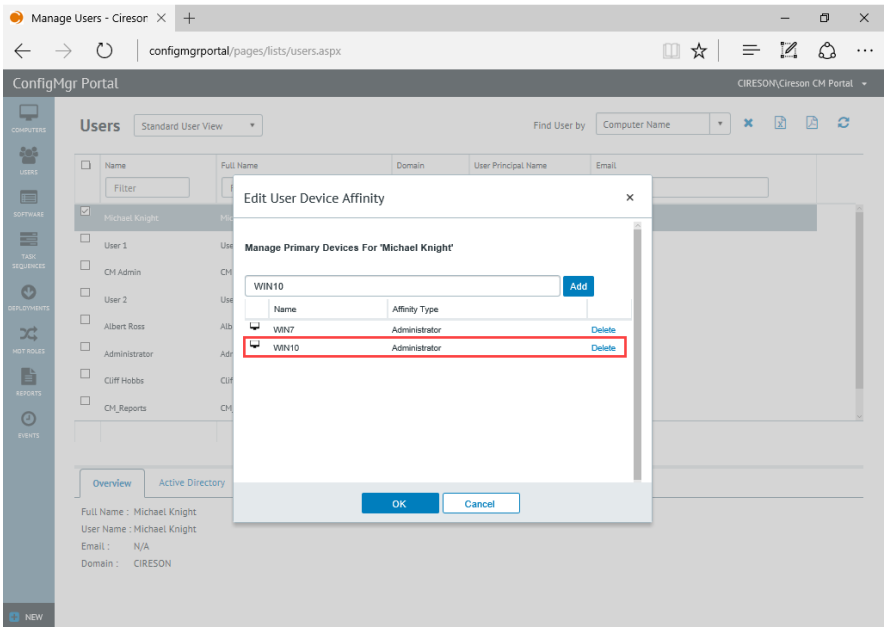
3. In the **Search** field, type the name of the computer/device you want to add as a primary device for the user until a match is found.



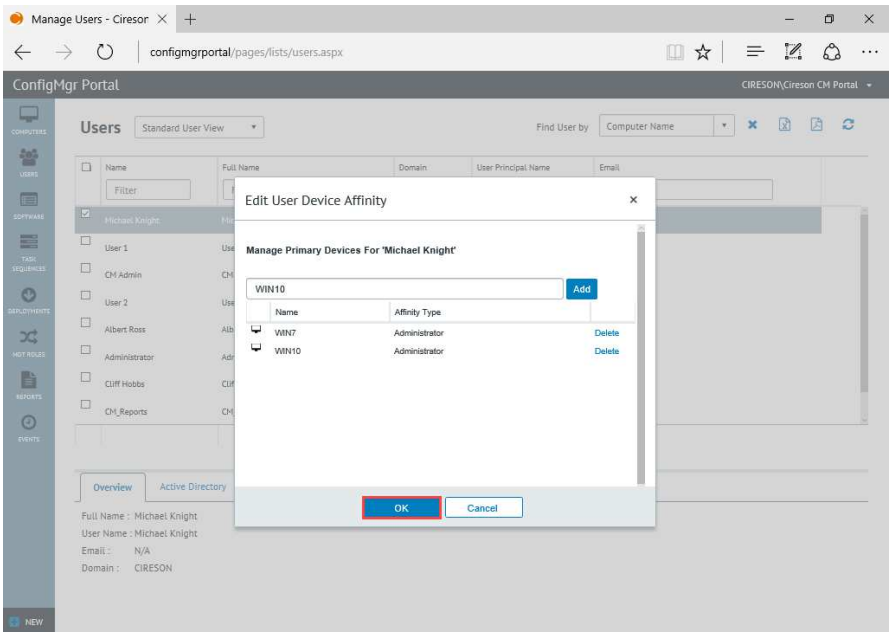
4. Select the relevant device then click **Add**



The new device is added to the list.



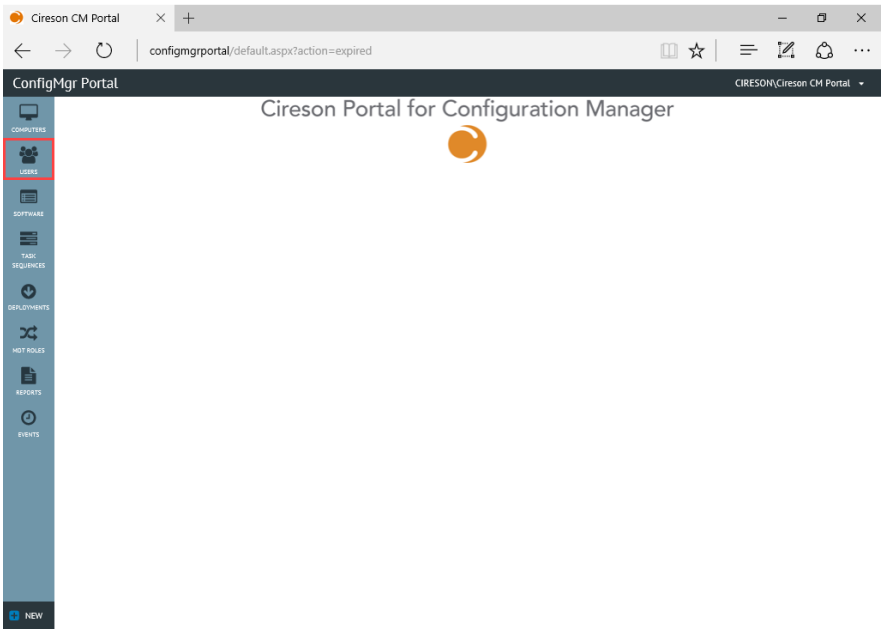
5. Click **OK** to close the **Edit User Device Affinity** page.



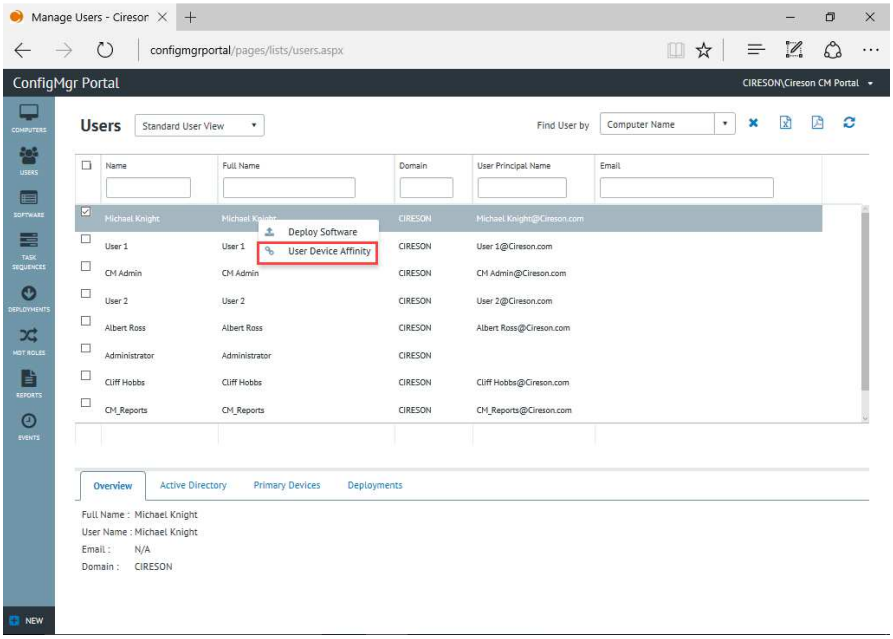
How do I delete a device from a user's User Device Affinity relationship?

To delete a device from a user's User Device Affinity relationship:

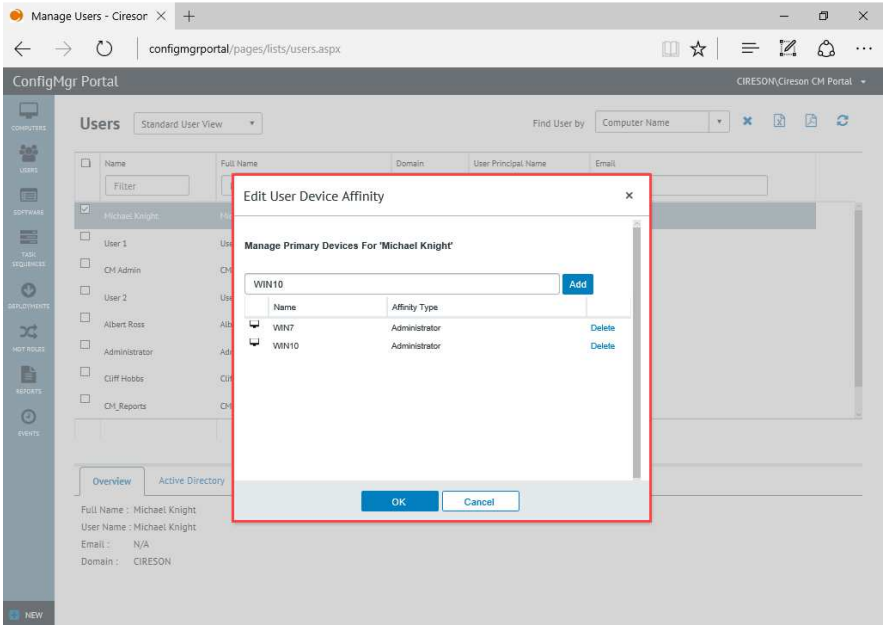
1. Click **Users** in the **Navigation Menu**



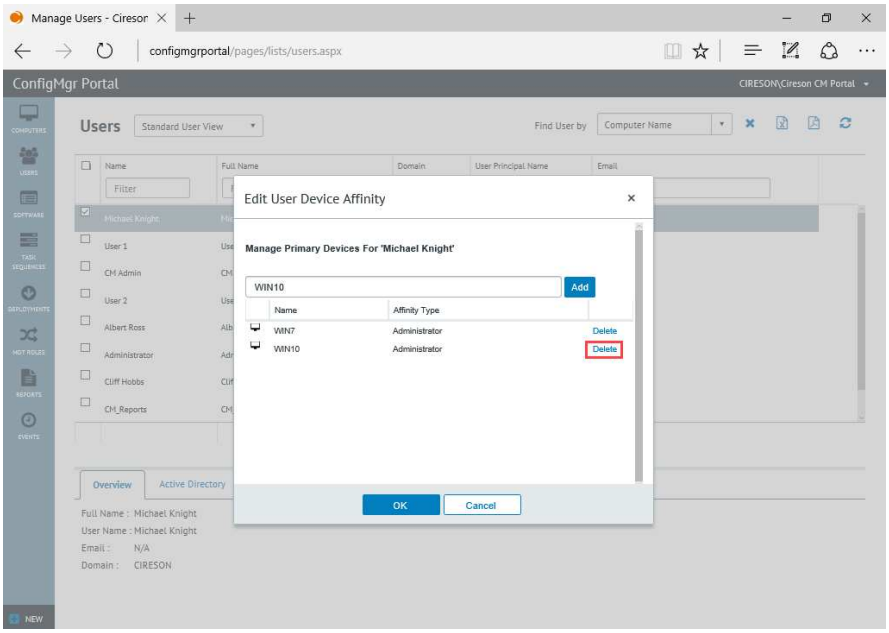
2. Right-click the relevant user and select **User Device Affinity**



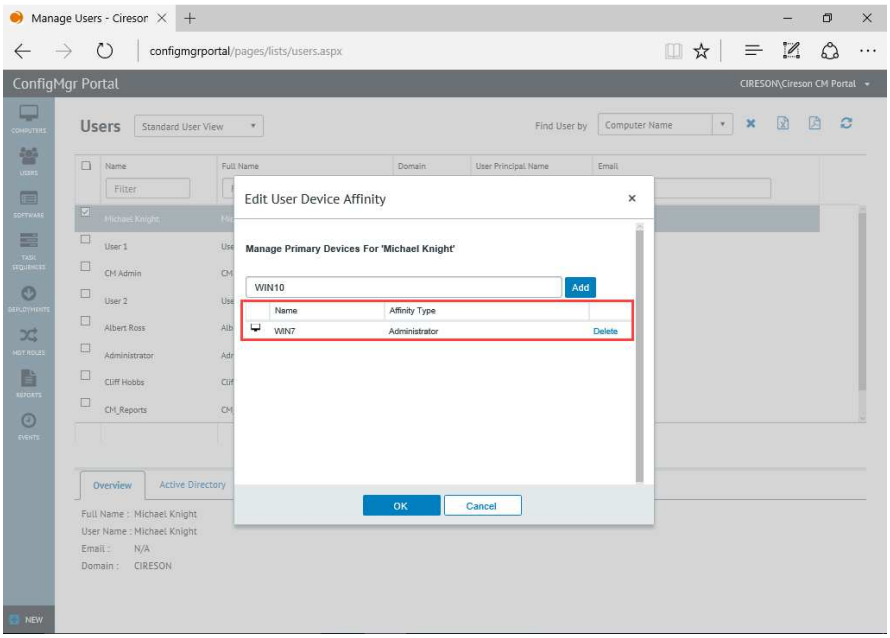
The **Edit User Device Affinity** page will be shown displaying the list of primary devices for the selected user.



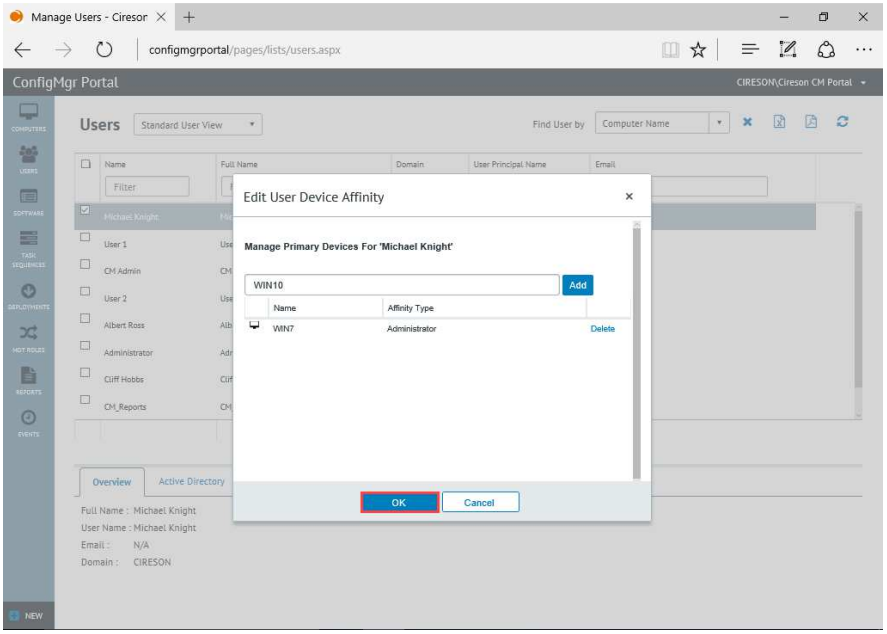
3. Click **Delete** beside the device you want to remove as a primary device for the user.



The device is removed from the list of devices for the user.



4. Click **OK** to close the **Edit User Device Affinity** page.



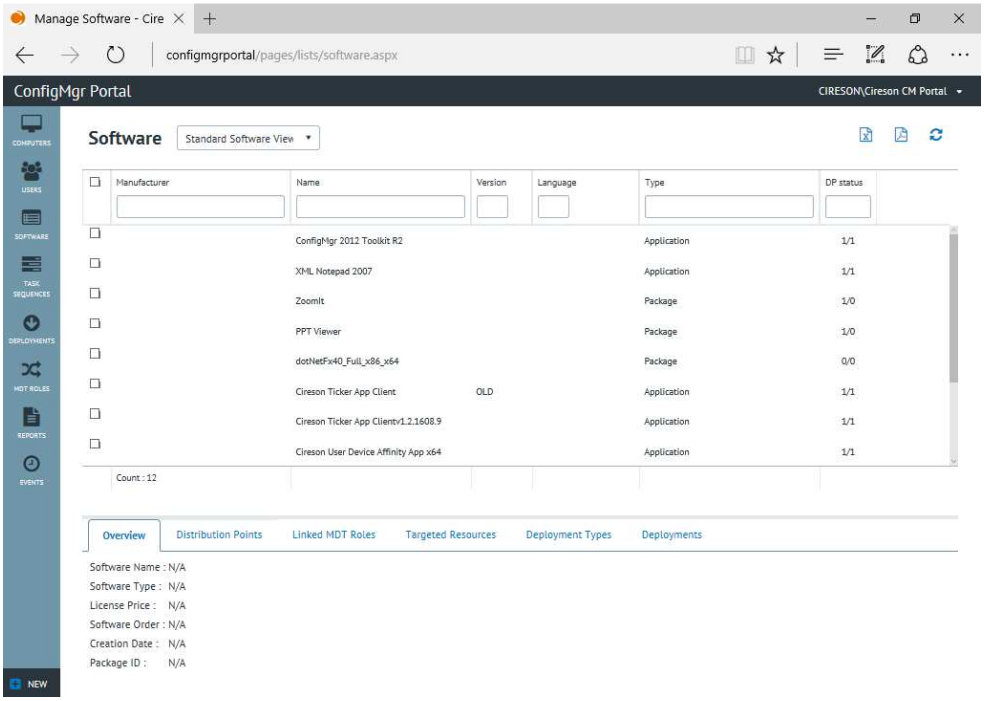
Managing Software

This section of the Portal allows you to manage the various content types currently supported by the Portal which are:

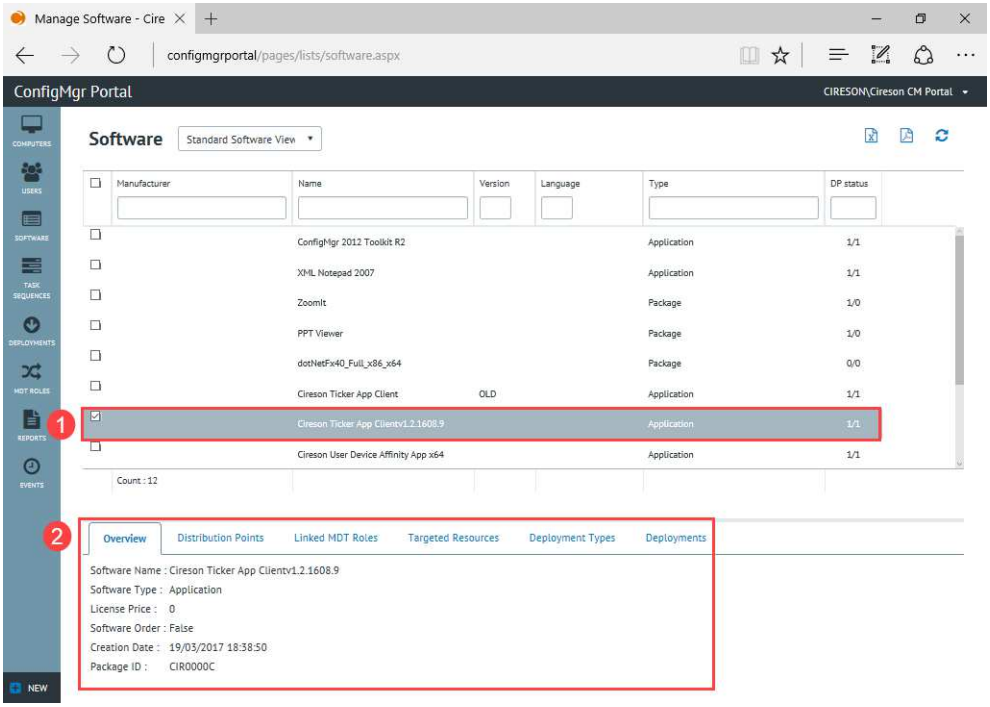
- Applications
- Packages
- Task Sequences

Overview

When you click **Software** on the **Navigation Menu**, the **Software** page is displayed.



When you select an item of software in the **Content List** area, the **Content Detail** pane shows a series of tabs that contain more detailed information that is relevant to the selected software.



Software Management-Related Tasks

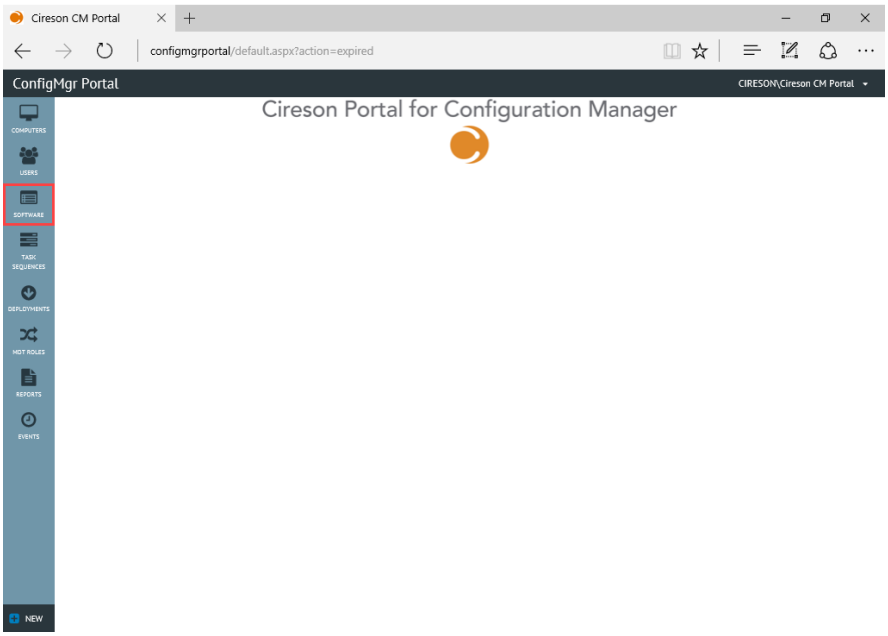
This section details the tasks related to managing Software in the Portal. A list of tasks is presented first which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

- How do I create a new Software Application?
- How do I create a new Software Package?
- How do I Deploy Software?
- How do I Distribute Content?
- How do I Retire an Application?
- How do I Delete Software?
- How do I view the Properties of a piece of Software?
- How do I manage the Permissions for a piece of Software?
- How do I see the basic information for a piece of software?
- How do I see which Distribution Points/Distribution Point Groups software has been distributed to?
- How do I see the Linked MDT Roles for a piece of content?
- How do I see which resources a piece of content has been assigned to?
- How do I see which Collections a piece of content has been Deployed to?
- How do I see the Deployment Types for an Application?
- How do I remove content from a Distribution Point/Distribution point Group?
- How do I verify content distribution using the Portal?
- How do I verify content removal using the Portal?
- How do I edit Software?
- How do I Add software to a Distribution Point/Distribution Point Group if it is missing?
- How do I Refresh software on a Distribution Point/Distribution Point Group?
- How do I Remove software from a Distribution Point/Distribution Point Group?

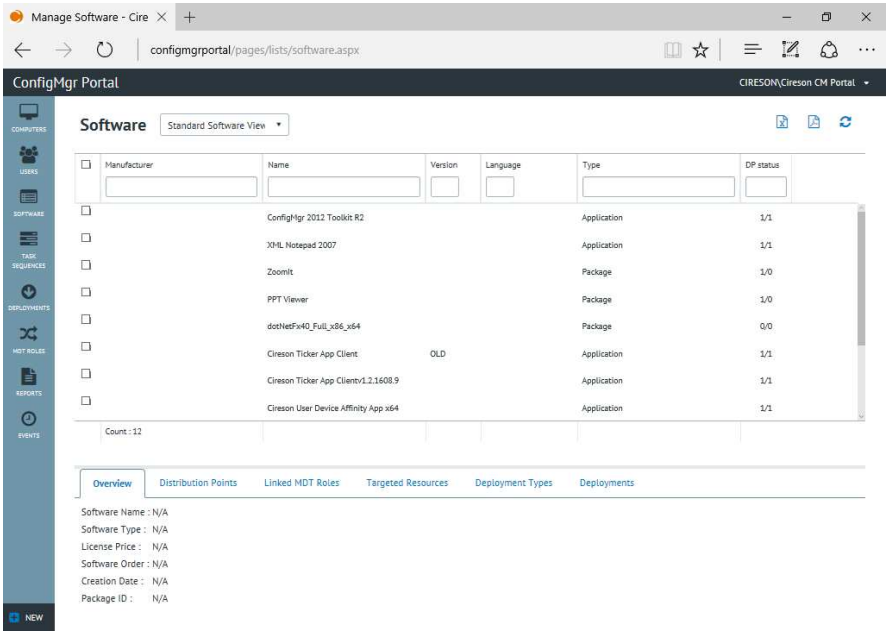
How do I Deploy Software?

To deploy a software:

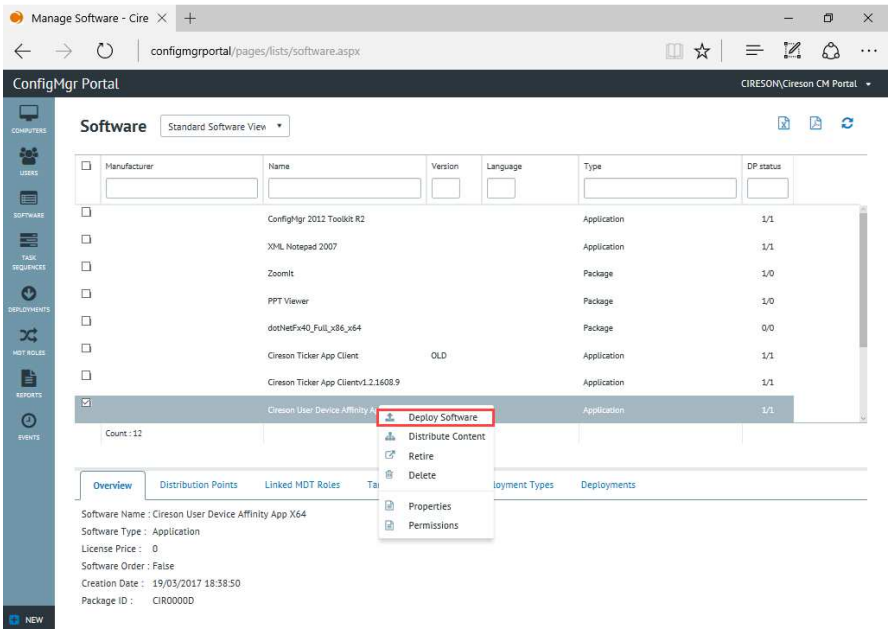
1. Click **Software** in the **Navigation Menu**



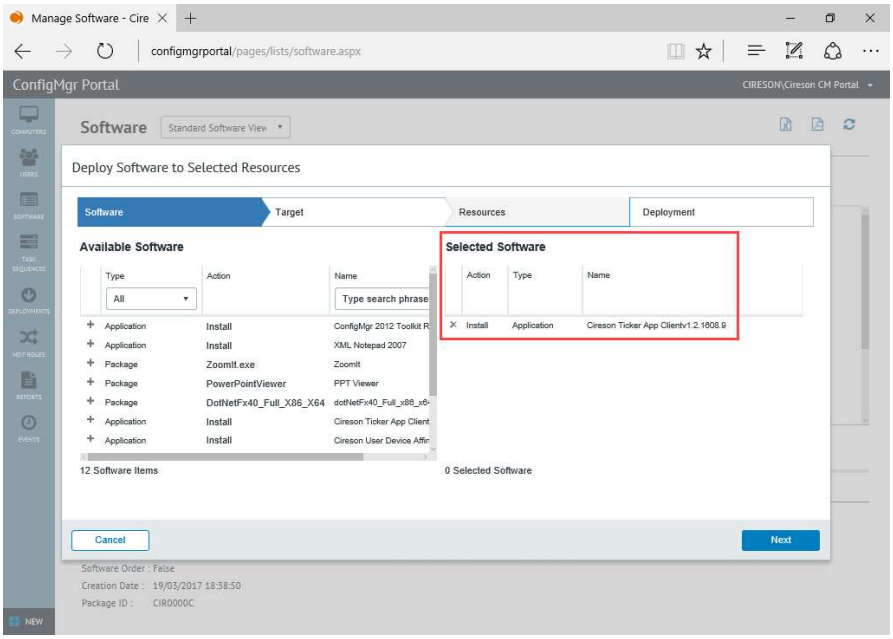
The list of current software in the Portal is displayed.



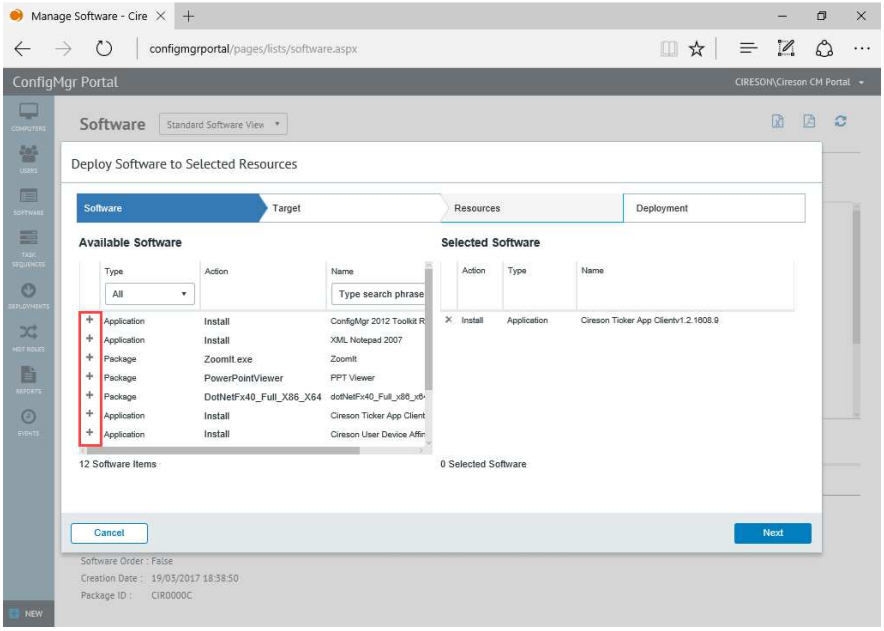
2. Right-click the relevant software and select **Deploy Software**



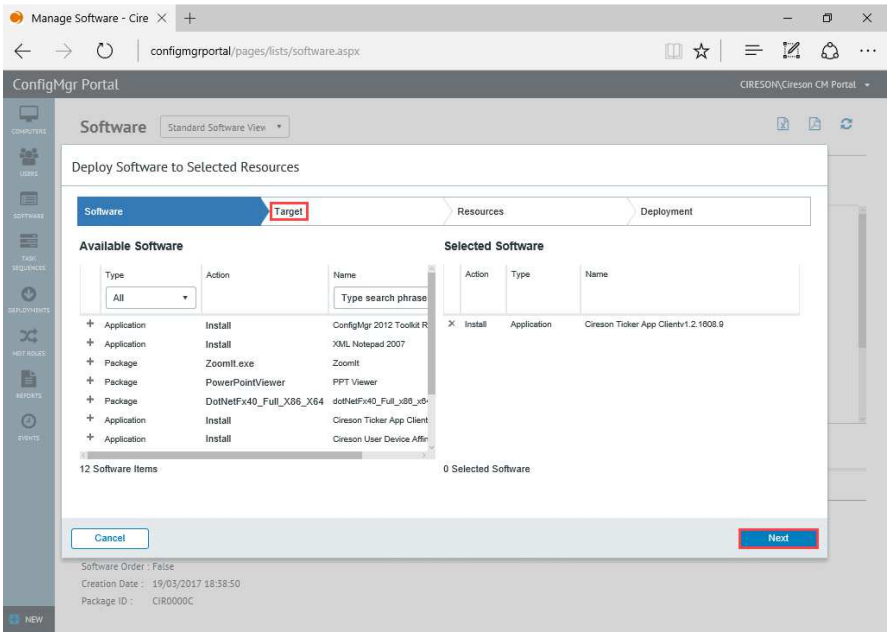
The **Deploy Software to Selected Resources** dialog box is shown displaying the selected software in the **Selected Software** column.



3. Click **+** beside any other software in the **Available Software** list you want to include in this deployment.



4. If you don't want to include any other software in this deployment, or once you have added all the required software, either click the **Target** tab or **Next**



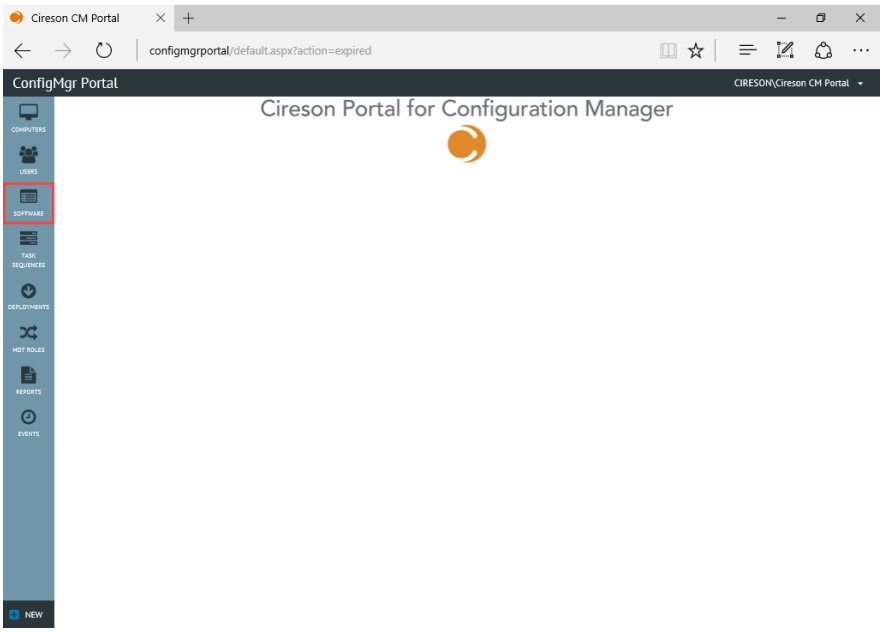
5. Follow the relevant procedure below:

   - How do I create a new Deployment to a new collection?
   - How do I deploy software to an existing collection?

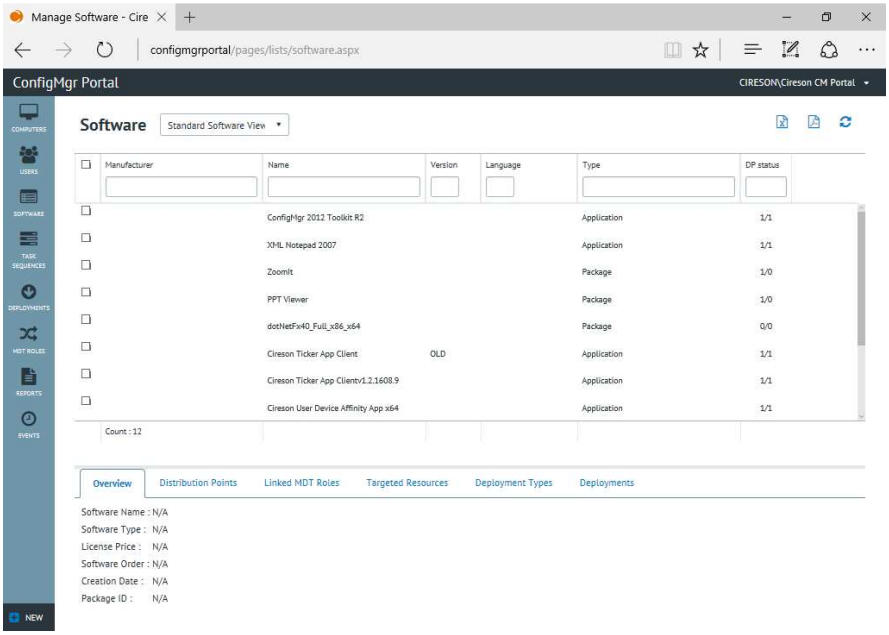
How do I Distribute Content?

To distribute content:

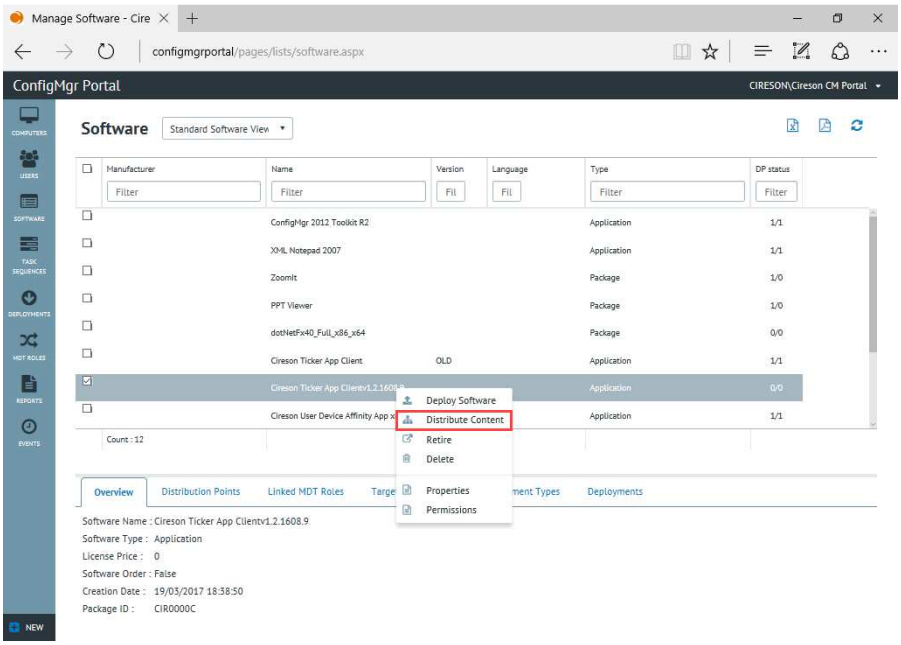
1. Click **Software** in the **Navigation Menu**



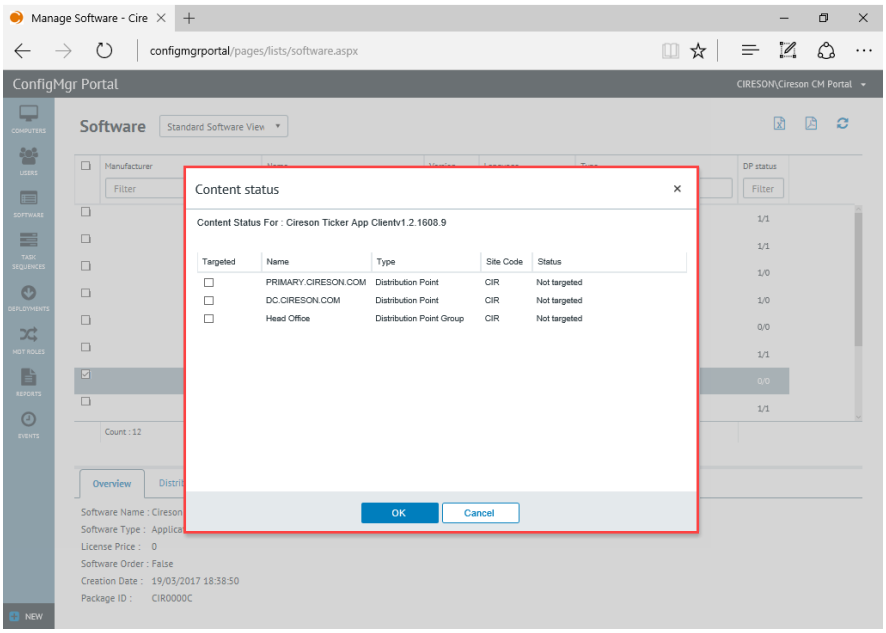
The list of current software in the Portal is displayed.



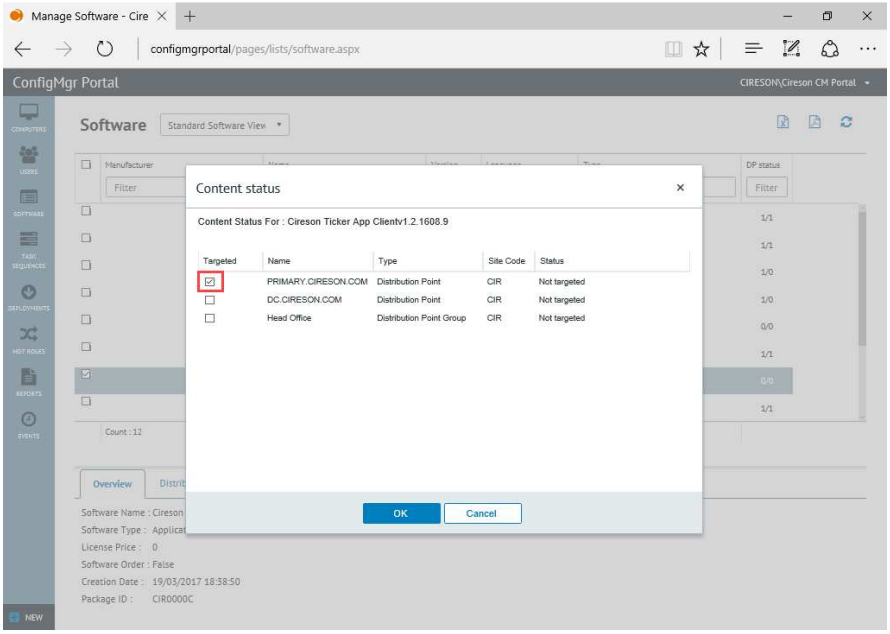
2. Right-click the relevant software and select **Distribute Content**



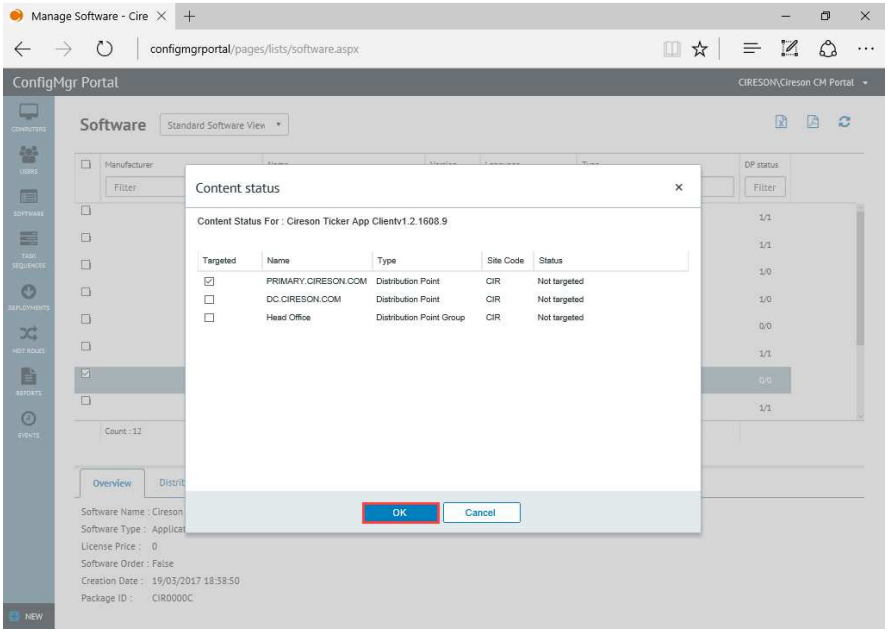
The **Content status** dialog box is shown, listing the distribution points (DPs) and DP groups the content has already been distributed to, or can be distributed to.



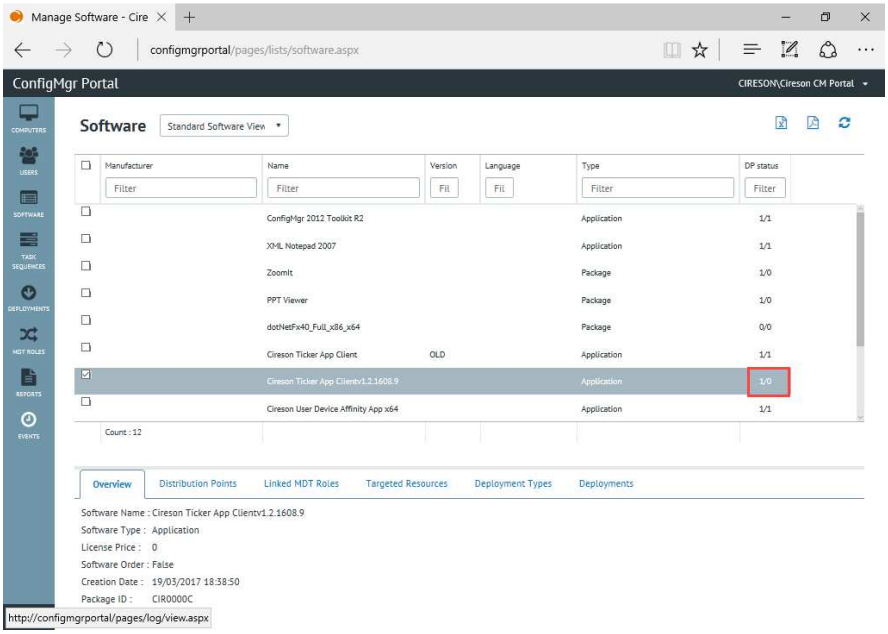
3. Check the **Targeted** checkbox beside the relevant DPs/DP groups you want to distribute the content to.



4. Click **OK**

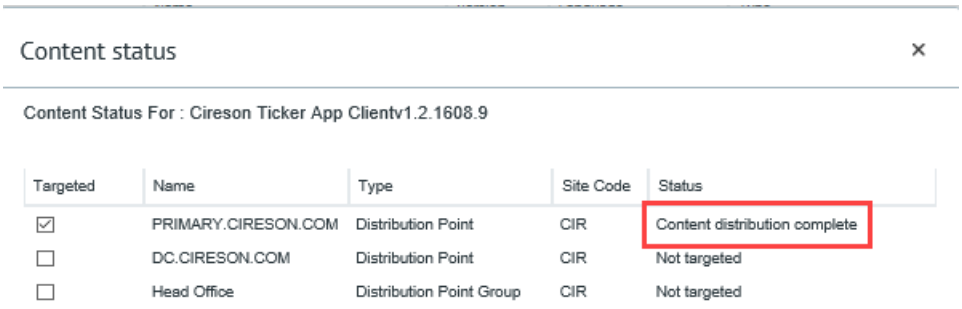


5. Refresh the Portal periodically until the **DP status** field updates correctly, which could take a few moments.



If for some reason the status does not update correctly, see How do I verify content distribution using the Portal?

NOTE: Once content has been successfully distributed to a DP, the **Status** field on the **Content status** page mentioned in Step 2. states **Content distribution complete**.

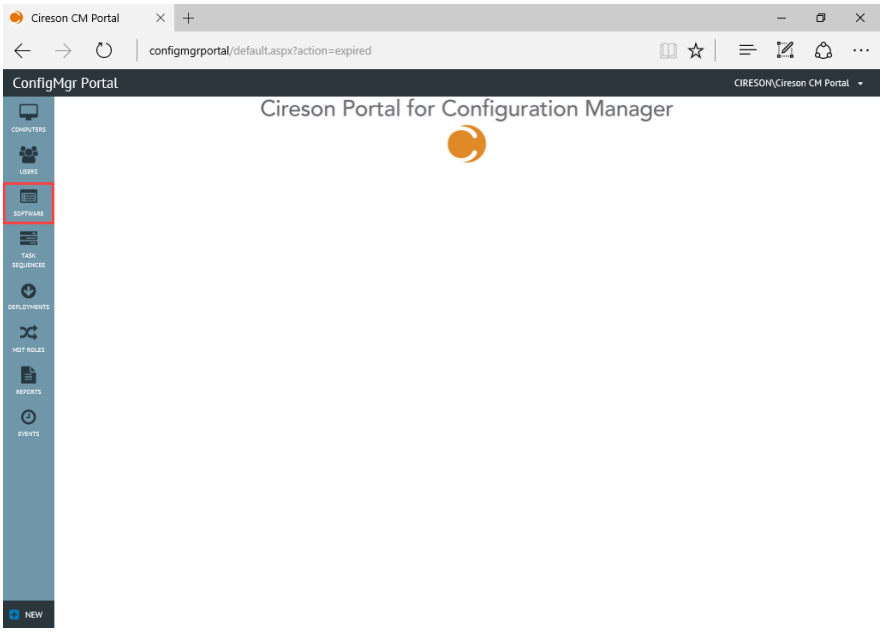


How do I Retire an Application?

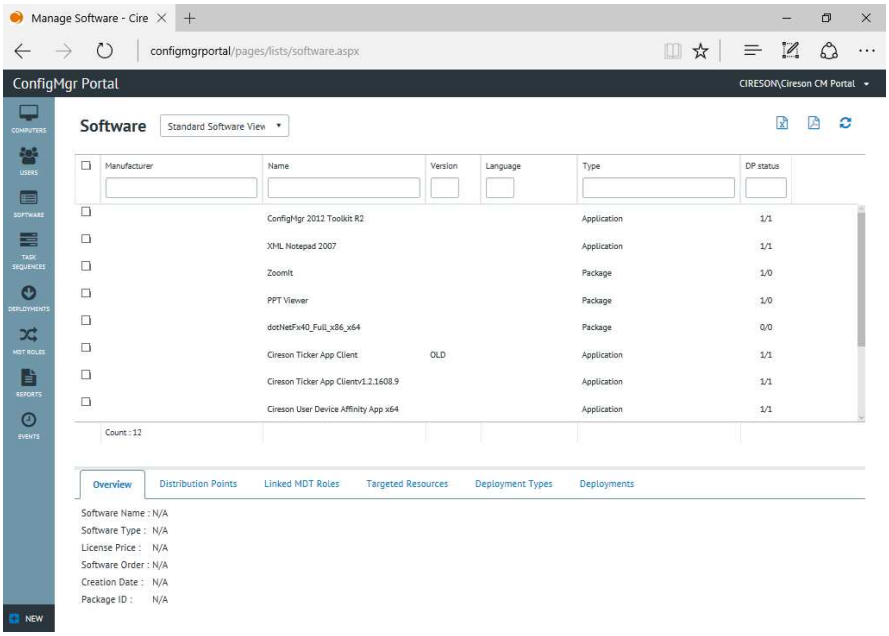
To retire an application:

NOTE: You can only retire applications. You cannot retire other types of content such as packages and task sequences.

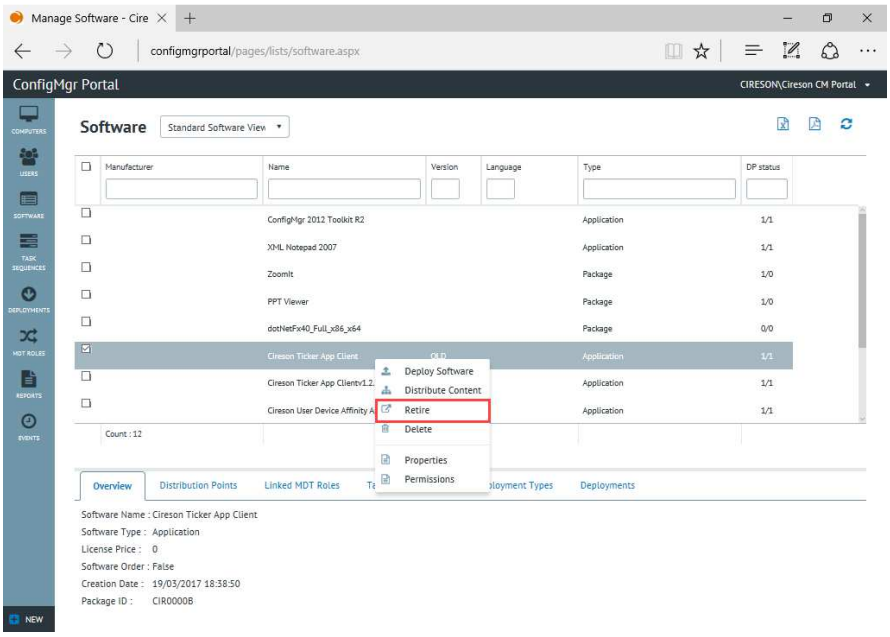
1. Click **Software** in the **Navigation Menu**



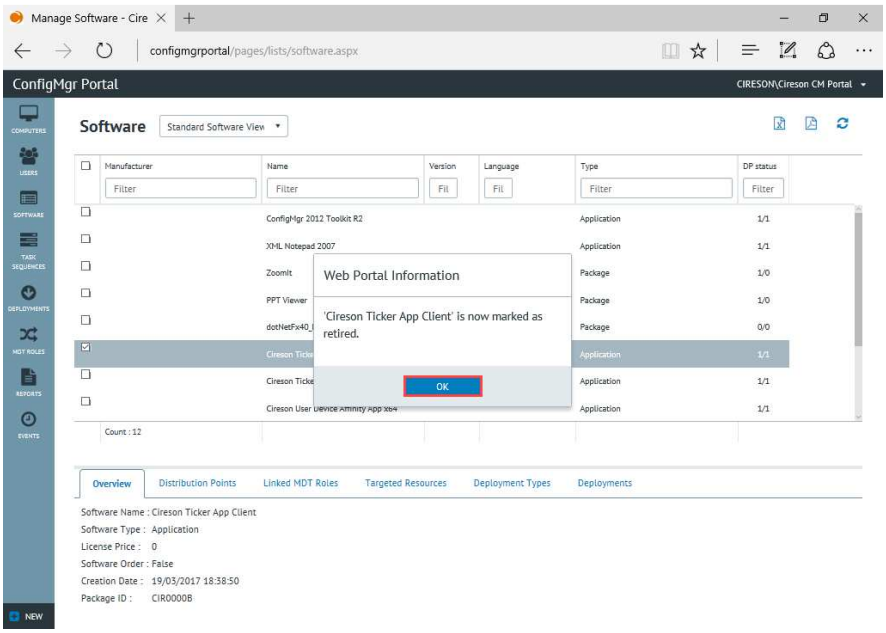
The list of current software in the Portal is displayed.



2. Right-click the relevant software and select **Retire**



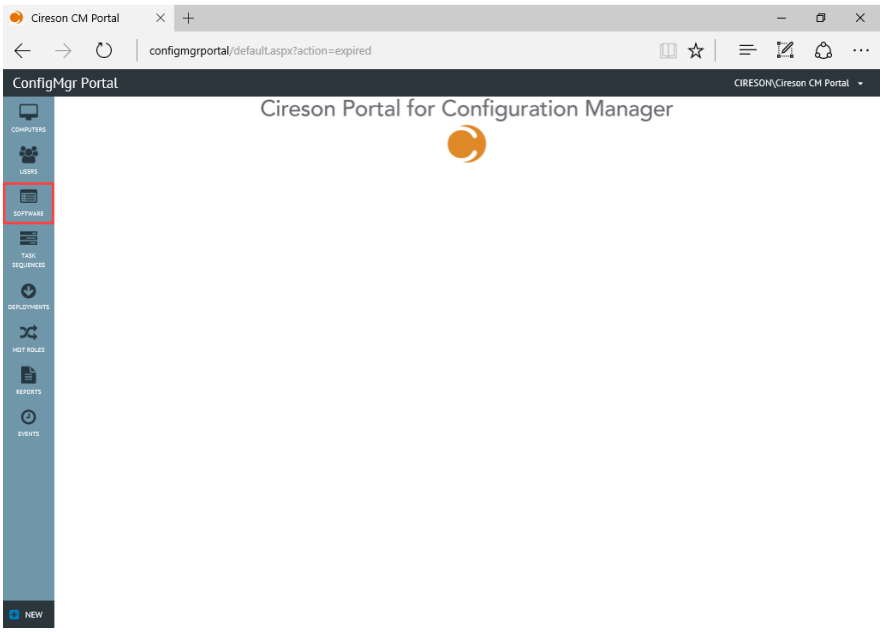
3. Click **OK** on the **Web Portal Information** dialog box stating **'<*application_name*> is now marked as retired.**



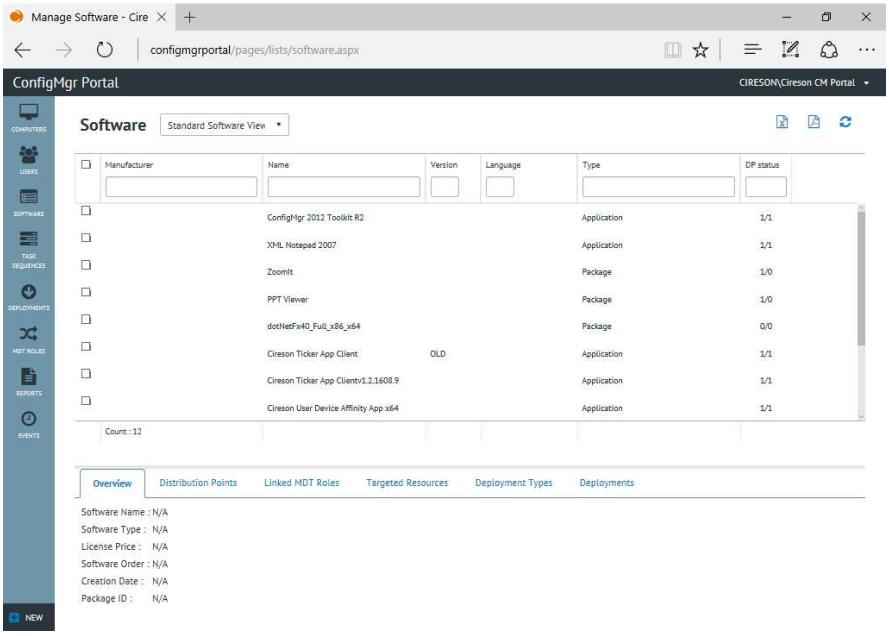
How do I Delete Software?

To delete software:

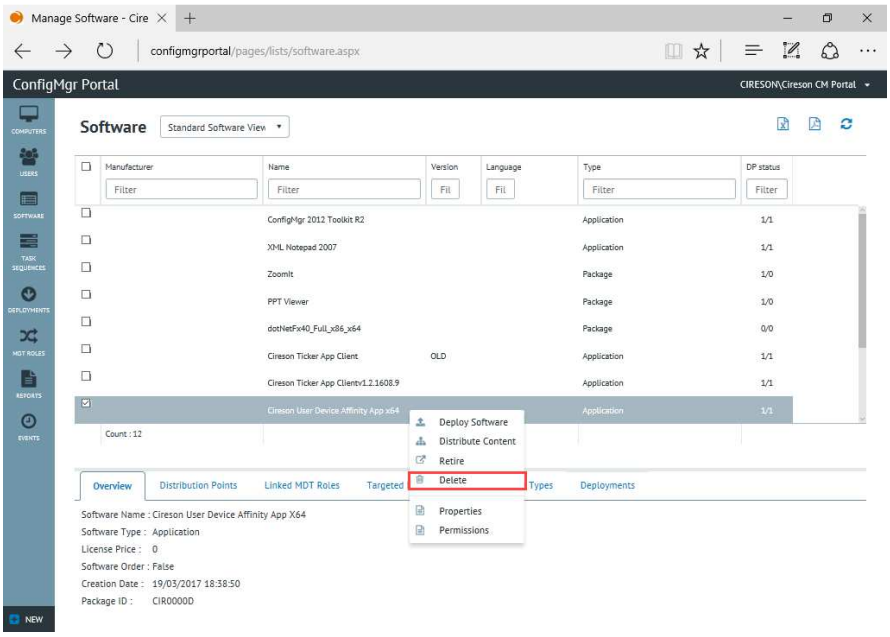
1. Click **Software** in the **Navigation Menu**



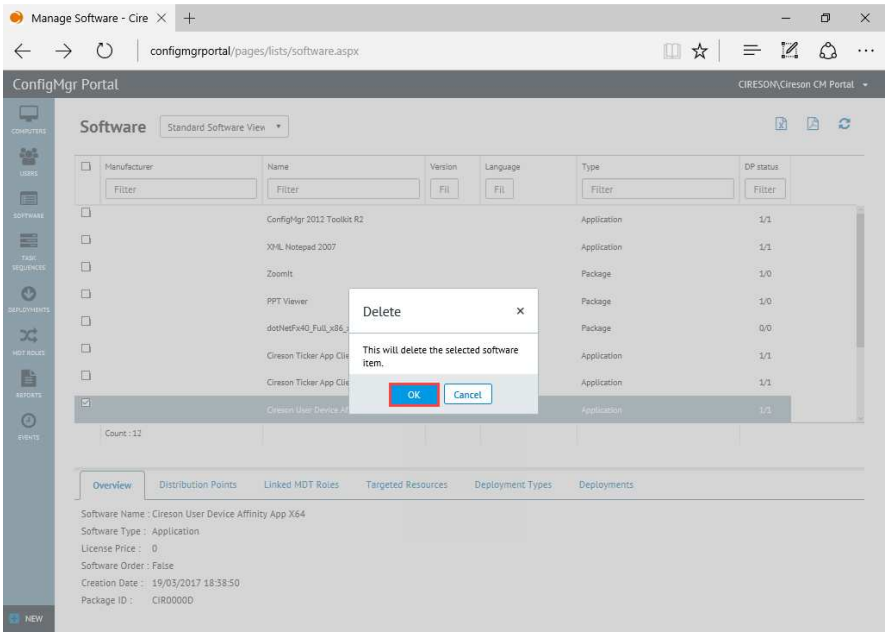
The list of current software in the Portal is displayed.



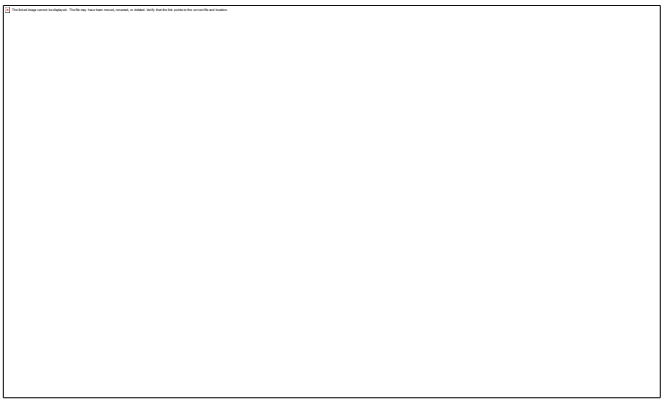
2. Right-click the relevant software and select **Delete**



3. Click **OK** on the **Delete** dialog box stating **This will delete the selected software item.**



4. Click **OK** on the **Web Portal Information** dialog box stating **The software is now being deleted, please allow a few minutes before it completes.**

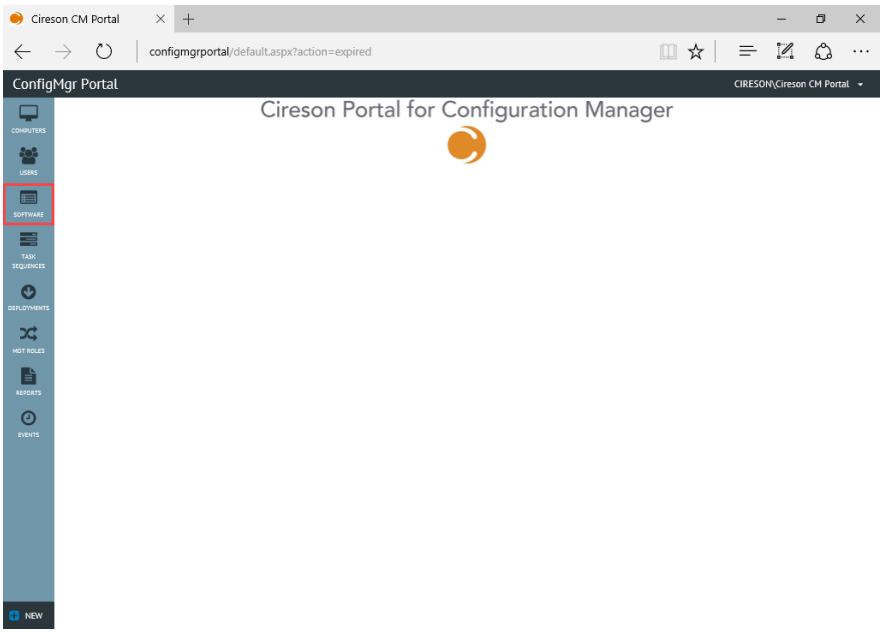


The Portal will automatically refresh. You may need to refresh the Portal periodically before the deleted content no longer appears on the **Software** page.

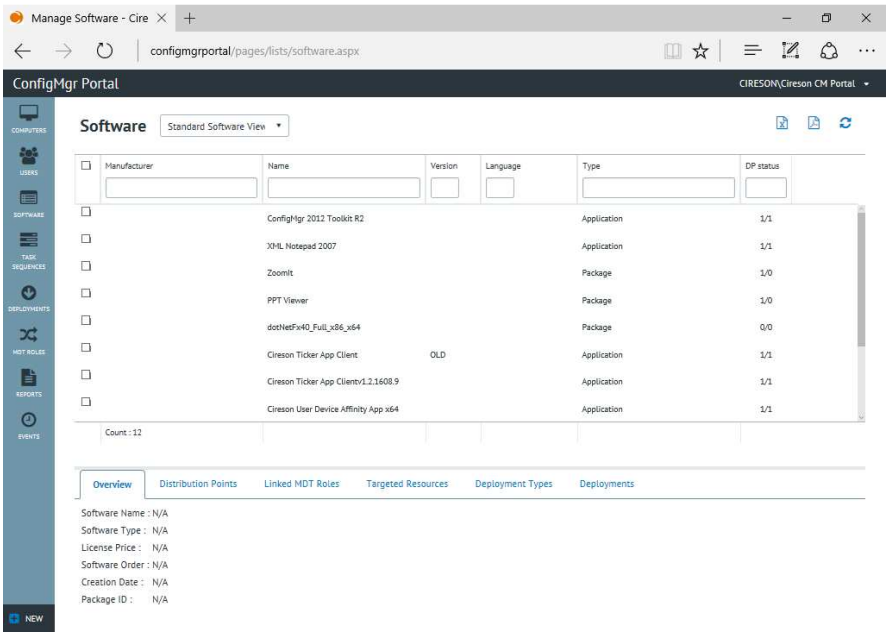
How do I view the Properties of a piece of Software?

To view the properties of a piece of software:

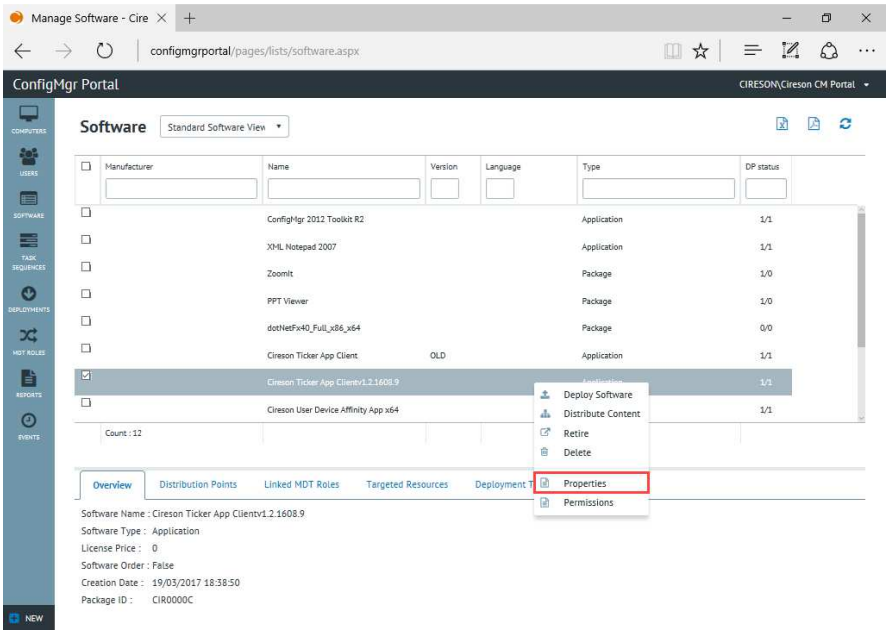
1. Click **Software** in the **Navigation Menu**



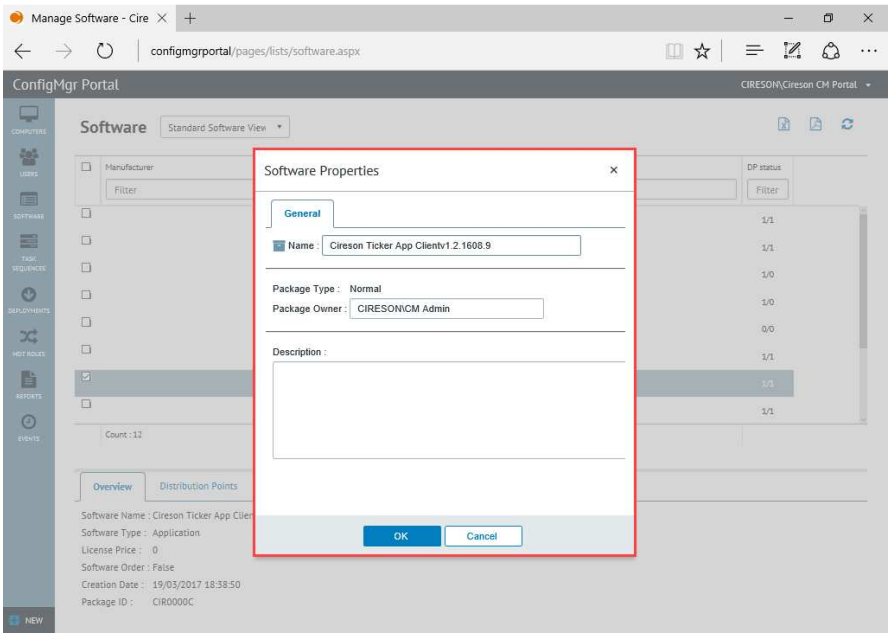
The list of current software in the Portal is displayed.



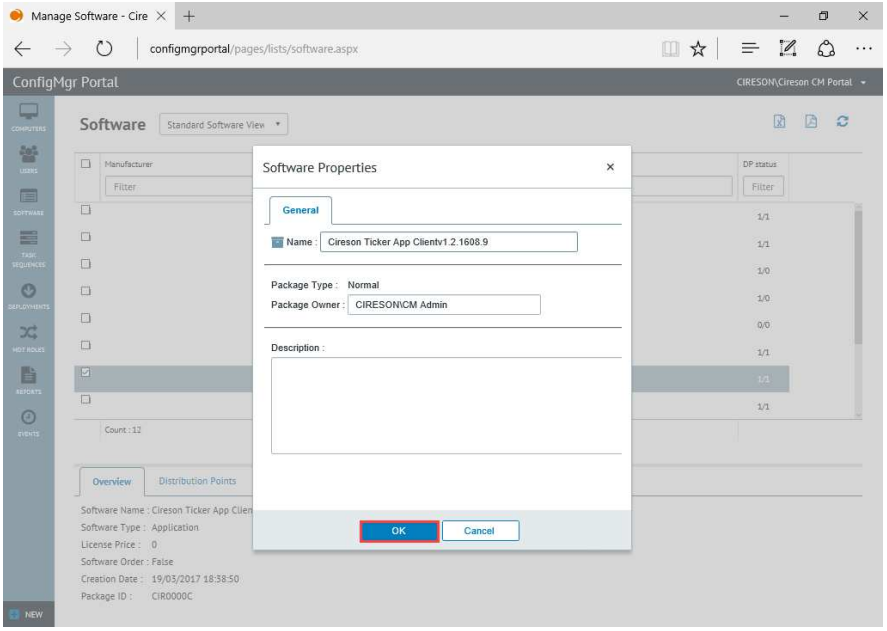
2. Right-click the relevant software and select **Properties**



The **Software Properties** dialog box will be displayed.



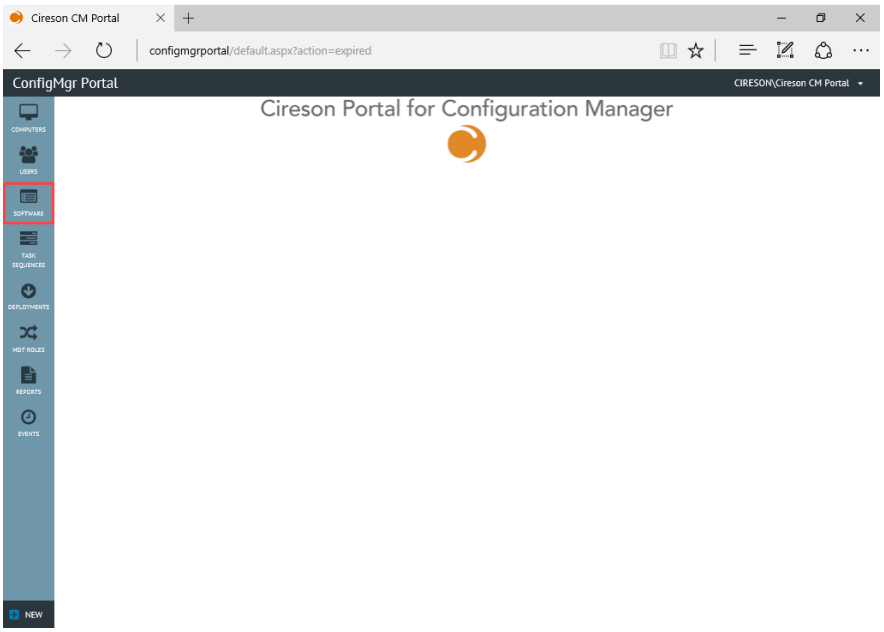
3. Review the properties as required.
4. Click **OK** to close the **Software Properties** dialog box.



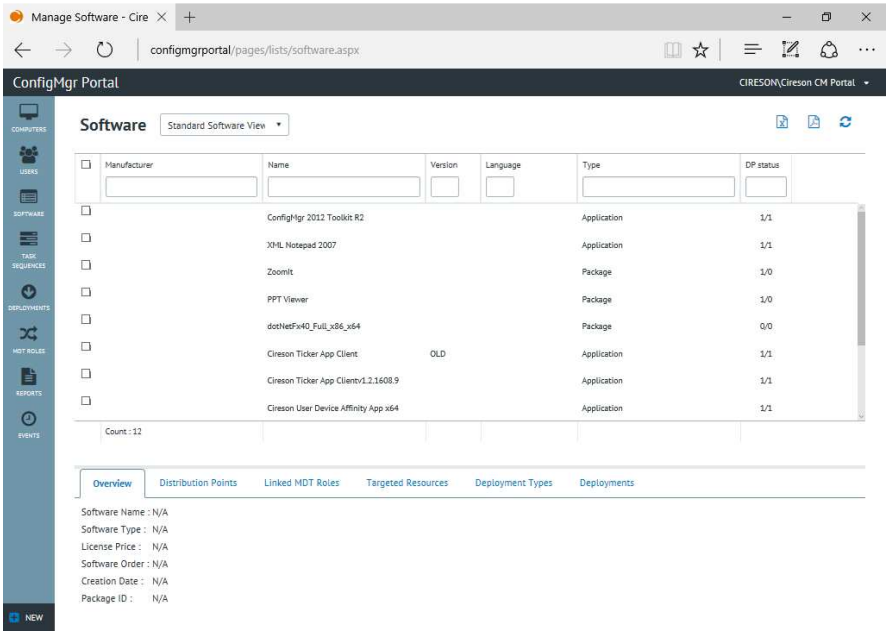
How do I manage the Permissions for a piece of Software?

To manage the permissions for a piece of software:

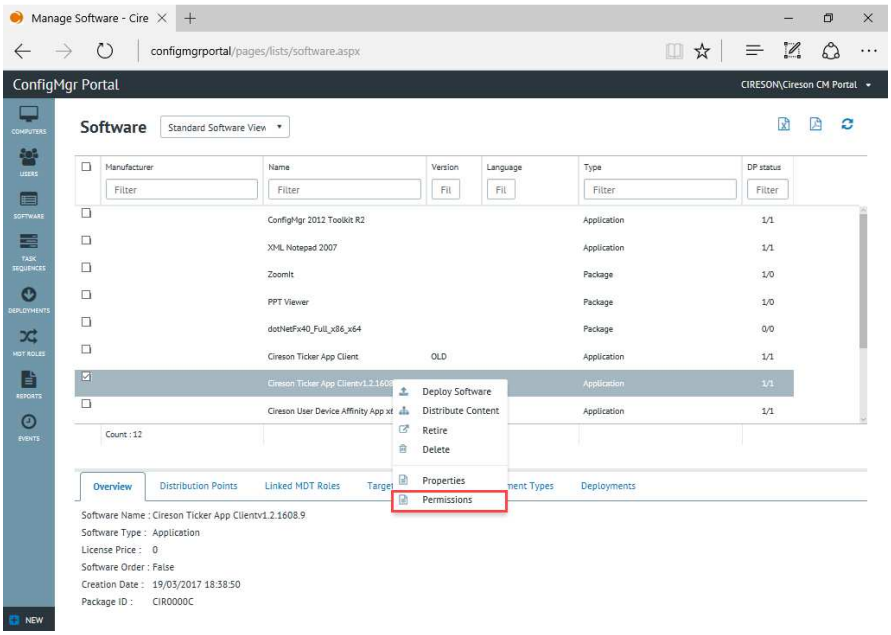
1. Click **Software** in the **Navigation Menu**



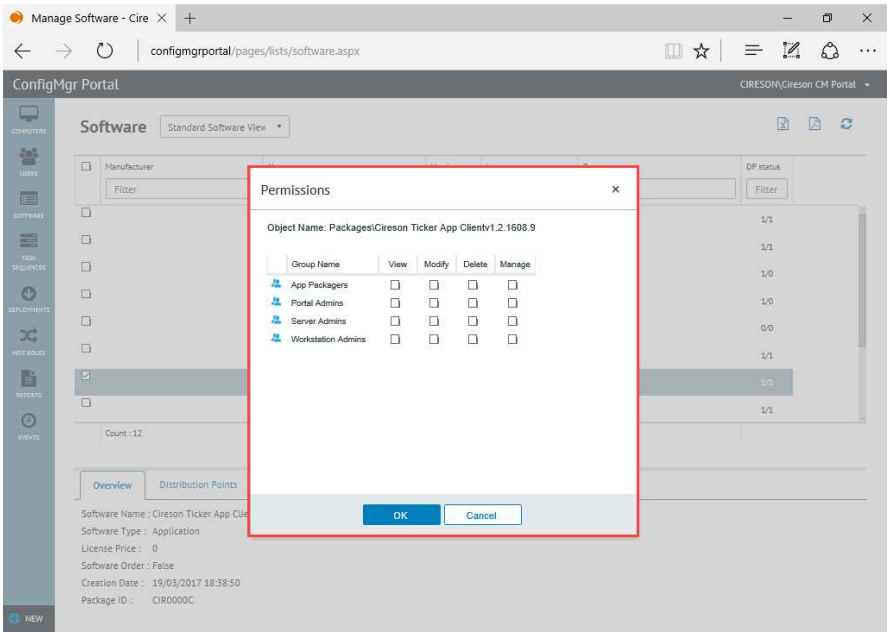
The list of current software in the Portal is displayed.



2. Right-click the relevant software and select **Permissions**

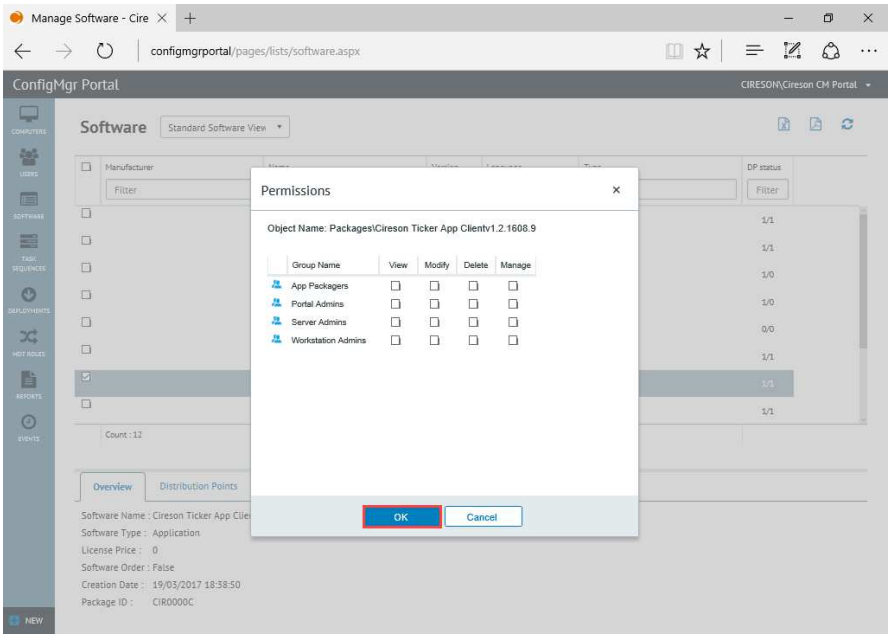


The **Permissions** dialog box is displayed.



3. Select the relevant permissions then click **OK**

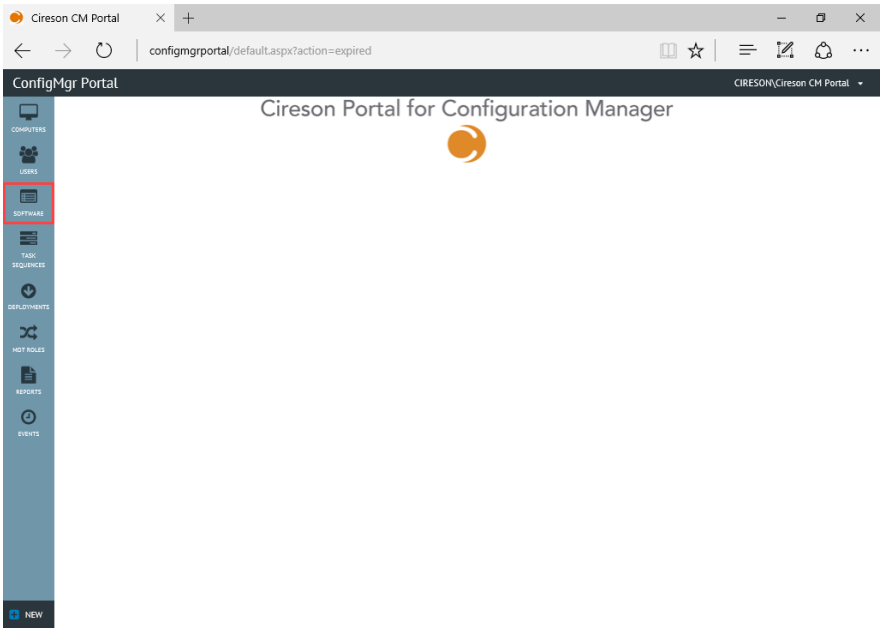
   NOTE: If you do not grant Global Rights to the Packages instance, you will need to grant a minimum of **View** permissions to a group in order for its members to be able to see a piece of software.



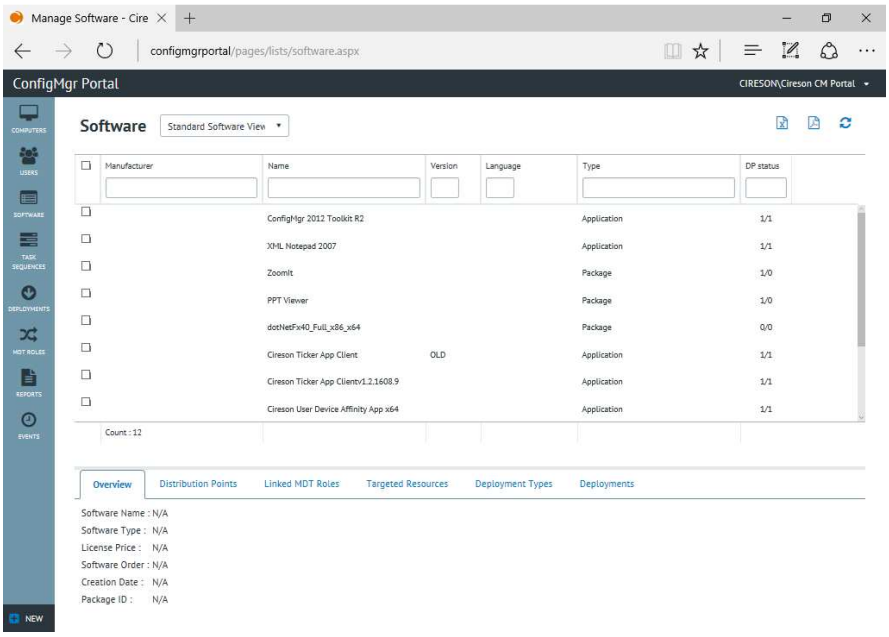
How do I see the basic information for a piece of software?

To see the basic information for a piece of software:

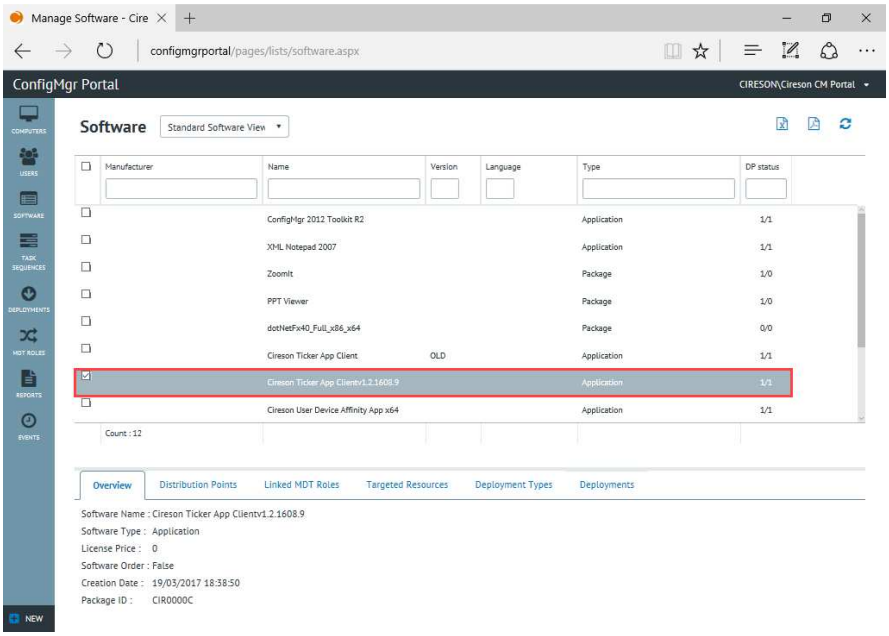
1. Click **Software** in the **Navigation Menu**



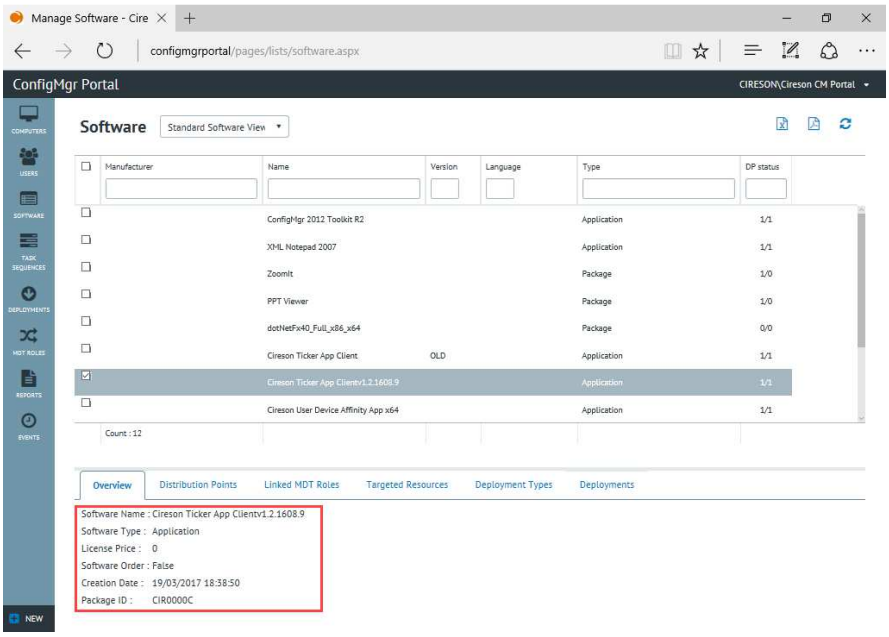
The list of current software in the Portal is displayed.



2. Select the relevant software whose information you want to see.



The **Overview** tab will then be populated.



The **Overview** tab will show you:

a. The **Software Name**

b. The **Software Type** which is **Application, Package** or **Task Sequence** depending on the type of content.

c. The **License Price** which is an optional value you can set when you create the content.

d. Whether or not the software is associated with a **Software Order** or not (a feature coming in a future release of the Portal).

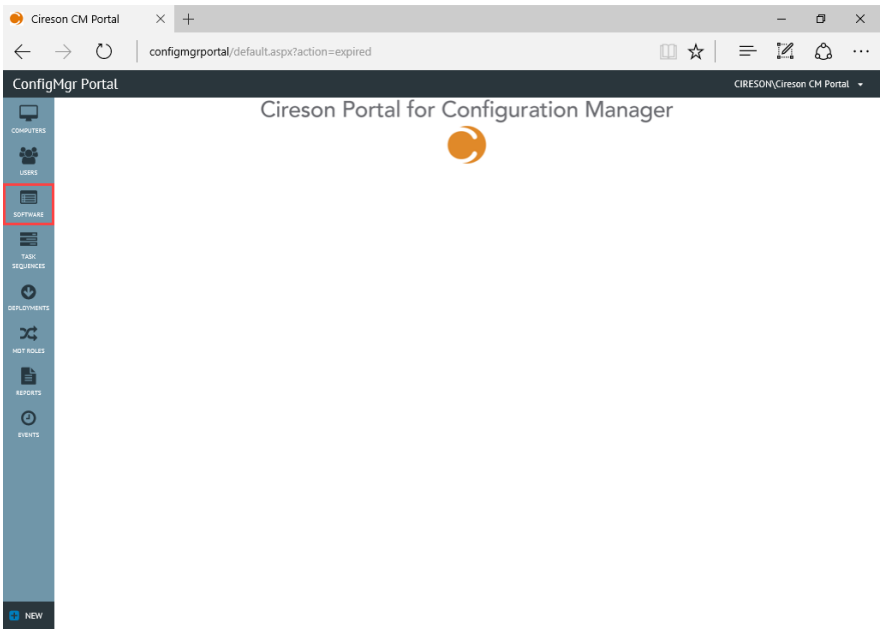
e. The **Creation Date** showing the date and time the content was created.

f. The ConfigMgr **Package ID**

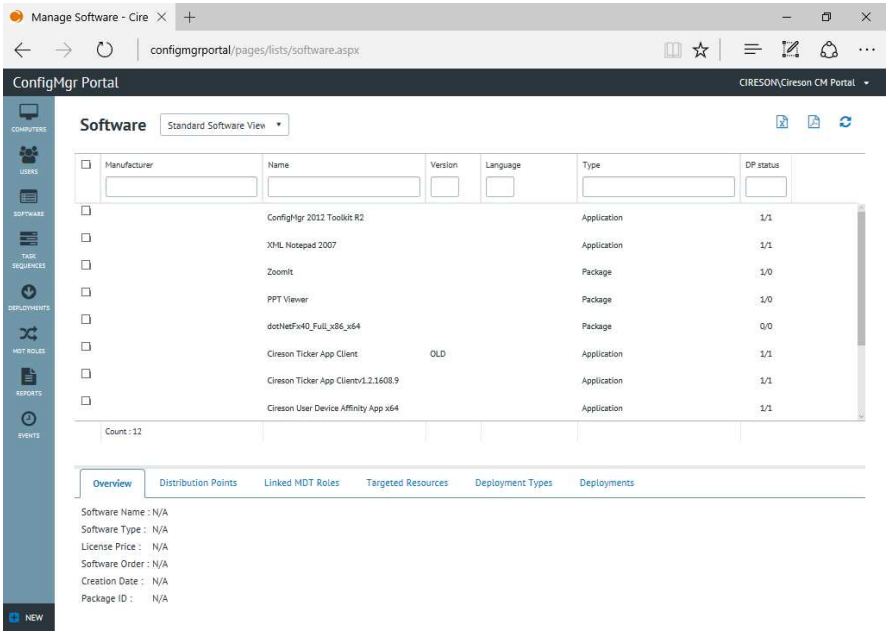
How do I see which Distribution Points/Distribution Point Groups software has been distributed to?

To see which distribution points (DPs)/DP groups software has been distributed to:

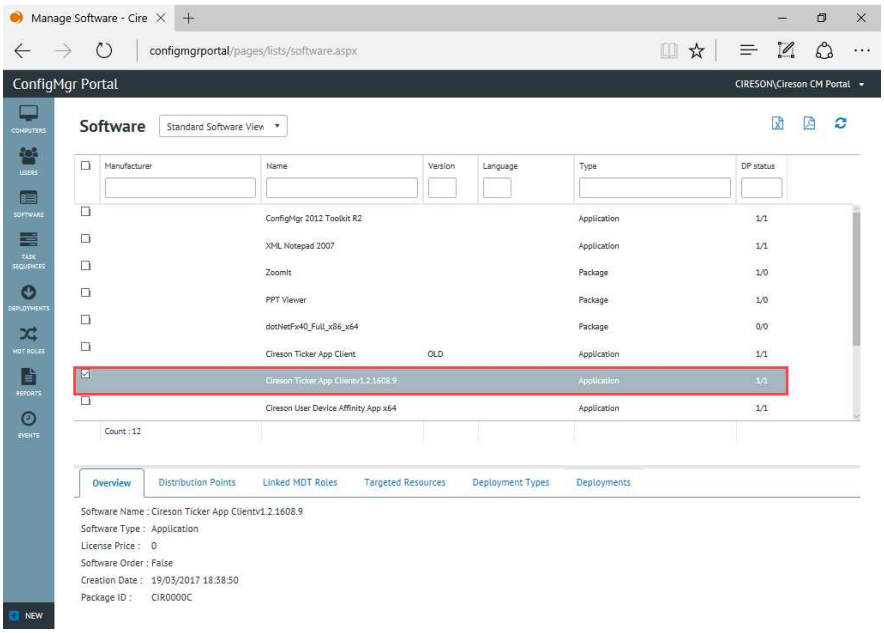
1. Click **Software** in the **Navigation Menu**



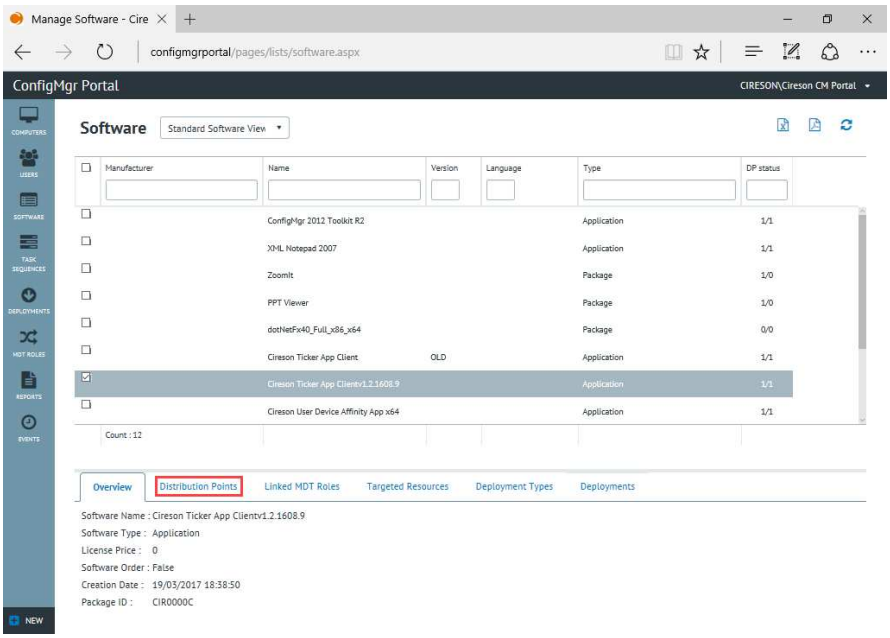
The list of current software in the Portal is displayed.



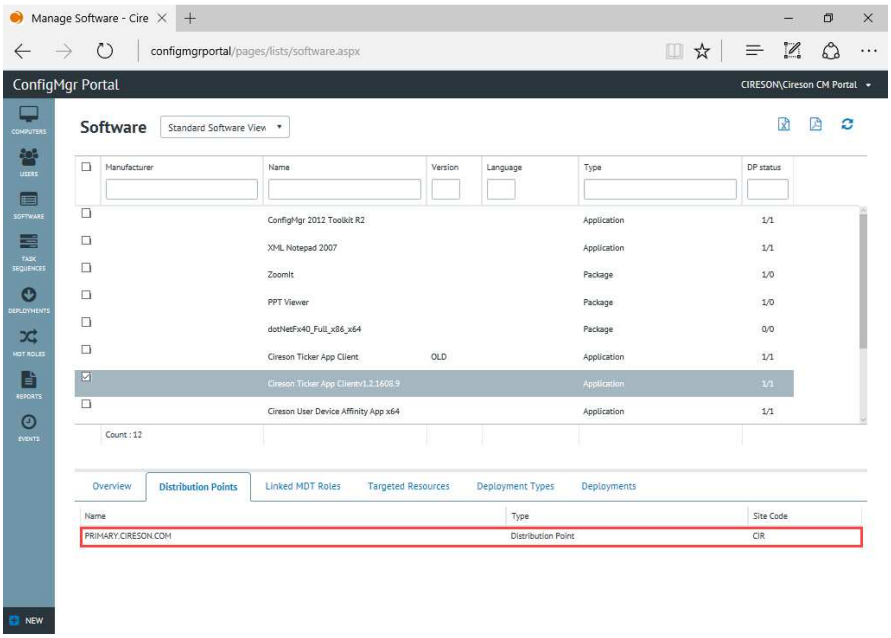
2. Select the relevant software whose status you want to check.



3. Click the **Distribution Points** tab in the **Content Detail** section.



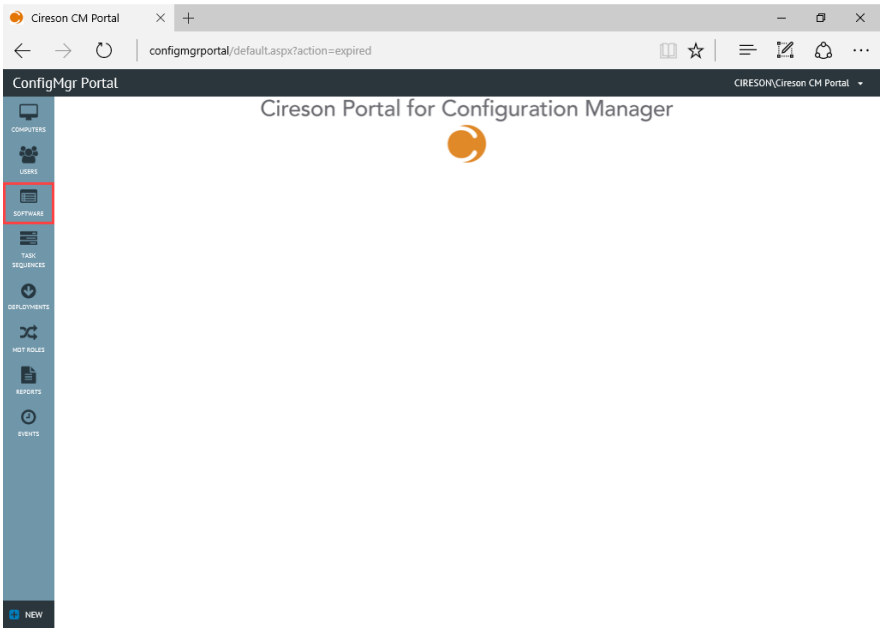
The DPs/DP Groups this software has been distributed to will be shown.



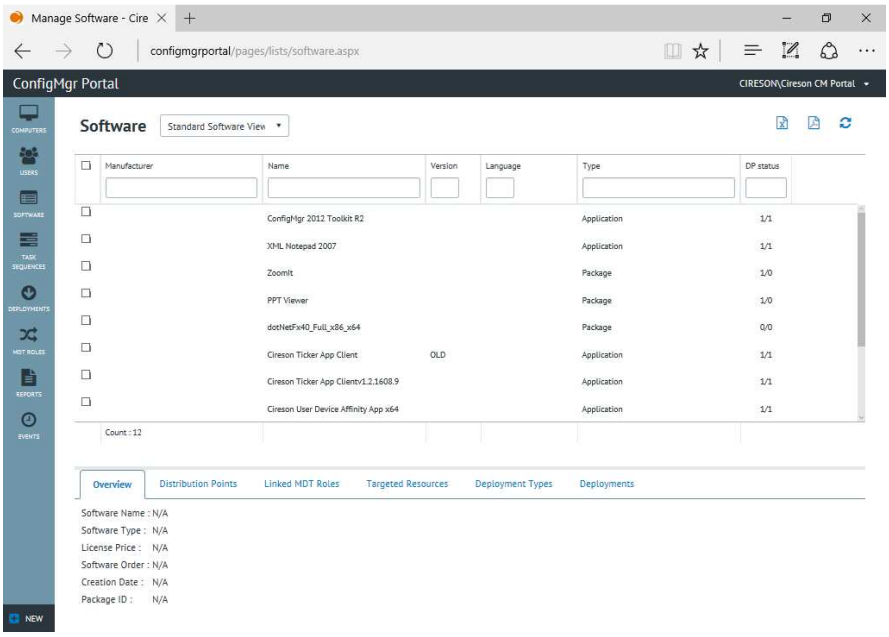
How do I see the Linked MDT Roles for a piece of content?

To see the Linked MDT Roles for a piece of content:

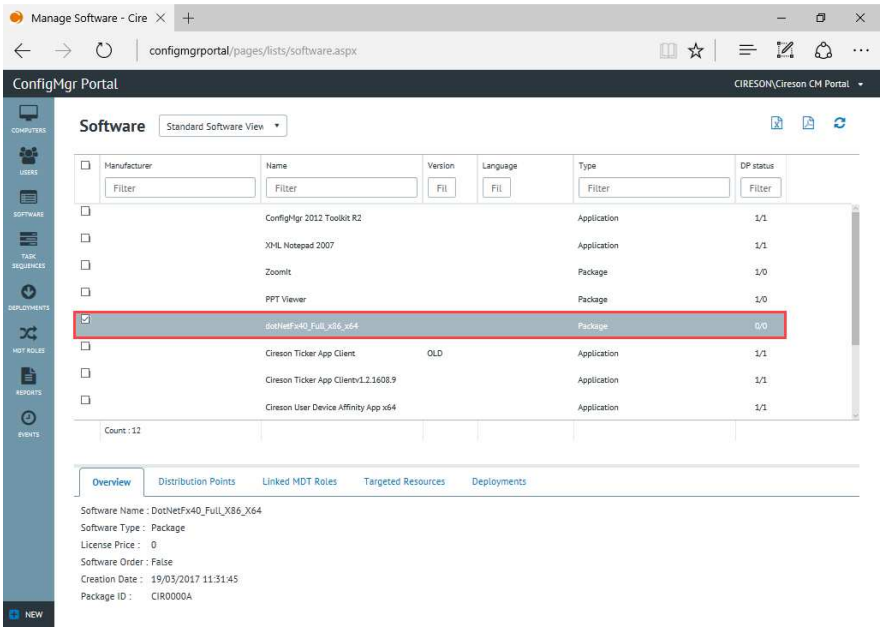
1. Click **Software** in the **Navigation Menu**



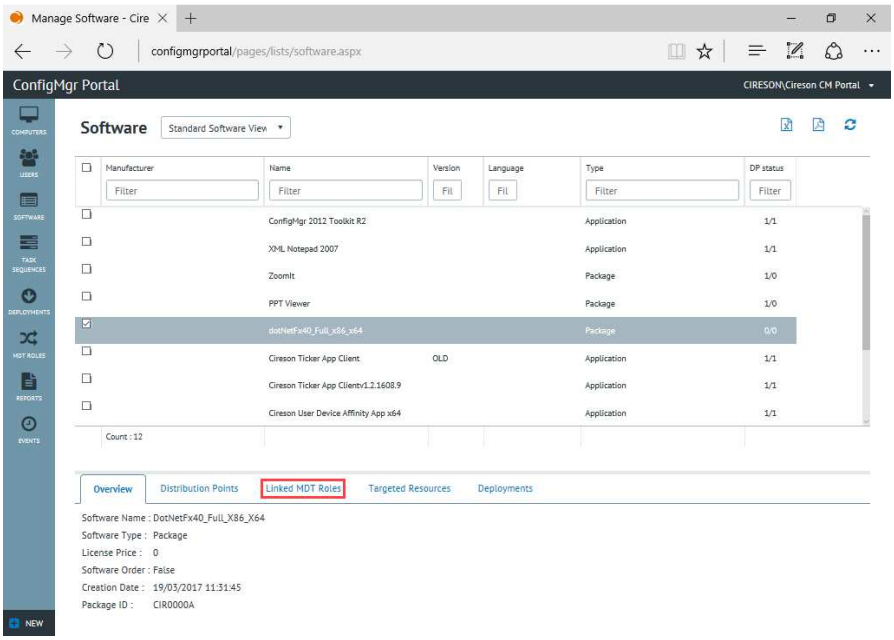
The list of current software in the Portal is displayed.



2. Select the relevant content whose linked MDT roles you want to see.

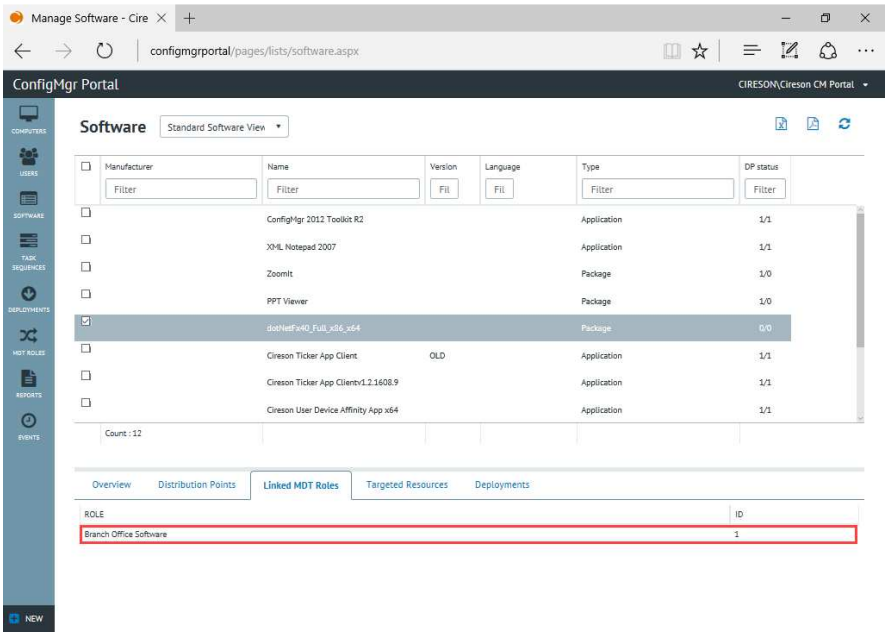


3. Click the **Linked MDT Roles** tab.



The MDT Roles this software is linked with will then be displayed.

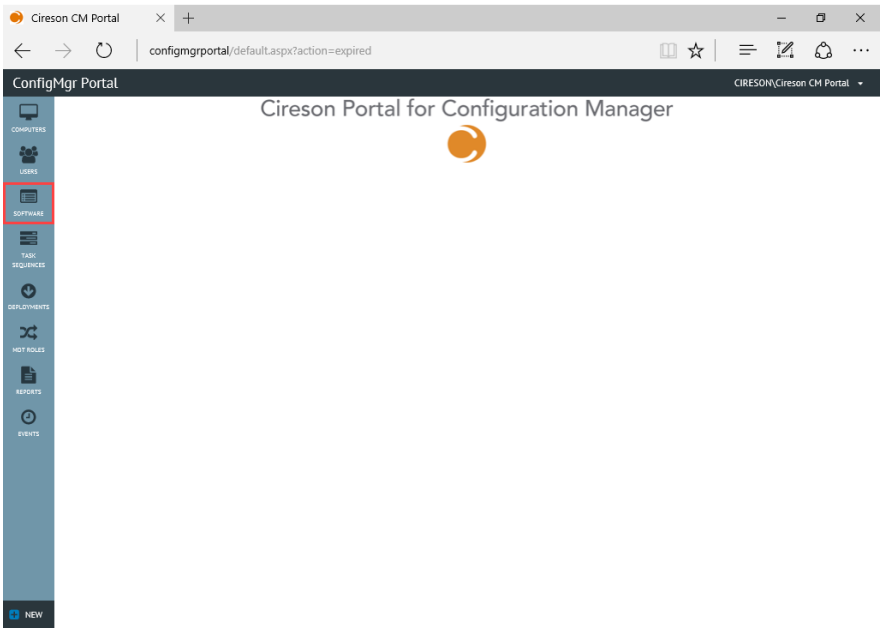
NOTE: The **Linked MDT Roles** tab is only displayed if you have integrated MDT with the Portal. If you have not integrated MDT with the Portal, this tab is not shown.



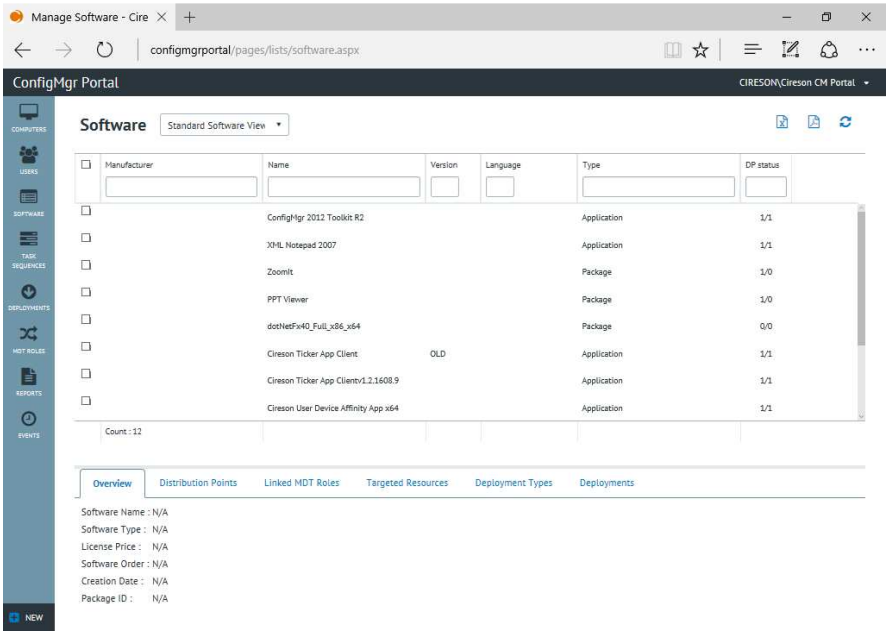
How do I see which resources a piece of content has been assigned to?

To see which resources a piece of content has been assigned to:

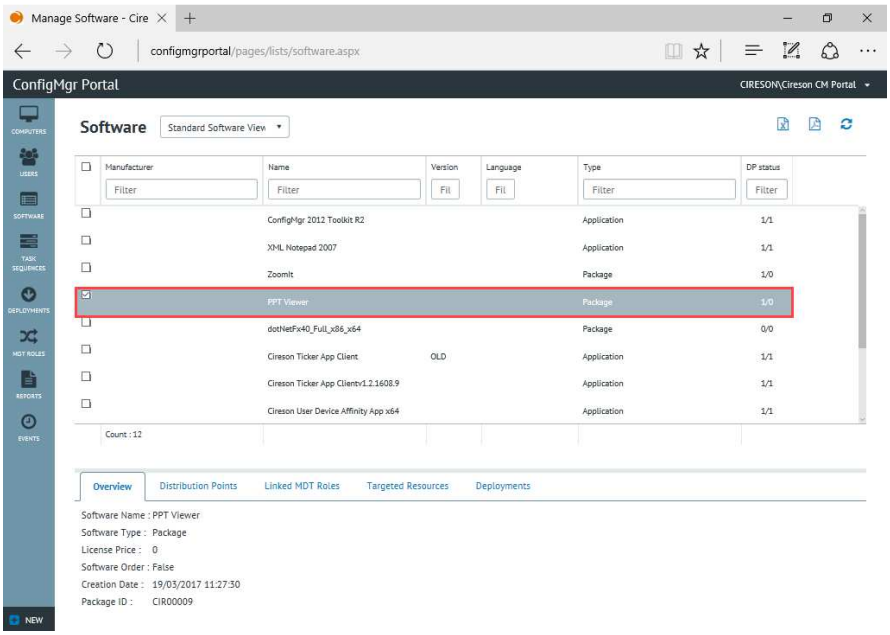
1. Click **Software** in the **Navigation Menu**



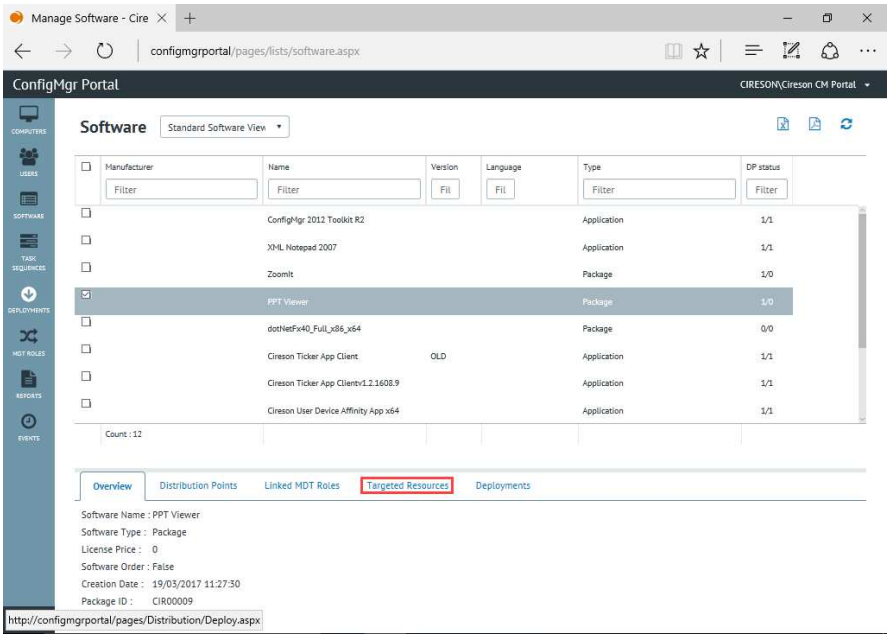
The list of current software in the Portal is displayed.



2. Select the relevant content.



3. Click the **Targeted Resources** tab.

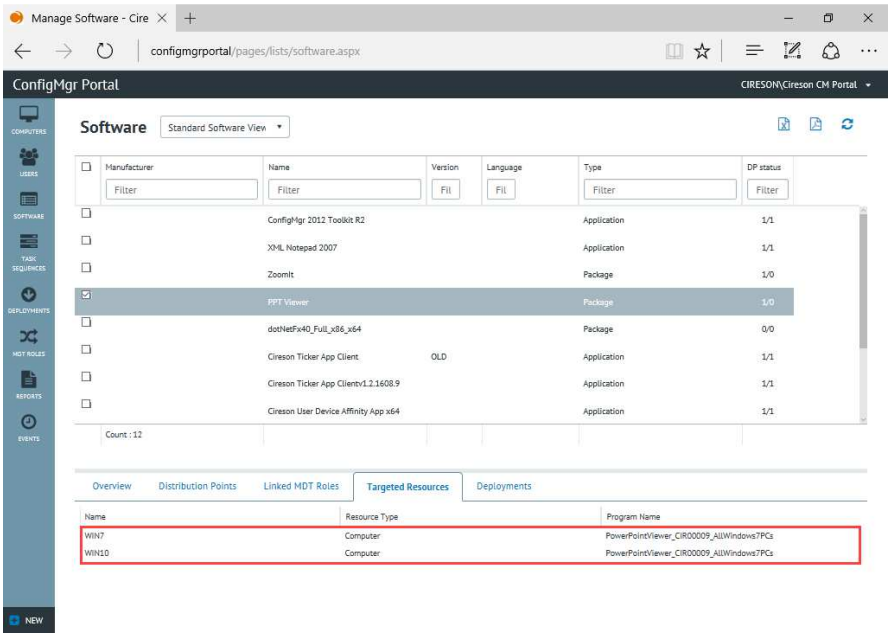


The **Targeted Resources** tab which shows you:

a. The **Name** of any resources to which the content has been assigned.

b. The **Resource Type** which is **Computer, User,** or **Group**

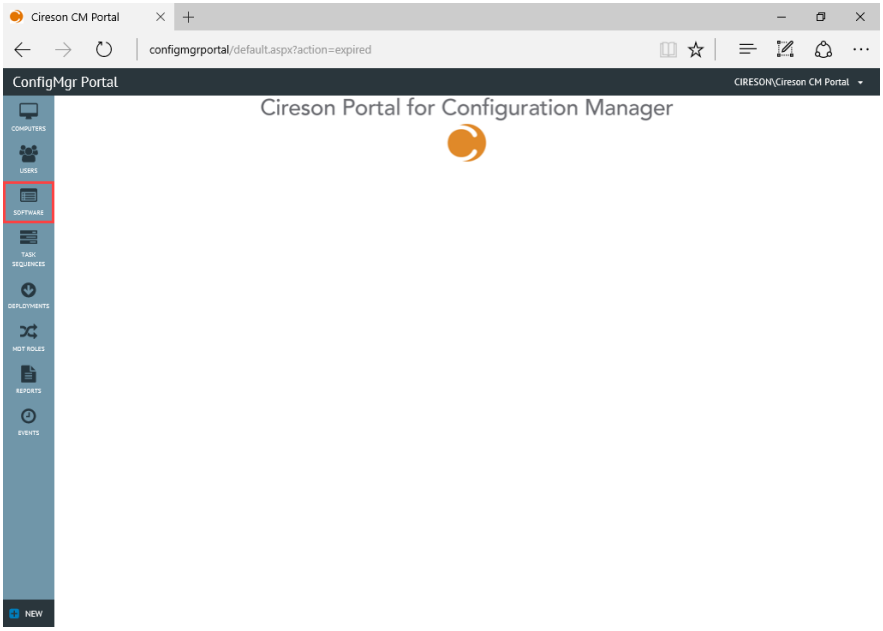
c. The **Action** for an **Application** such as **Install** or **Uninstall**, or for a **Package** the **Program Name**



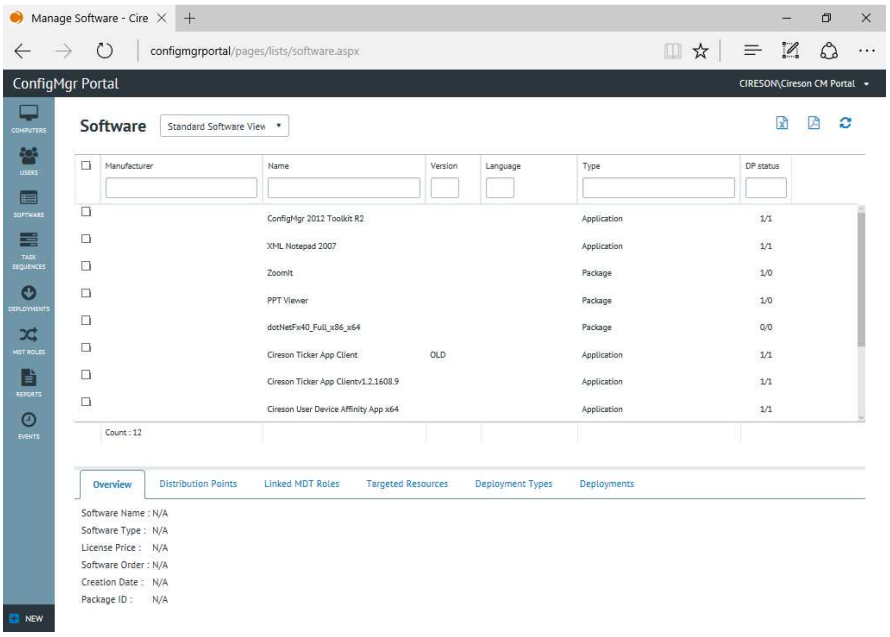
How do I see which Collections a piece of content has been Deployed to?

To see which collections a piece of content has been deployed to:

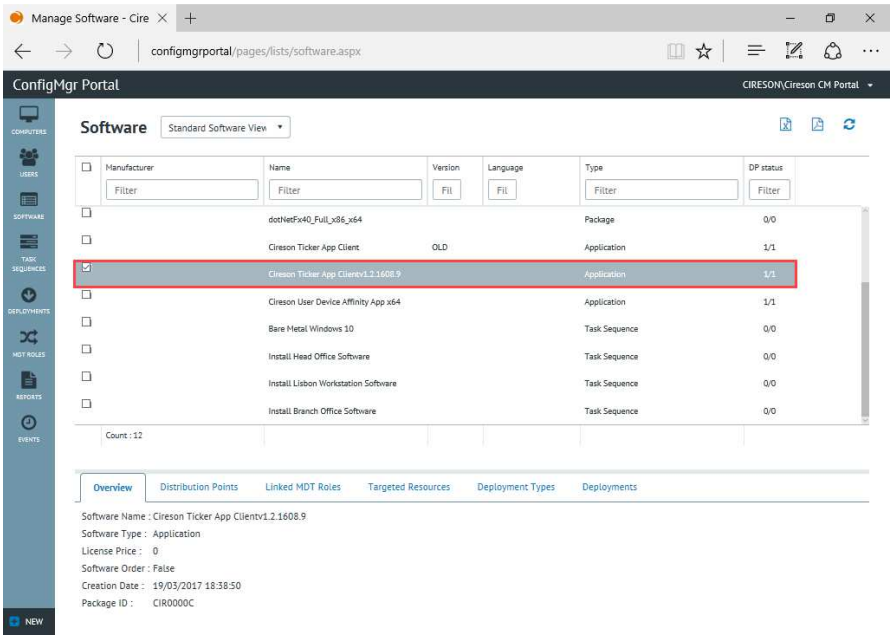
1. Click **Software** in the **Navigation Menu**



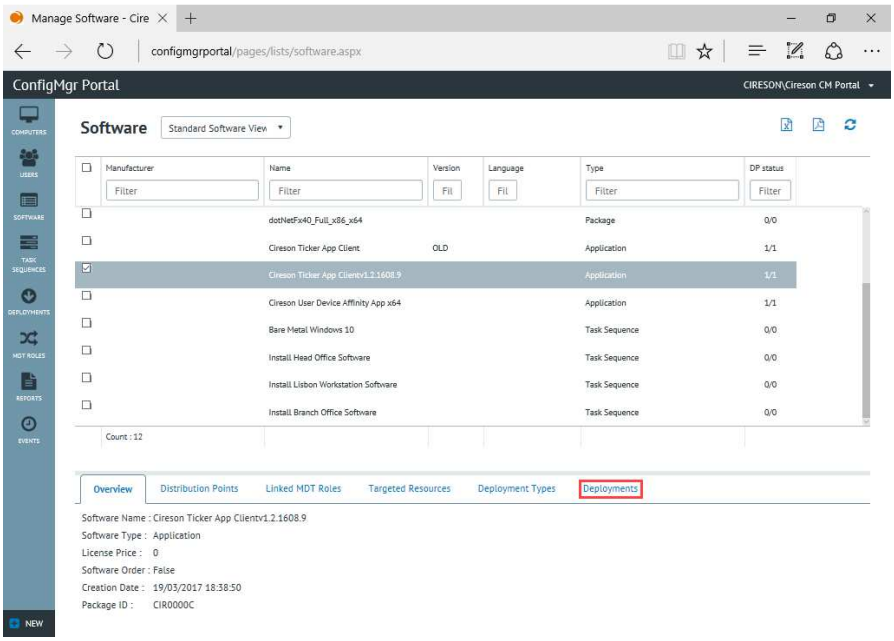
The list of current software in the Portal is displayed.



2. Select the relevant content.

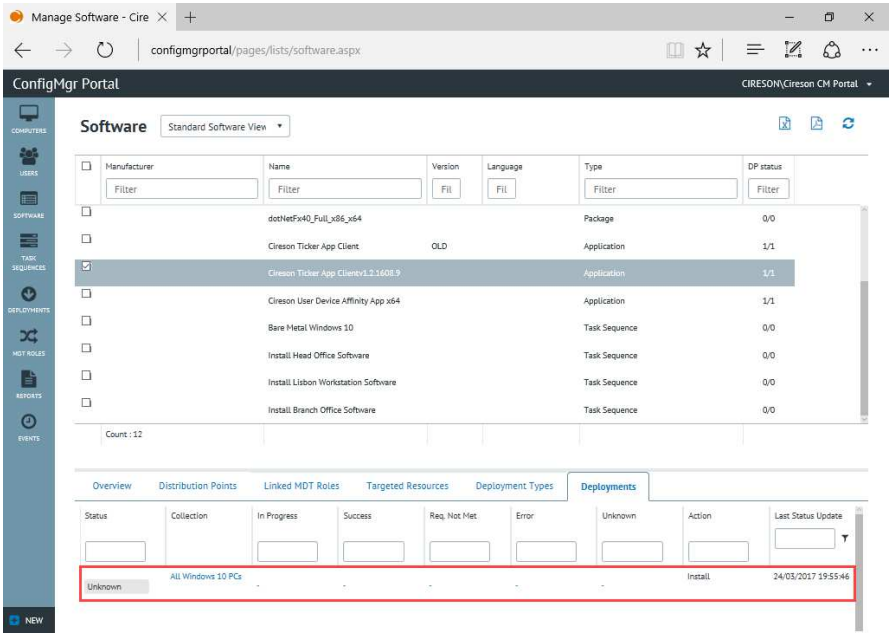


3. Click the **Deployments** tab.



The **Deployments** tab shows you various information for the deployment.

NOTE: You can click on either the deployment status or collection name to drilldown to further information related to a deployment.

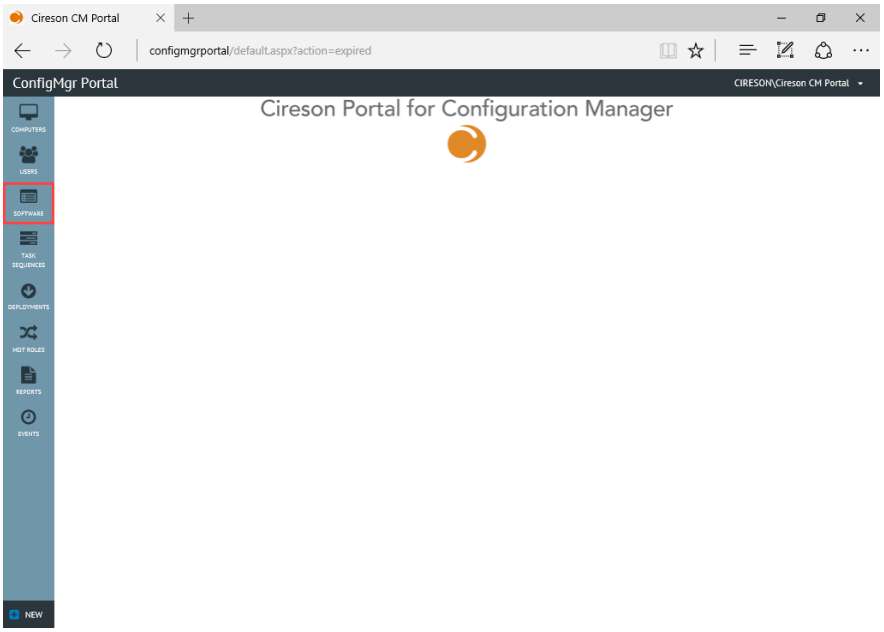


How do I see the Deployment Types for an Application?

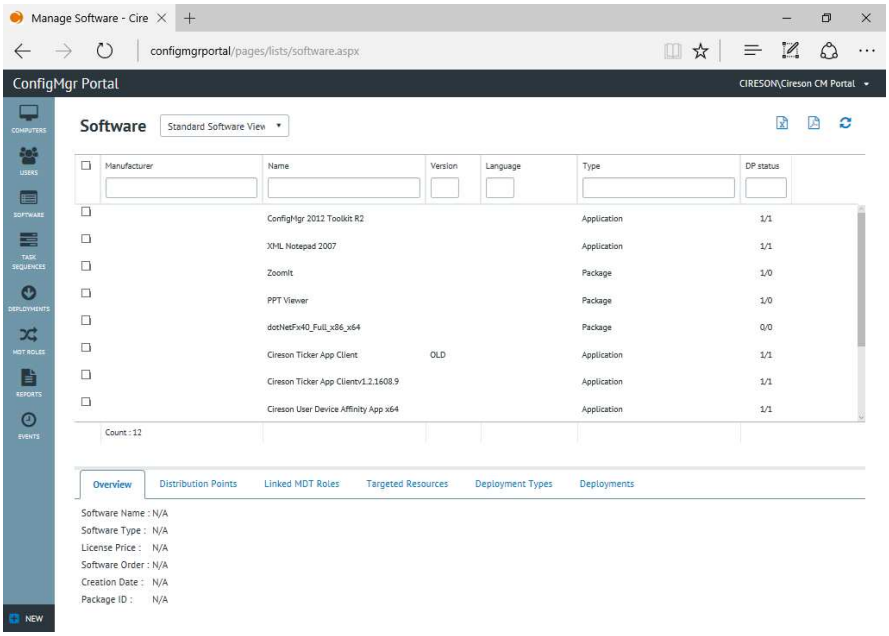
To see the deployment types for an application:

NOTE: Deployment types are only relevant for applications. The **Deployment Types** tab is not shown in the Portal for the other types of content such as packages or task sequences.

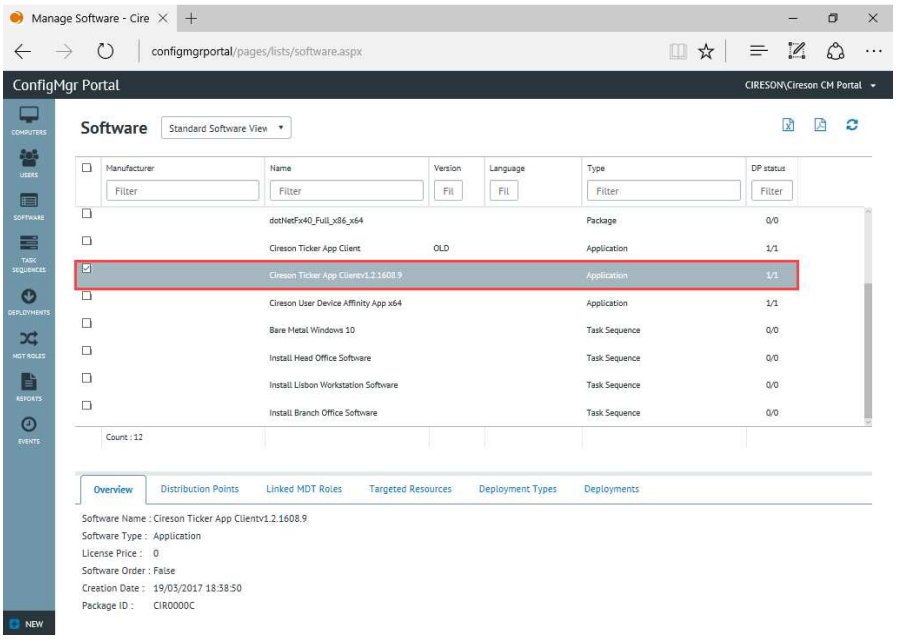
1. Click **Software** in the **Navigation Menu**



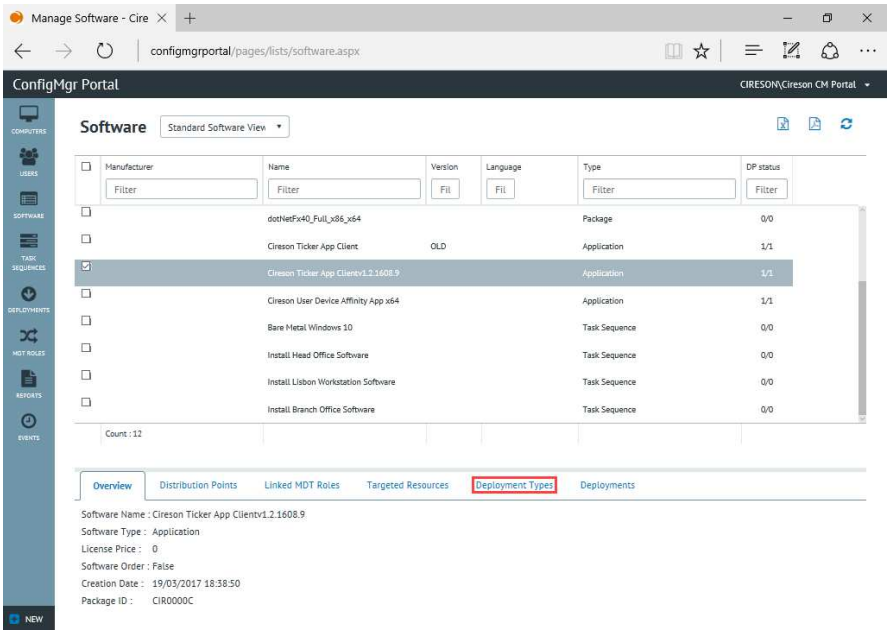
The list of current software in the Portal is displayed.



2. Select the relevant application.



3. Click the **Deployment Types** tab.

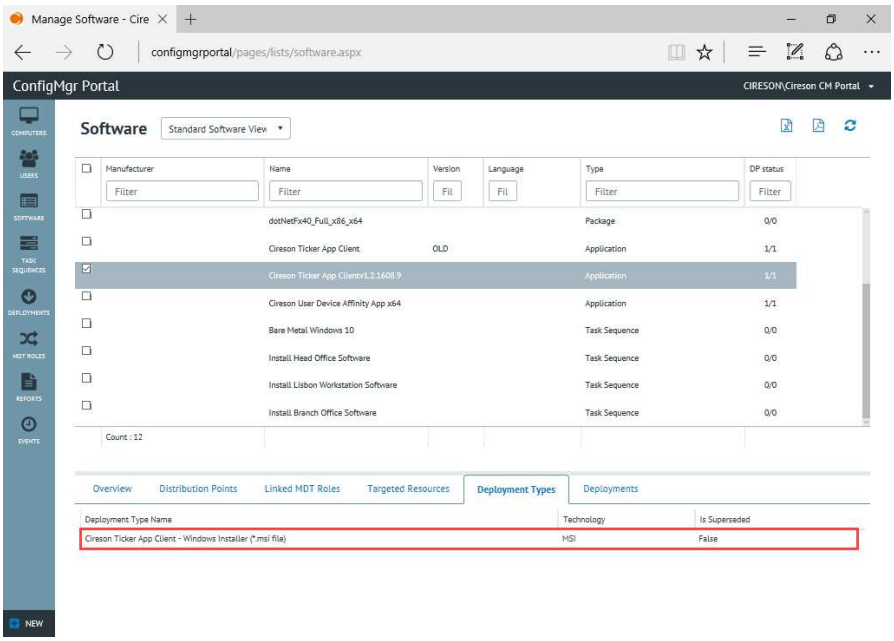


The **Deployment Types** tab shows you:

a. The **Deployment Type Name**

b. The **Technology** such as **Script**, **MSI**, etc.

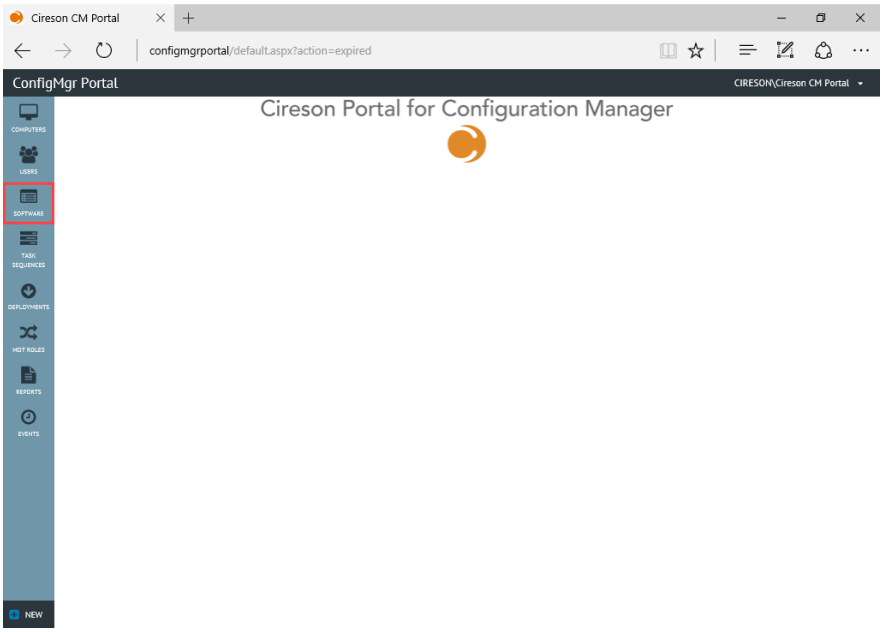
c. If the content has been superseded.



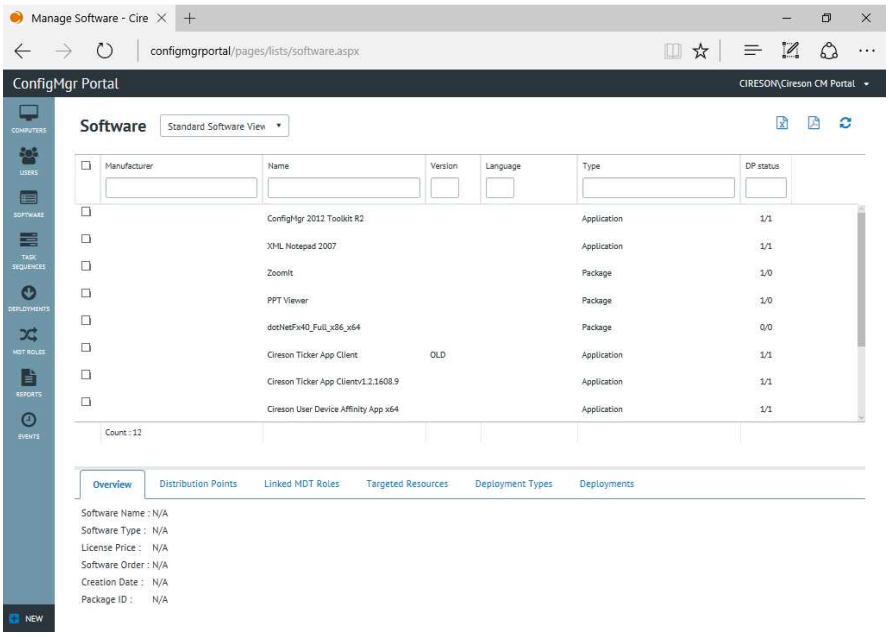
How do I remove content from a Distribution Point/Distribution point Group?

To remove content from a distribution point (DP)/DP group:

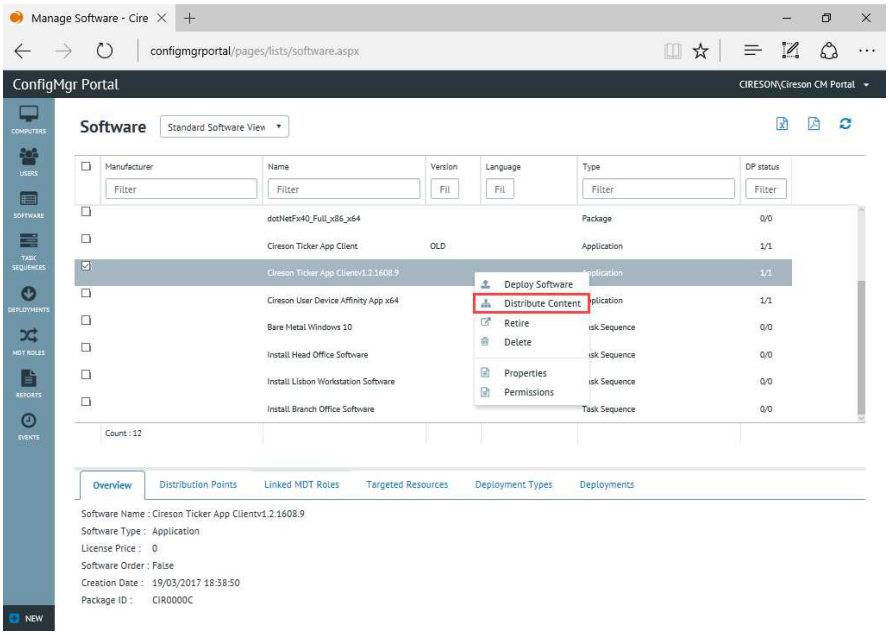
1. Click **Software** in the **Navigation Menu**



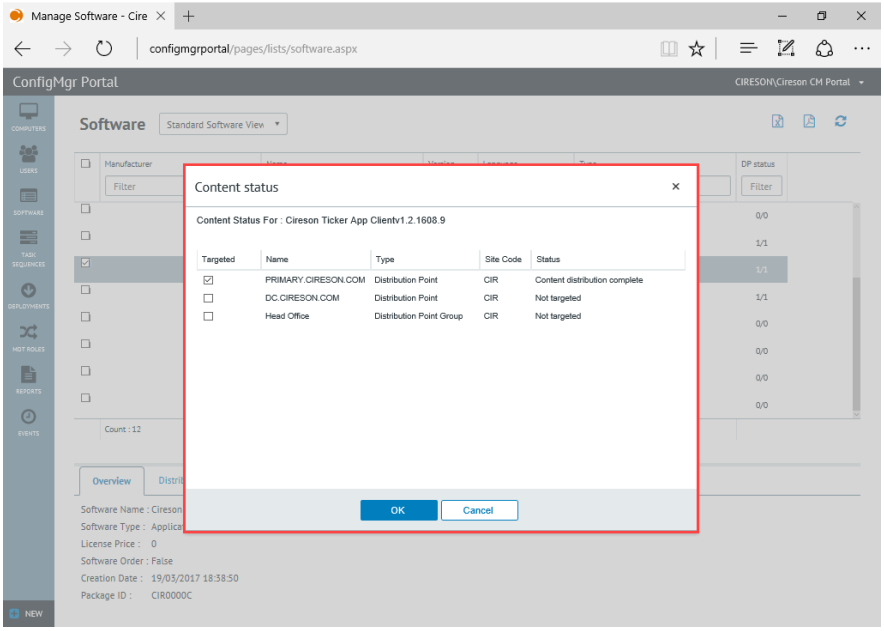
The list of current software in the Portal is displayed.



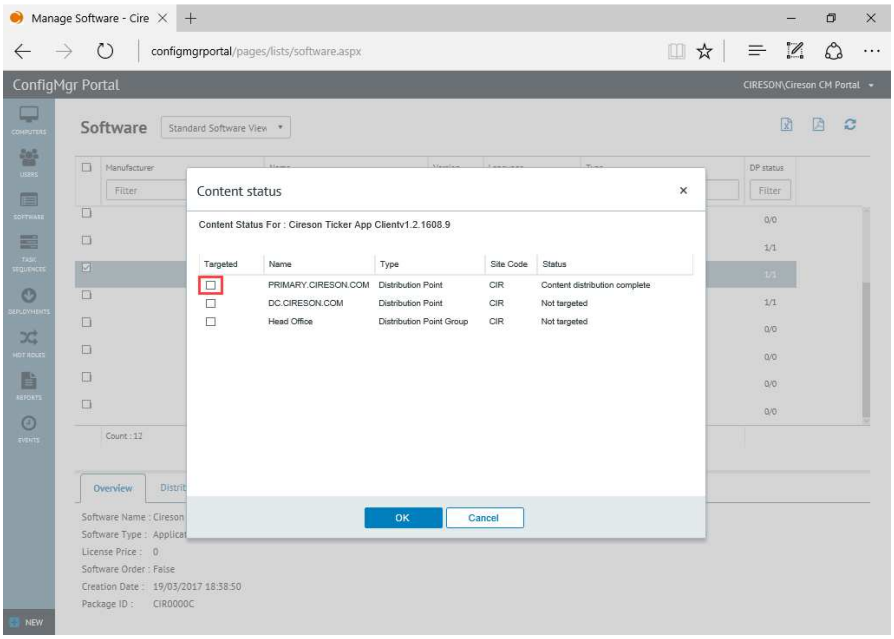
2. Right-click the relevant content you want to remove and select **Distribute Content**



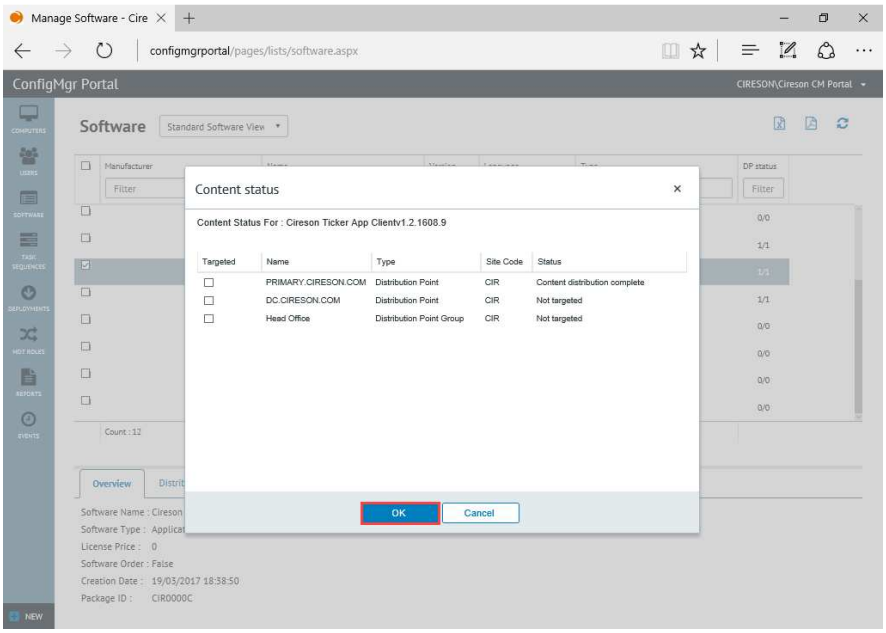
The **Content status** dialog box is displayed showing which DPs/DP Groups the content has been targeted to and its status.



3. Uncheck the **Targeted** checkbox beside the relevant DP(s)/DP Groups you want to remove the content from.

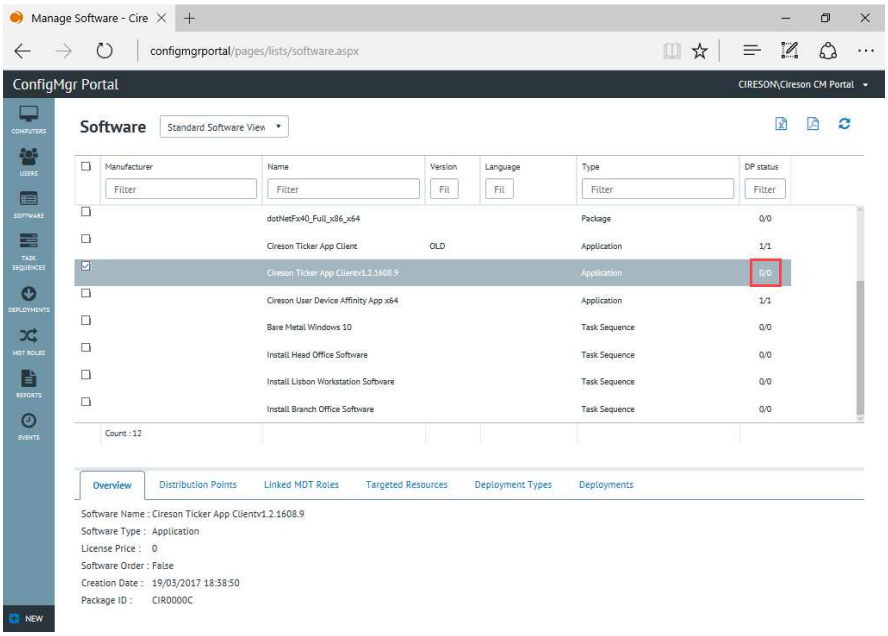


4. Click **OK**



NOTE: At this point, the **Status** field on the **Content status** page mentioned in step 2. will now state **Not targeted**.

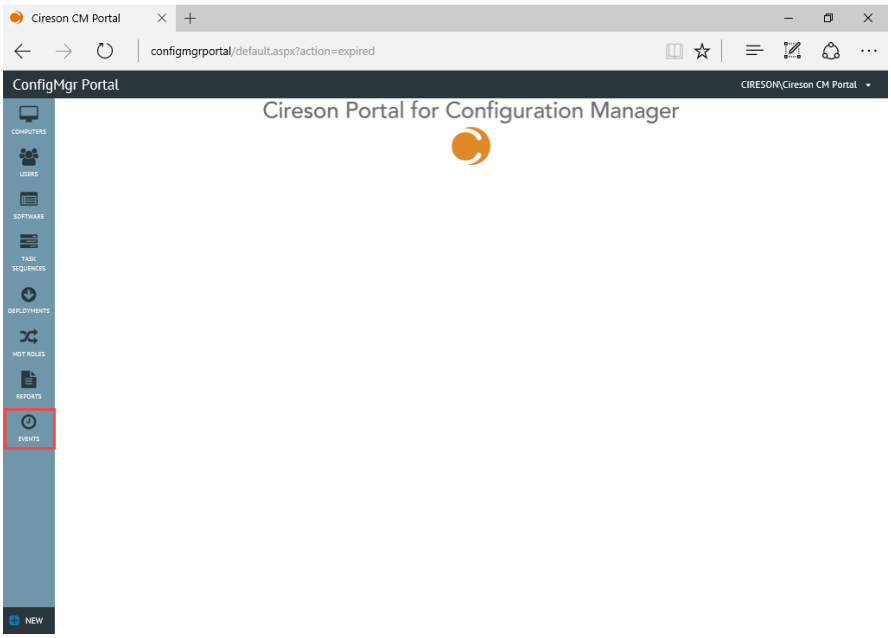
5. Refresh the Portal periodically until the **DP status** field updates correctly.



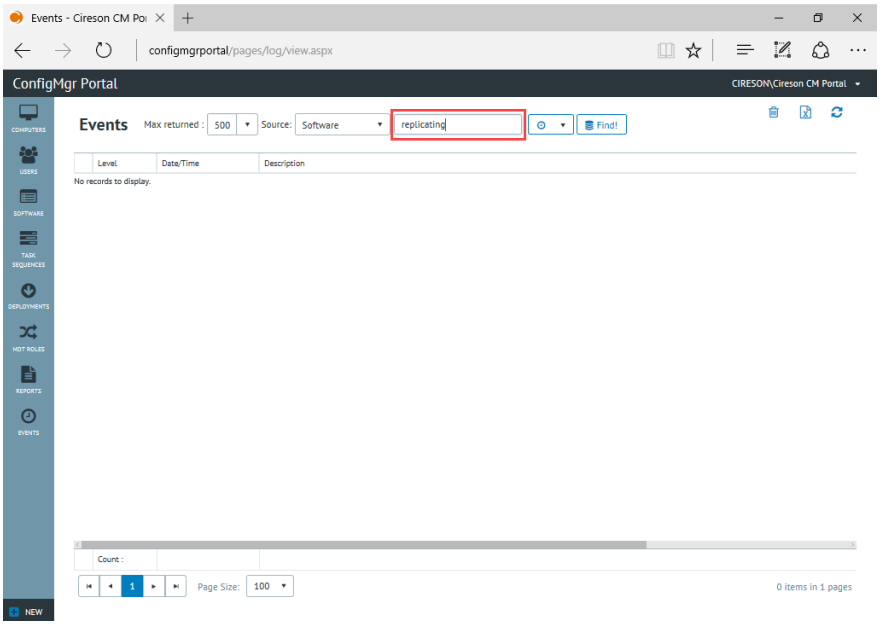
How do I verify content distribution using the Portal?

To verify content distribution using the Portal:

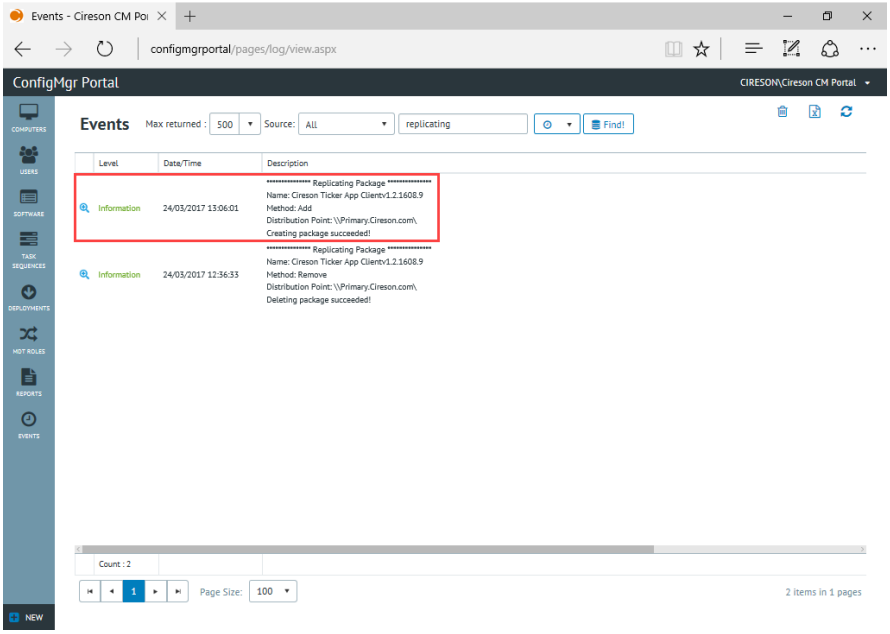
1. Click **Events** in the **Navigation Menu**



2. In the search field, type **replicating** and press **ENTER**.



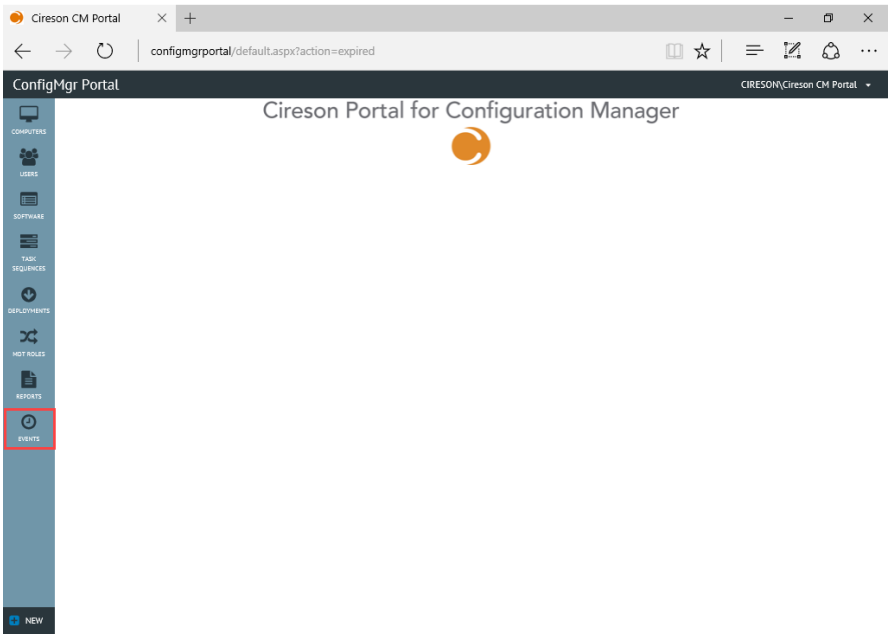
3. Look for a corresponding entry for the content, the last line of which is **Creating <*content_type*> succeeded!**



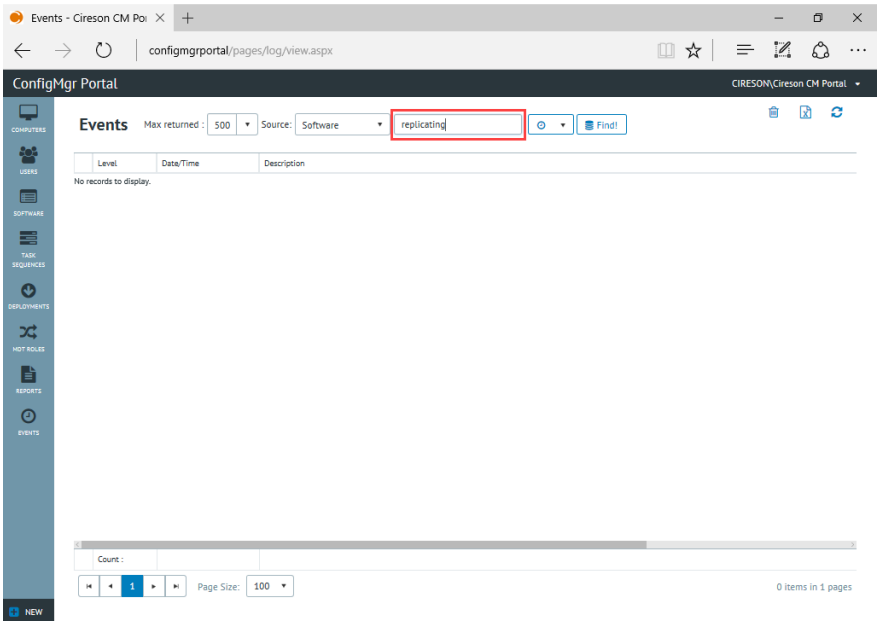
How do I verify content removal using the Portal?

To verify content removal using the Portal:

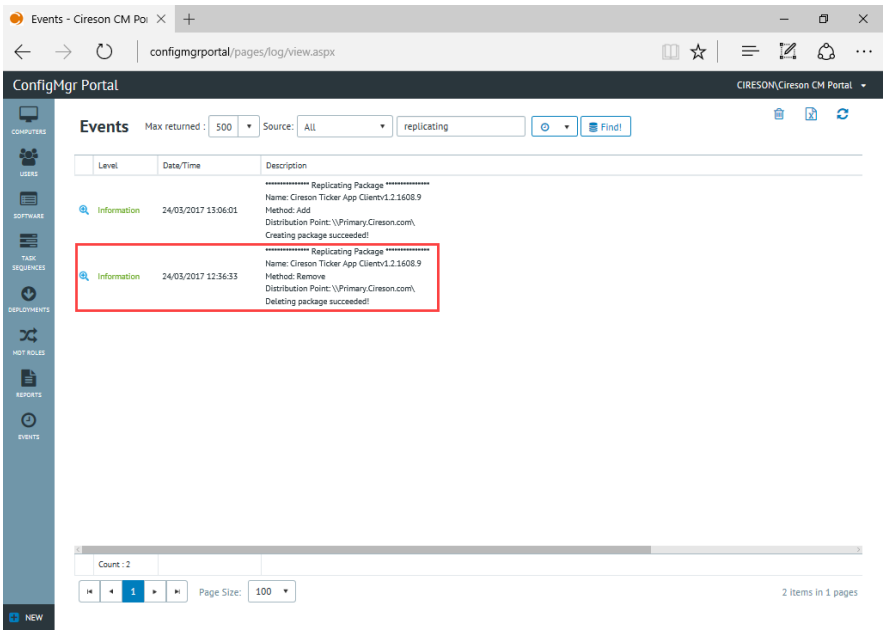
1. Click **Events** in the **Navigation Menu**



2. In the search field type **replicating** and press **ENTER**.



3. Look for a corresponding entry for the content, the last line of which is **Deleting <*content_type*> succeeded!**



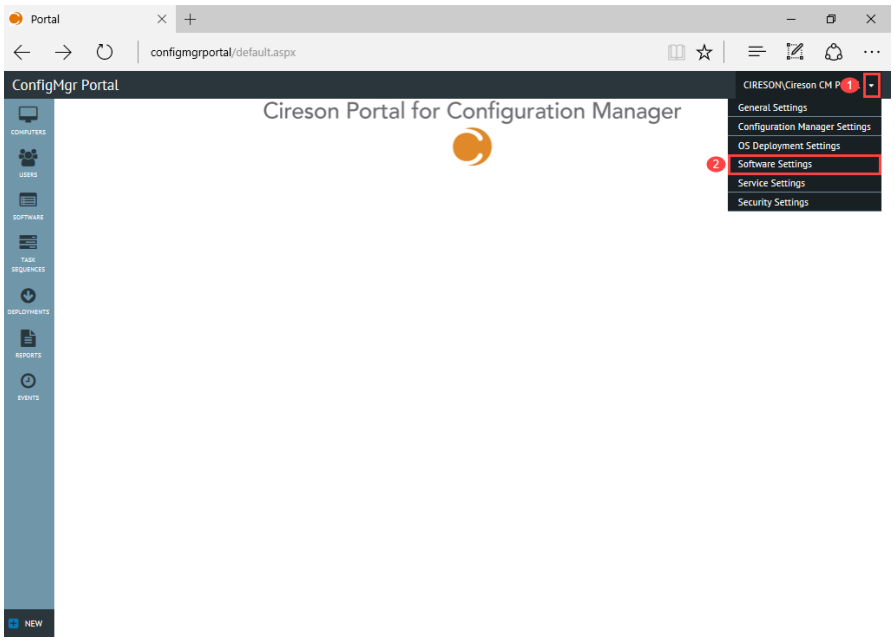
How do I edit Software?

In the current release of the Portal there is no ability to edit software. If you do need to edit software, this will need to be performed from within the ConfigMgr console.

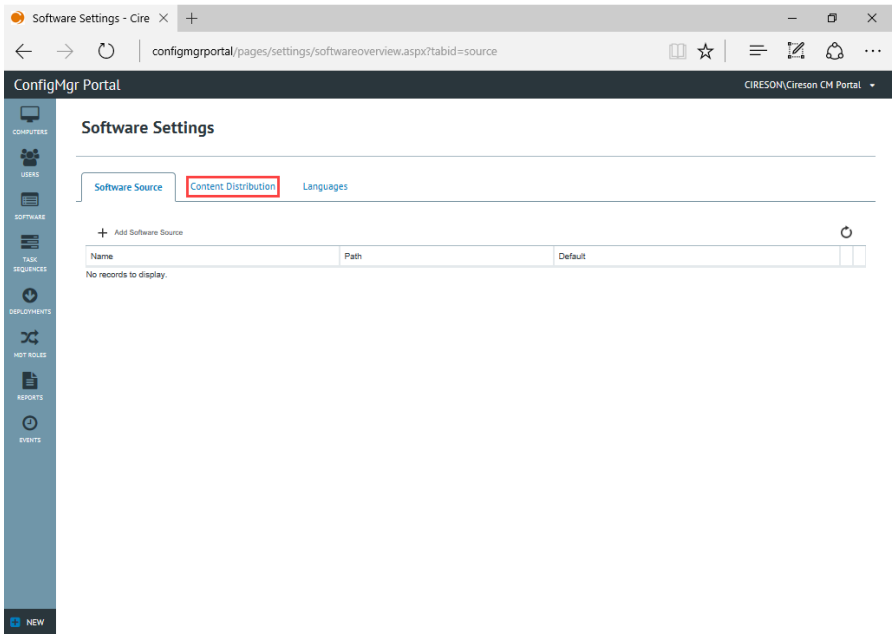
How do I Add software to a Distribution Point/Distribution Point Group if it is missing?

To add software to a distribution point/distribution point group if it is missing:

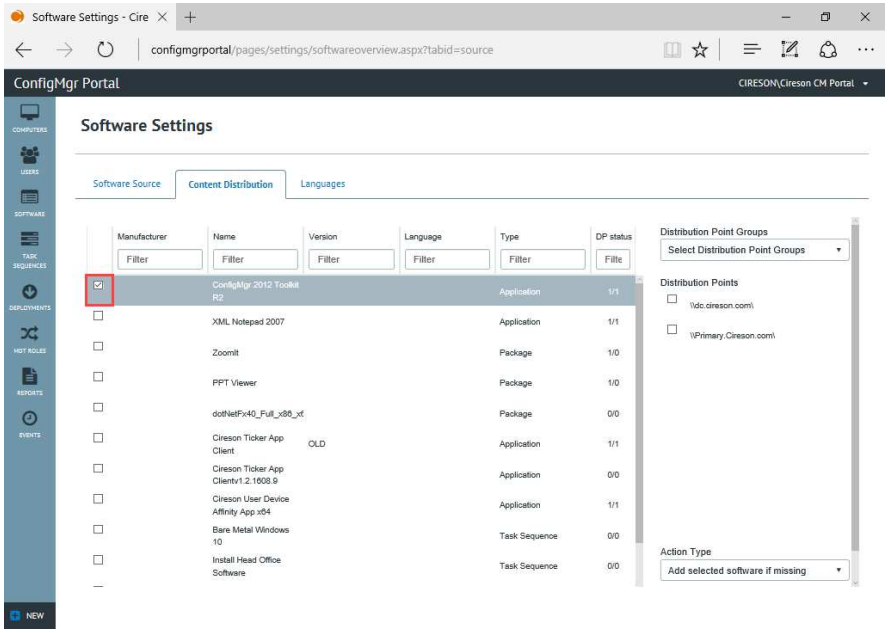
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**



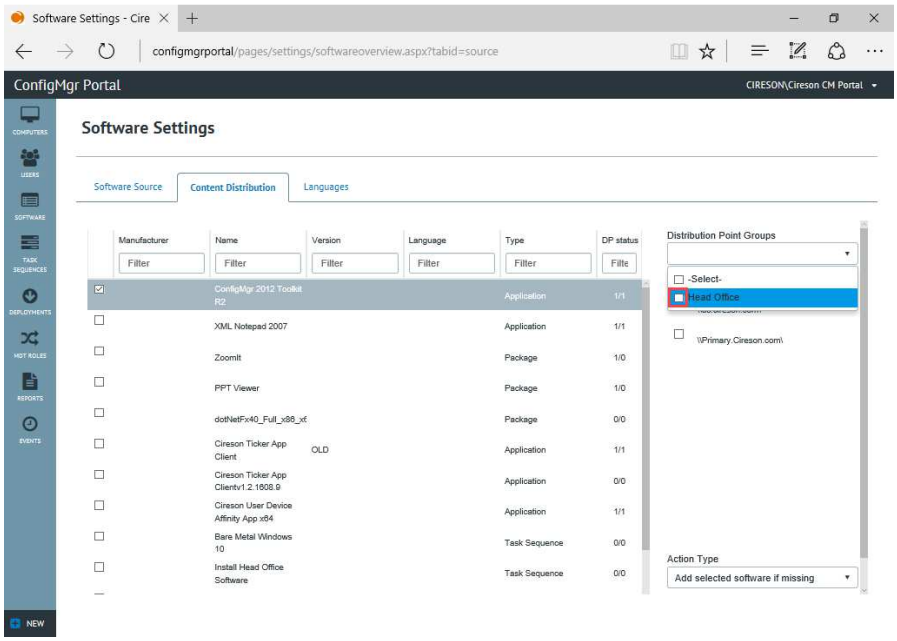
2. Click the **Content Distribution** tab.



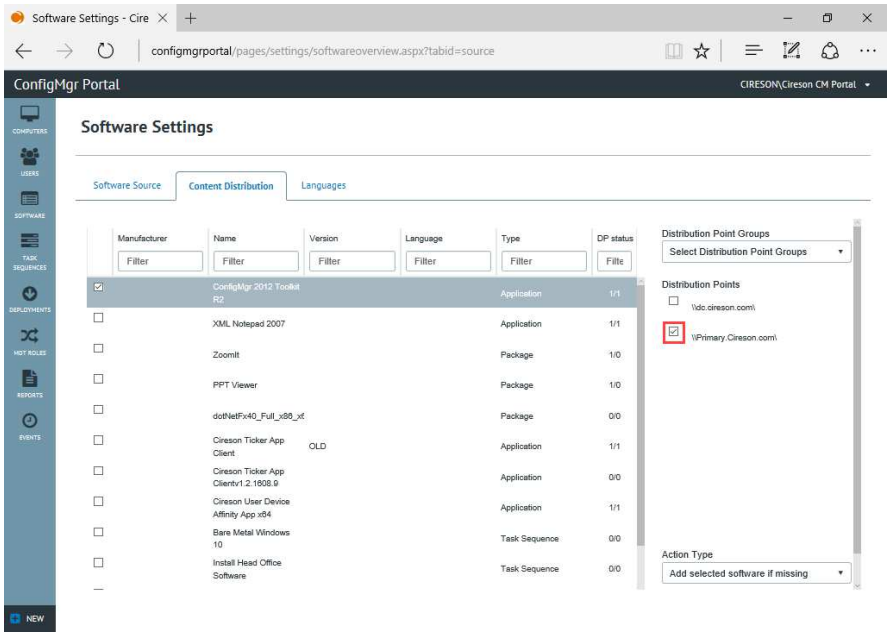
3. Click the checkbox beside the relevant content you want to add.



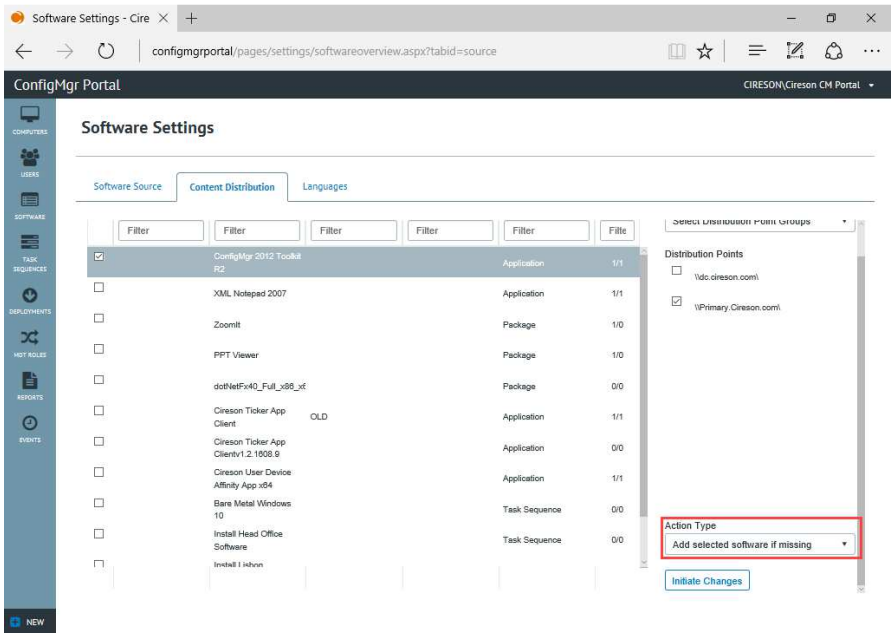
4. If applicable, select the relevant DP Group from the **Distribution Point Groups** dropdown list.



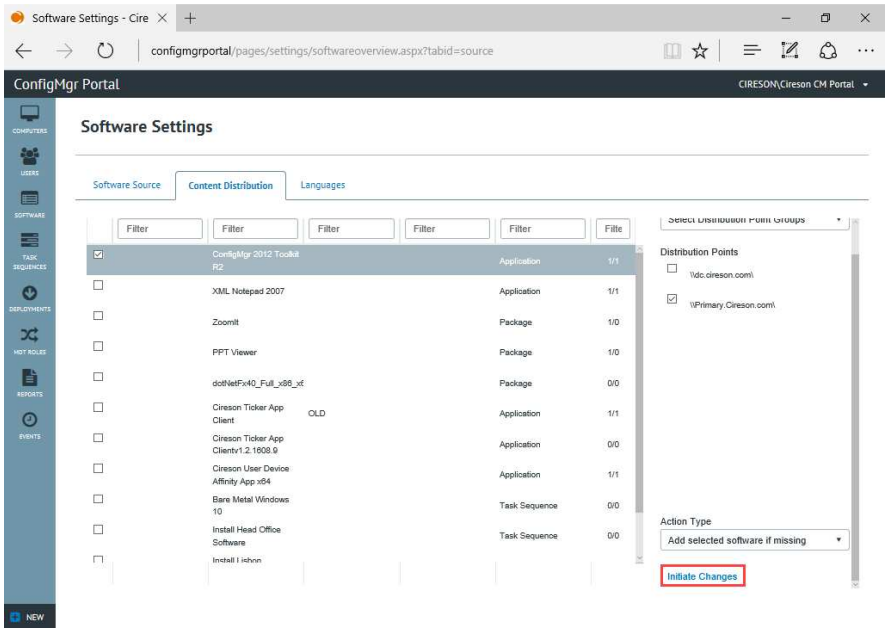
5. Select the relevant DPs from the **Distribution Points** list.



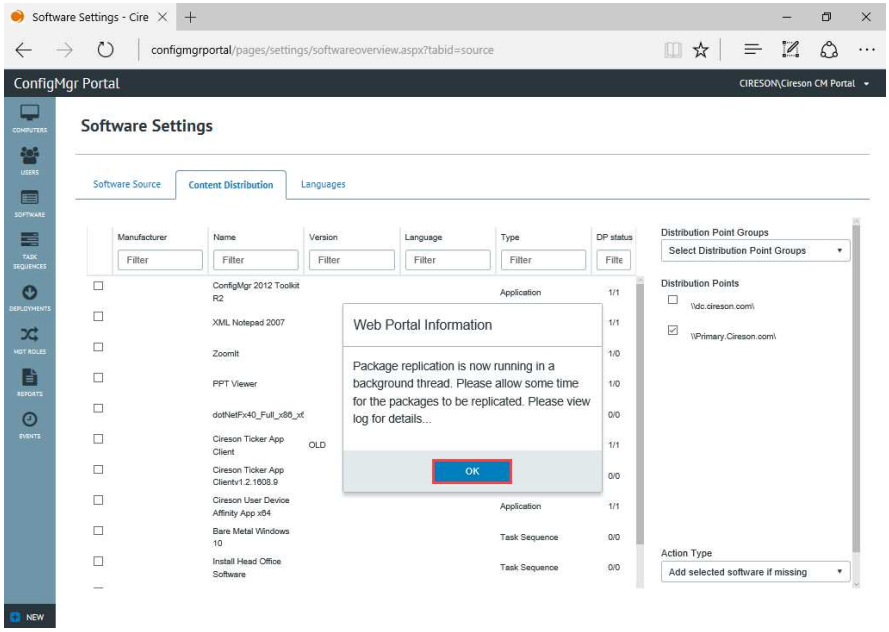
6. From the **Action Type** dropdown list, make sure **Add selected software if missing** is selected.



7. Click **Initiate Changes**



8. Click **OK** on the **Web Portal Information** dialog box stating **Package replication is now running in a background thread. Please allow some time for the packages to be replicated. Please view log for details…**

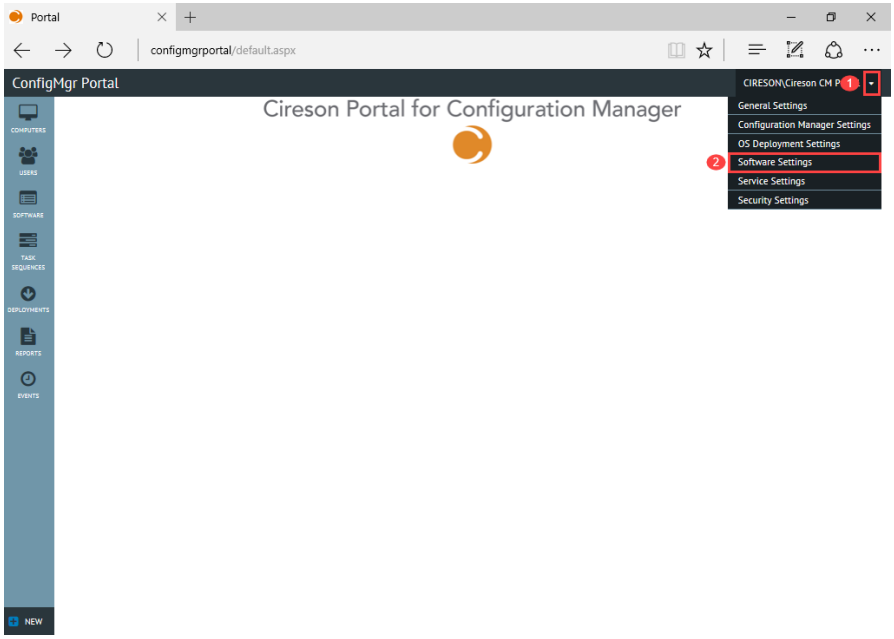


NOTE: You can verify the content has been added using the process detailed in How do I verify content distribution using the Portal?

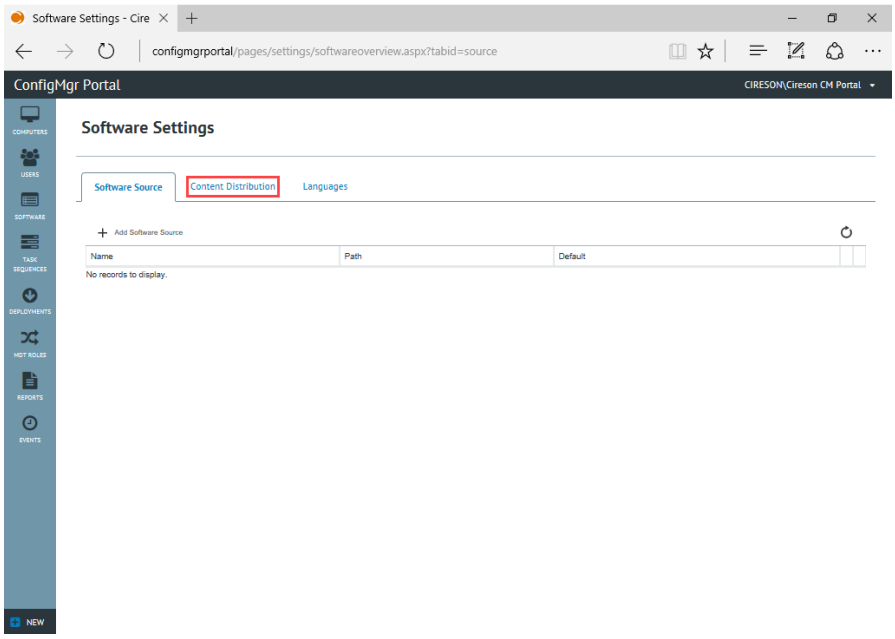
How do I Refresh software on a Distribution Point/Distribution Point Group?

To refresh software on a distribution point (DP)/DP group:

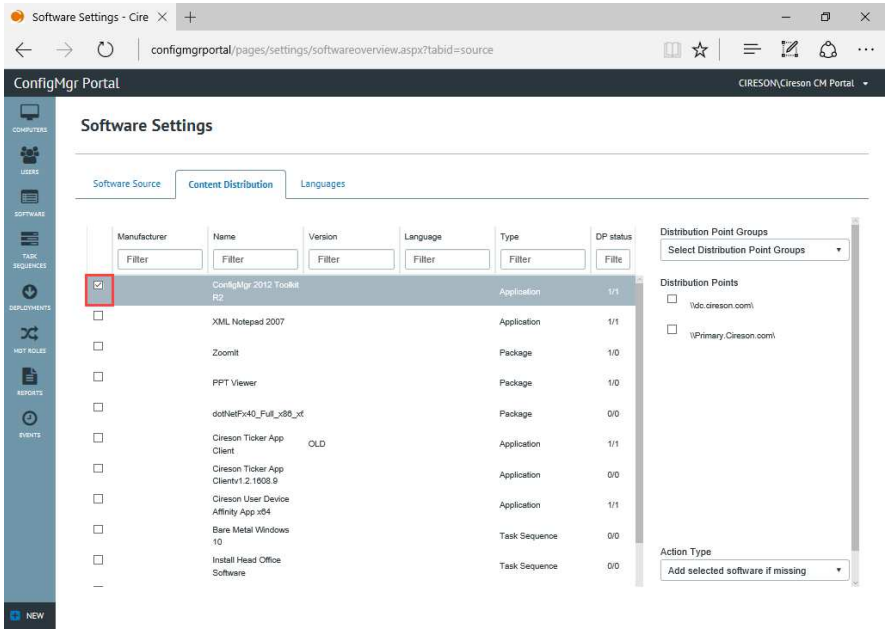
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**



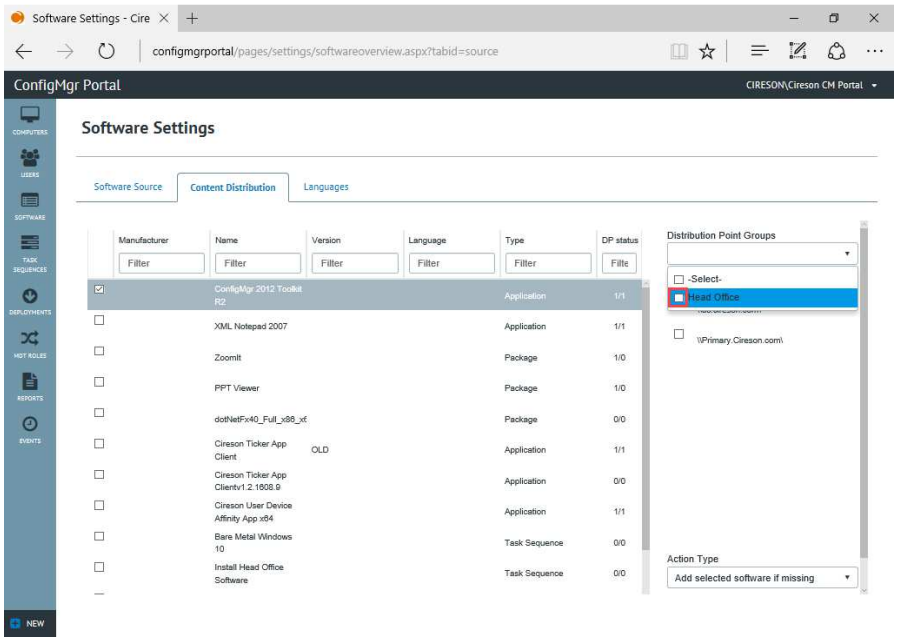
2. Click the **Content Distribution** tab.



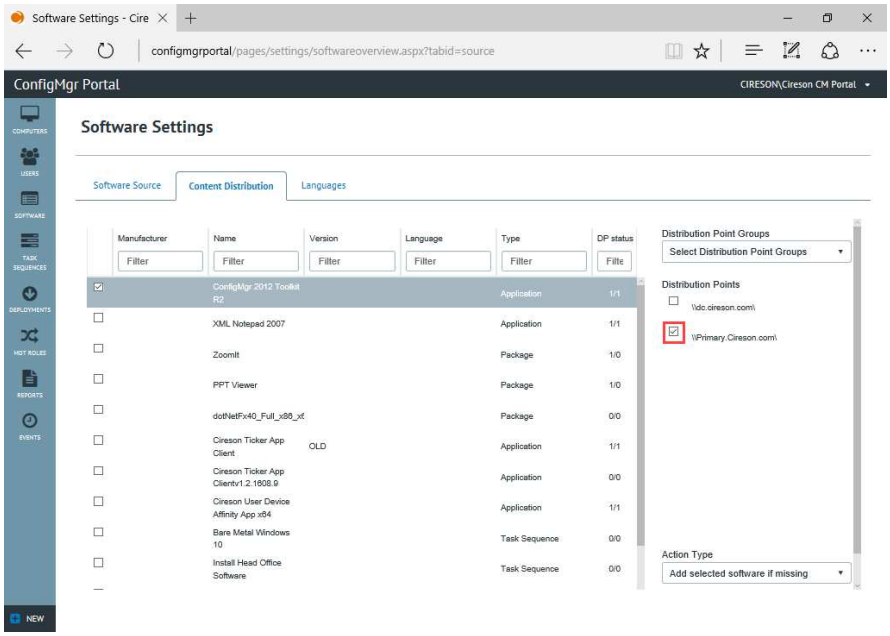
3. Click the checkbox beside the relevant content you want to refresh.



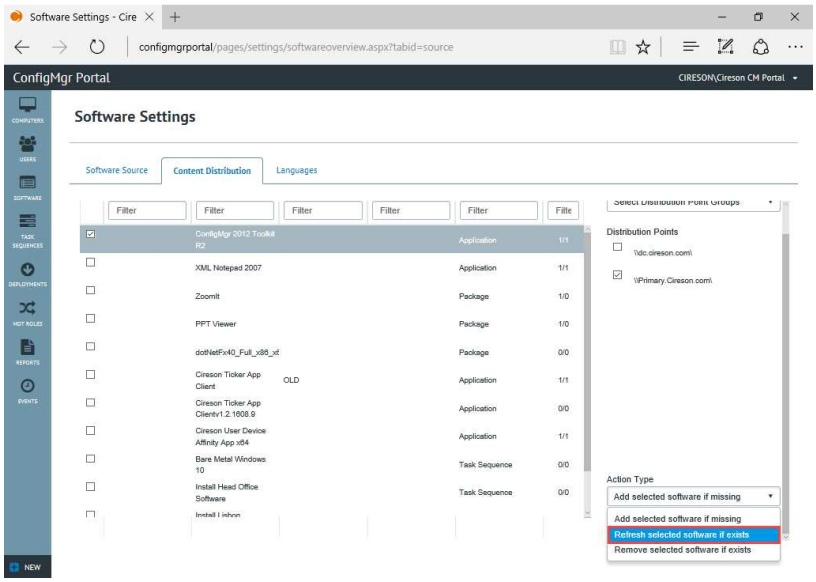
4. If applicable, select the relevant DP group from the **Distribution Point Groups** dropdown list.



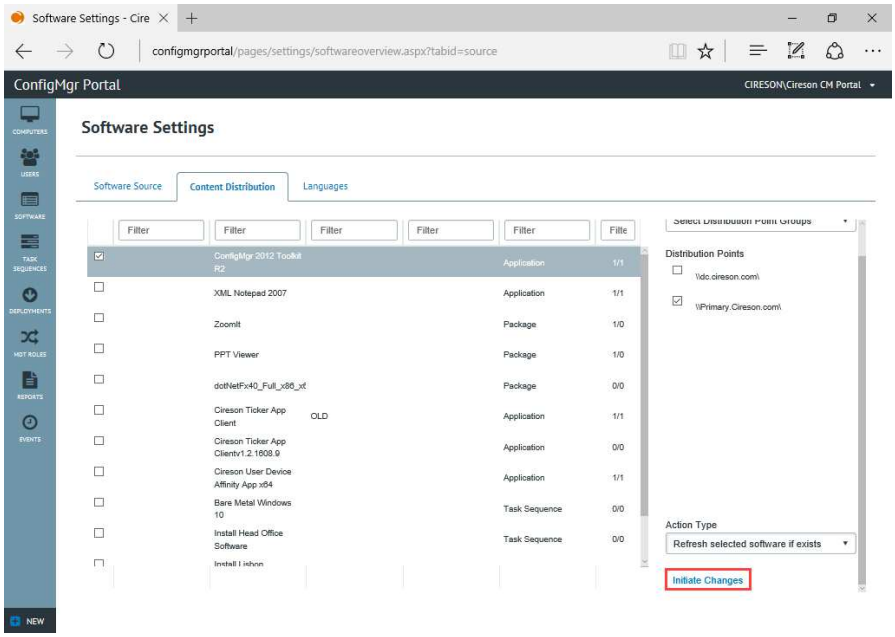
5. Select the relevant DPs from the **Distribution Points** list.



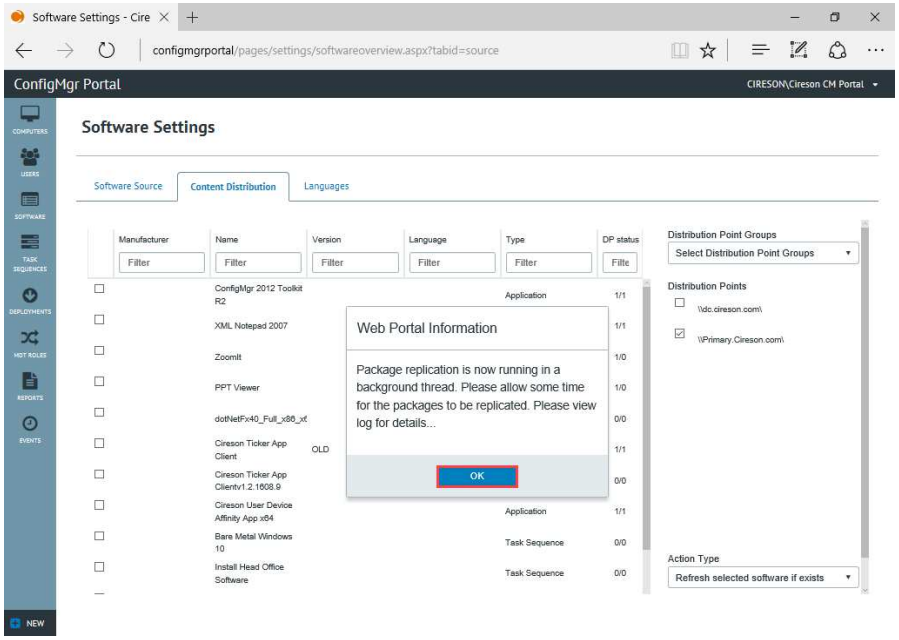
6. From the **Action Type** dropdown list, select **Refresh selected software if exists**



7. Click **Initiate Changes**



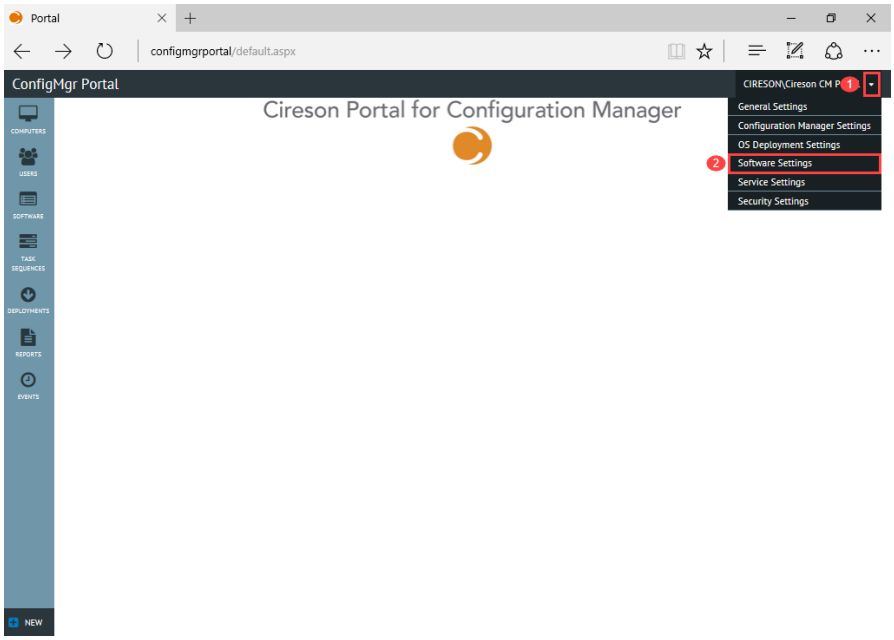
8. Click **OK** on the **Web Portal Information** dialog box stating **Package replication is now running in a background thread. Please allow some time for the packages to be replicated. Please view log for details…**



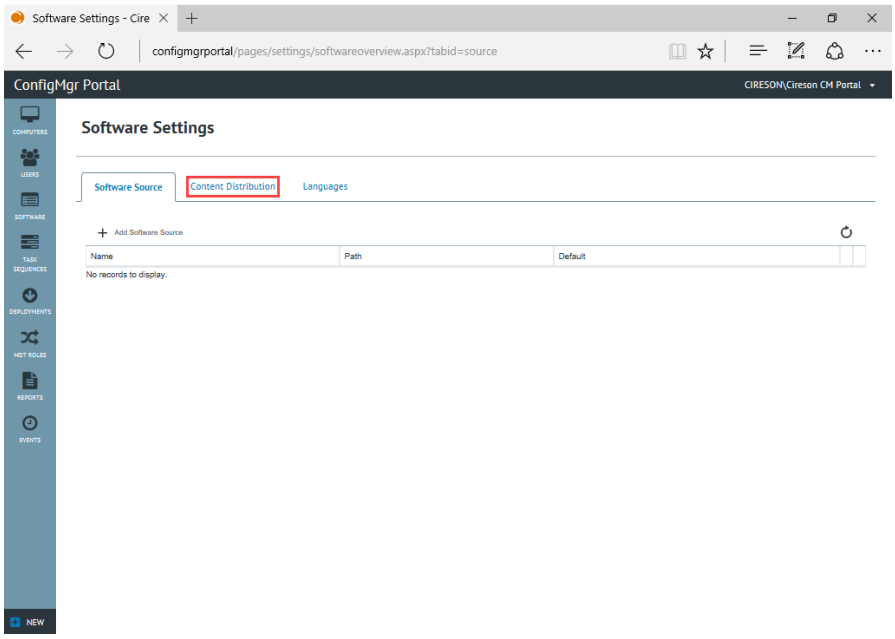
How do I Remove software from a Distribution Point/Distribution Point Group?

To remove software from a distribution point (DP)/DP group:

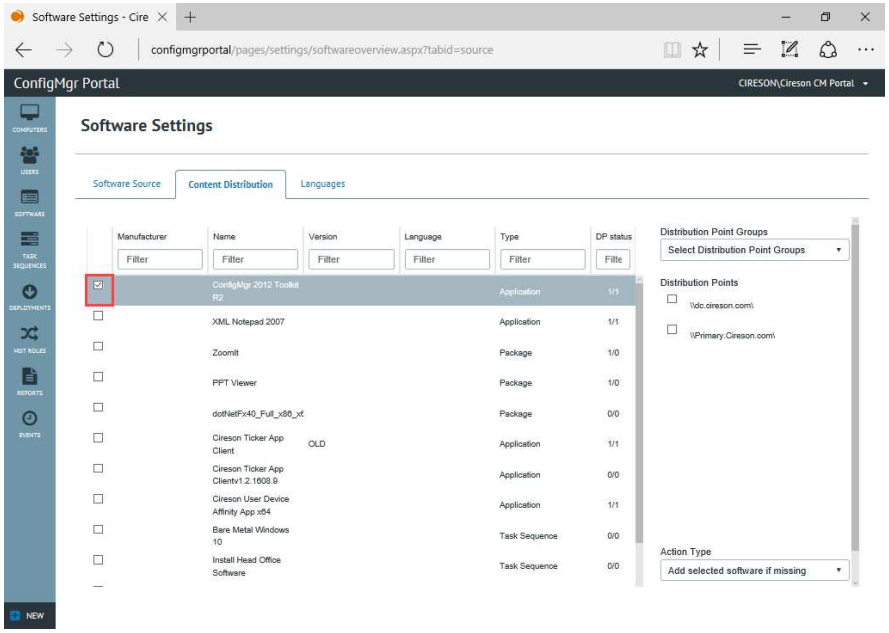
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**



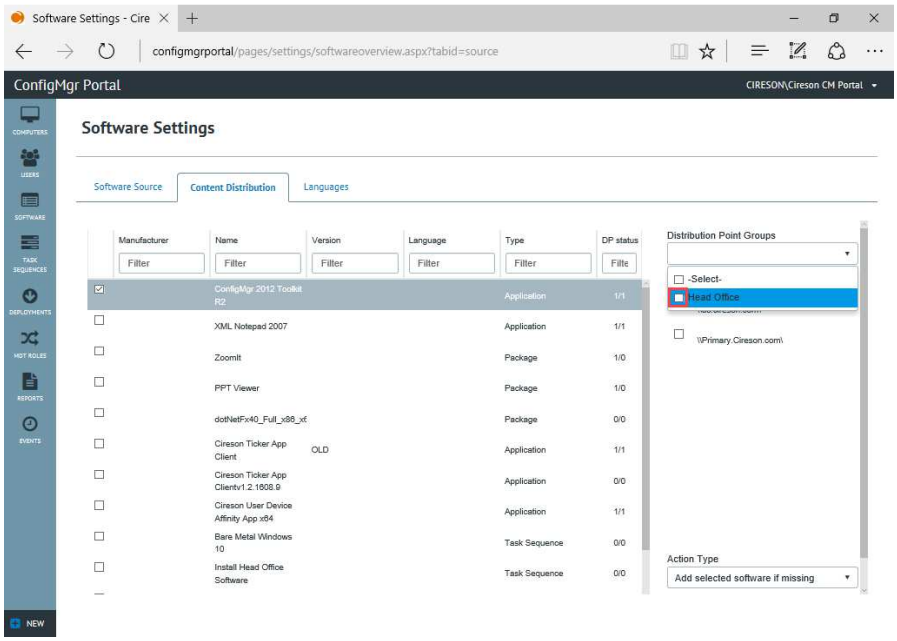
2. Click the **Content Distribution** tab.



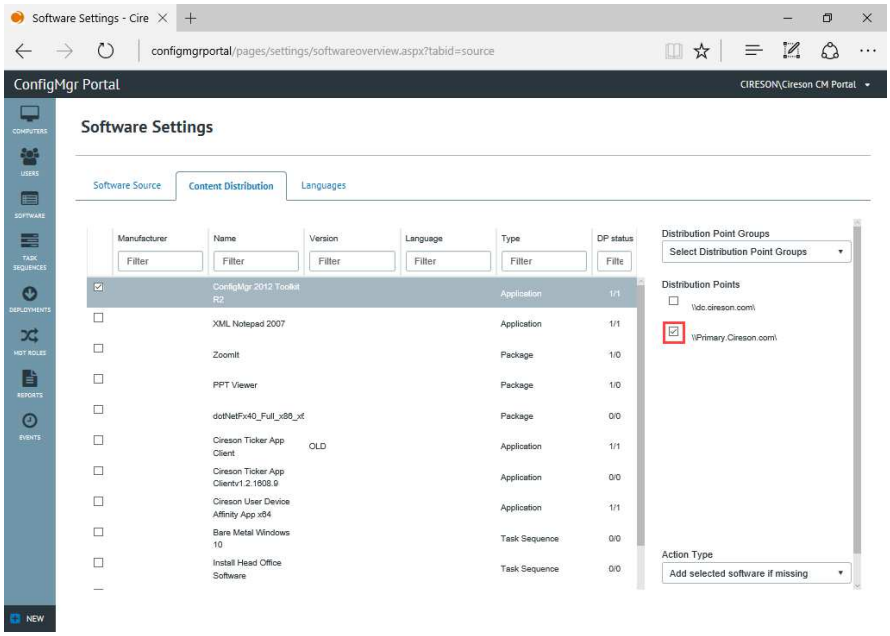
3. Click the checkbox beside the relevant content you want to remove.



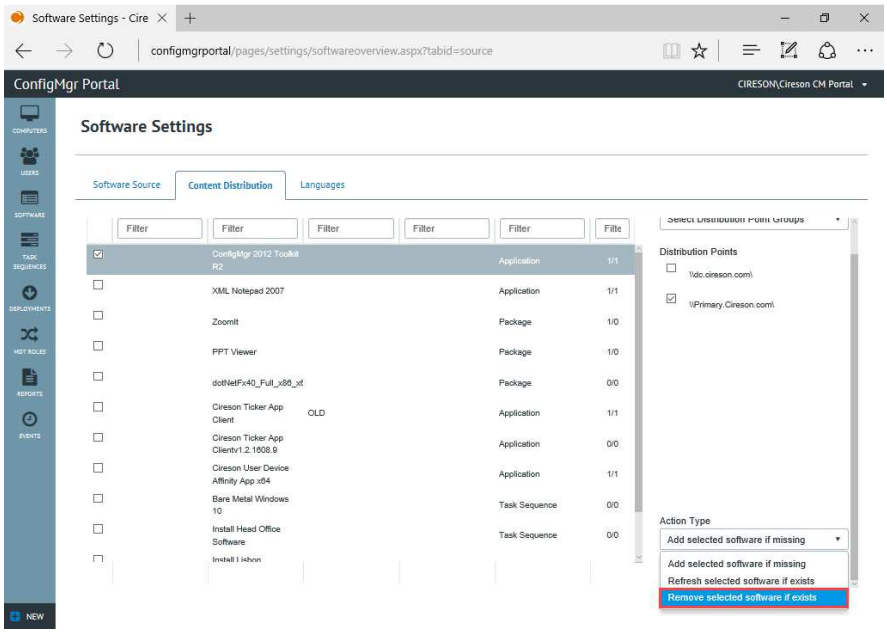
4. If applicable, select the relevant DP group from the **Distribution Point Groups** dropdown list.



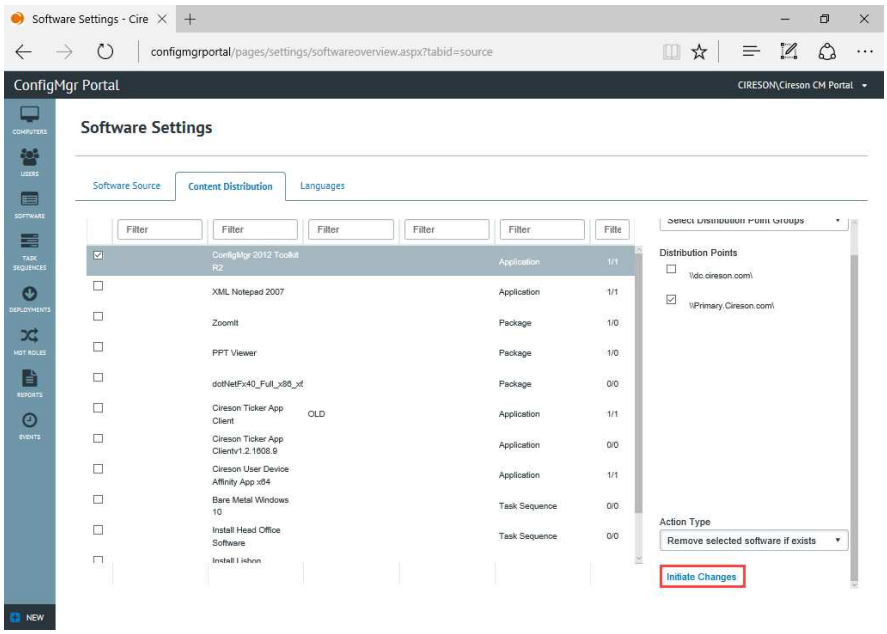
5. Select the relevant DPs from the **Distribution Points** list.



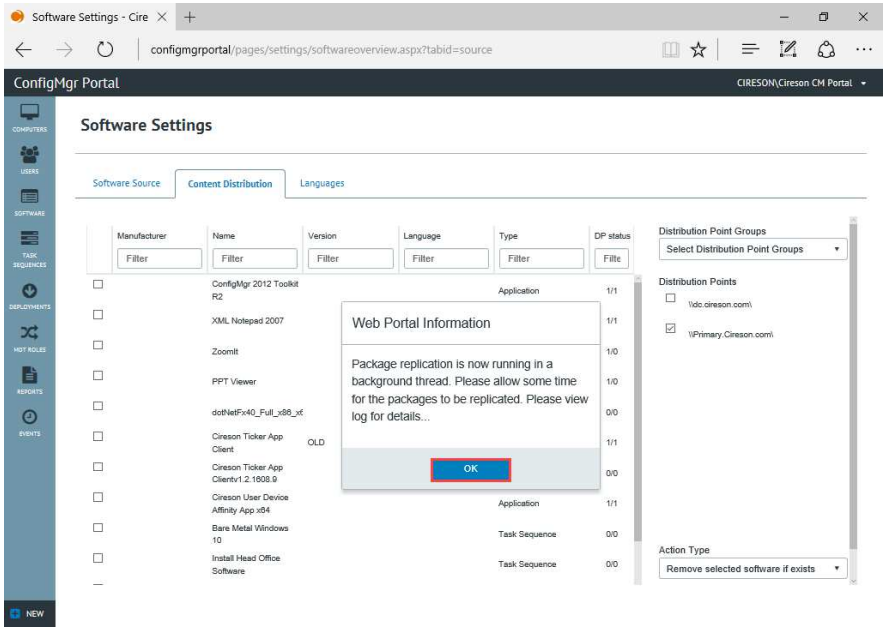
6. From the **Action Type** dropdown list, select **Remove selected software if exists**



7. Click **Initiate Changes**



8. Click **OK** on the **Web Portal Information** dialog box stating **Package replication is now running in a background thread. Please allow some time for the packages to be replicated. Please view log for details…**

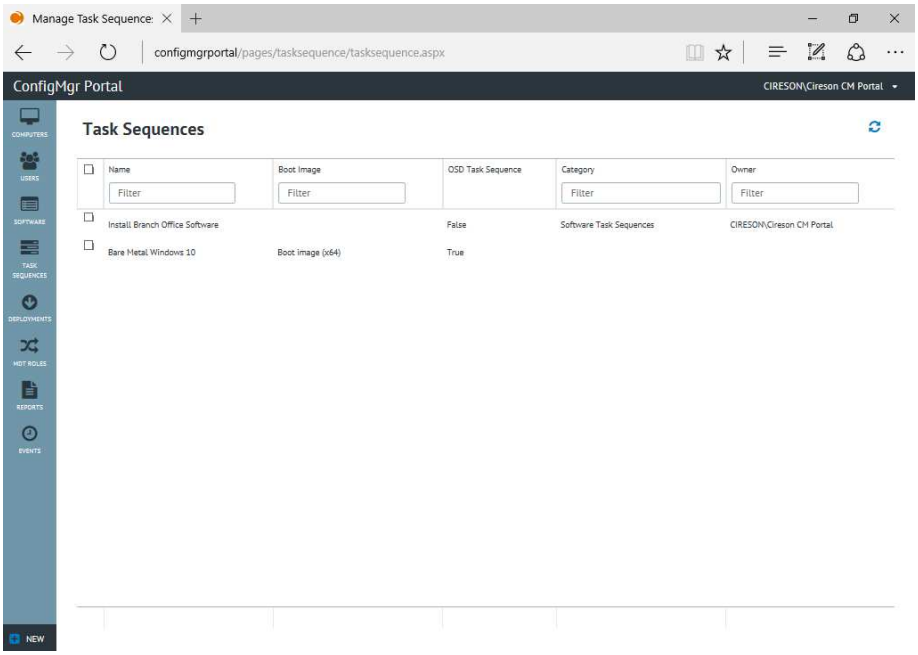


NOTE: You can verify the content has been removed using the process detailed in How do I verify content removal using the Portal?

Managing Task Sequences

Overview

When you click **Task Sequences** on the **Navigation Menu**, the **Task Sequences** page is displayed showing a list of all Task Sequences created in the Portal and/or ConfigMgr console.



Task Sequence Management-Related Tasks

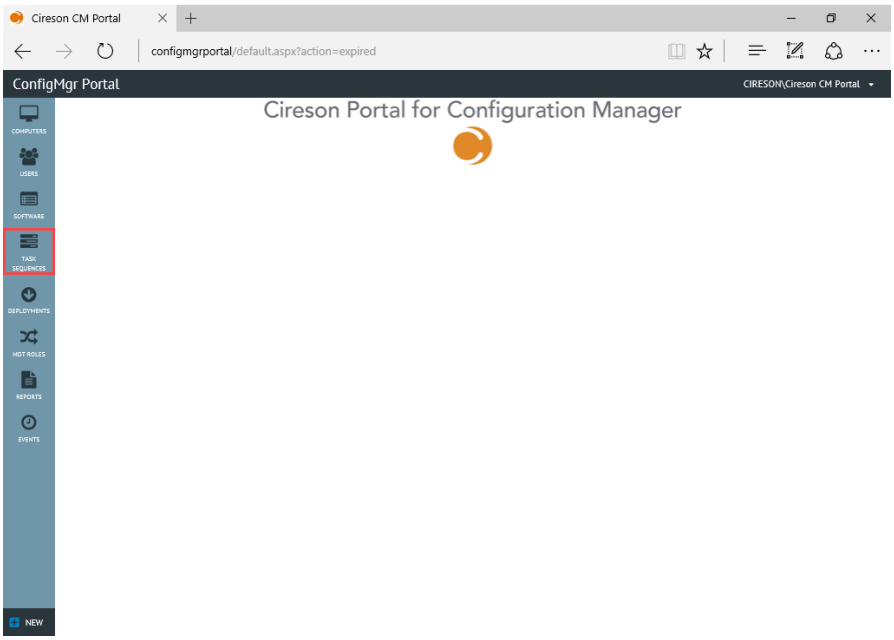
This section details the tasks related to managing Task Sequences in the Portal. A list of tasks is presented first which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

- How do I create a new Software Task Sequence?
- How do I create a new OSD Task Sequence?
- How do I deploy a Task Sequence?
- How do I edit a Task Sequence?
- How do I view a Task Sequence?
- How do I manage the permissions on a Task Sequence?
- How do I delete a Task Sequence?

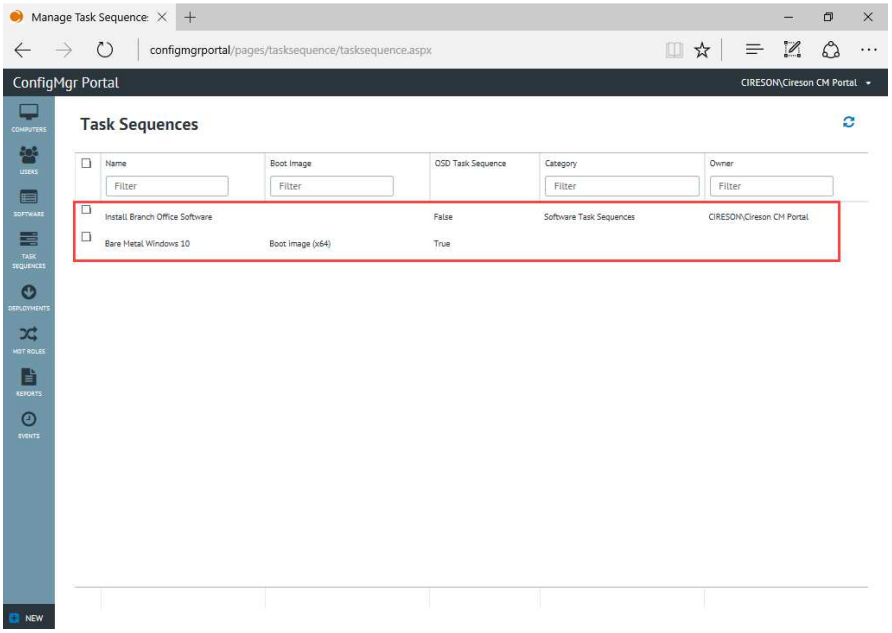
How do I deploy a Task Sequence?

To deploy a Task Sequence:

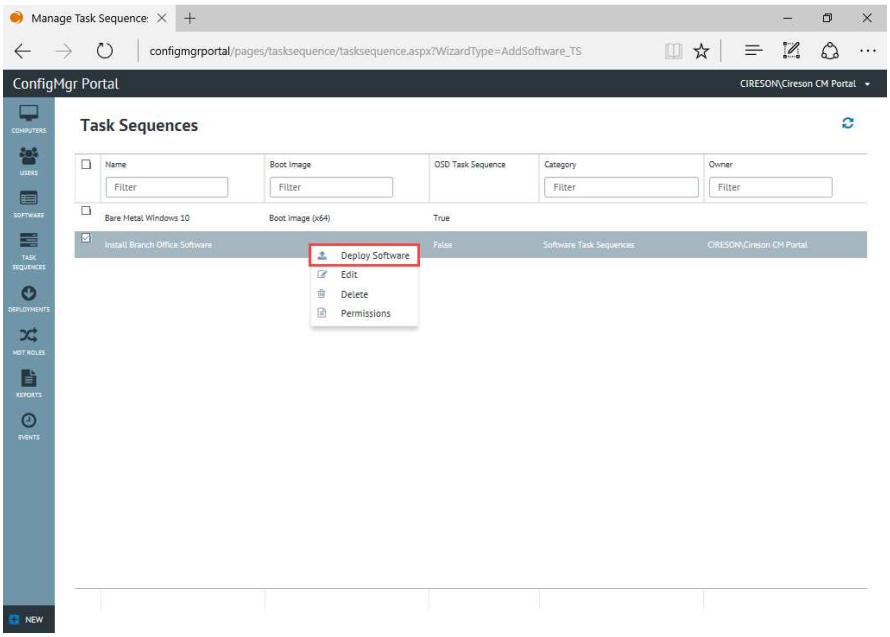
1. At the bottom of the **Navigation Menu**, select **Task Sequences**



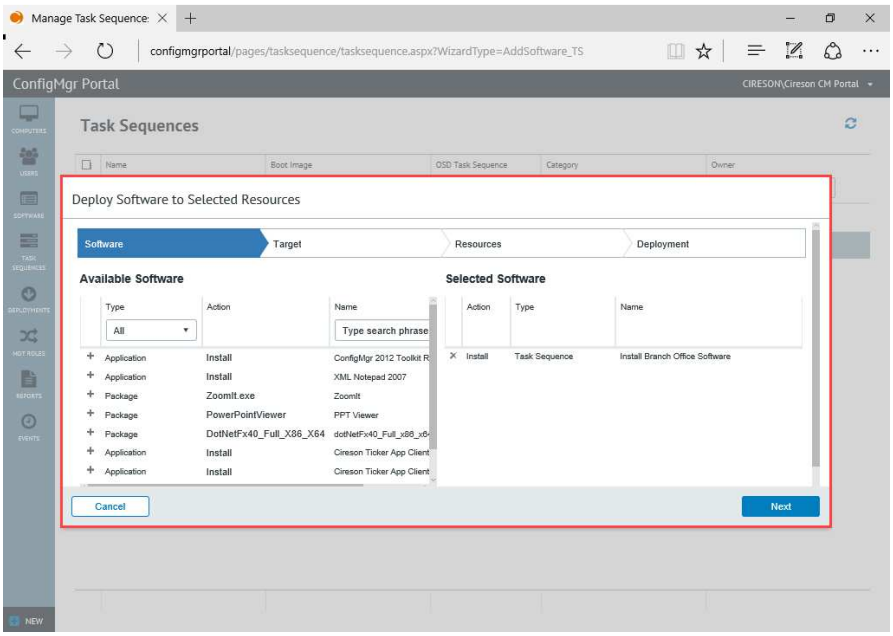
The **Task Sequences** page is loaded showing all of the existing Task Sequences.



2. Right-click the Task Sequence you want to deploy and select **Deploy Software**



The **Deploy Software to Selected Resources** wizard will automatically start with the selected task sequence already added to the Selected Resources area.



3. Work your way through the wizard following the relevant procedure below:

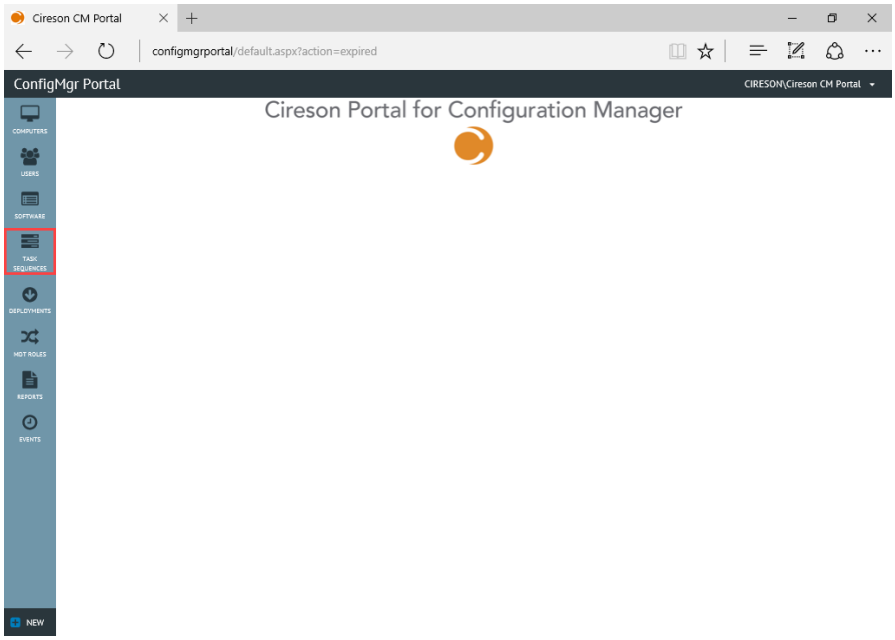
- How do I create a new Deployment to a new collection?
- How do I deploy software to an existing collection?

How do I edit a Task Sequence?

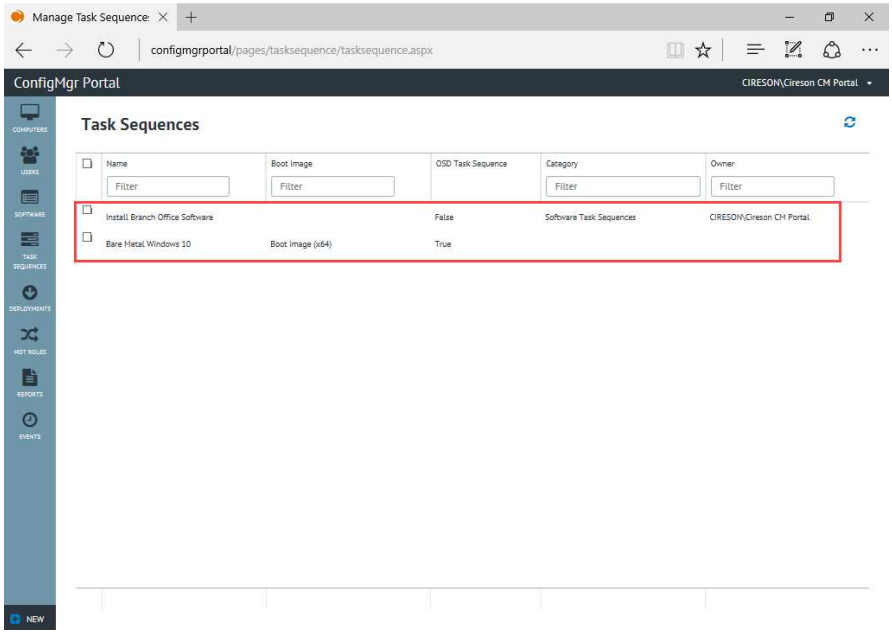
To edit a Task Sequence:

NOTE: In the current release of the Portal, you can only edit Software Task Sequences. The ability to be able to edit OSD Task Sequences is planned for a future release of the Portal.

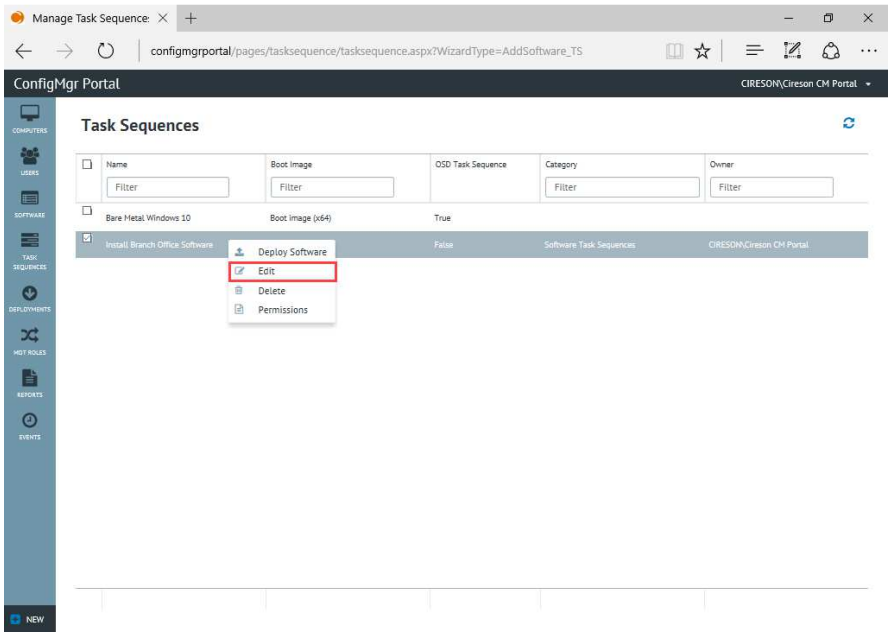
1. At the bottom of the **Navigation Menu**, select **Task Sequences**



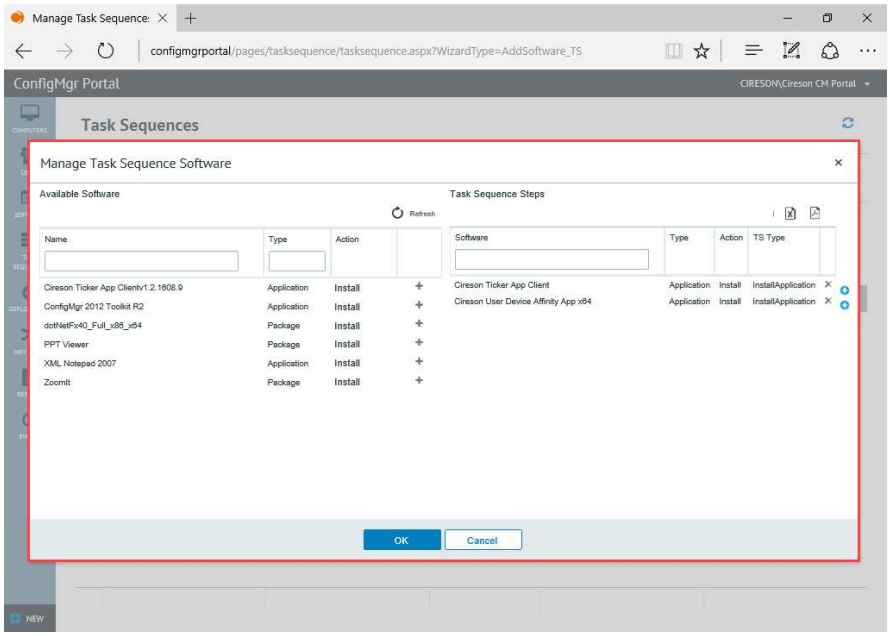
The **Task Sequences** page is loaded showing all of the existing Task Sequences.



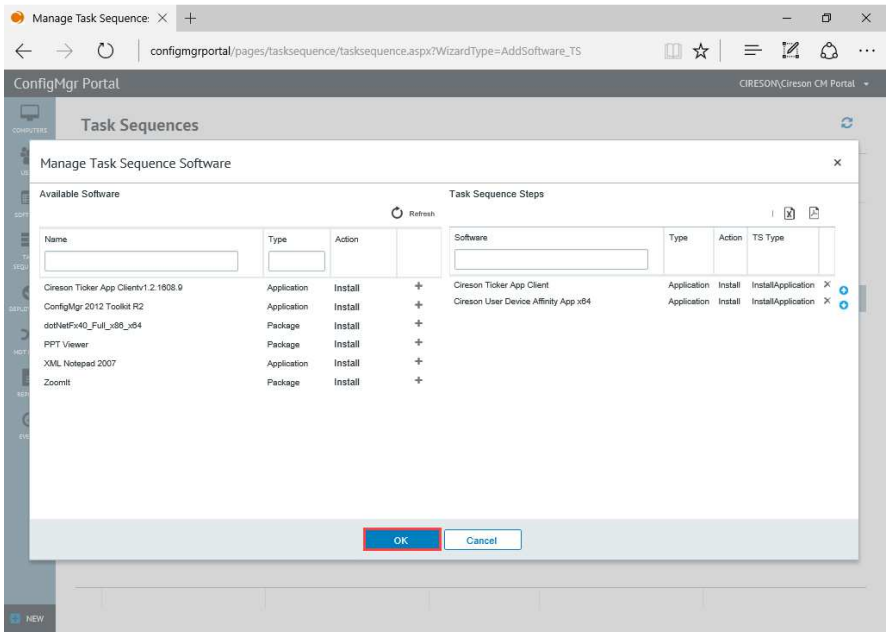
2. Right-click the Software Task Sequence you want to edit and select **Edit**



The **Manage Task Sequence Software** page appears.



3. Make any required changes then click **OK** to save them.

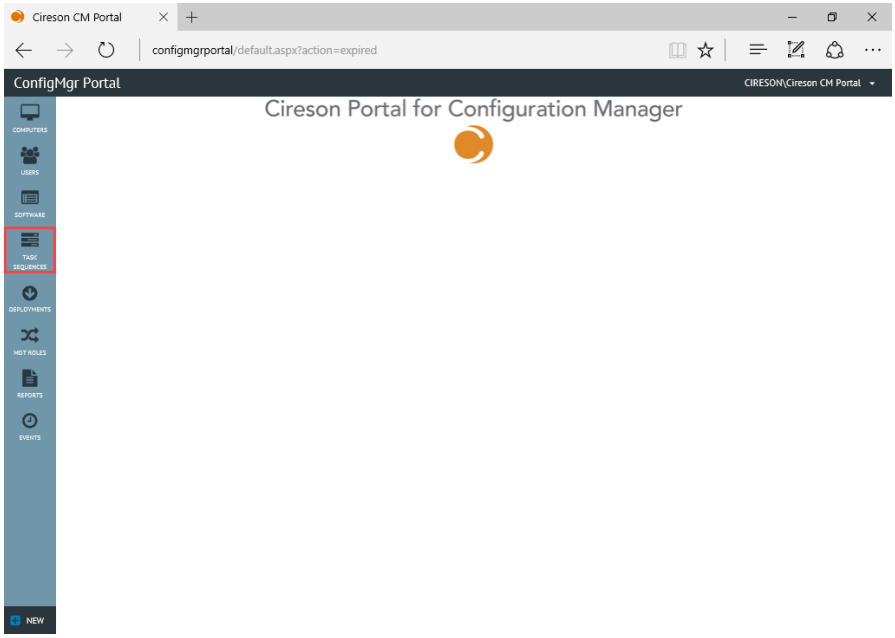


How do I view a Task Sequence?

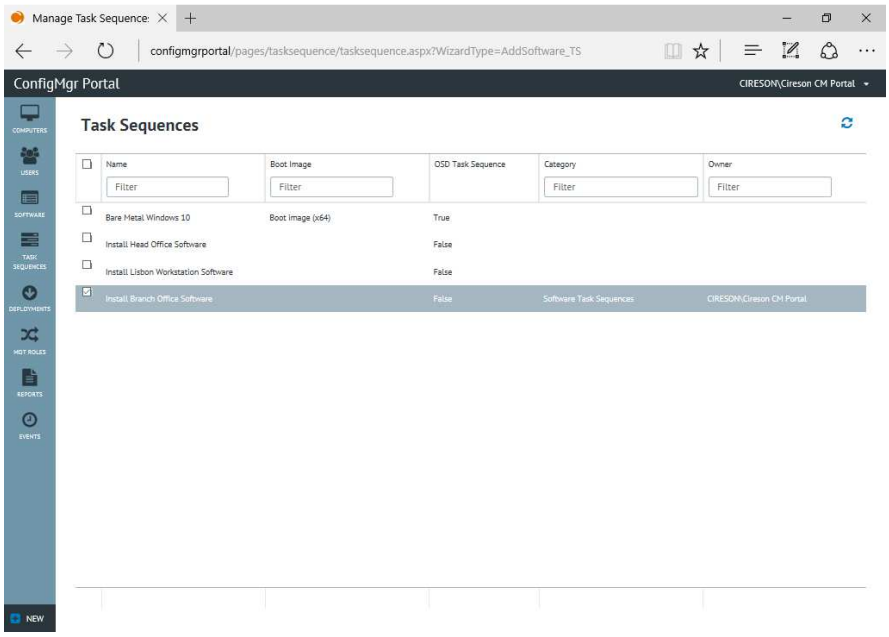
To view a Task Sequence:

NOTE: In the current release of the Portal, you can only view and not edit an OSD Task Sequence. The ability to be able to edit OSD Task Sequences is planned for a future release of the Portal.

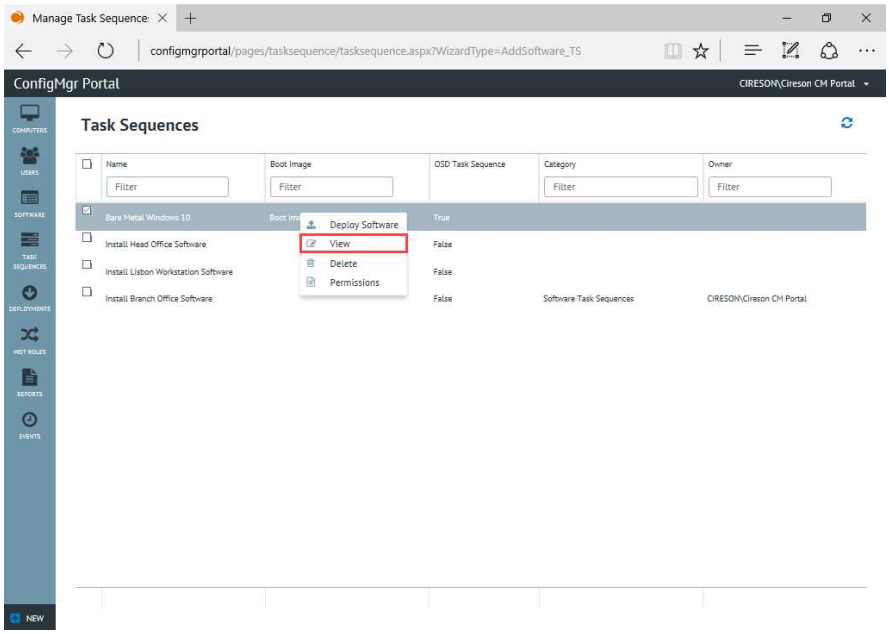
1. At the bottom of the **Navigation Menu**, select **Task Sequences**



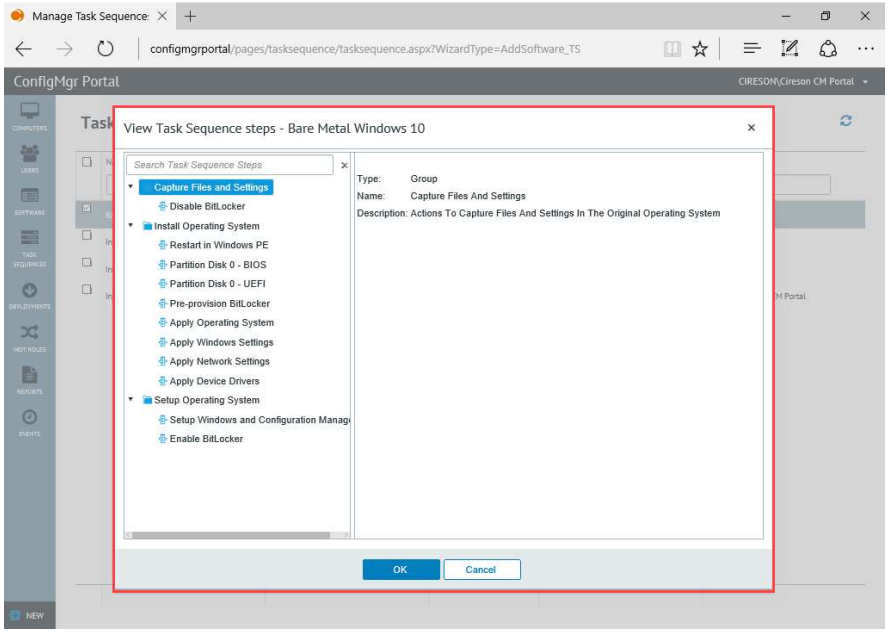
The **Task Sequences** page is loaded showing all of the existing Task Sequences.



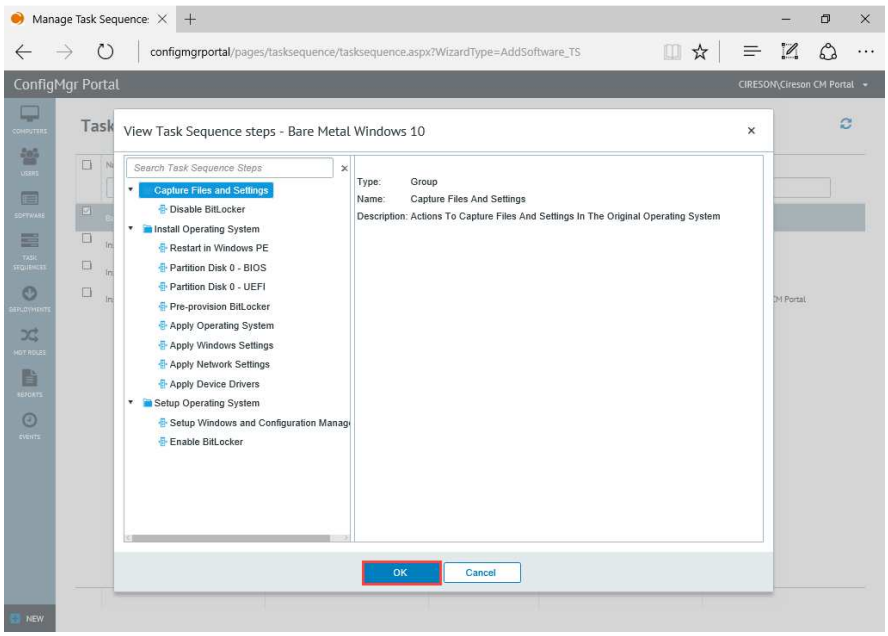
2. Right-click the OSD Task Sequence you want to view and select **View**



The **View Task Sequence steps - <*task_sequence_name*>** page is displayed allowing you to see the contents of the Task Sequence.



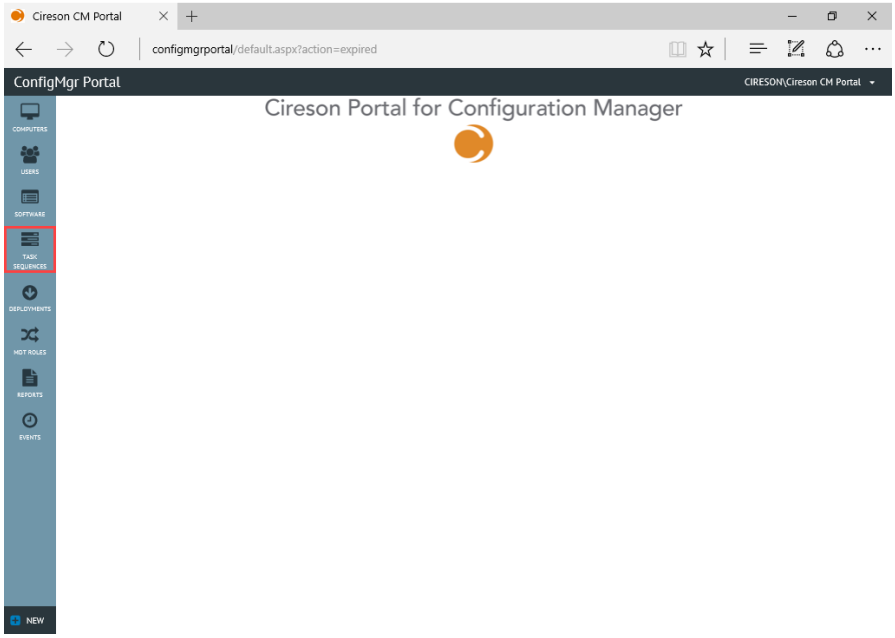
3. Click **OK** to close the **View Task Sequence steps - <*task_sequence_name*>** page.



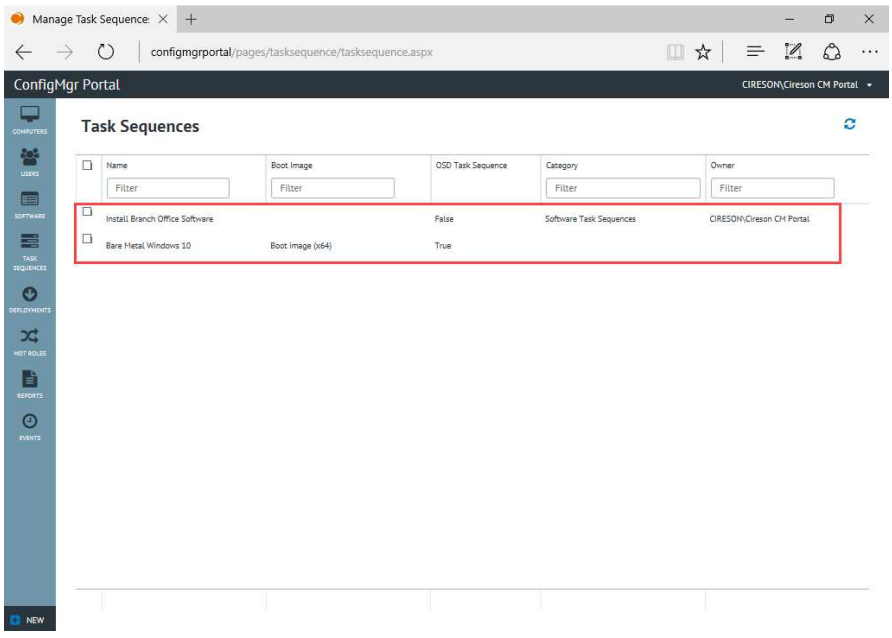
How do I manage the permissions on a Task Sequence?

To manage the permissions on a Task Sequence:

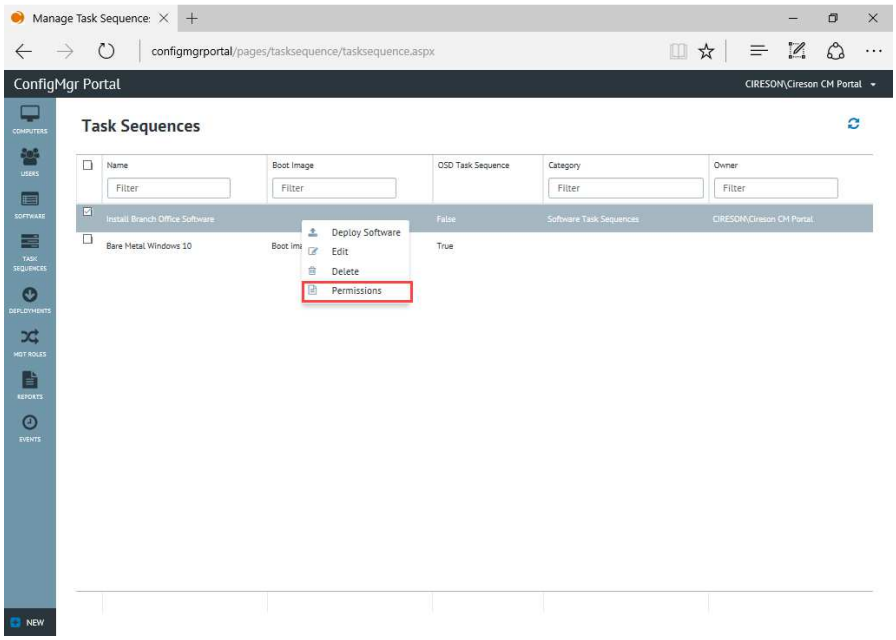
1. At the bottom of the **Navigation Menu**, select **Task Sequences**



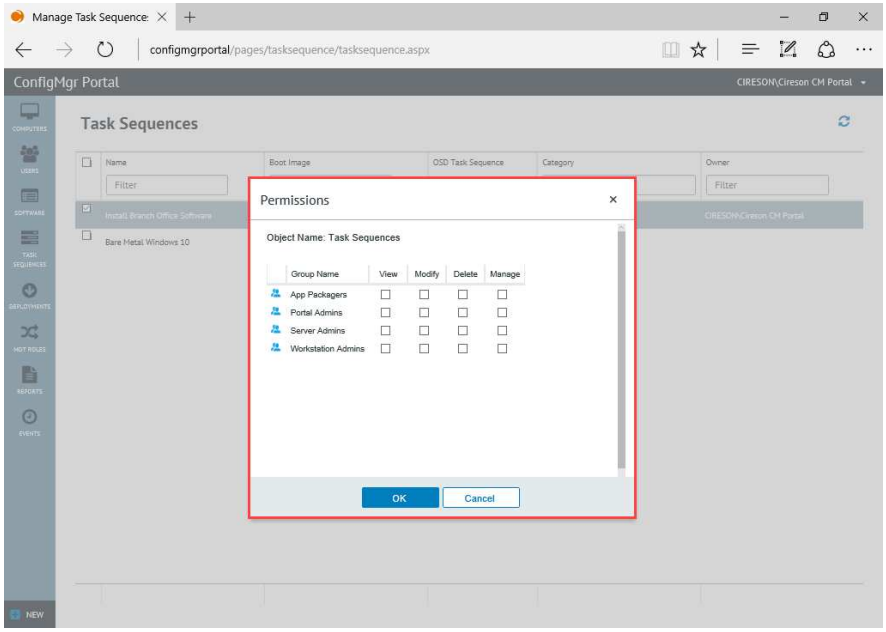
The **Task Sequences** page is loaded showing all of the existing Task Sequences.



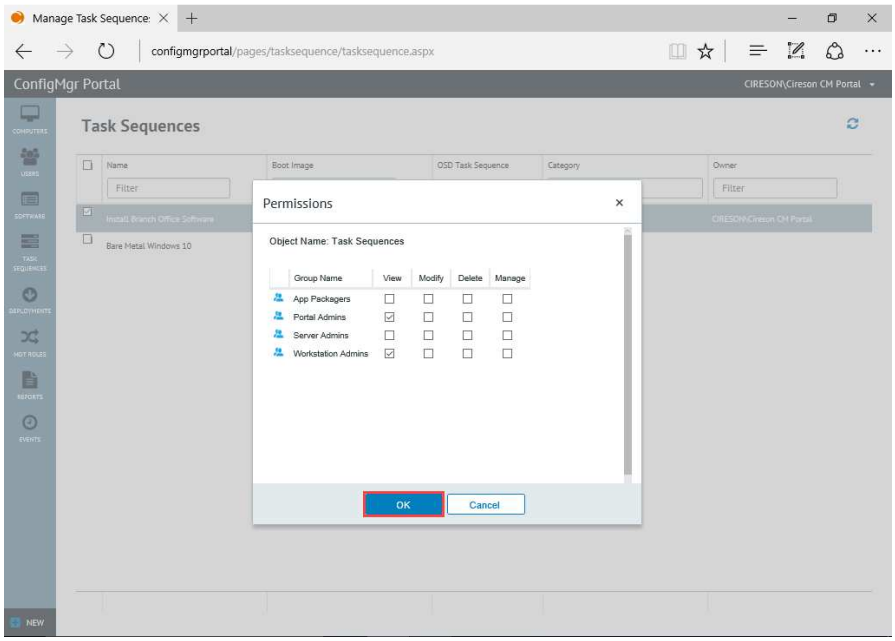
2. Right-click the Task Sequence whose permissions you want to manage and select **Permissions**



3. On the **Permissions** dialog box, configure the permissions accordingly. Remember that a group needs a minimum of **View** to be able to see a Task Sequence.



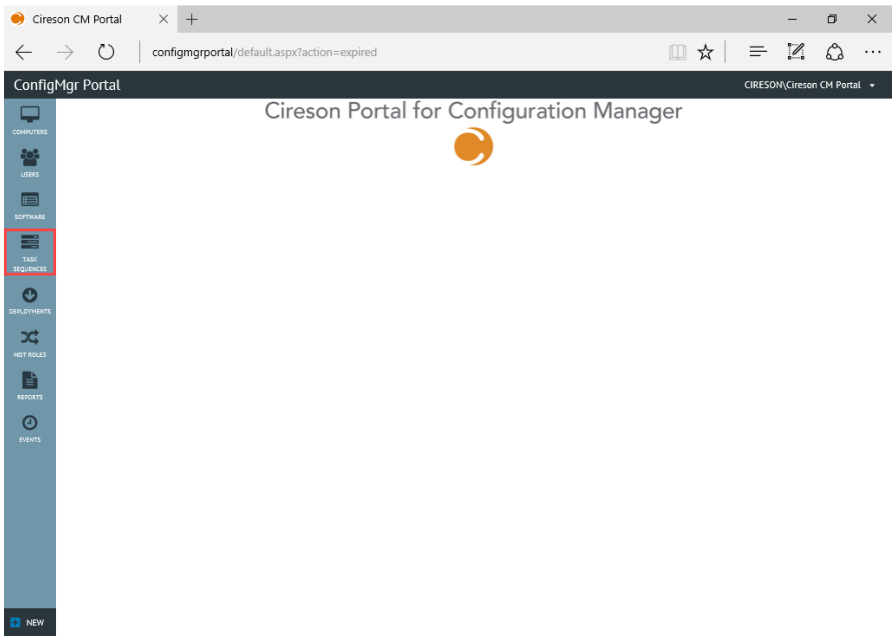
4. Click **OK** to save your changes.



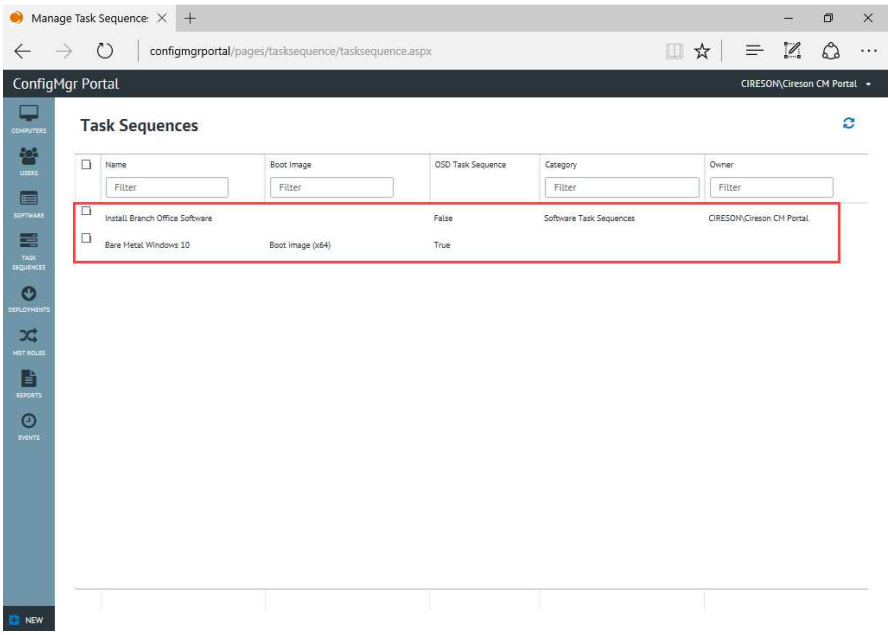
How do I delete a Task Sequence?

To delete a Task Sequence:

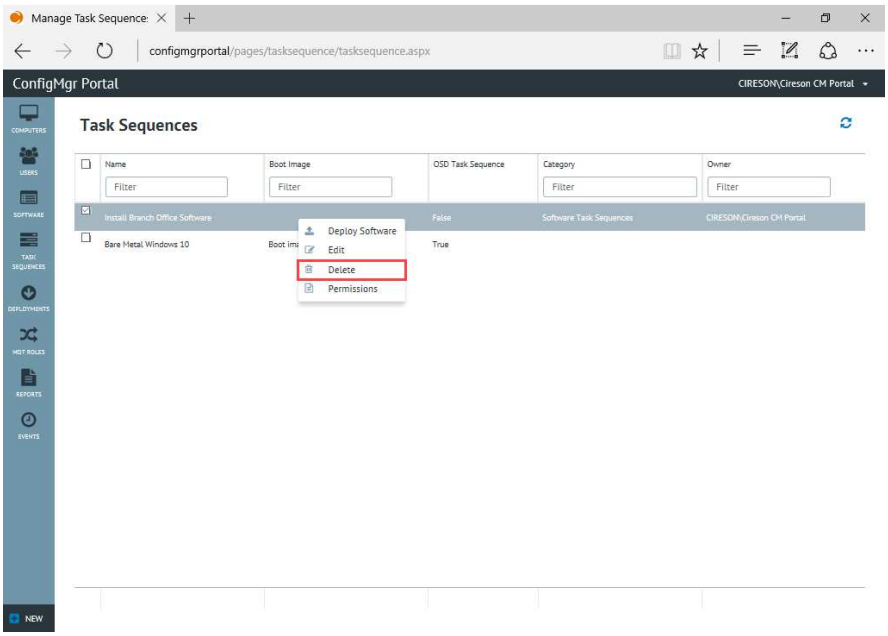
1. At the bottom of the **Navigation Menu**, select **Task Sequences**



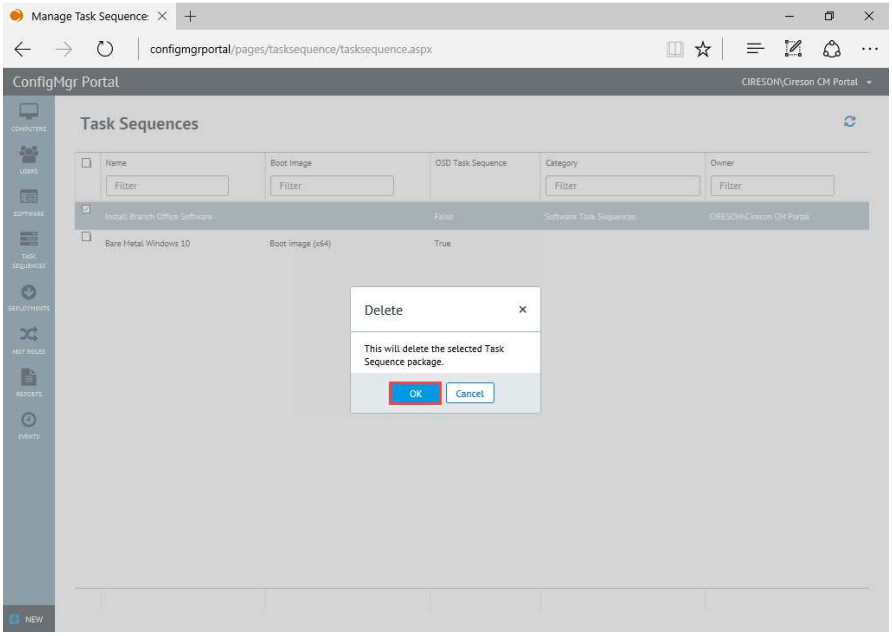
The **Task Sequences** page is loaded showing all of the existing Task Sequences.



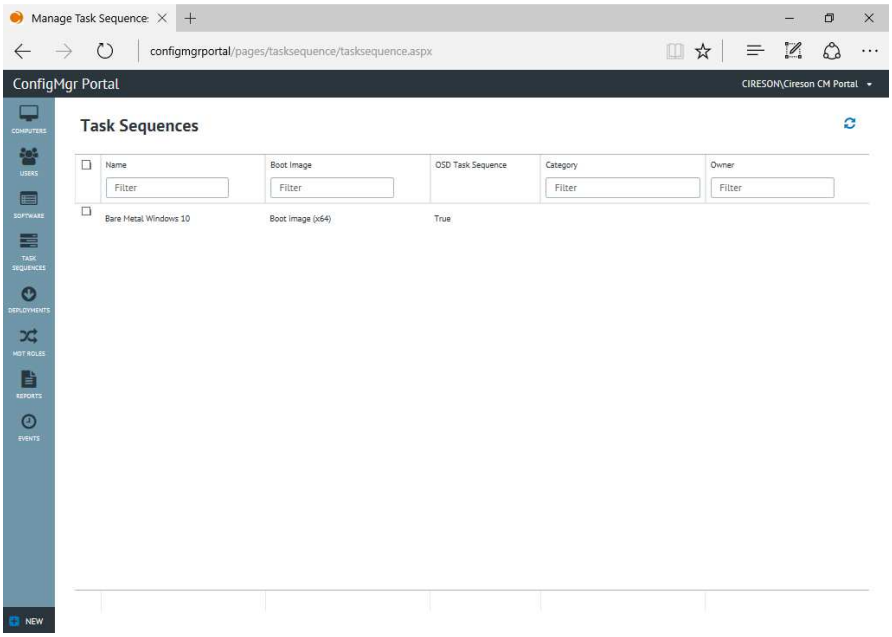
2. Right-click the Task Sequence you want to delete and select **Delete**



3. Click **OK** on the **Delete** dialog box stating **This will delete the selected Task Sequence package.**



The **Task Sequences** page automatically refreshes and the deleted Task Sequence is no longer shown.

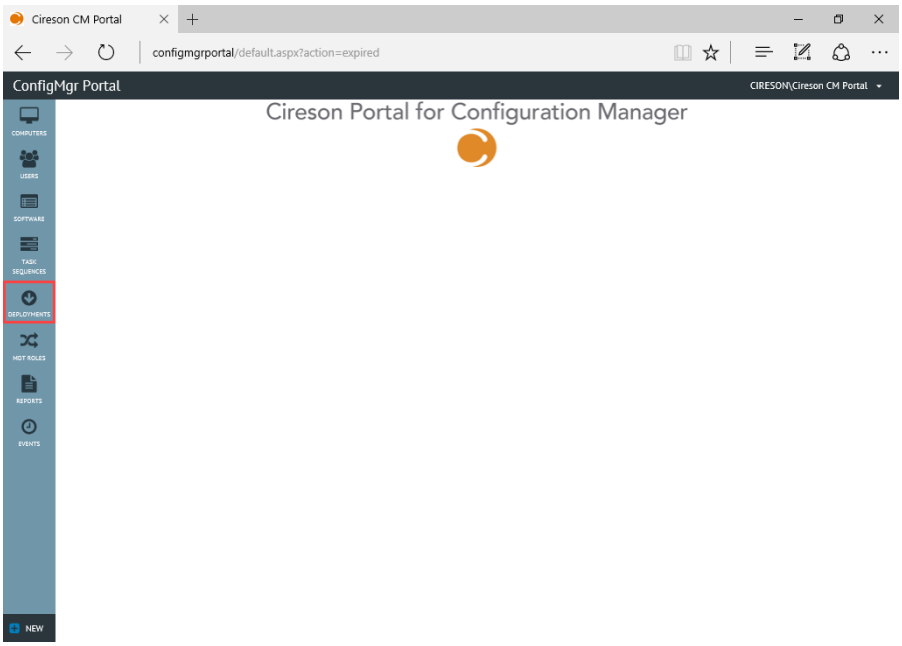


Managing Deployments

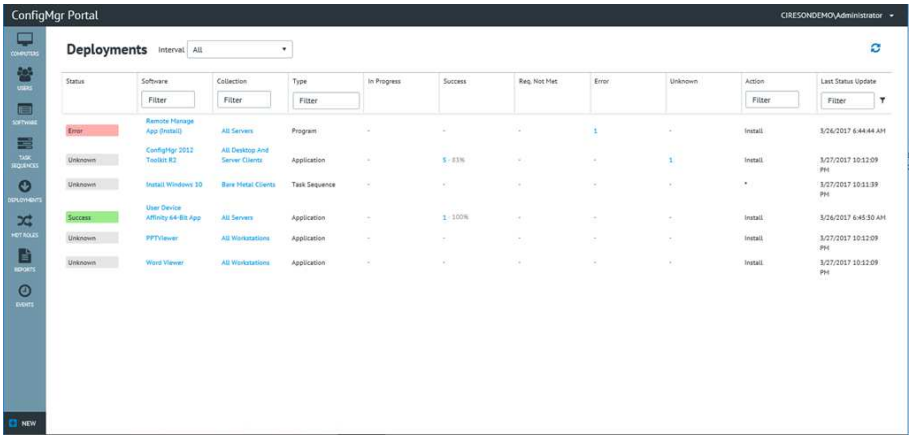
This section of the Portal allows you to manage deployments.

Overview

To access the Deployments page, click **Deployments** on the **Navigation Menu**



The **Deployments** page is then displayed showing details of the various deployments.



Deployment Management-Related Tasks

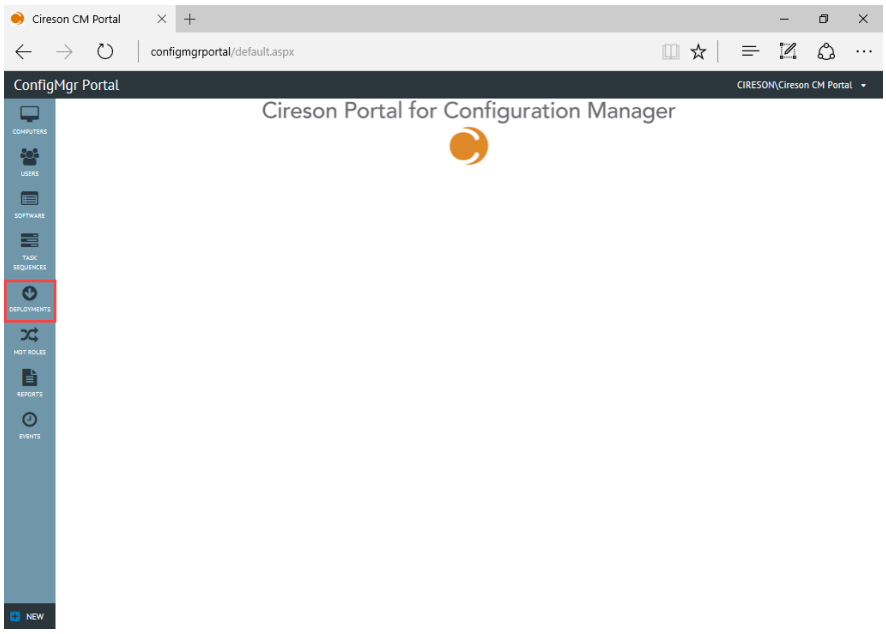
This section details the tasks related to managing Deployments in the Portal. A list of tasks is presented first which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

- How do I create a new Deployment to a new collection?
- How do I deploy software to an existing collection?
- How do I control the Interval of which Deployments are shown?
- How do I view the Status of a Deployment?
- How do I filter the list of Deployments?

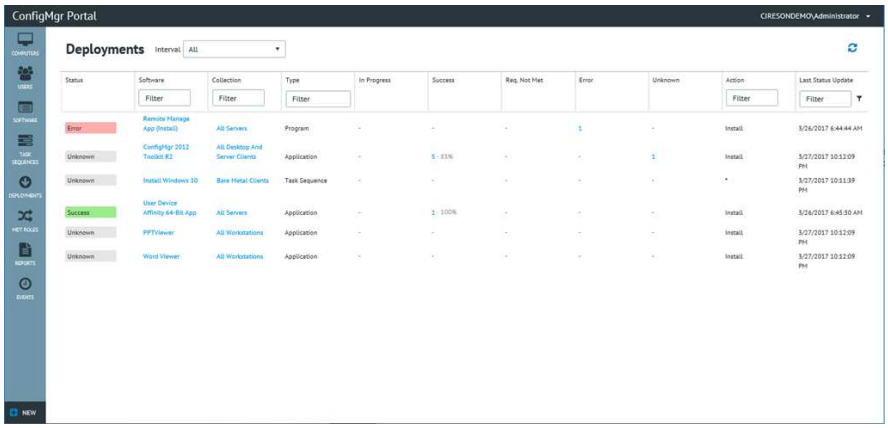
How do I control the Interval of which Deployments are shown?

To control the Interval of which deployments are shown:

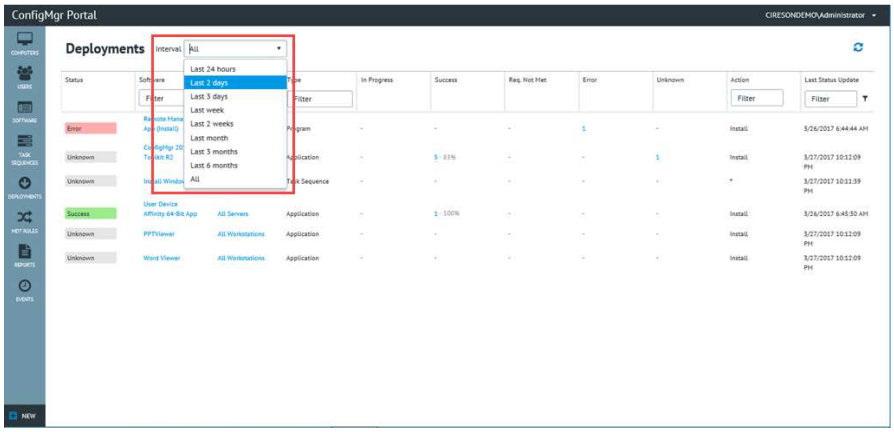
1. Click **Deployments** in the **Navigation Menu**



The list of existing deployments is displayed.



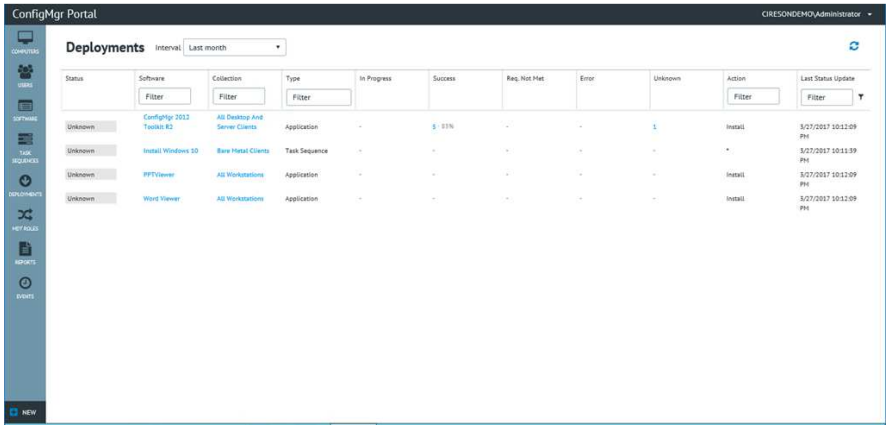
2. From the **Interval** dropdown, select the required interval.



Available values are:

- Last 24 hours
- Last 2 days
- Last 3 days
- Last week
- Last 2 weeks
- Last month
- Last 3 months
- Last 6 months
- All

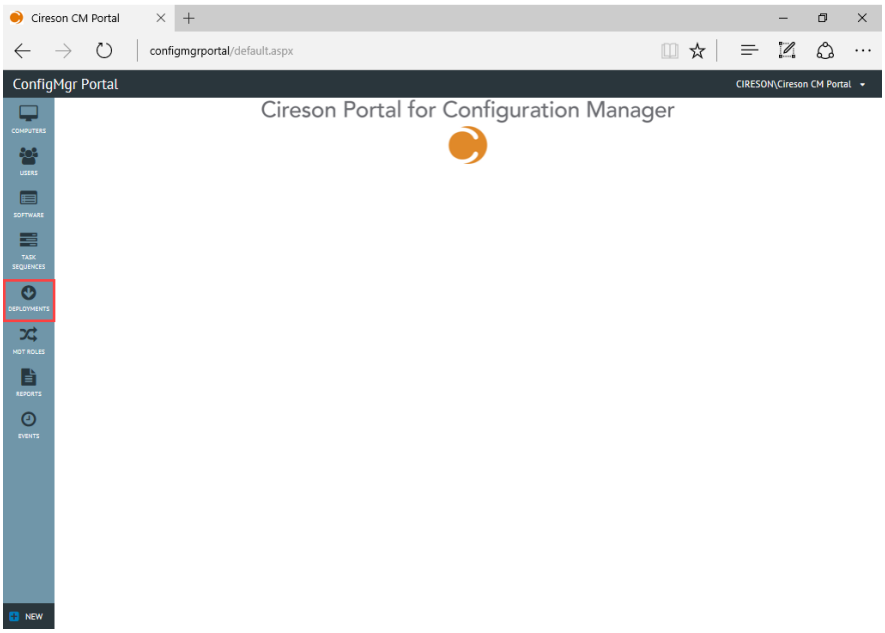
Only the deployments matching the selected interval are shown:



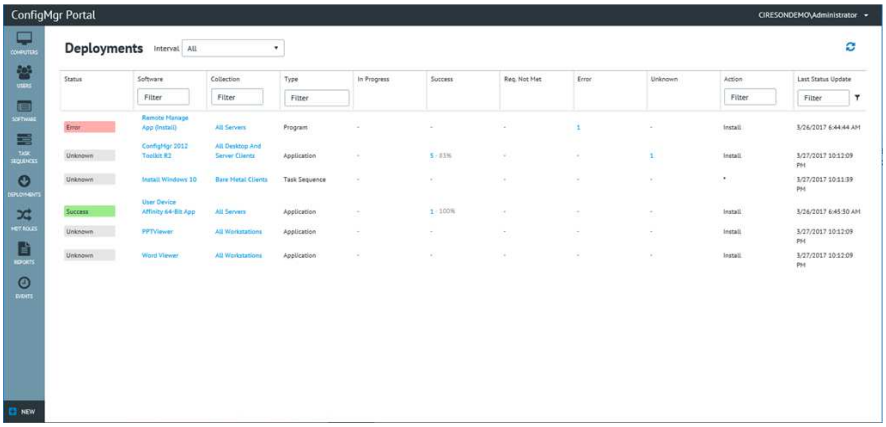
How do I view the Status of a Deployment?

To view the status of a deployment:

1. Click **Deployments** in the **Navigation Menu**



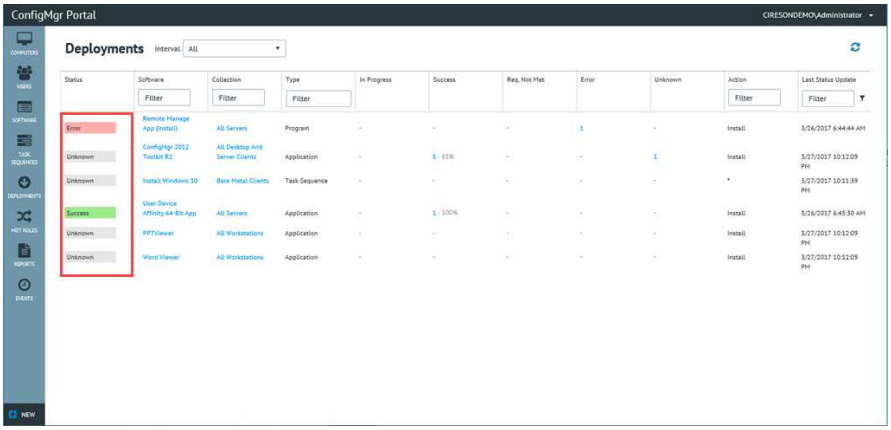
The list of existing deployments is displayed.



The **Status** column shows the status for each deployment. The status types are explained in the following table:

NOTE: The **Status** level for a deployment is based on the lowest status for any one object. For example, if any resource returns a failure, the deployment status will show **Error** even if the same deployment completed successfully on other objects.

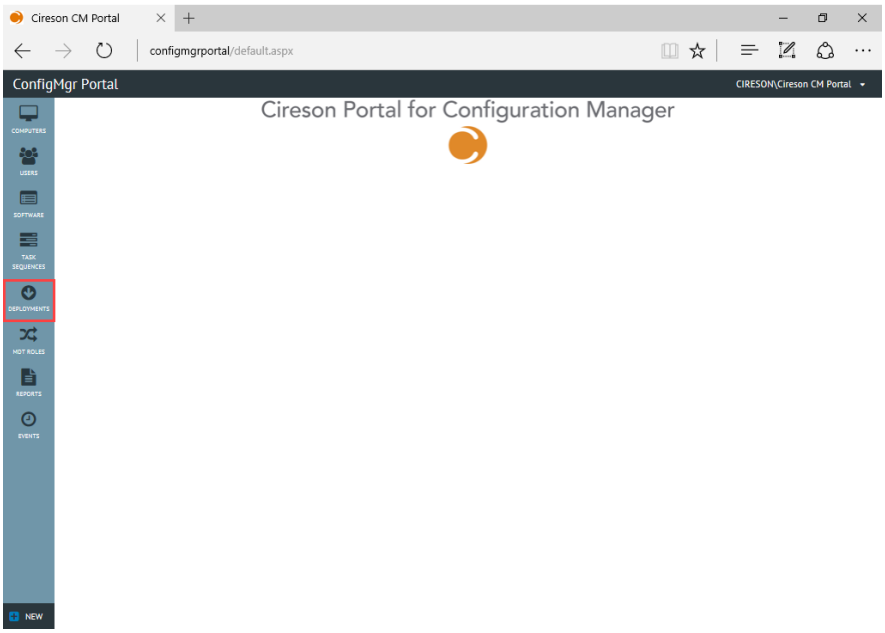
Status	Description
Error	An error was encountered.
In Progress	The deployment is in progress.
Req. Not Met	One or more requirements (such as a dependency, requirements rule, inappropriate operating system version, etc.), were not met.
Success	The deployment completed successfully.
Unknown	No status information has been received to allow the status to be updated.



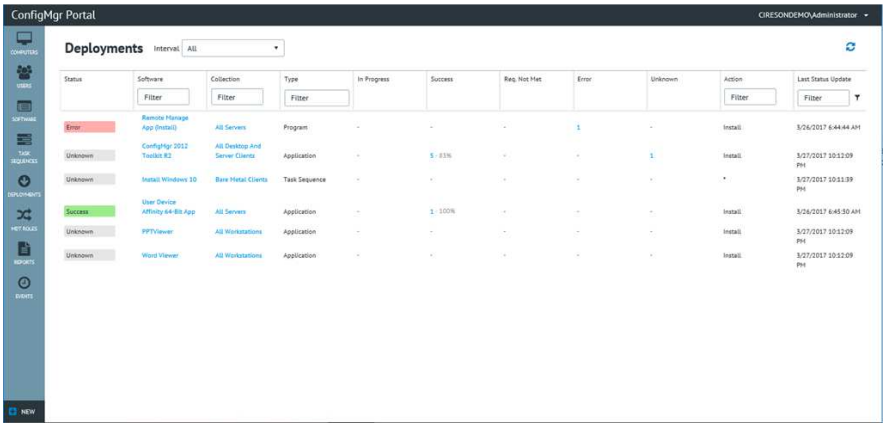
How do I filter the list of Deployments?

To filter the list of deployments:

1. Click **Deployments** in the **Navigation Menu**

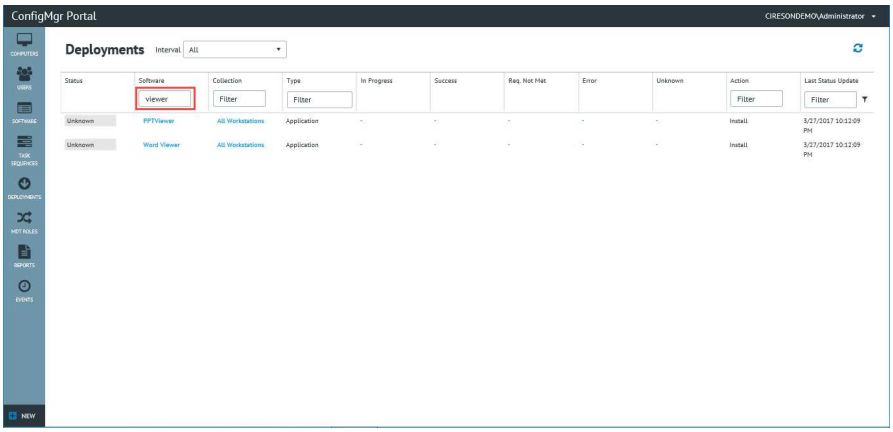


The list of existing deployments is displayed.



2. Type the relevant text in the **Filter** box under the relevant column you wish to filter by then press **ENTER** to display the results. For example, typing **viewer** in the **Software** filter box and pressing **ENTER** only shows two results.

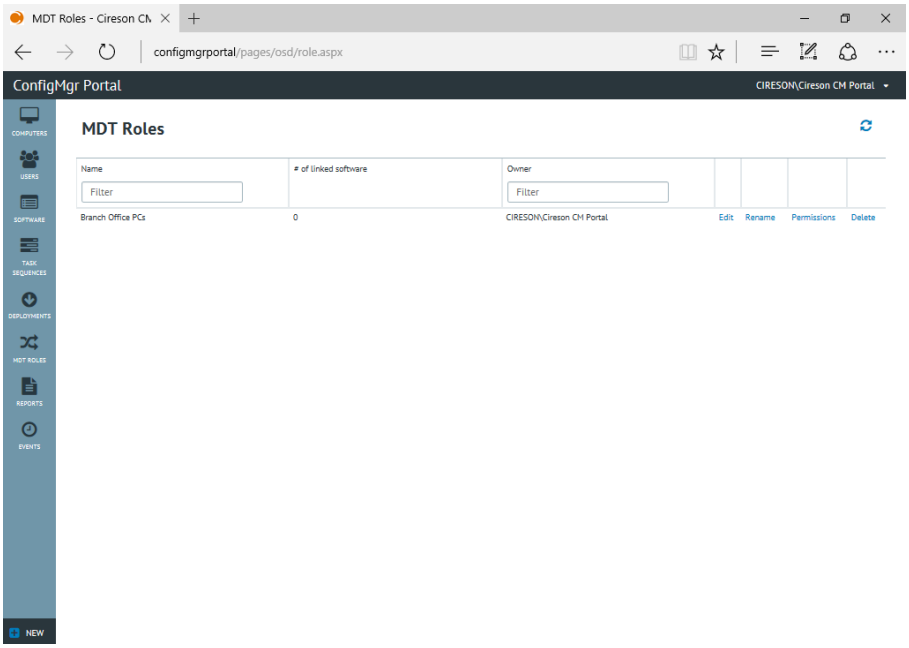
   NOTE: To clear the filter, you need to clear the text entered in the **Filter** boxes then press **ENTER**.



   NOTE: Beside the **Type** and **Last Status Update** fields there is an additional filter dropdown ( ) to provide greater filtering capabilities.

Managing MDT Roles

When you click **MDT Roles** on the **Navigation Menu** the **MDT Roles** page is displayed.



MDT Roles can be created and then used to install software applicable for that role. For example, you may have Branch Office PCs that require a different set of software from your Head Office PCs.

Using MDT Roles, you could create one role for your Branch Office PCs containing all of their required software, and another role for your Head Office PCs containing all of the software they require.

The **MDT Roles** page shows any MDT Roles that have been created and the number of software items that have been linked to each role.

Details of how to create and manage MDT Roles can be found in the following sections of this document:

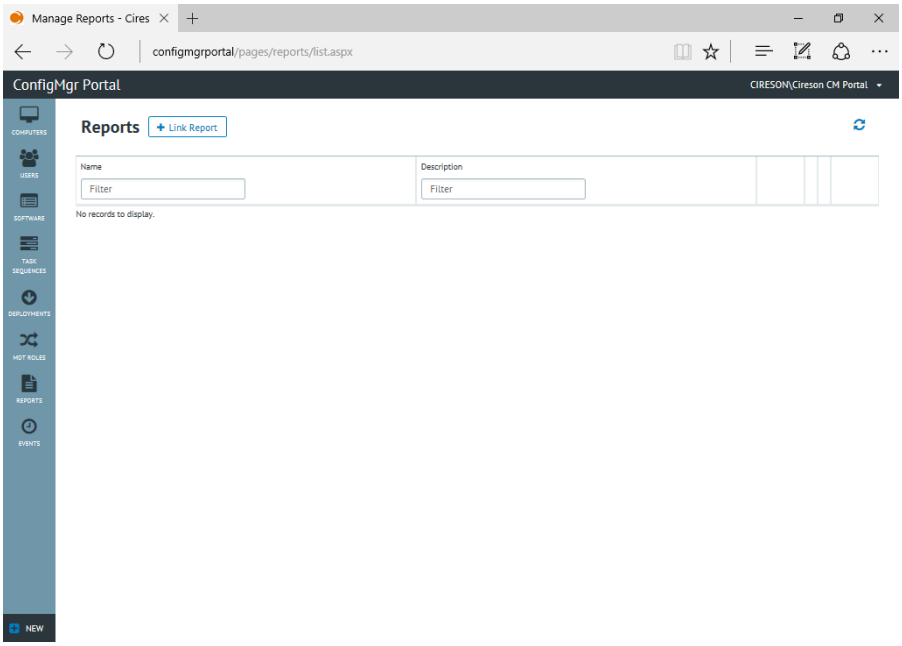
- How do I create a new MDT Role?
- How do I edit an MDT Role?
- How do I rename an MDT Role?
- How do I manage the permissions on an MDT Role?
- How do I delete an MDT Role?

Managing Reports

This section details the tasks related to managing reports in the Portal. A list of tasks is presented first which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

Overview

When you click **Reports** on the **Navigation Menu**, the **Reports** page is displayed showing all the ConfigMgr reports linked with the Portal.



NOTE: By default, no reports are registered to the Portal. Enabling Reporting involves:

1. Configuring Reporting Services so that the Portal can access the SQL Server Reporting Services database as detailed in How do I configure Reporting Services?
2. Registering the required reports to the Portal as detailed in How do I register a Report with the Portal?
3. Setting the appropriate permissions on each report to control who can view and modify them as detailed in How do I manage the permissions on a Report?

Report Management-Related Tasks

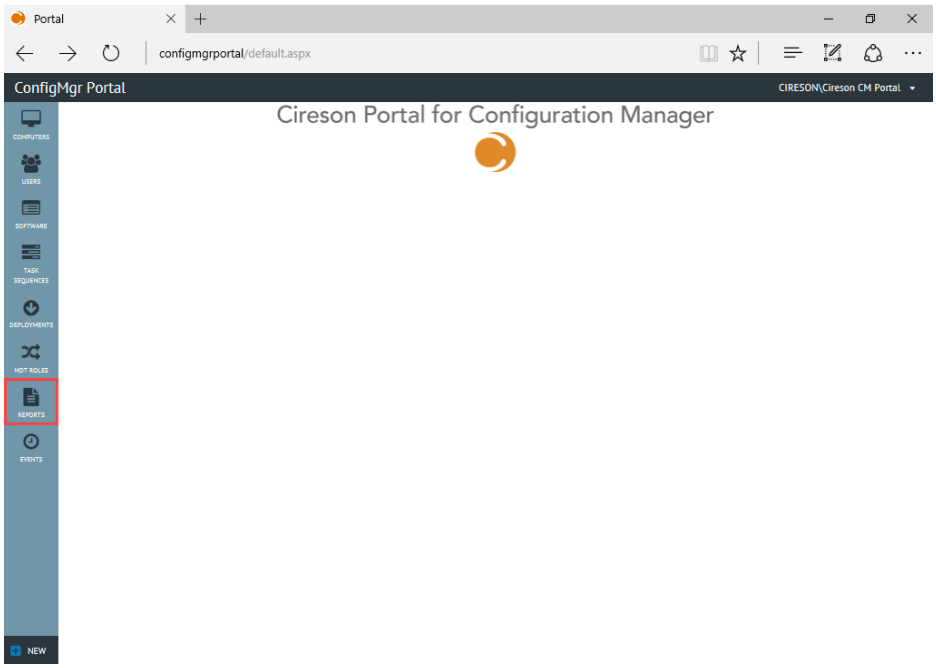
This section details the tasks related to managing reports in the Portal. The following list summarizes the tasks to be performed, which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

- How do I configure Reporting Services?
- How do I register a Report with the Portal?
- How do I manage the permissions on a Report?
- How do I view a Report?
- How do I Unlink a Report?

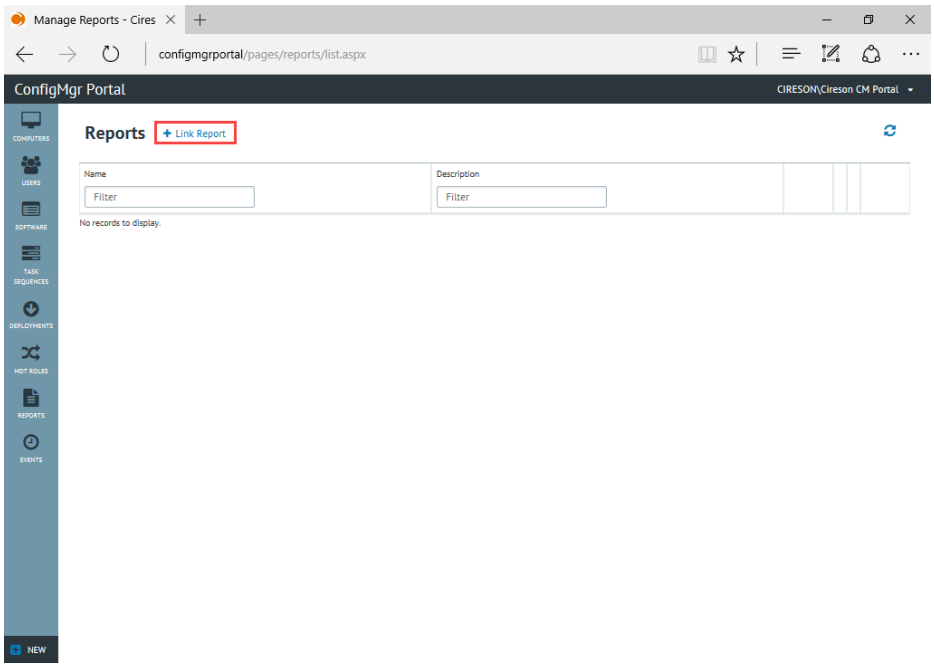
How do I register a Report with the Portal?

To register a Report with the Portal:

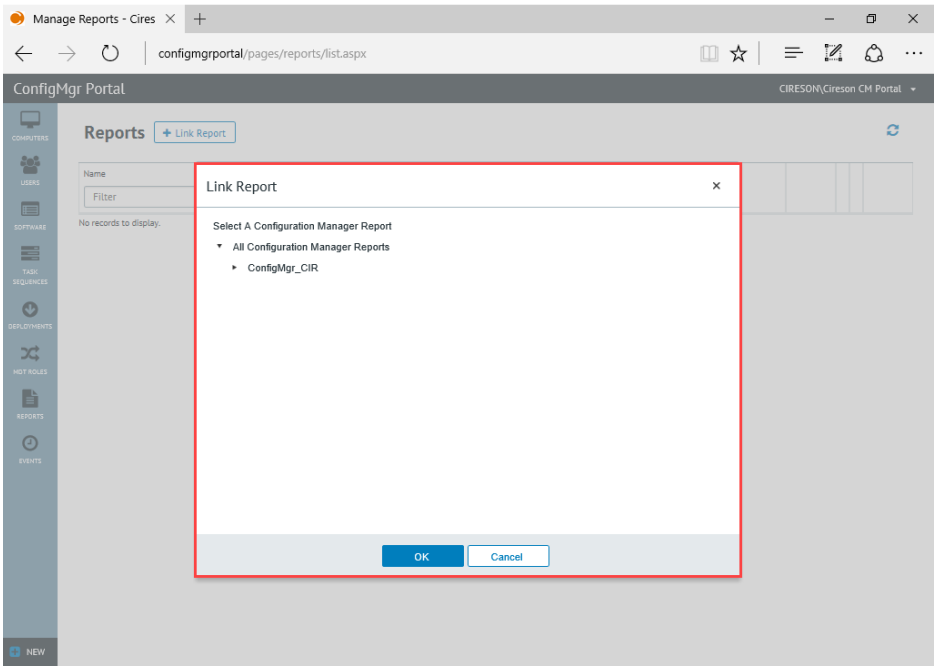
1. Click **Reports** on the **Navigation Menu**



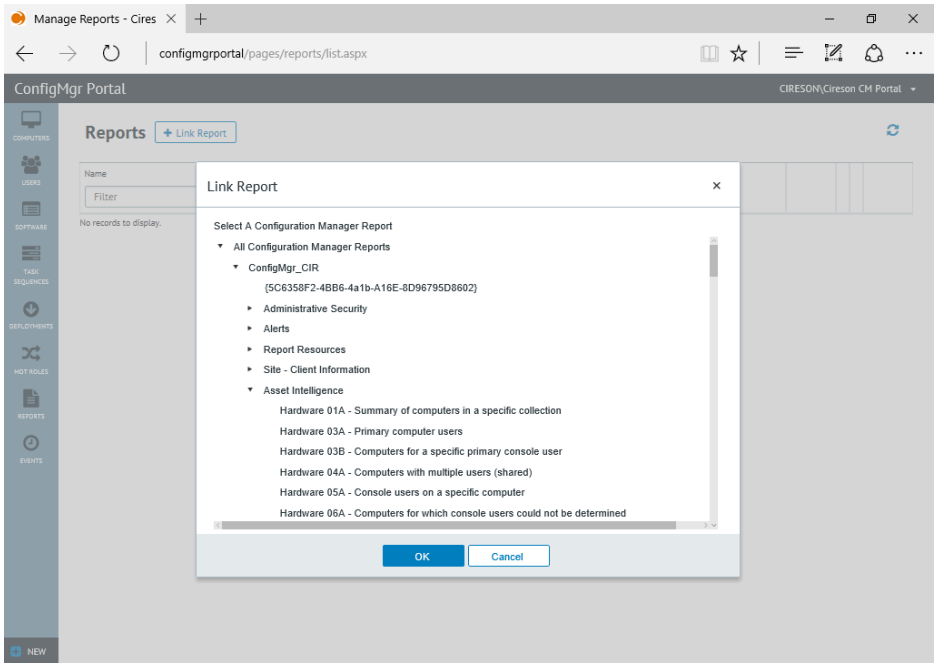
2. On the **Reports** page, click the **Link Report** button.



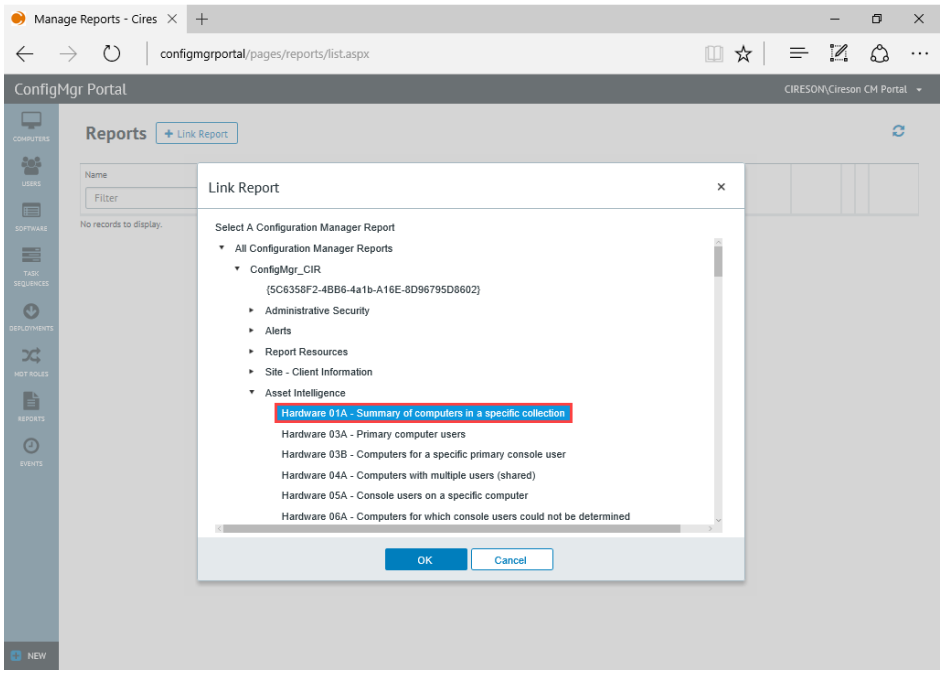
The **Link Report** page is displayed.



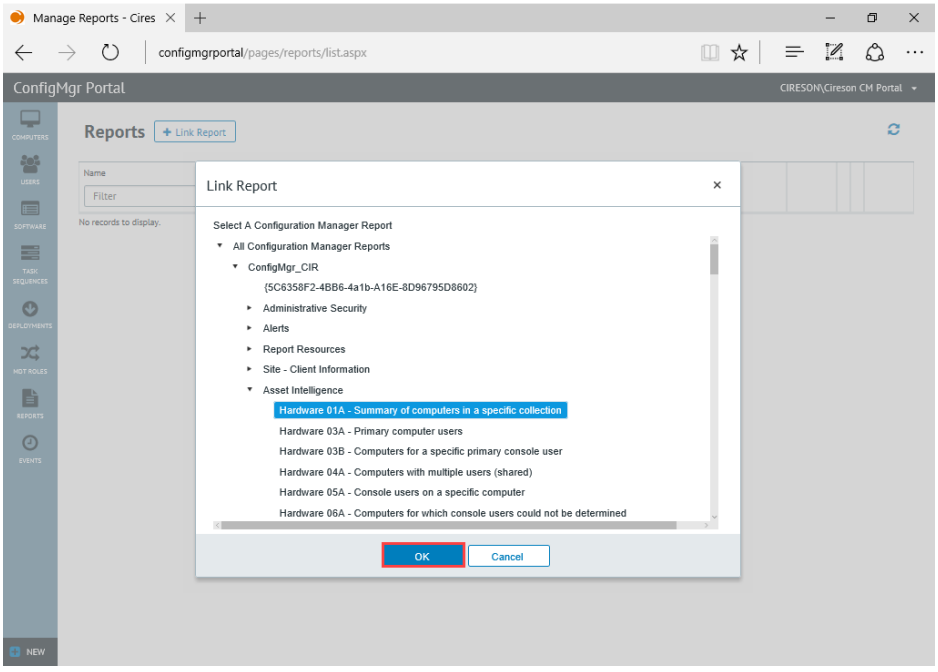
3. On the **Link Report** page, navigate through the hierarchy of Reports until you locate the Report you wish to import.



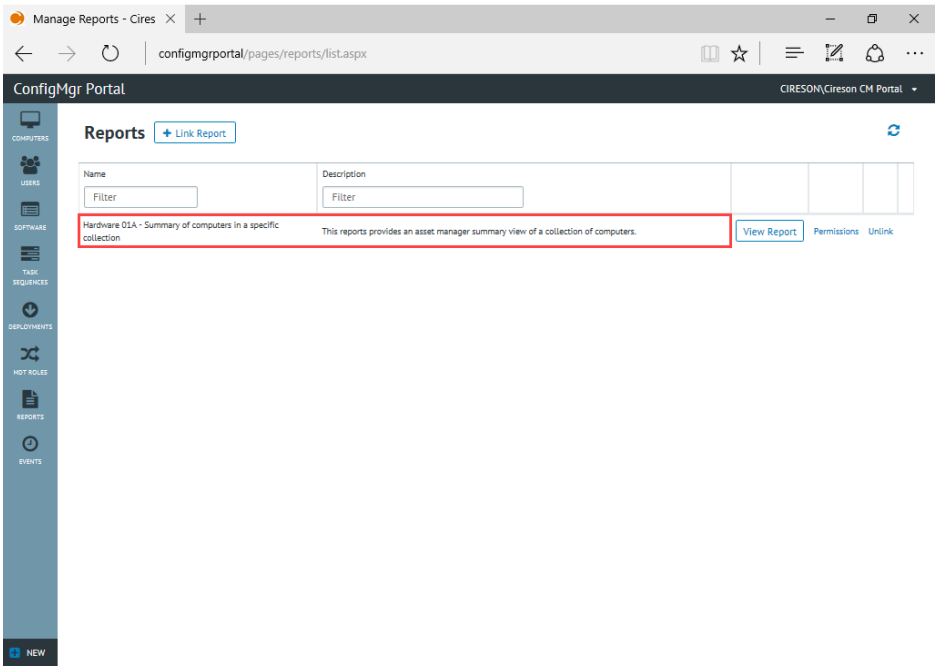
4. Click the Report to select it.



5. Click **OK** to link it to the Portal.



You are then returned to the **Reports** page where the newly linked Report is displayed.

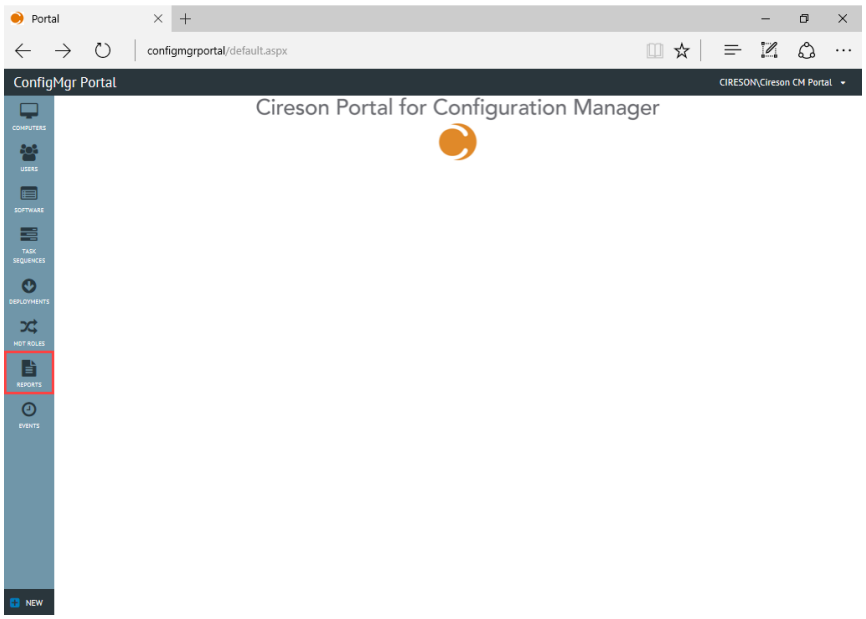


How do I manage the permissions on a Report?

Once a Report has been linked, you can manage its permissions to control who has access to it.

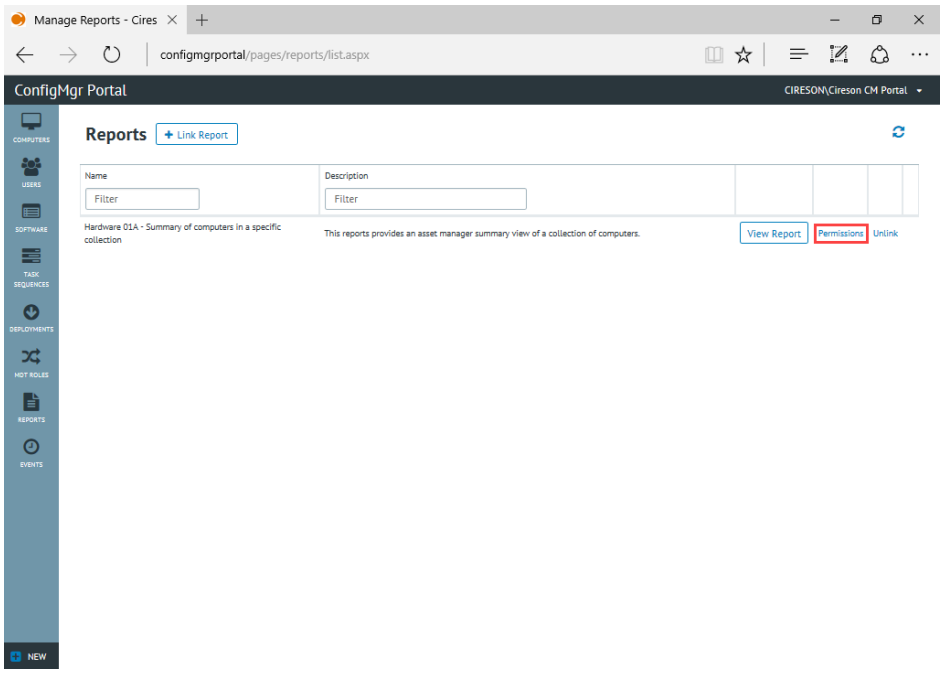
To manage the permissions on a Report:

1. Click **Reports** on the **Navigation Menu**

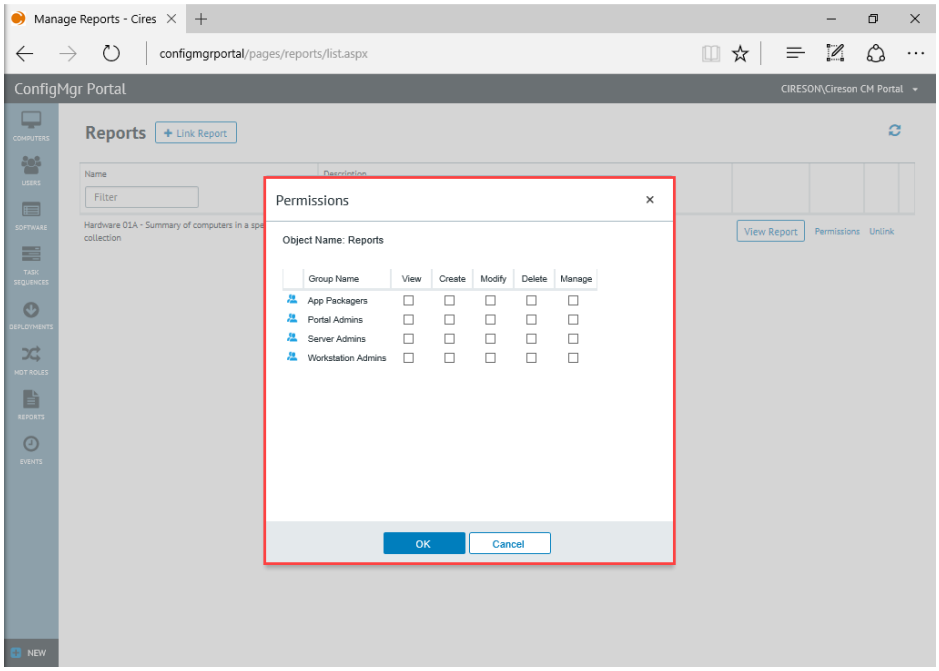


2. On the **Reports** page, click **Permissions** beside the Report whose permissions you want to manage.

   TIP: If you have a lot of Reports, use the **Name** and **Description** filters to help you easily locate the relevant Report.



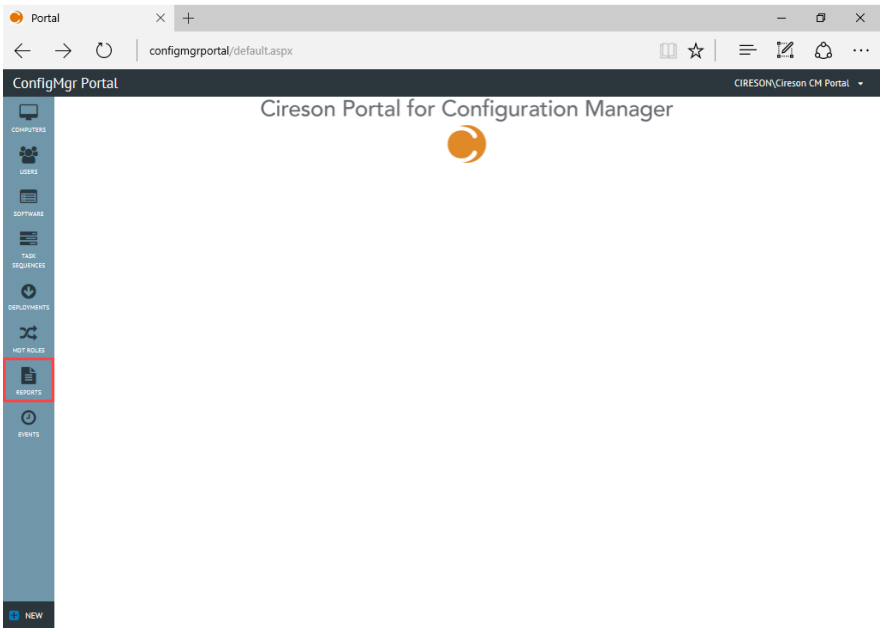
3. On the **Permissions** dialog box select the relevant permissions to grant or revoke to the various Portal groups then click **OK** to save your changes.



How do I view a Report?

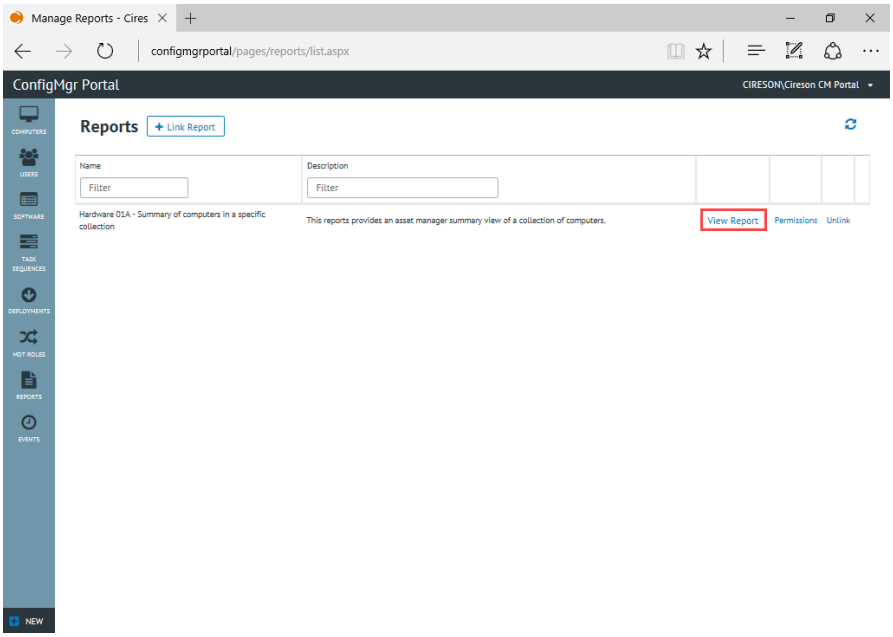
To view a Report:

1. Click **Reports** on the **Navigation Menu**

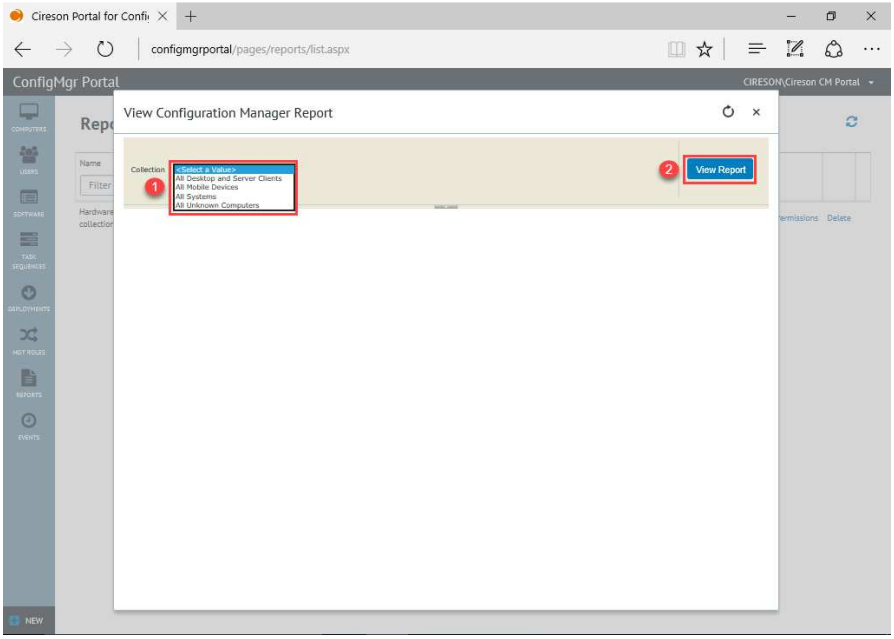


2. On the **Reports** page, click **View Report** beside the Report you wish to run.

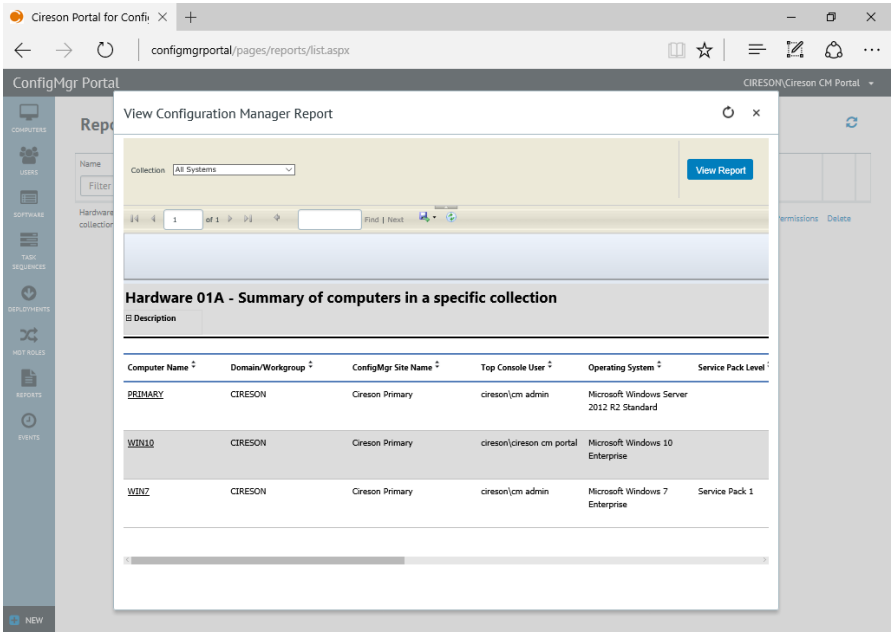
   TIP: If you have a lot of Reports, use the **Name** and **Description** filters to help you easily locate the relevant Report.



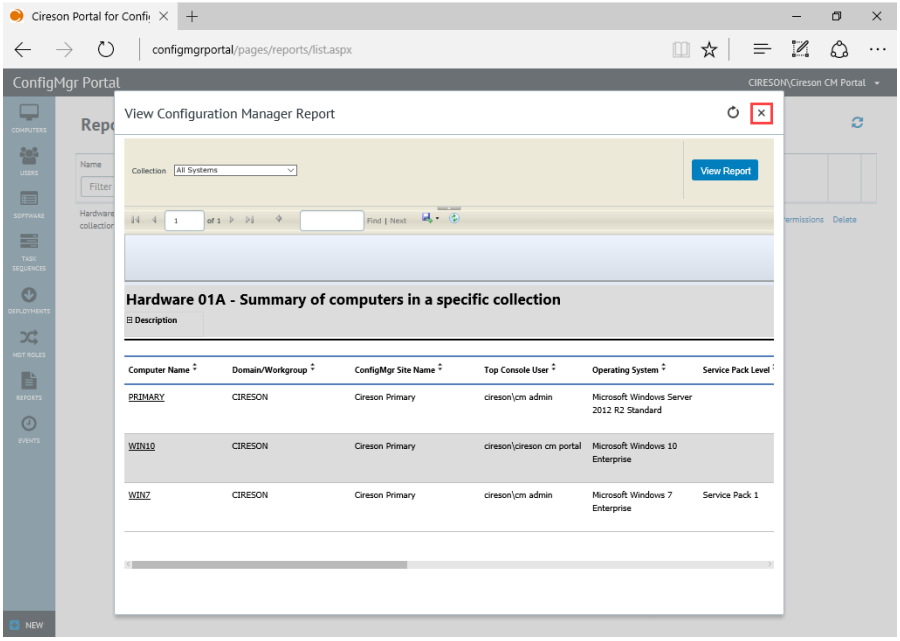
3. The **View Configuration Manager Report** window opens containing the actual Report. If required, provide any requested values then click **View Report**



The Report will then be displayed.



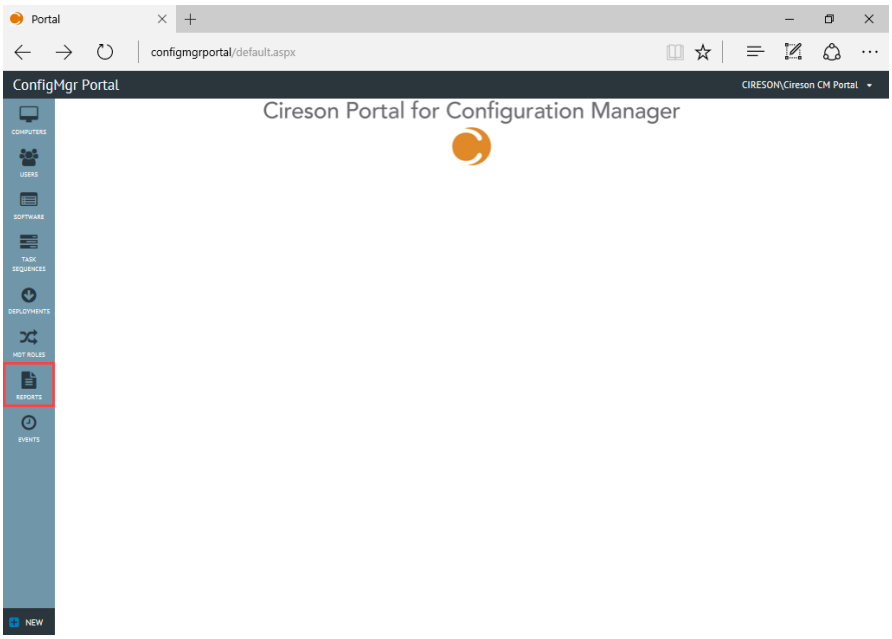
4. Once you have finished with the Report, click the "**x**" in the top right corner of the **View Configuration Manager Report** window to return to the **Reports** page.



How do I Unlink a Report?

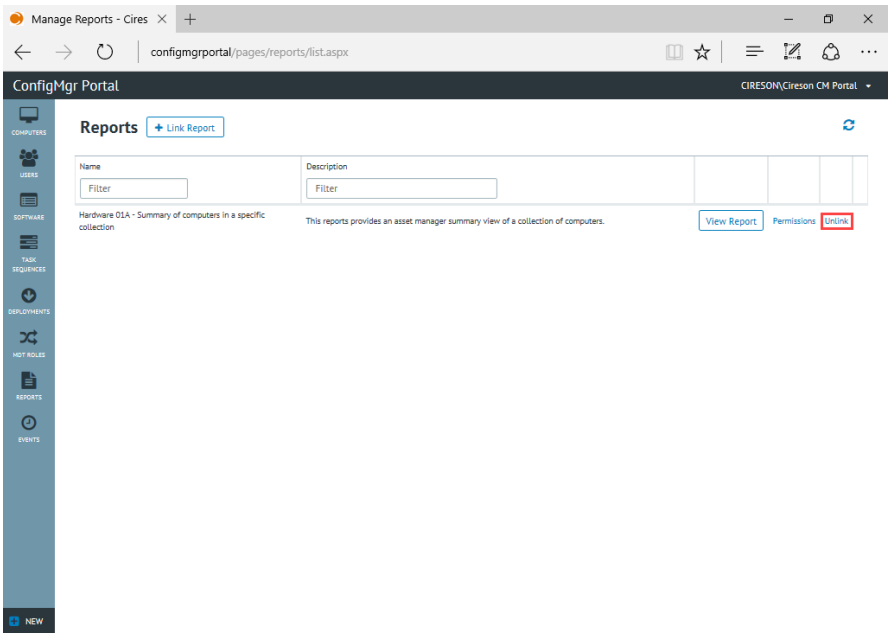
To unlink a Report:

1. Click **Reports** on the **Navigation Menu**



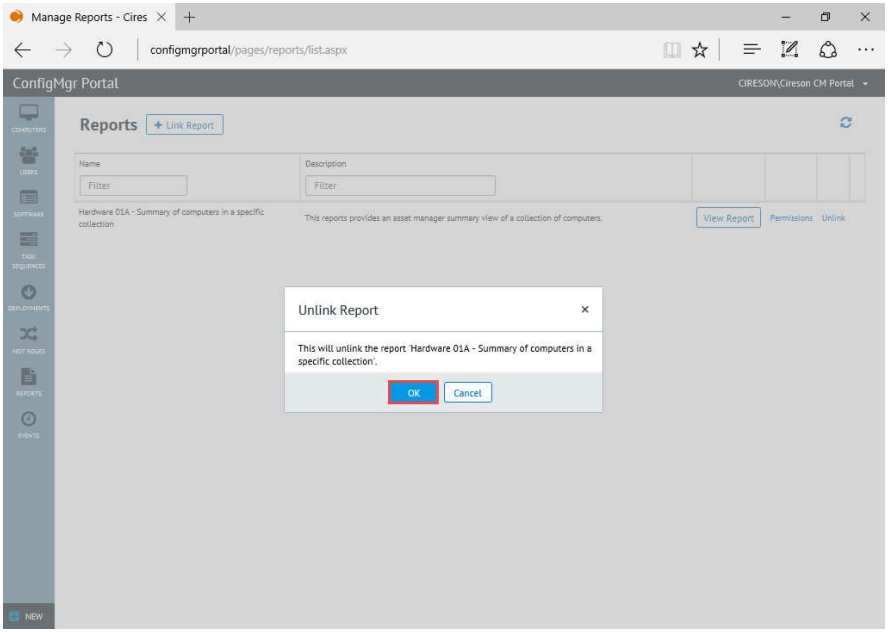
2. On the **Reports** page, click **Unlink** beside the Report you wish to unlink from the Portal.

   TIP: If you have a lot of Reports, use the **Name** and **Description** filters to help you easily locate the relevant Report.

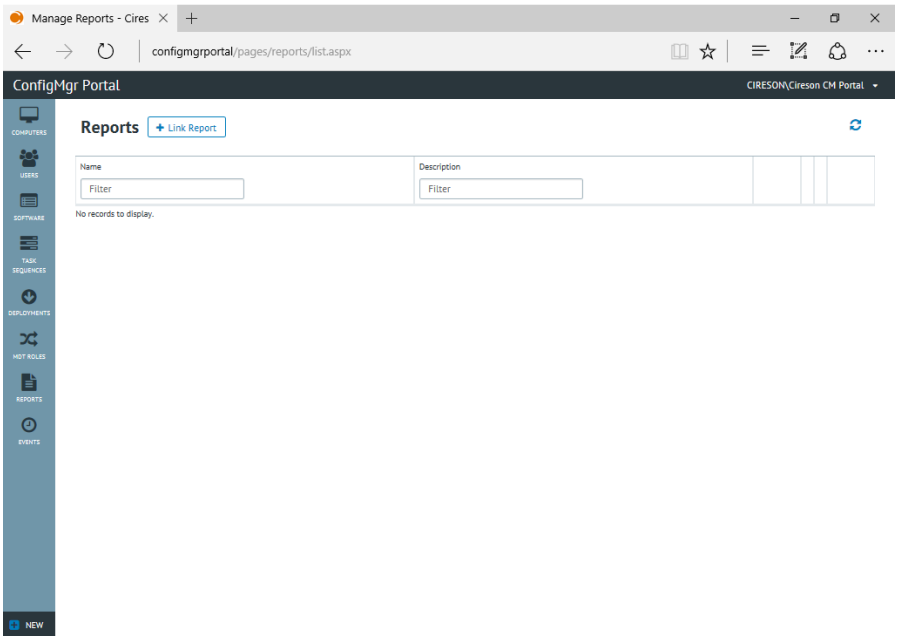


3. Click **OK** on the **Unlink Report** dialog box stating:

   This will unlink the report '*<report_name>*.'



The **Report** page is refreshed and no longer shows the unlinked report.

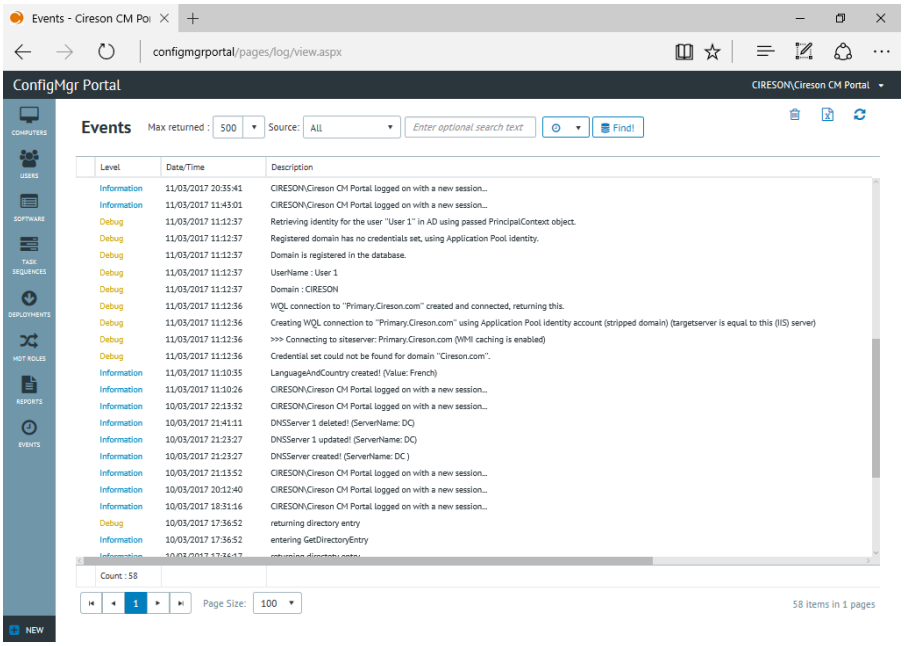


Managing Events

This section details the tasks related to managing Events in the Portal. A list of tasks is presented first which can be used to navigate to the relevant section of the document that contains the details for performing the actual task.

Overview

When you click **Events** on the **Navigation Menu** the **Events** page is displayed showing all of the events generated by the Portal.



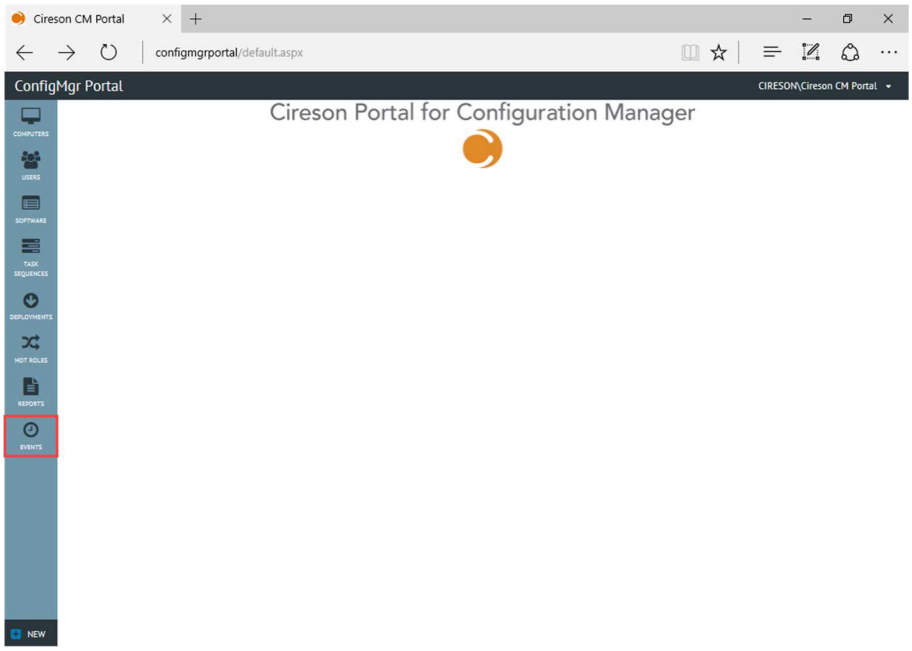
Event Management-Related Tasks

This section details the tasks related to managing events in the Portal. The following list summarizes the tasks that can be performed which can be used to navigate to the relevant section of the document containing the details for performing the actual task.

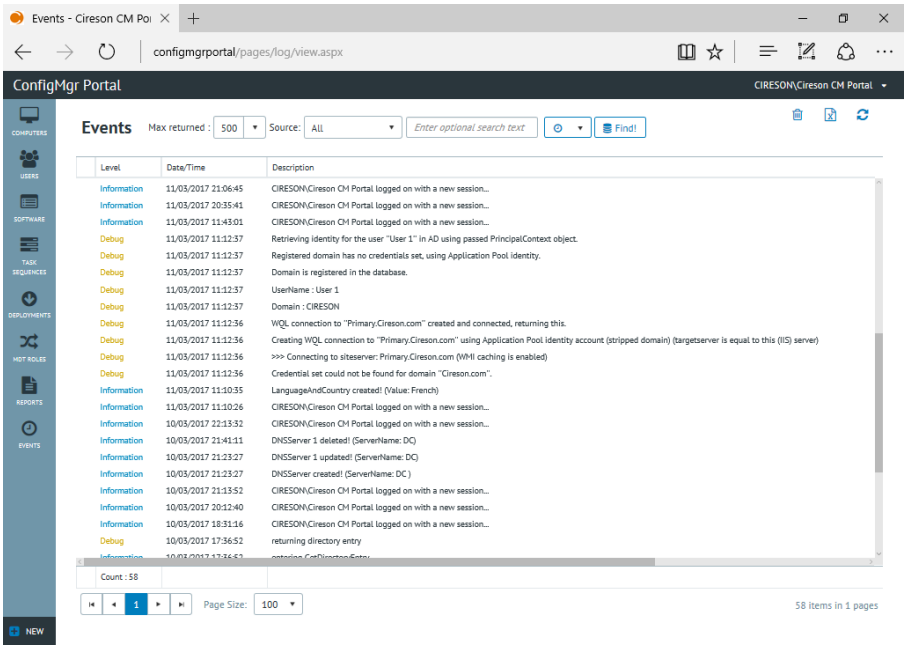
- How do I view Events?
- How do I control the number of Events displayed?
- How do I control which source of Events are displayed?
- How can I search for a specific Event?
- How can I search for Events that occurred during a certain period?
- How do I control how many Events are displayed per page in the Portal?
- How do I cleanup an Event(s)?

How do I view Events?

To view Events, click **Events** on the **Navigation Menu**



The **Events** page will be displayed.

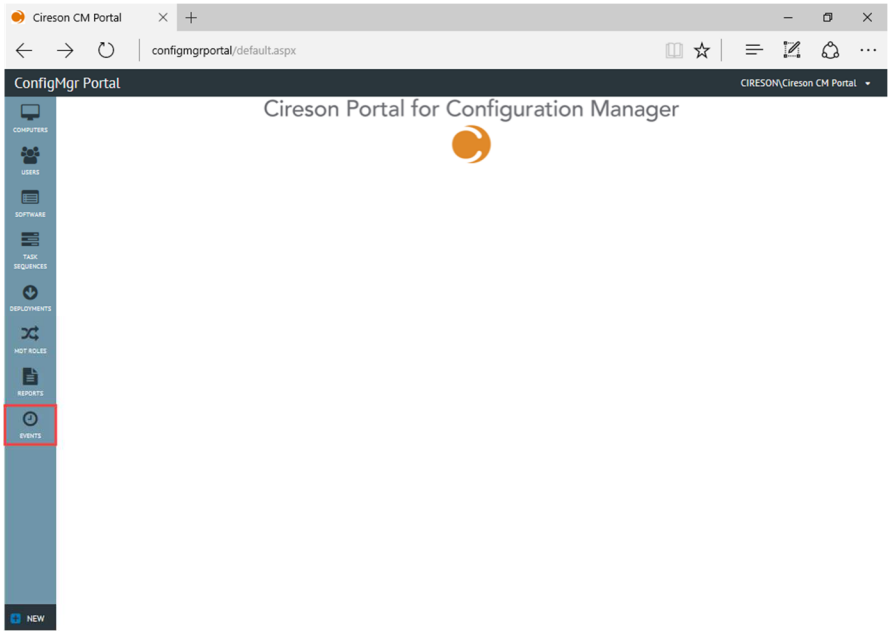


How do I control the number of Events displayed?

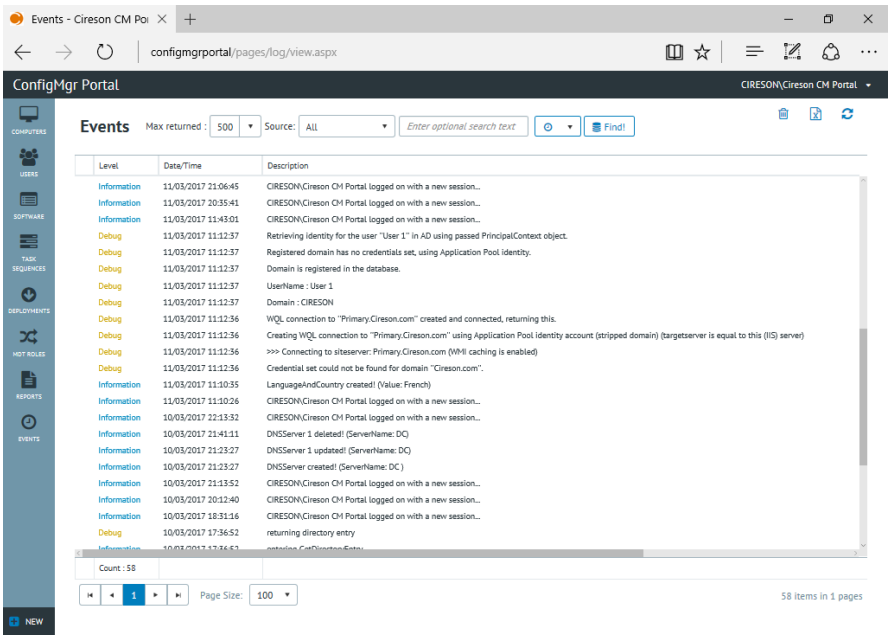
By default, the Portal displays the 500 most recent Events.

To change the number of Events shown by the Portal:

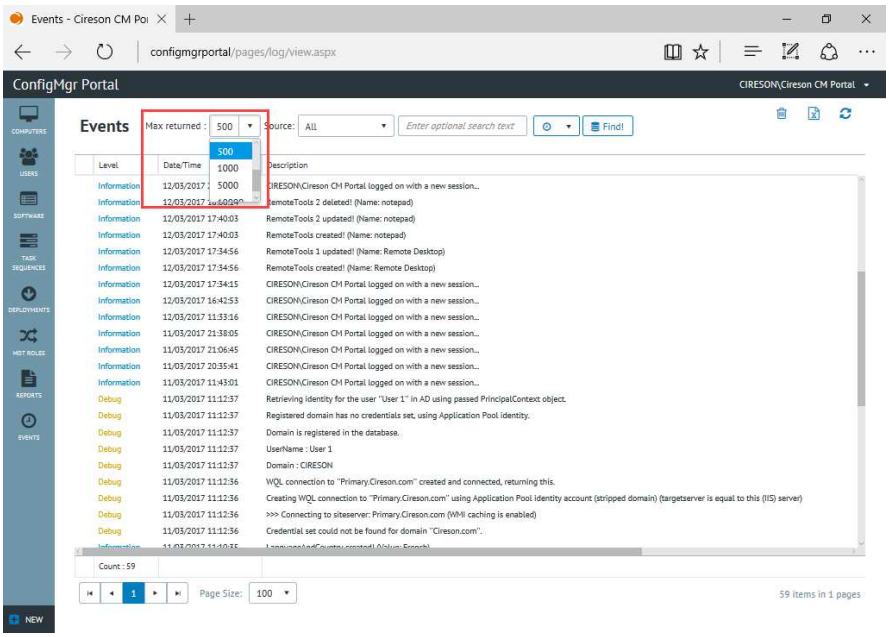
1. Click **Events** on the **Navigation Menu**



The **Events** page will be displayed.



2. On the **Events** page, select the number of events you want to be displayed by selecting the relevant value from the **Max returned** dropdown list.

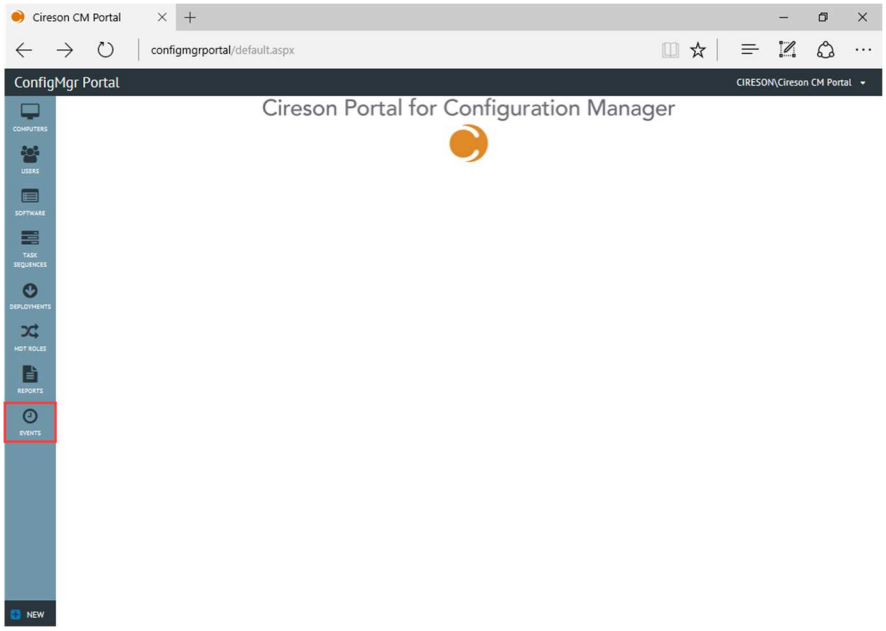


How do I control which source of Events are displayed?

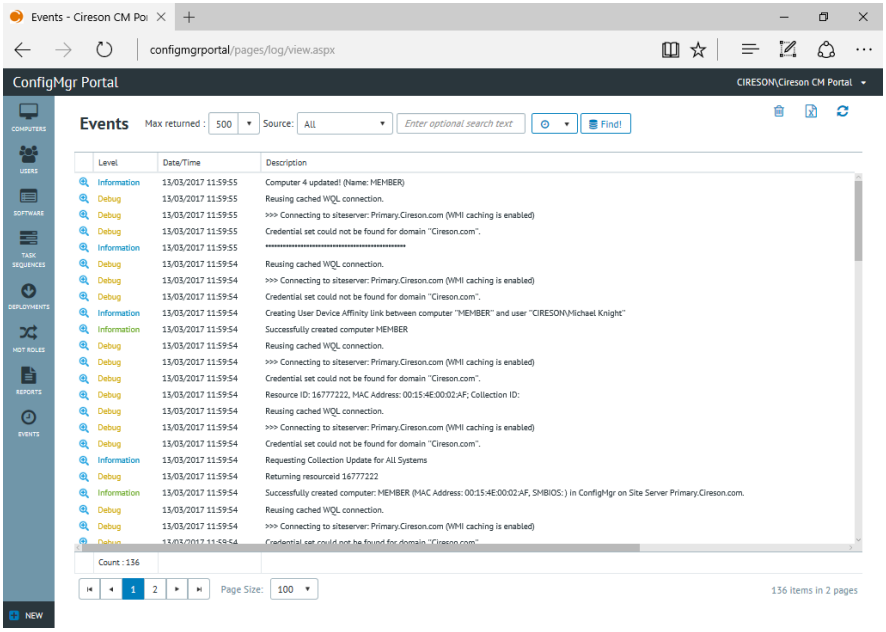
It is possible to only display events generated by a certain source (the available sources being **All**, **Computer**, **Deployment**, **OSD**, **Software**, **MDT Roles**, **Task Sequence** and **Other**).

To change the source of Events displayed by the Portal:

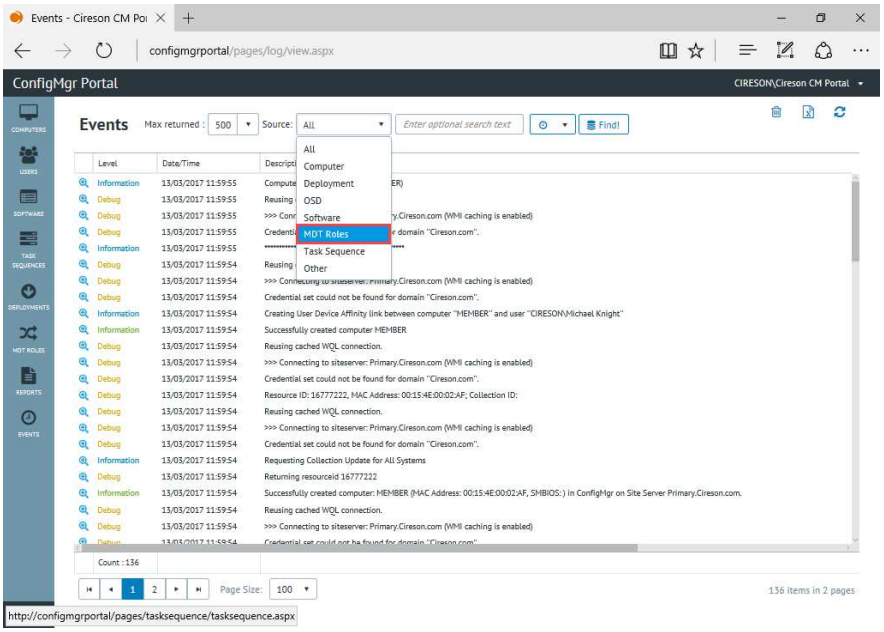
1. Click **Events** on the **Navigation Menu**



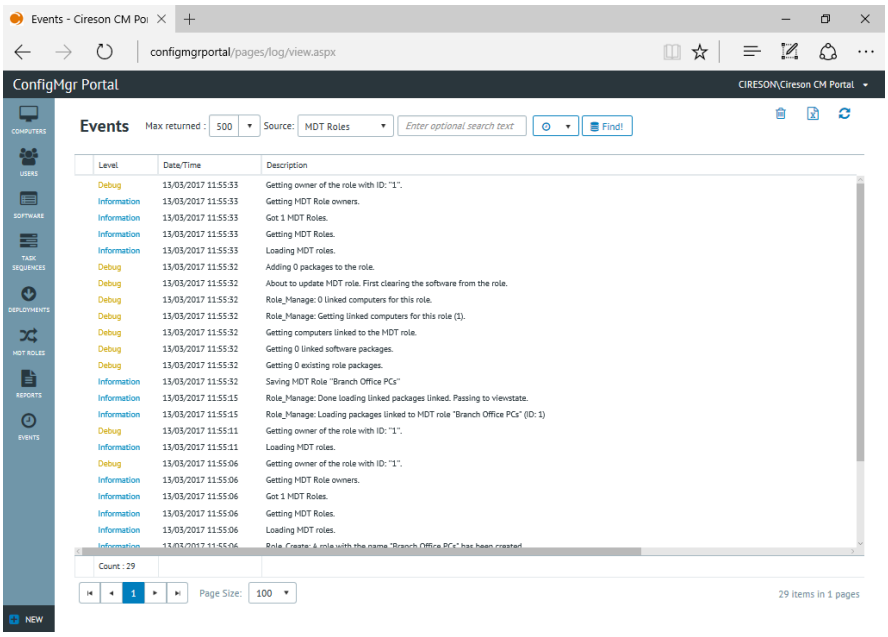
The **Events** page will be displayed.



2. On the **Events** page, select the required source of events you only want to be displayed by selecting the relevant value from the **Source** dropdown list. For example, to only show Events that relate to MDT Roles, select **MDT Roles** from the **Source** dropdown.



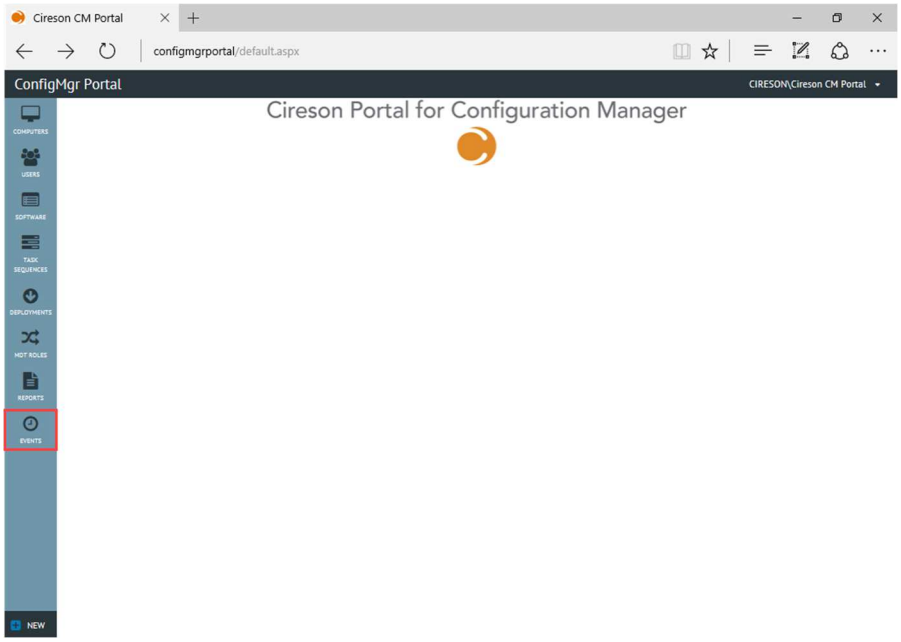
The list of Events will be filtered according to the **Source** selected. For example, only MDT Roles in our example.



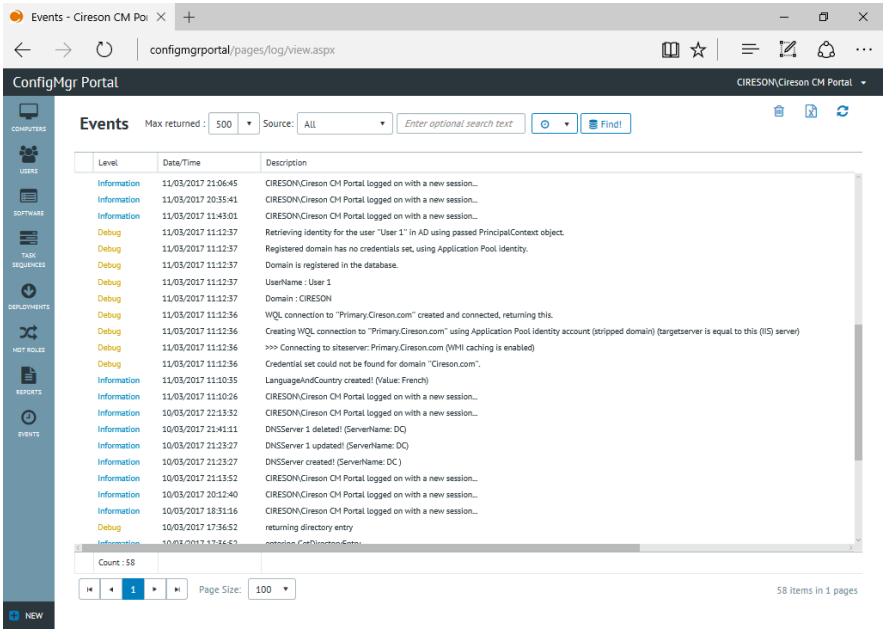
How can I search for a specific Event?

To search for a specific Event:

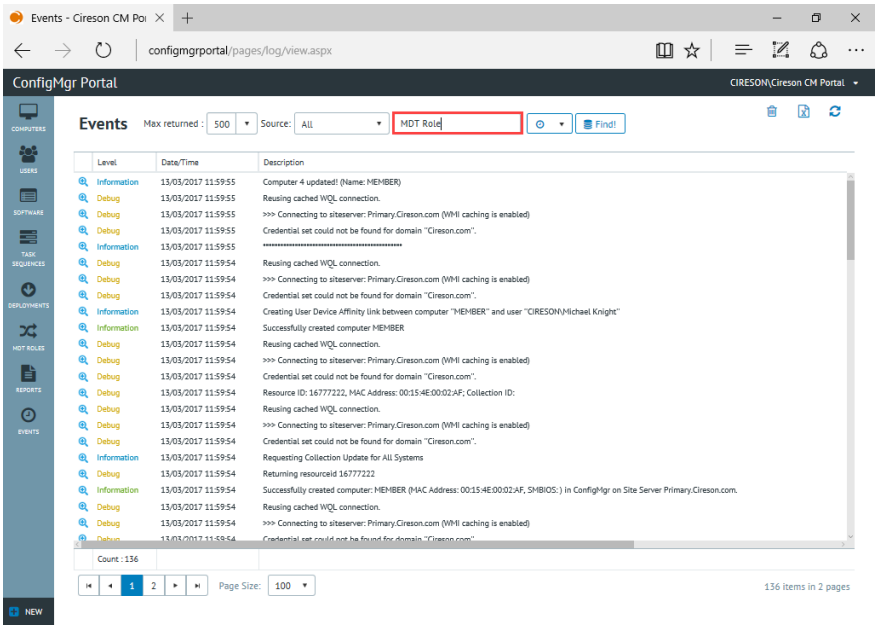
1. Click **Events** on the **Navigation Menu**



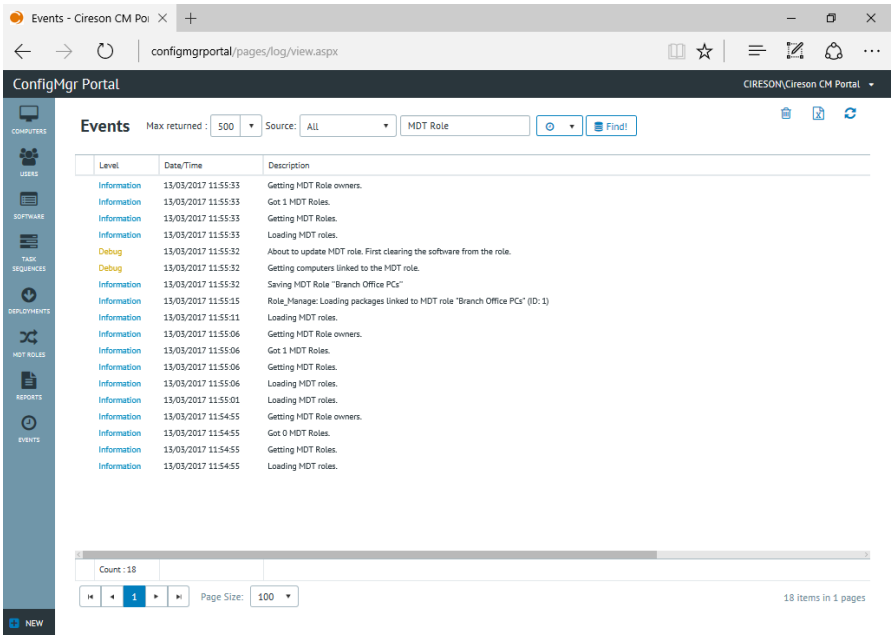
The **Events** page will be displayed.



2. On the **Events** page, enter your search string in the **Enter optional search text** field.



3. Press **ENTER** to see the search results.

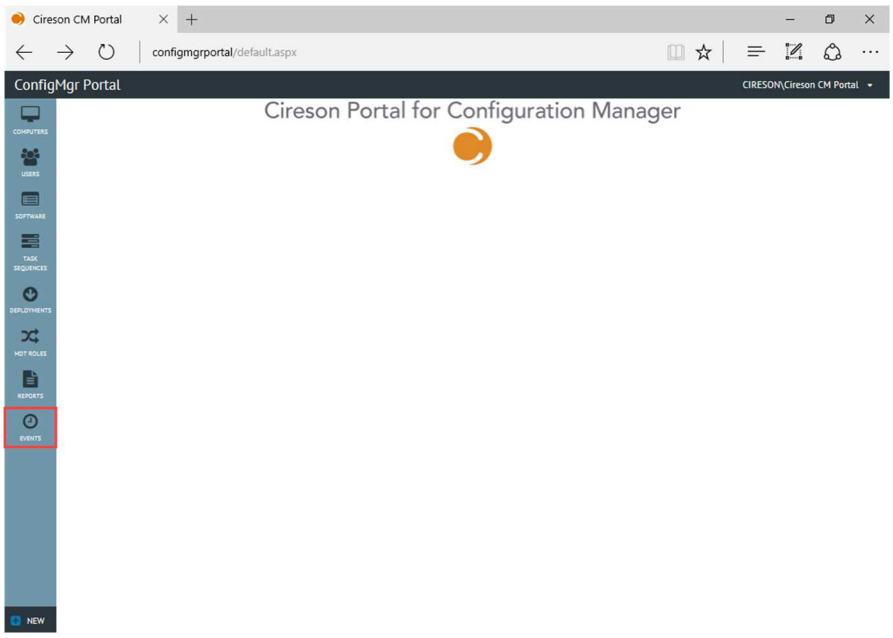


NOTE: To clear the search results, clear the value entered in the **Enter optional search text** field and press **ENTER**

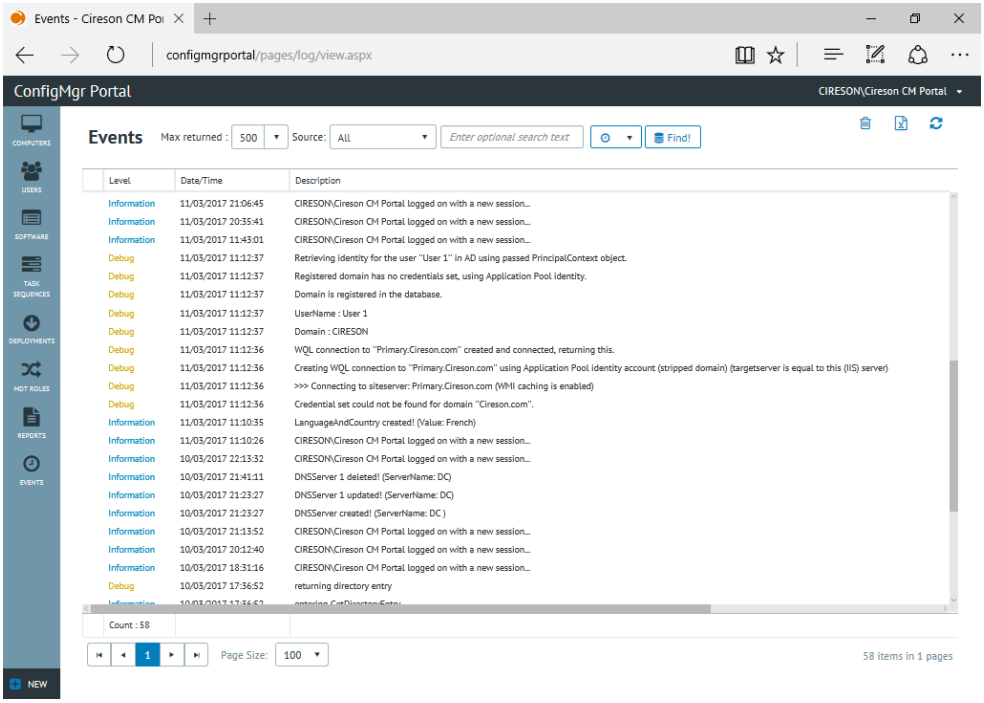
How can I search for Events that occurred during a certain period?

To search for Events that occurred during a certain period:

1. Click **Events** on the **Navigation Menu**

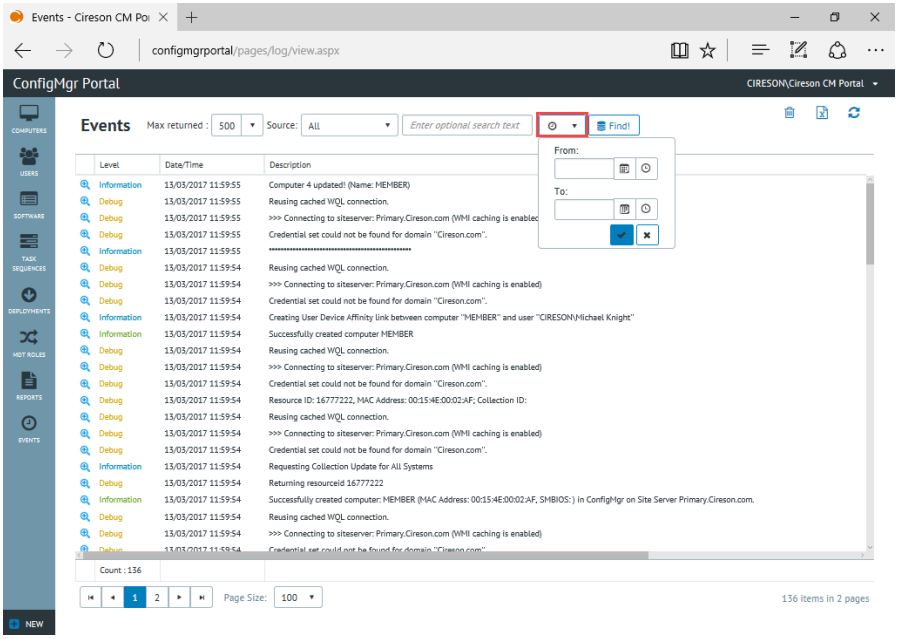


The **Events** page will be displayed.

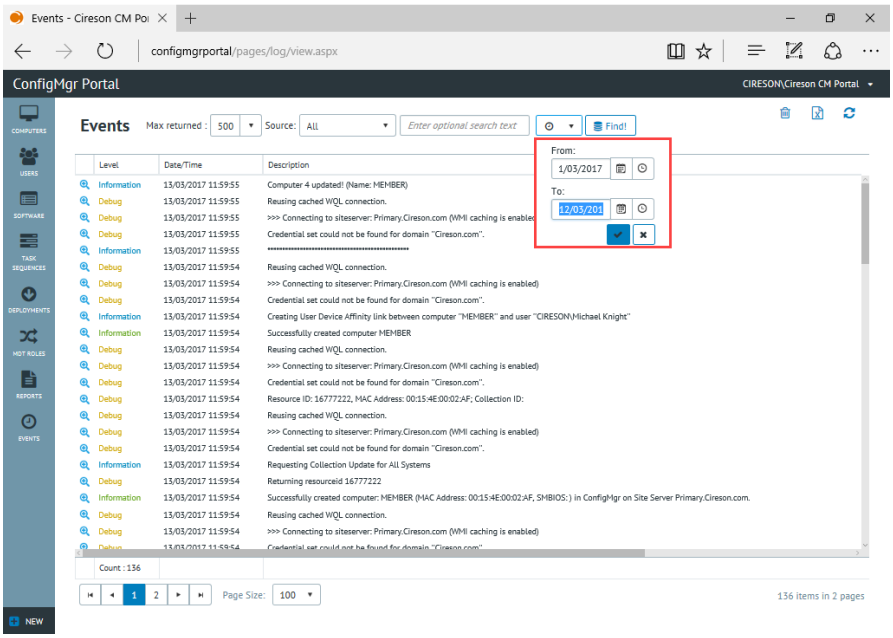


2. On the **Events** page, set the values in the **Max returned, Source** and search fields as required.

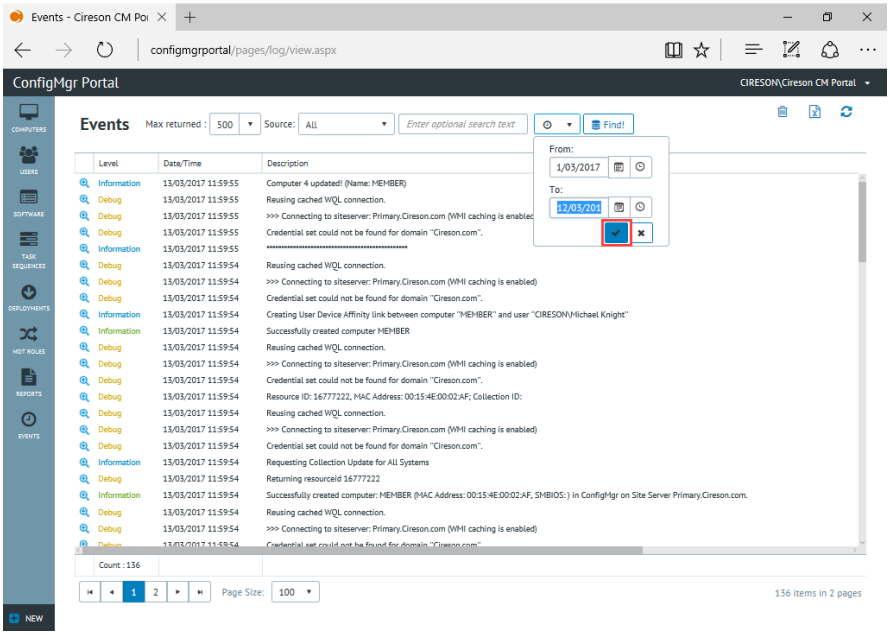
3. Click the Date/Time picker button ( ).



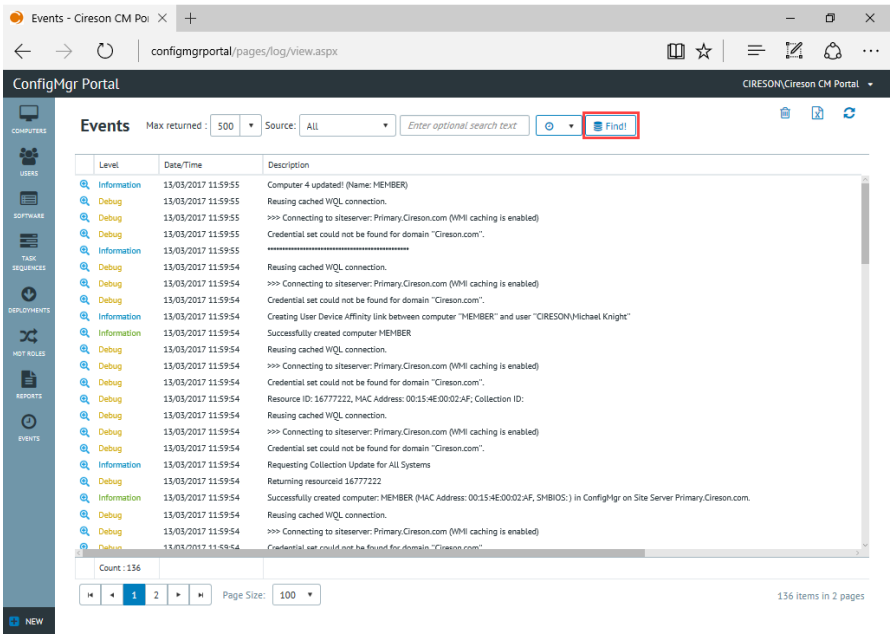
4. In the **From** and **To** fields, enter the relevant date/time periods you want to search.



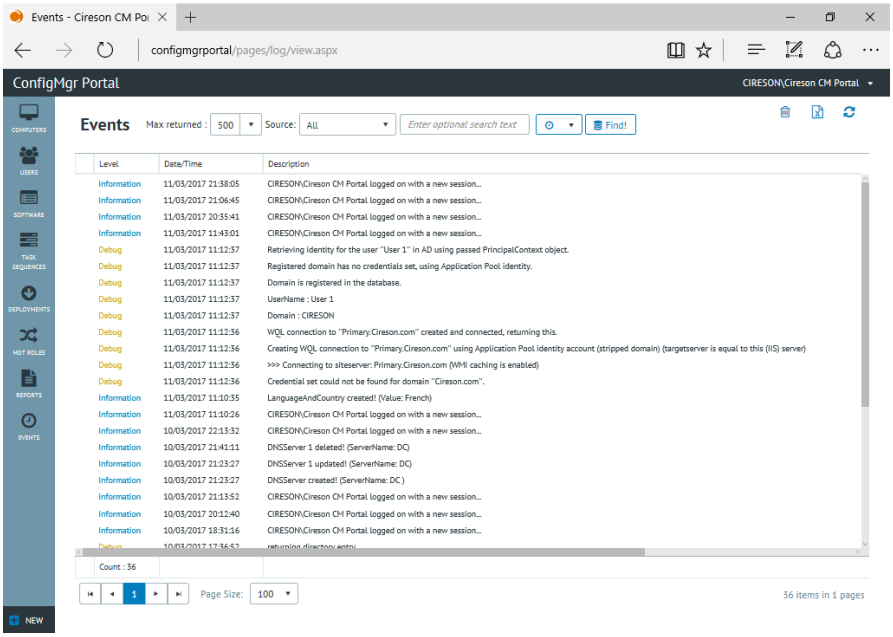
5. Either click the checkmark or press **ENTER** to close the Date/Time picker.



6. Click **Find** to display the matching Events.



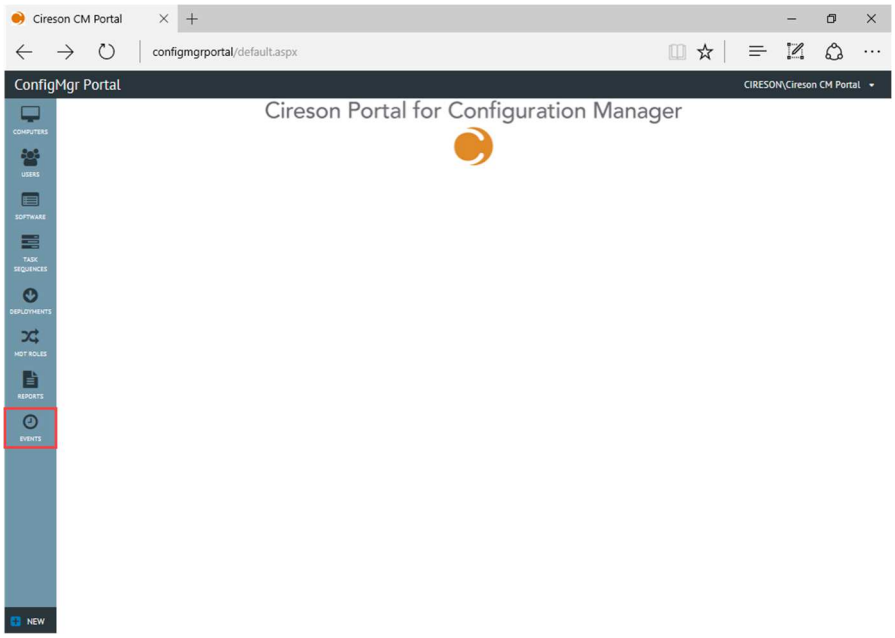
A list of matching Events is displayed.



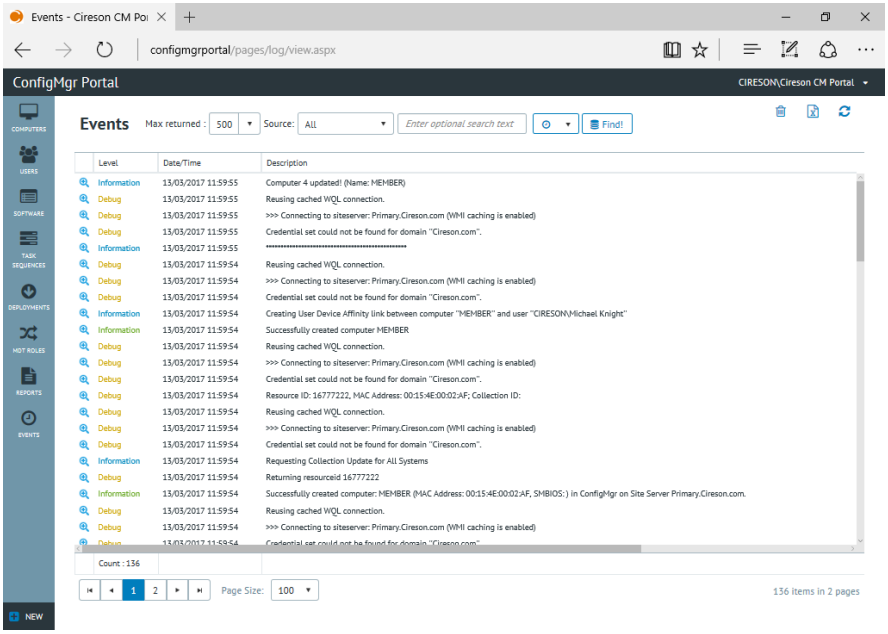
How do I control how many Events are displayed per page in the Portal?

To control how many Events are displayed per page in the Portal:

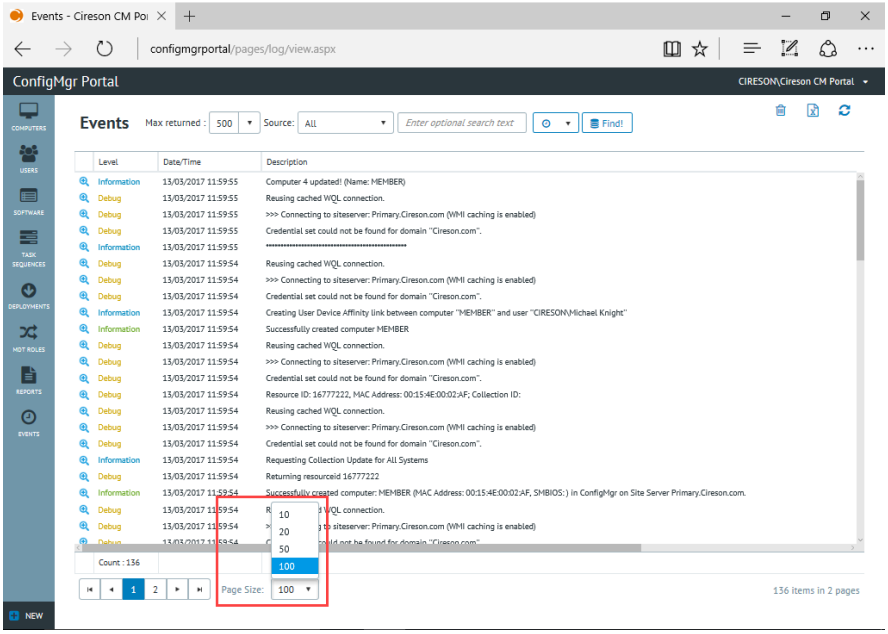
1. Click **Events** on the **Navigation Menu**



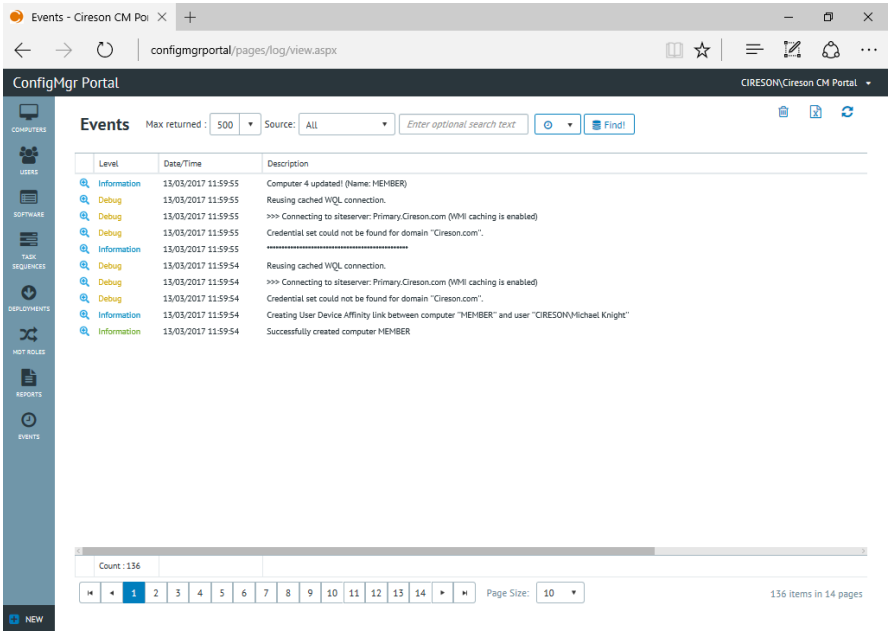
The **Events** page will be displayed.



2. Click the **Page Size** dropdown list at the bottom of the page and select the relevant number of Events (10, 20, 50, or 100) you want displayed per page in the Portal.



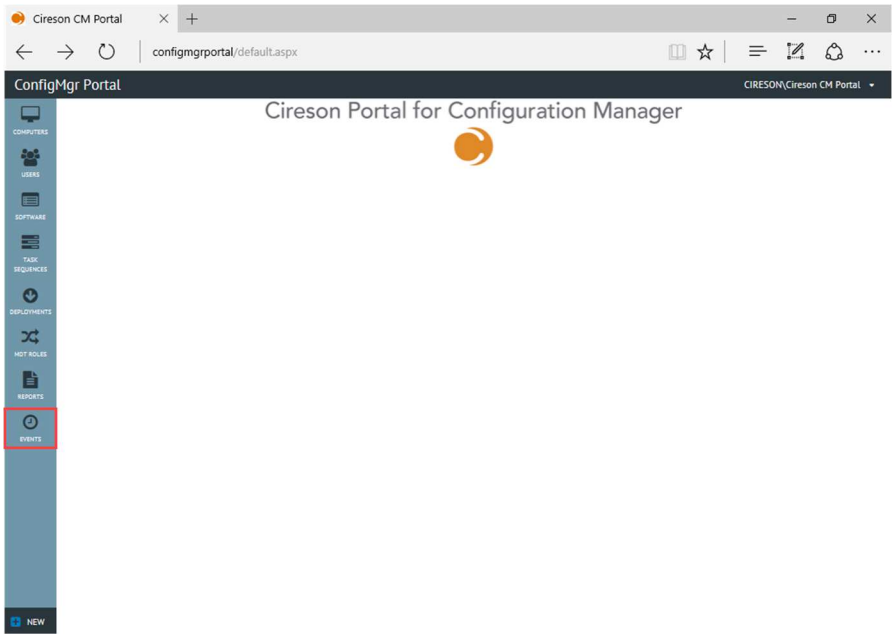
The **Events** page automatically reloads, adjusting to the number of Events chosen. For example, if **10** Events per page is chosen the result is as follows.



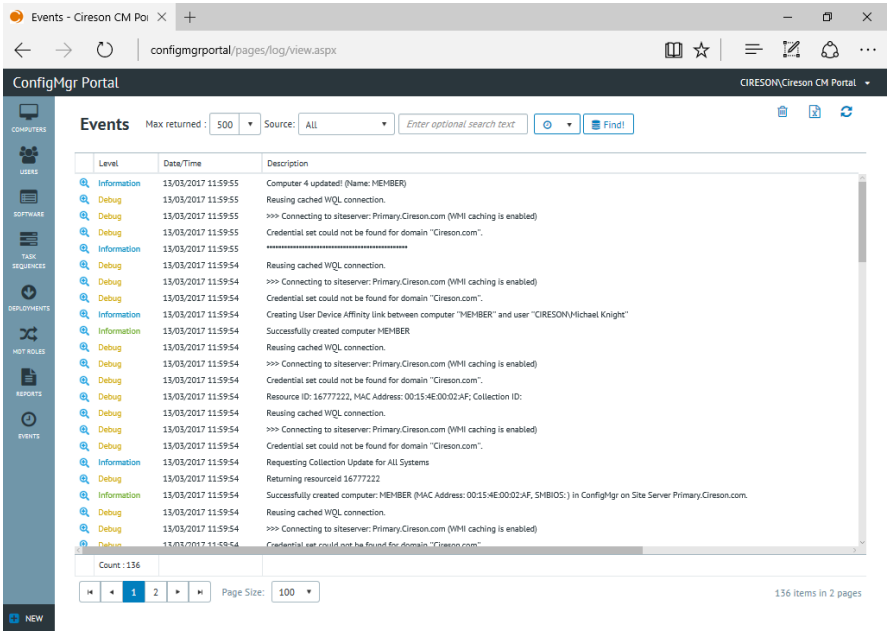
How do I cleanup an Event(s)?

To cleanup an Event(s):

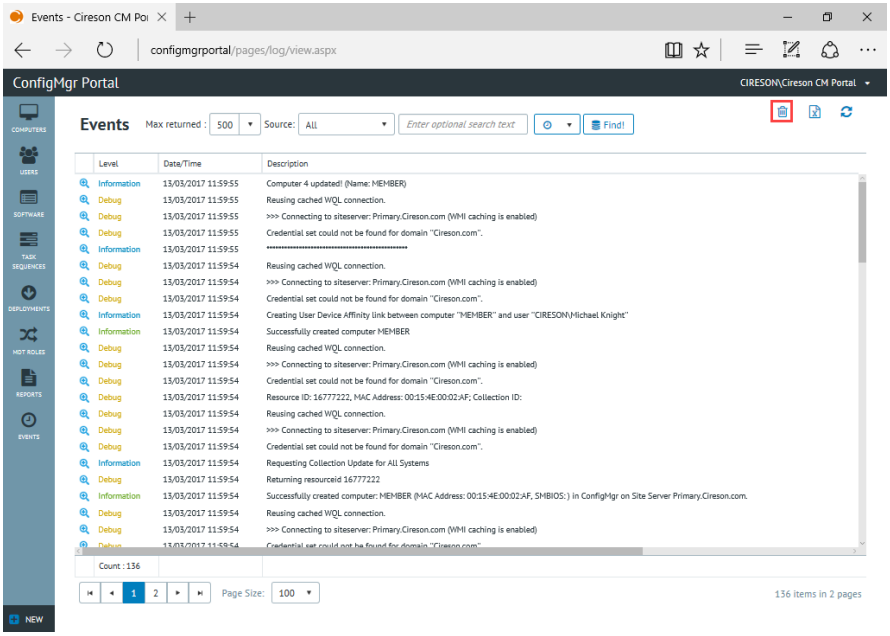
1. Click **Events** on the **Navigation Menu**



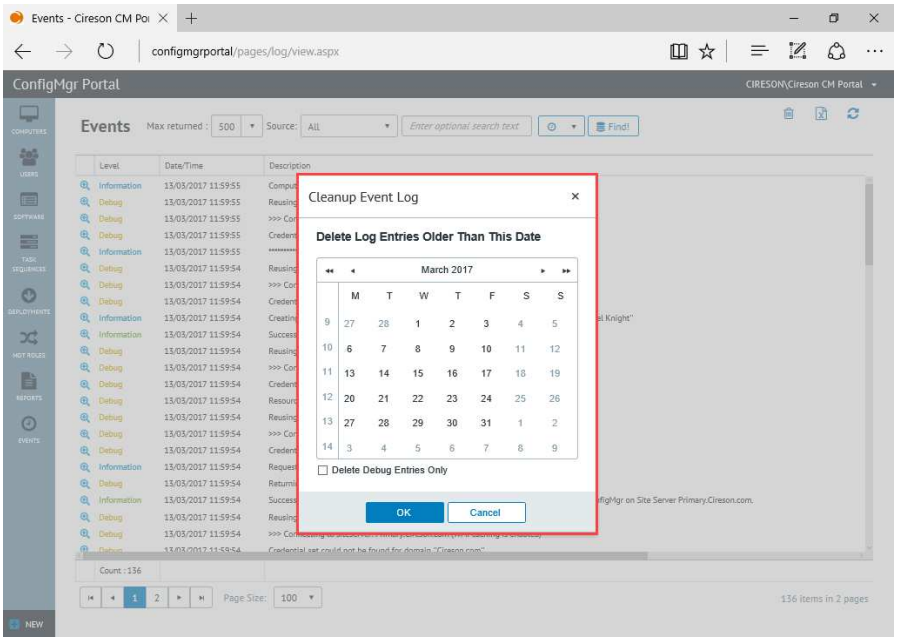
The **Events** page will be displayed.



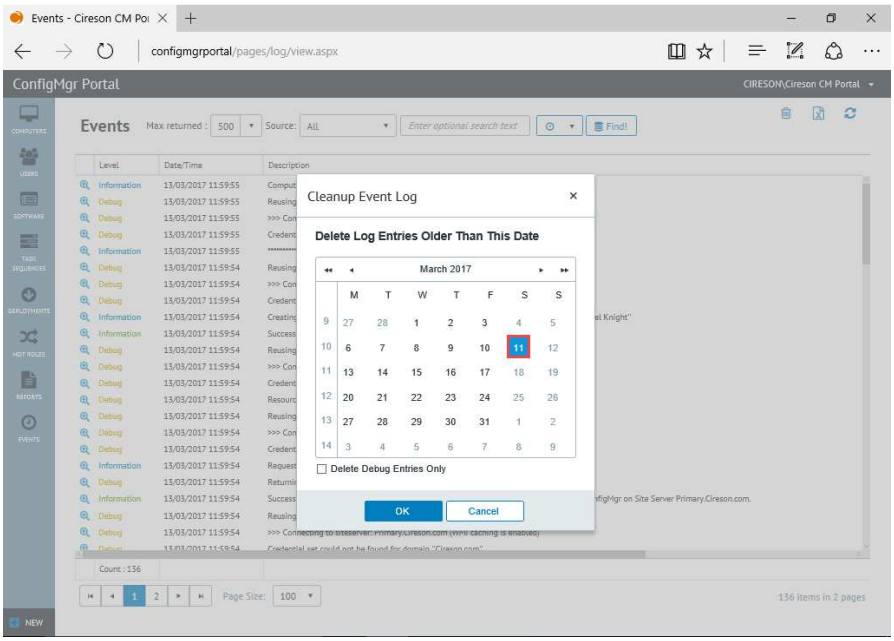
Click the Trashcan ( ) on the **Portal Header Bar**



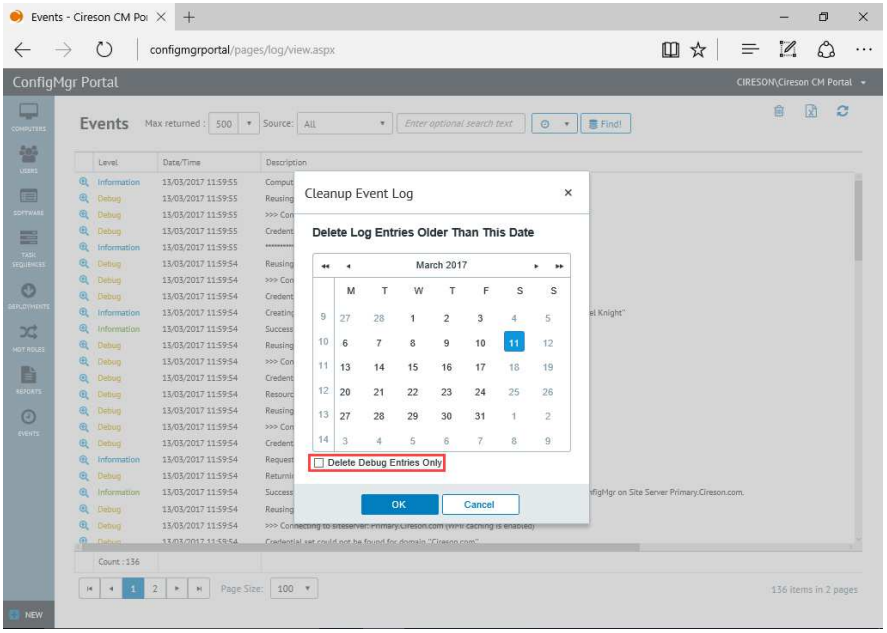
The **Cleanup Event Log** dialog will then be displayed.



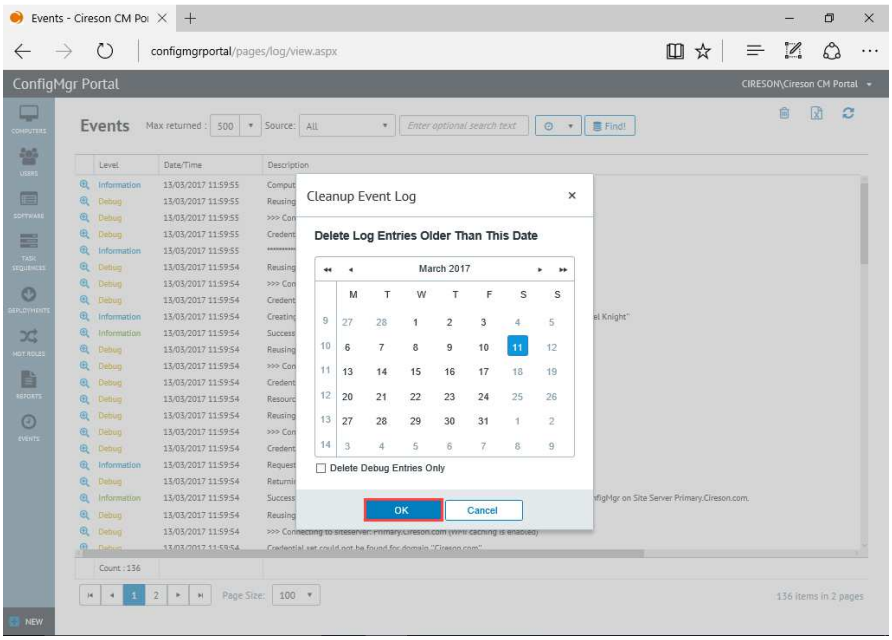
2. Select the date you wish to delete Events prior to.



3. Click the **Delete Debug Entries Only** checkbox if you only wish to delete debug events (in-depth log events).

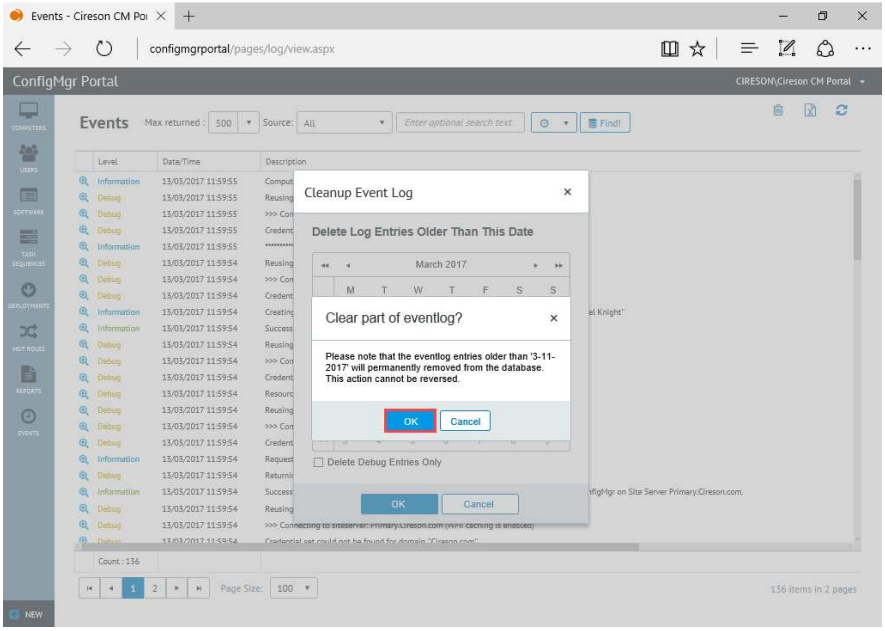


4. Click **OK**



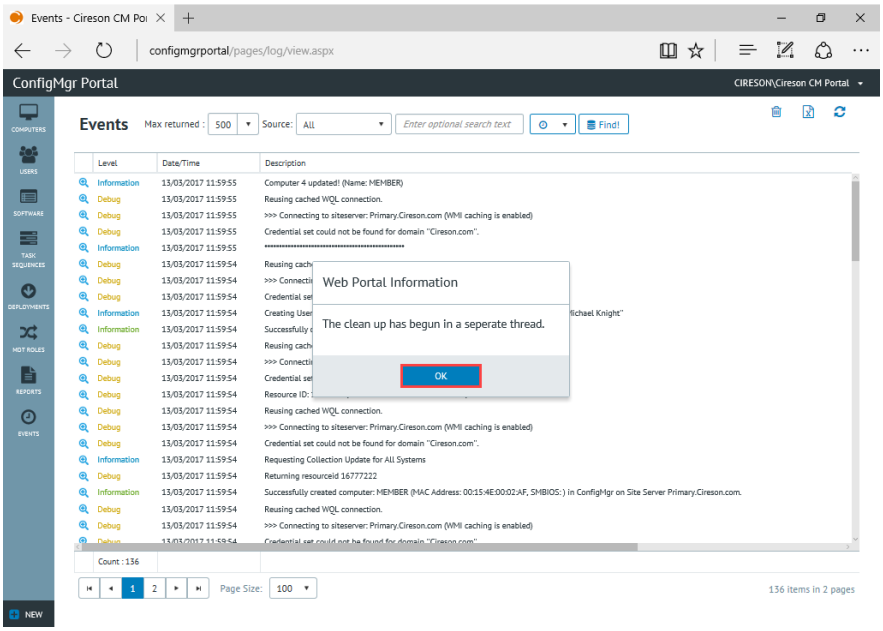
5. To confirm the cleanup, click **OK** on the **Clear part of eventlog?** dialog box stating:

   Please note that the eventlog entries older than '*date*' will permanently removed from the database. This action cannot be reversed.



6. Click **OK** on the **Web Portal Information** dialog box stating:

   The clean up has begun in a separate thread.



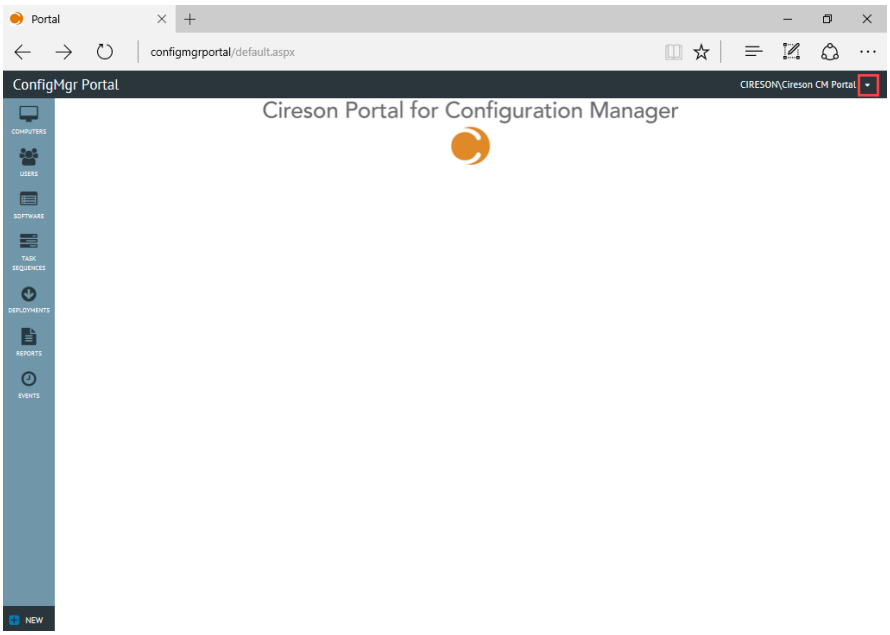
7. Periodically refresh the **Events** page to confirm the relevant Events have been deleted.

Managing Settings

This section details how to manage the various settings for the Portal which are explained in detail in Appendix B – Settings Menu Reference.

In general, to manage any of the settings for the Portal:

1. Click the down arrow ( ) after the username in the **Portal Header Bar**



2. Select the relevant settings menu for the setting you require.
3. Select the relevant tab.
4. Select the relevant group (where applicable) that contains the setting you wish to manage.
5. Select the relevant setting.
6. Make the required changes.
7. Click **Save Settings**

Settings-related Tasks

This section contains a list of settings related tasks, grouped by task and sorted alphabetically.

- Deployment Scopes
- Domains
- Global Administrator
- MDT Roles
- Organizational Units
- Registered Services
- Security Groups
- Service Tasks
- Templates
- DNS
- External Tools
- Languages
- Number Sequencing Series
- OSD Templates
- Reporting
- Security Rights
- Software Source
- Views

Deployment Scopes

Deployment Scopes are a way of controlling the available resources users have access to when deploying software. They allow resources sharing common criteria such as operating system, to be grouped together in a similar way as a ConfigMgr collection.

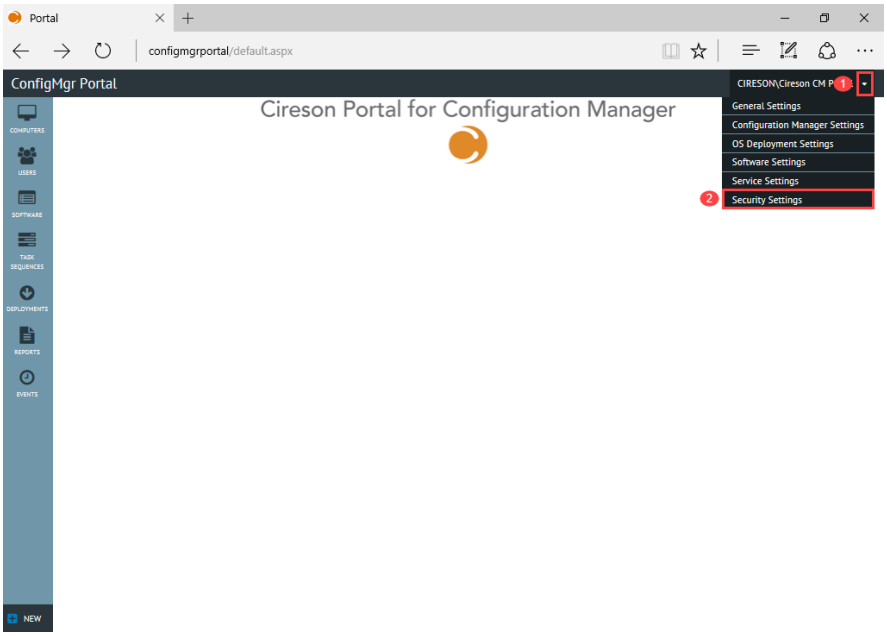
This section details the tasks related to Deployment Scopes that you can perform using the Portal.

- How do I add a new collection based Deployment Scope?
- How do I add a new filter based Deployment Scope?
- How do I edit a Deployment Scope?
- How do I manage the permissions on a Deployment Scope?
- How do I delete a Deployment Scope?

How do I add a new collection based Deployment Scope?

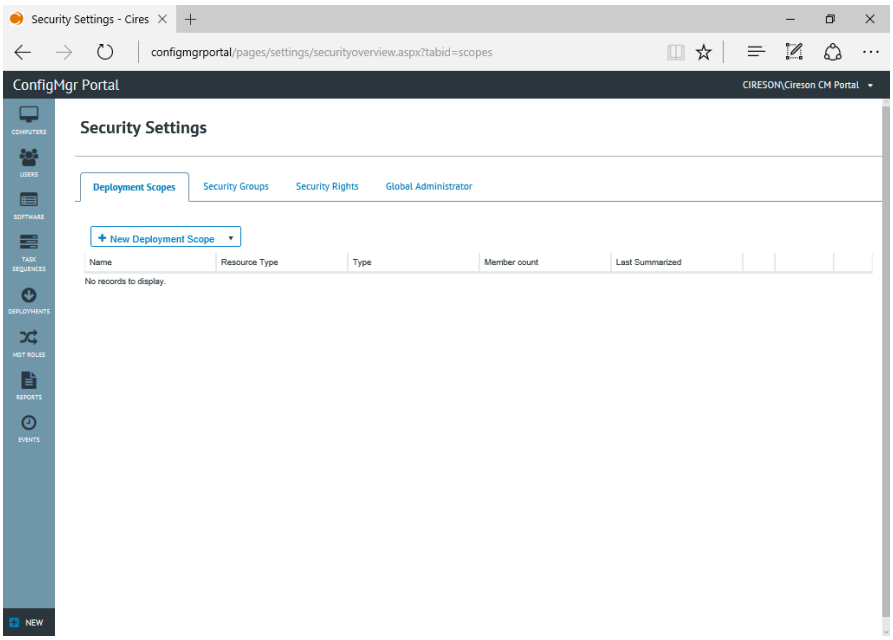
To add a new collection based Deployment Scope:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**

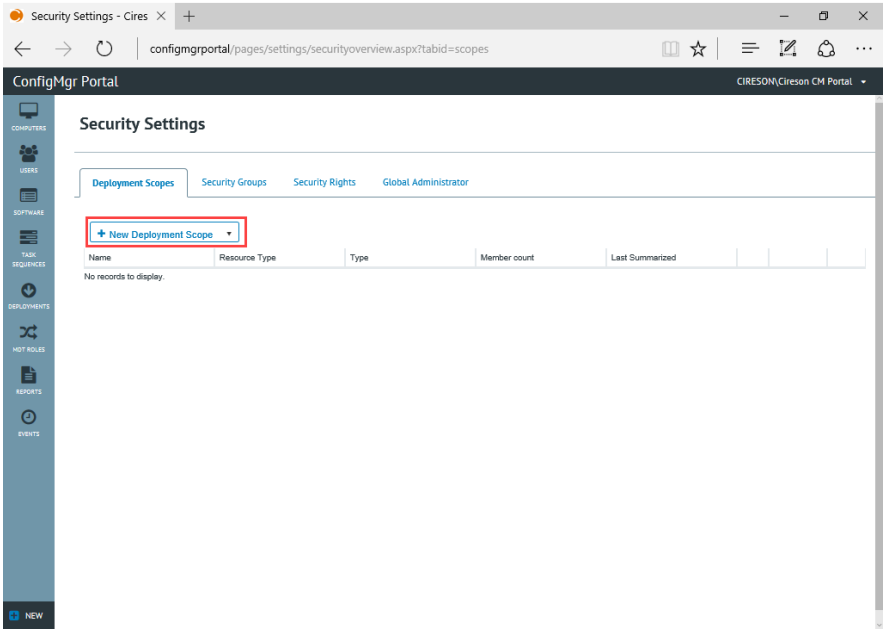


2. Click the **Deployment Scopes** tab (if not selected already). A list of the current Deployment Scopes is displayed.

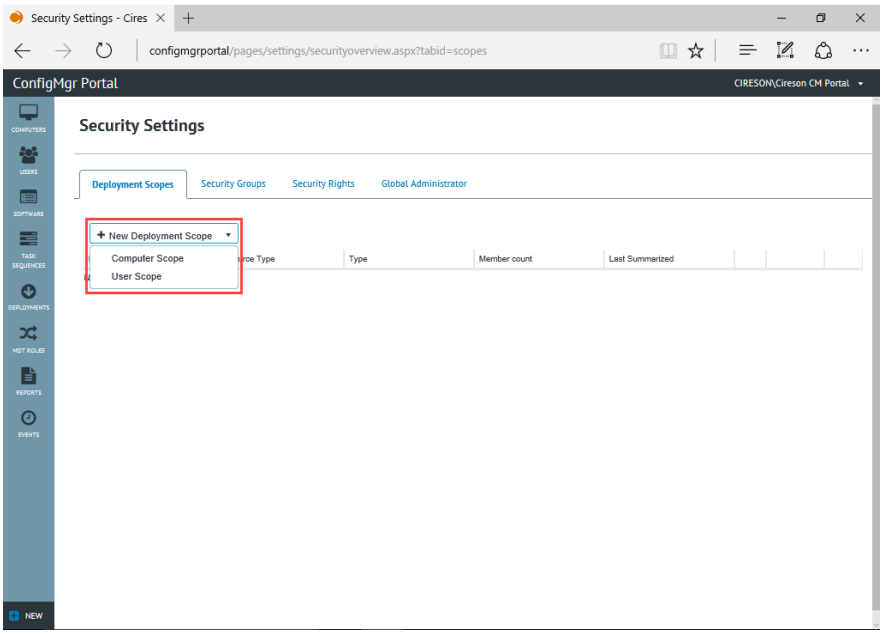
   NOTE: The Portal does not ship with any default Deployment Scopes.



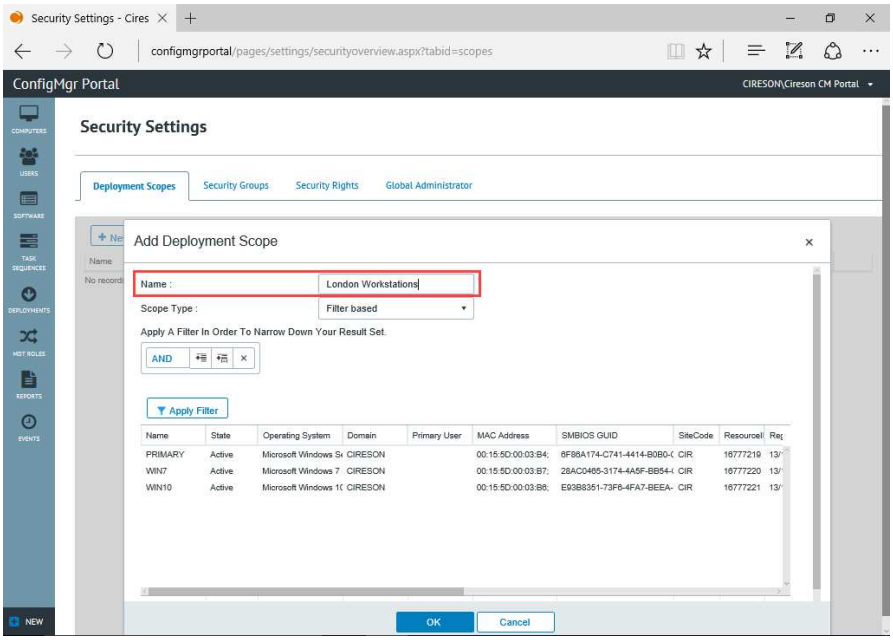
3. Click **New Deployment Scope**



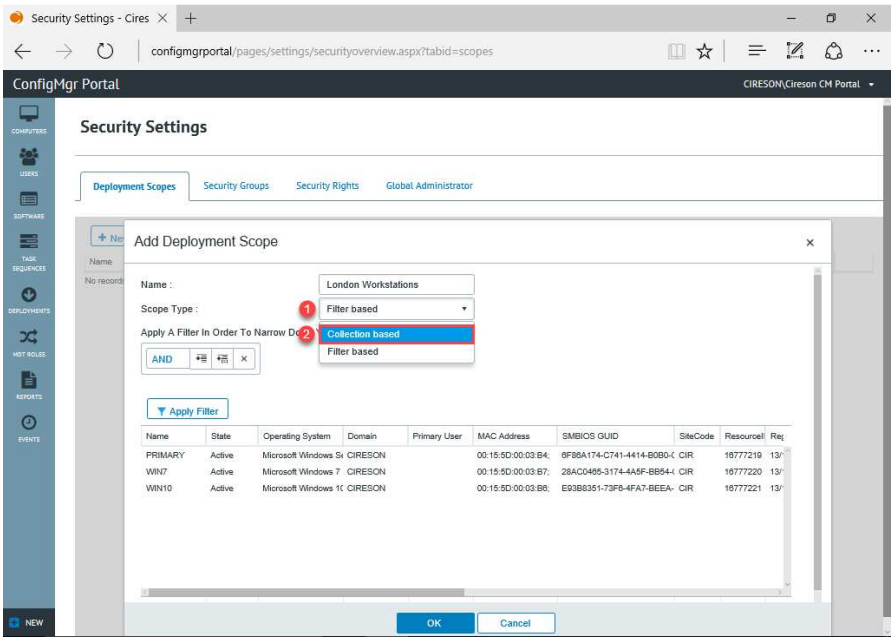
4. Choose the type of Deployment Scope you want to create (**Computer Scope** or **User Scope**).



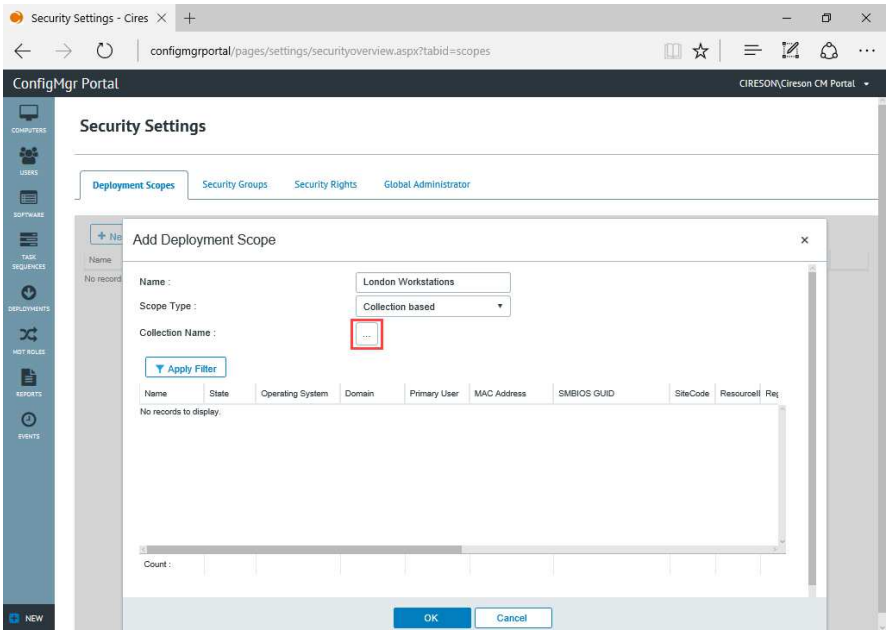
5. On the **Add Deployment Scope** page, enter the name for the new Deployment Scope in the **Name** field.



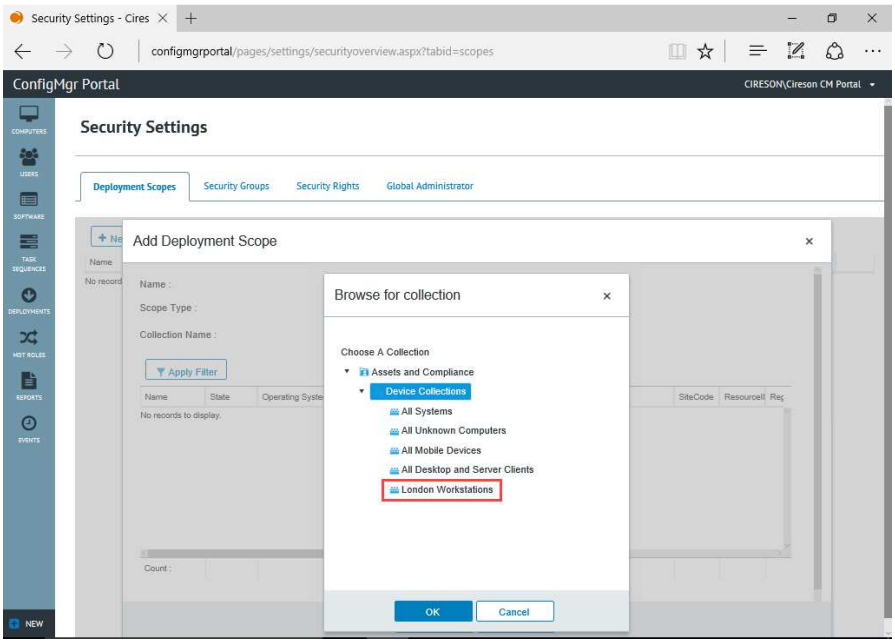
6. From the **Scope Type** dropdown, select **Collection based**



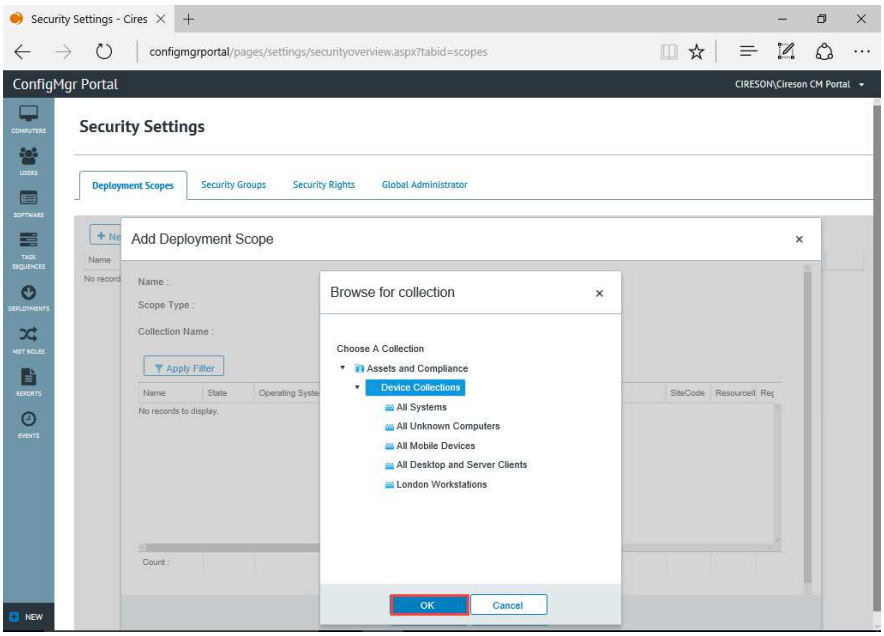
7. Click the browse button beside the **Collection Name** field.



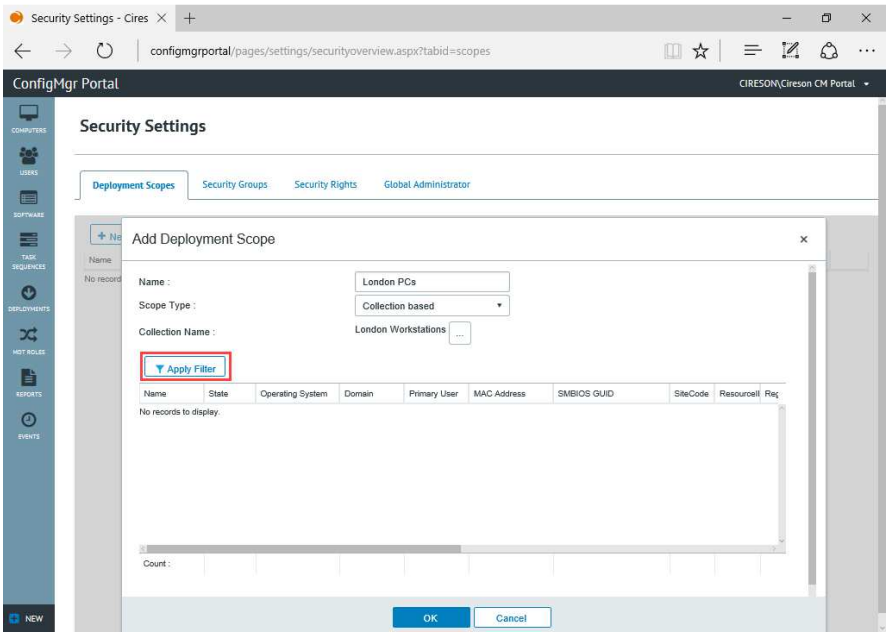
8. On the **Browse for collection** page, select the relevant ConfigMgr collection.



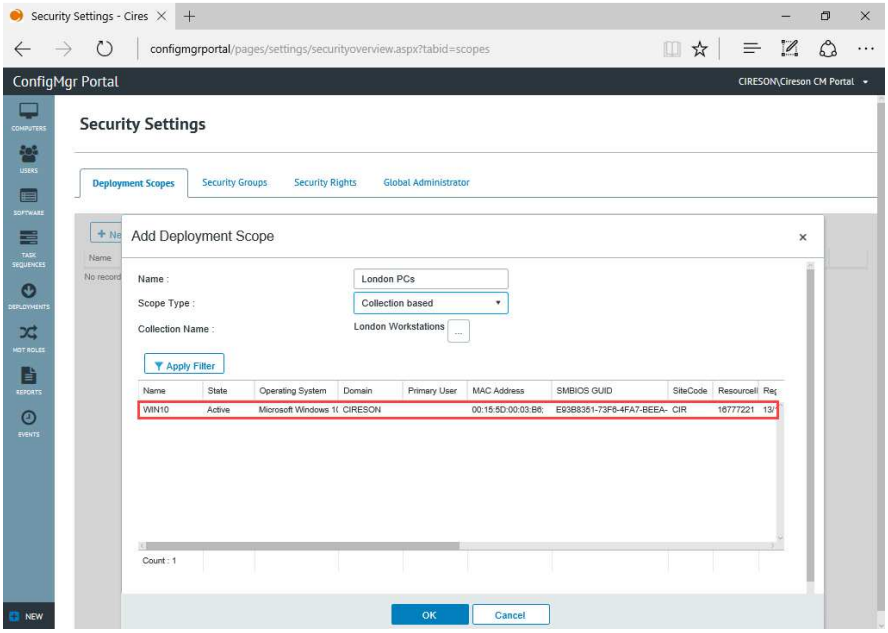
9. Click **OK**



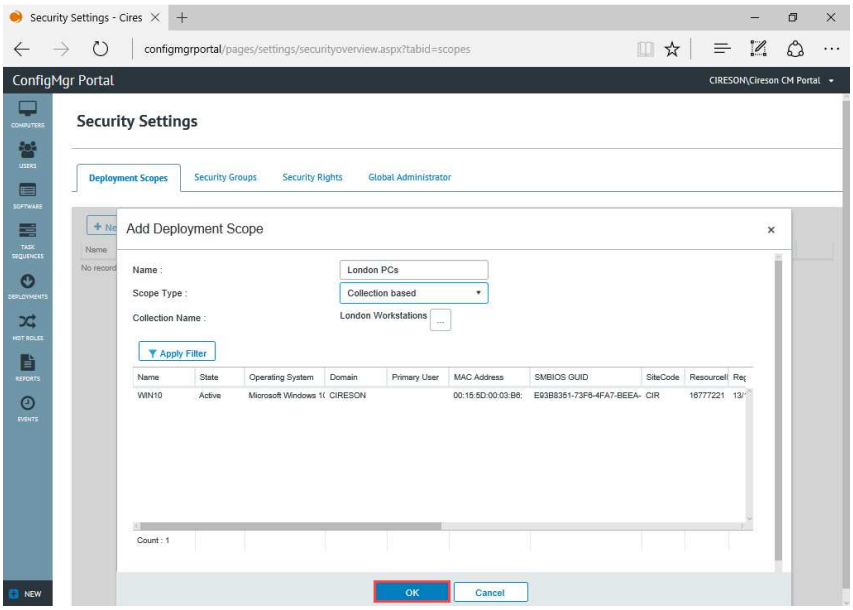
10. Click **Apply Filter** to verify that the Deployment Scope is working as expected.



The details pane will update with the corresponding resources contained within the selected collection.

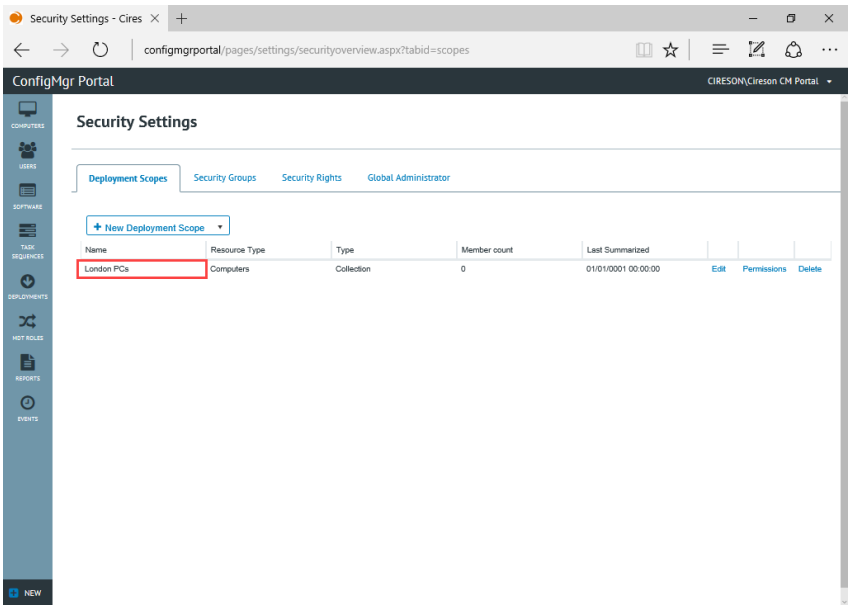


11. Click **OK** to save the Deployment Scope.



The **Deployment Scopes** tab automatically refreshes to show the newly created Deployment Scope.

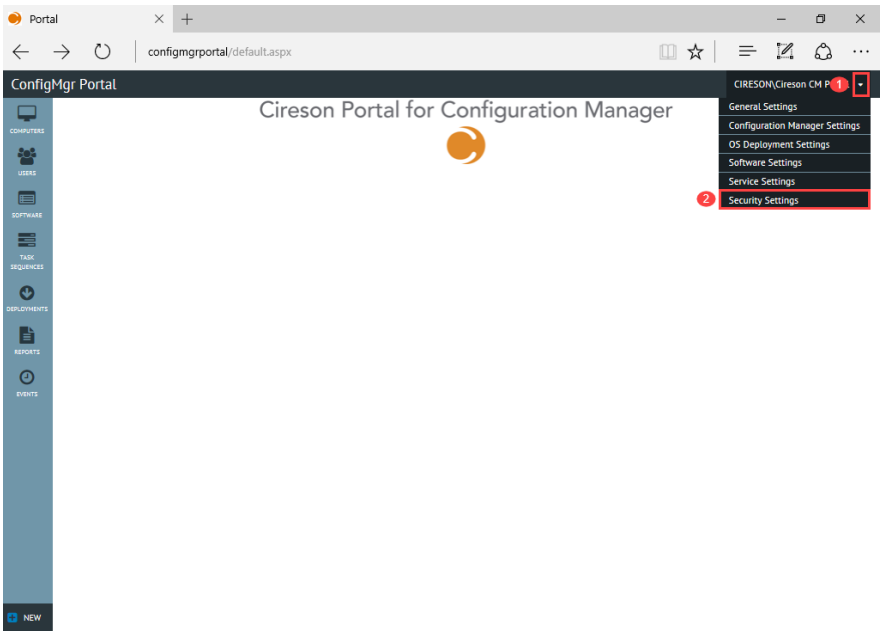
NOTE: Before you can use a deployment scope, summarization needs to complete to update the 'Member count' so that assigned users can deploy to the newly created deployment scope. The frequency of summarization is controlled through the **DeploymentScope** scheduled task, details of which can be found in How do I change how often the Portal queries the ConfigMgr database for an object?



How do I add a new filter based Deployment Scope?

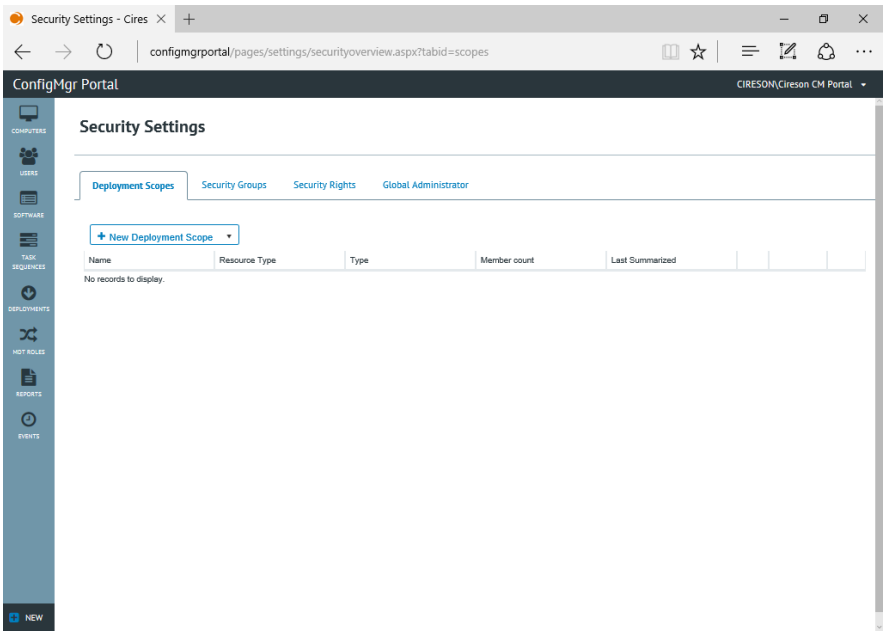
To add a new filter based Deployment Scope:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**

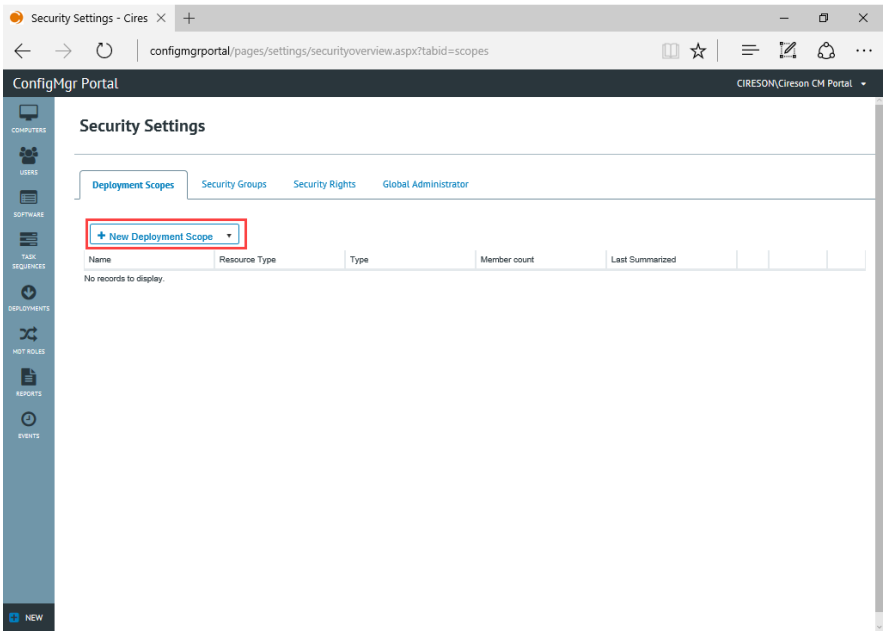


2. Click the **Deployment Scopes** tab (if not selected already). A list of the current Deployment Scopes is displayed.

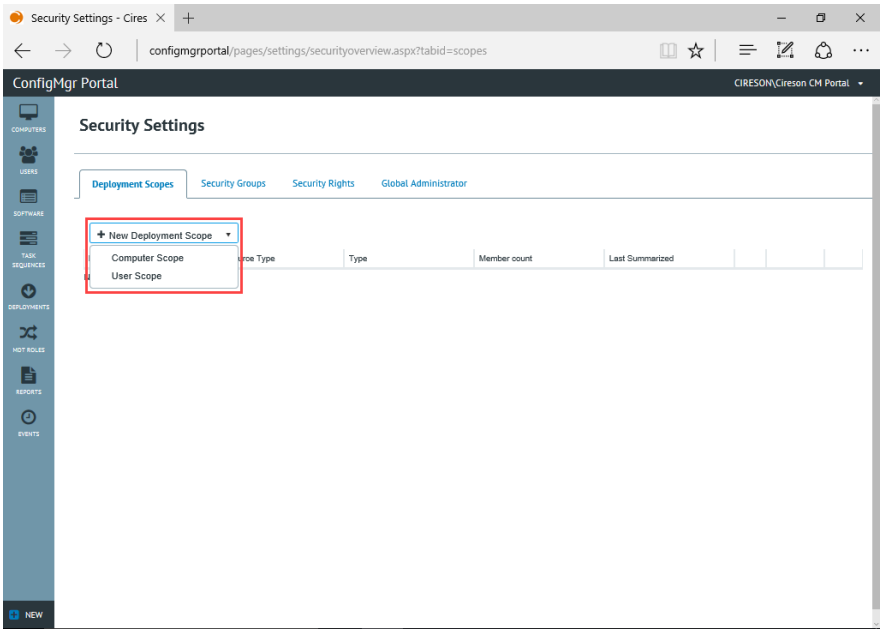
   NOTE: The Portal does not ship with any default Deployment Scopes.



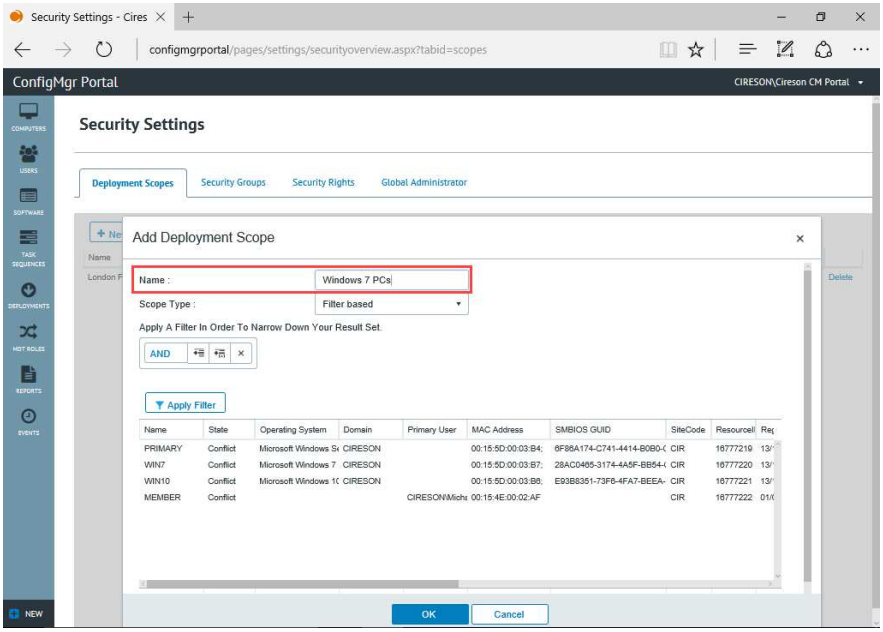
3. Click **New Deployment Scope**



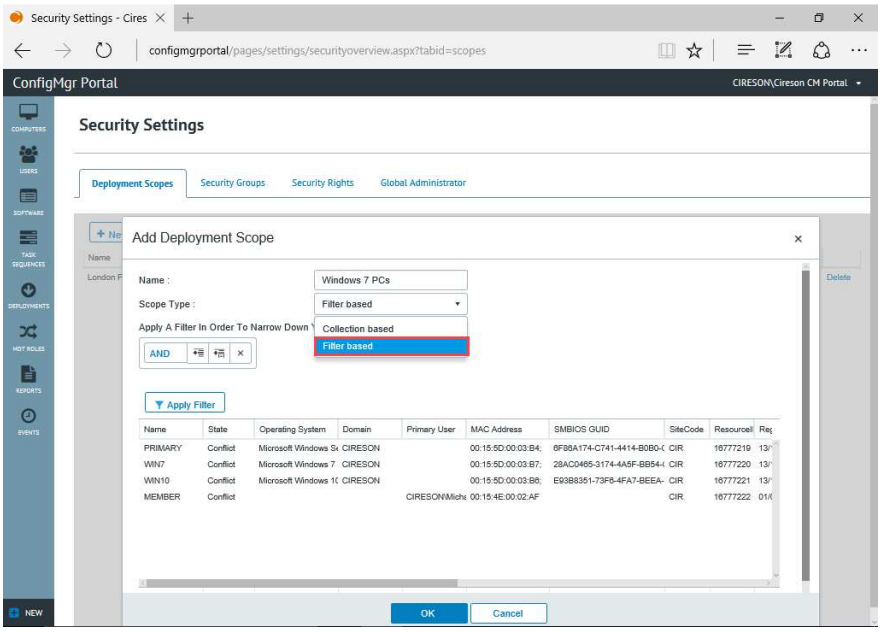
4. Choose the type of Deployment Scope you want to create (**Computer Scope** or **User Scope**).



5. On the **Add Deployment Scope** page, enter the name for the new Deployment Scope in the **Name** field. In this example, we will create a new Filter Based Deployment Scope for only Windows 7 PCs.

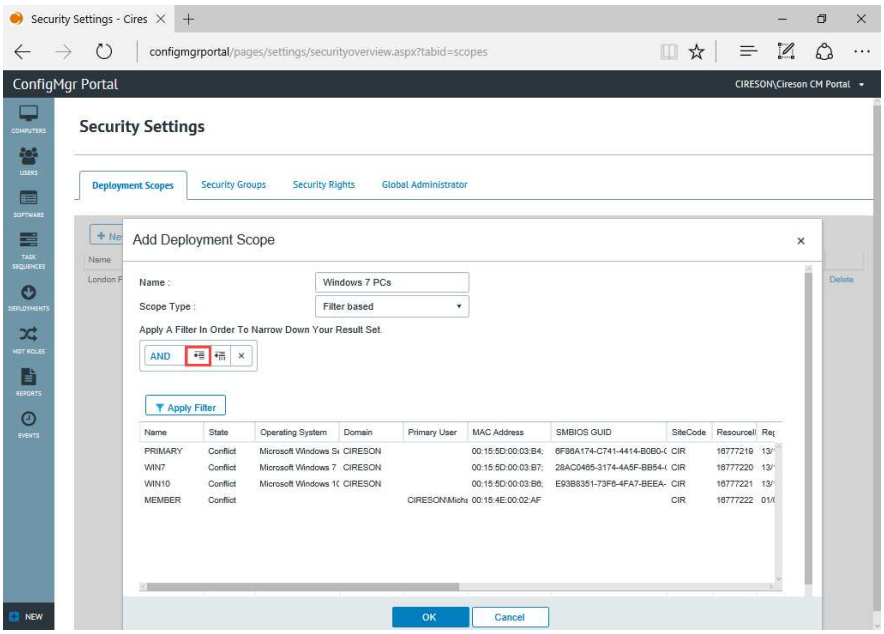


6. From the **Scope Type** dropdown, select **Filter based**

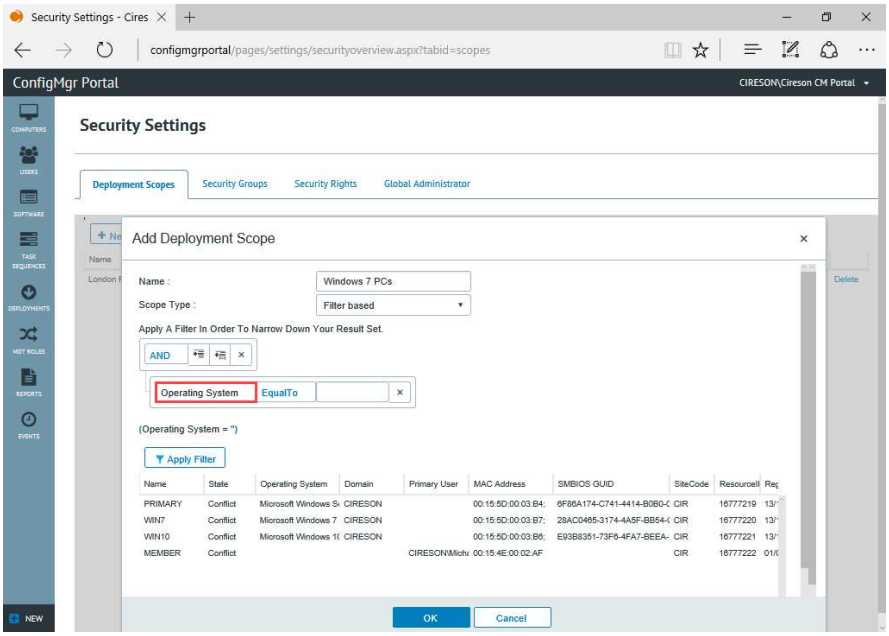


7. Choose the type of operator you want to define for the Deployment Scope from the criterion dropdown.

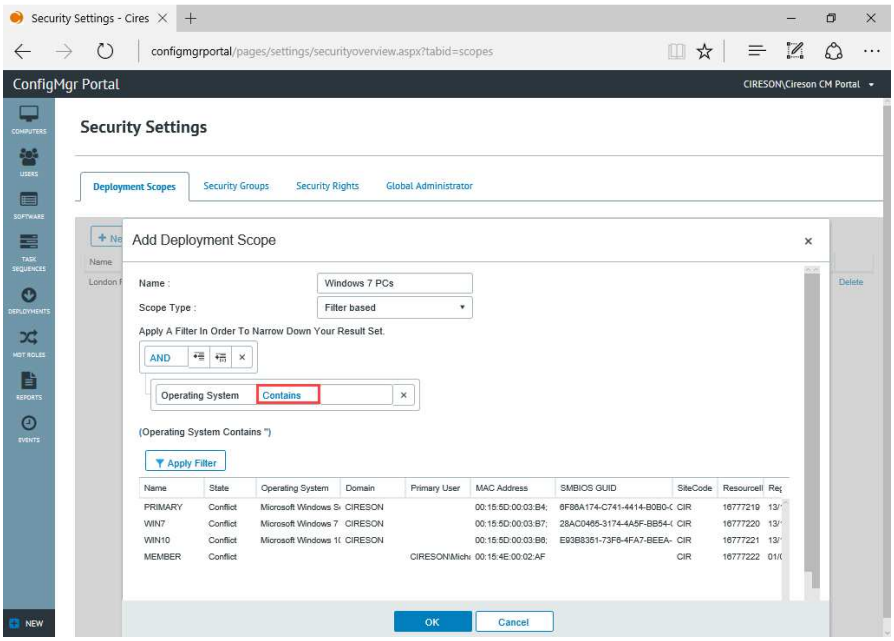
8. Either click **Add Expression** or **Add Group** depending on your requirements (in this case click **Add Expression**).



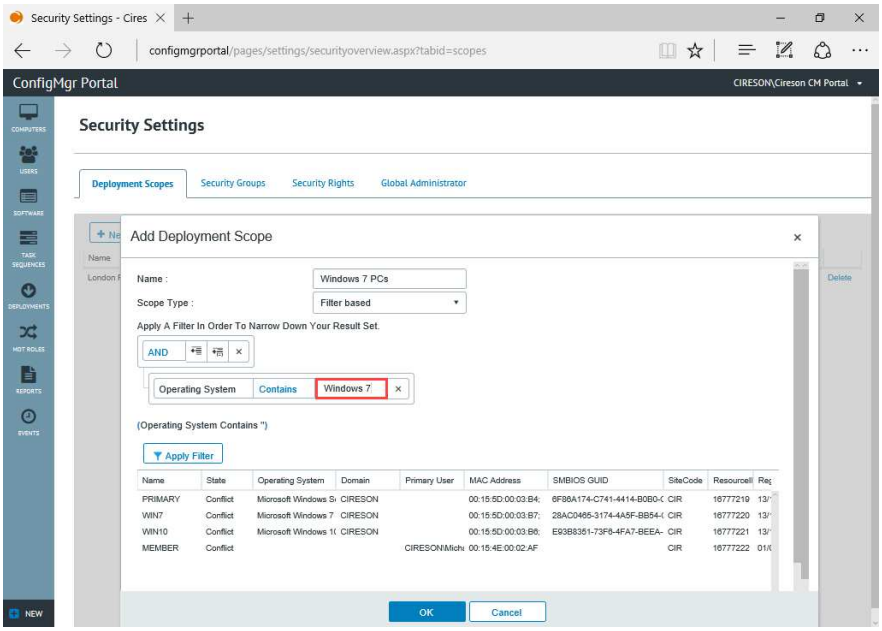
9. Select the attribute you want to filter by from the dropdown (for example **Operating System**).



10. Select the relevant operator from the dropdown (for example **Contains**).

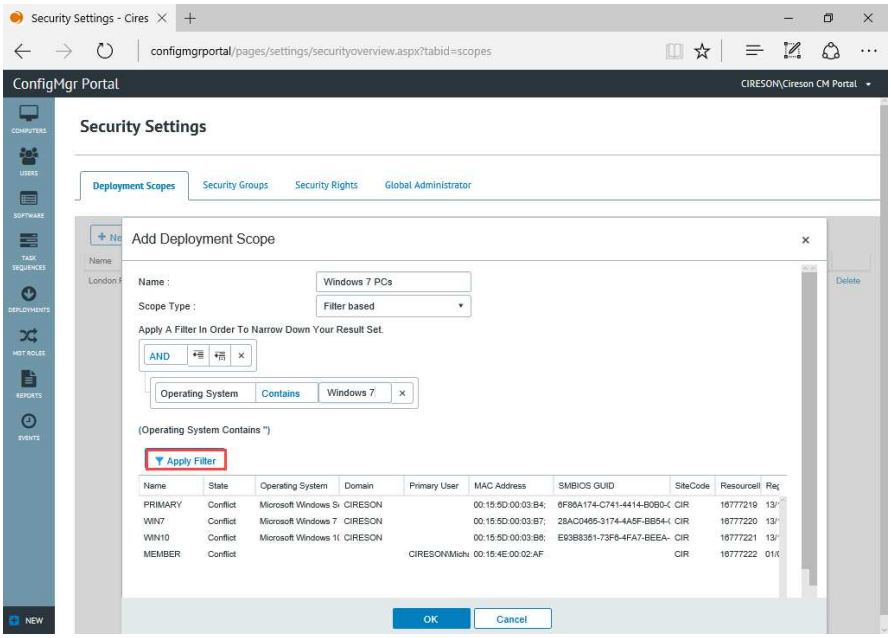


11. Enter the required value (for example **Windows 7**).

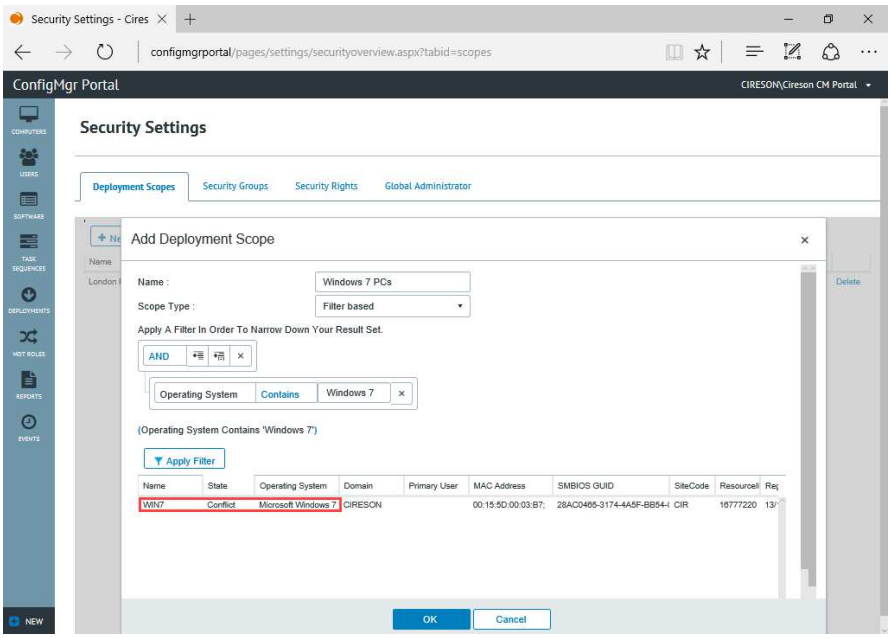


12. Click **Apply Filter** to verify the Deployment Scope is working as expected.

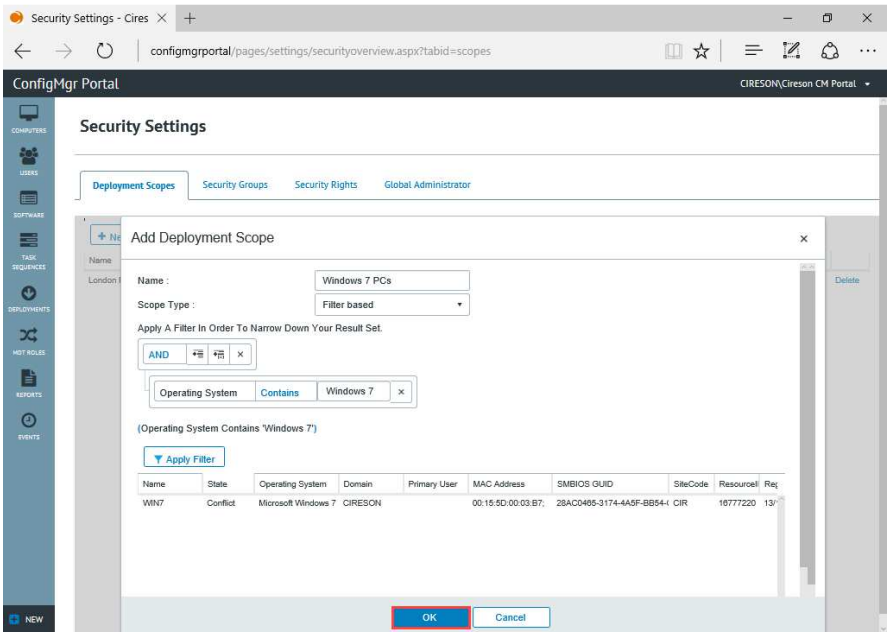
    NOTE: You can add multiple expressions to a deployment scope filter.



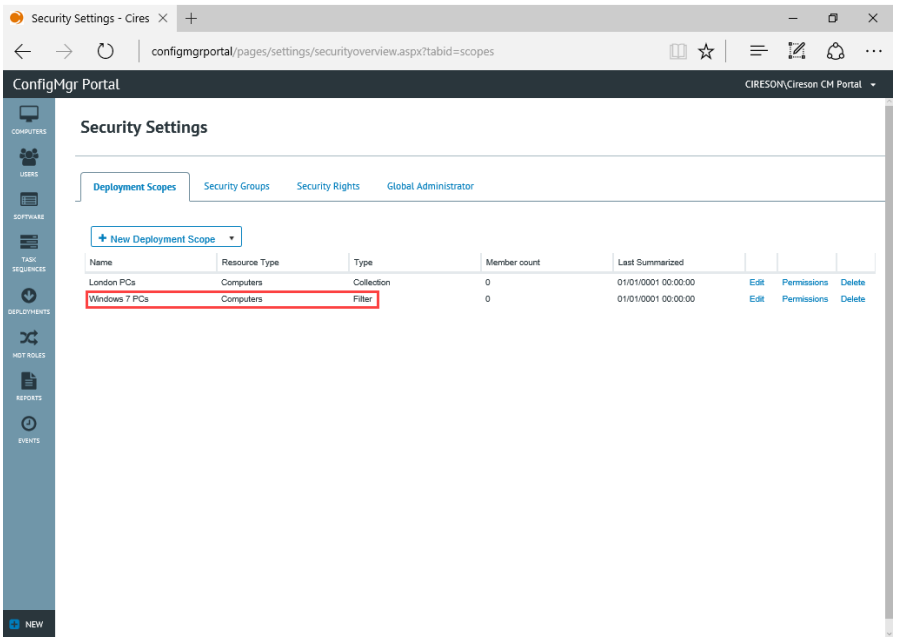
In our example, the only computer shown is the one running Windows 7.



13. Click **OK** to save the Deployment Scope.



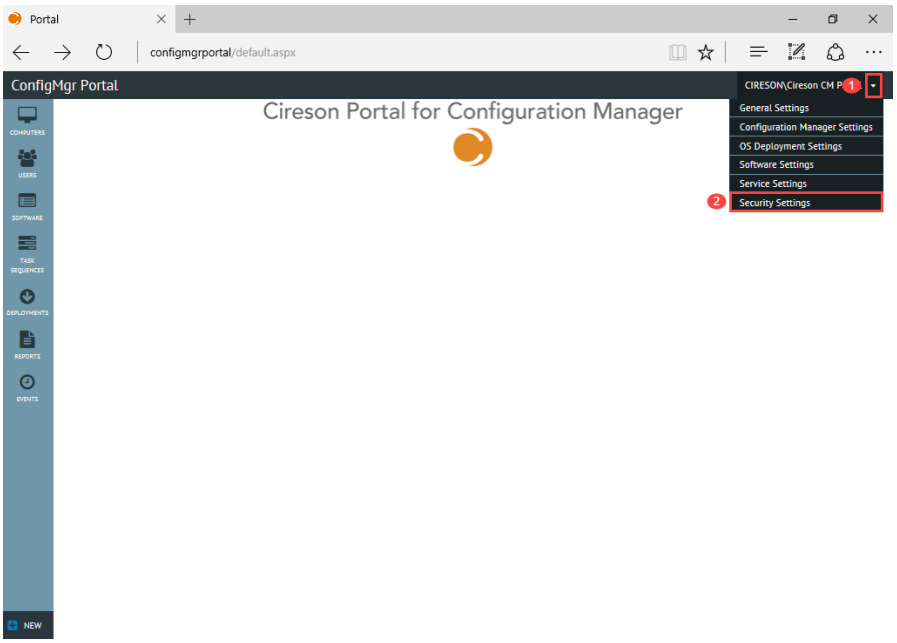
The **Deployment Scopes** tab is automatically refreshed showing the newly added Filter Deployment Scope.



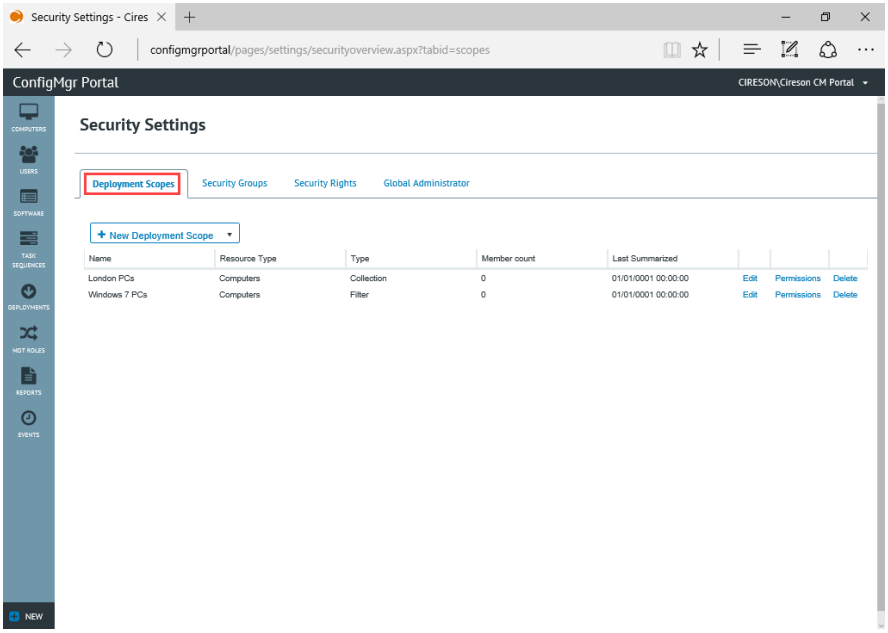
How do I edit a Deployment Scope?

To edit a Deployment Scope:

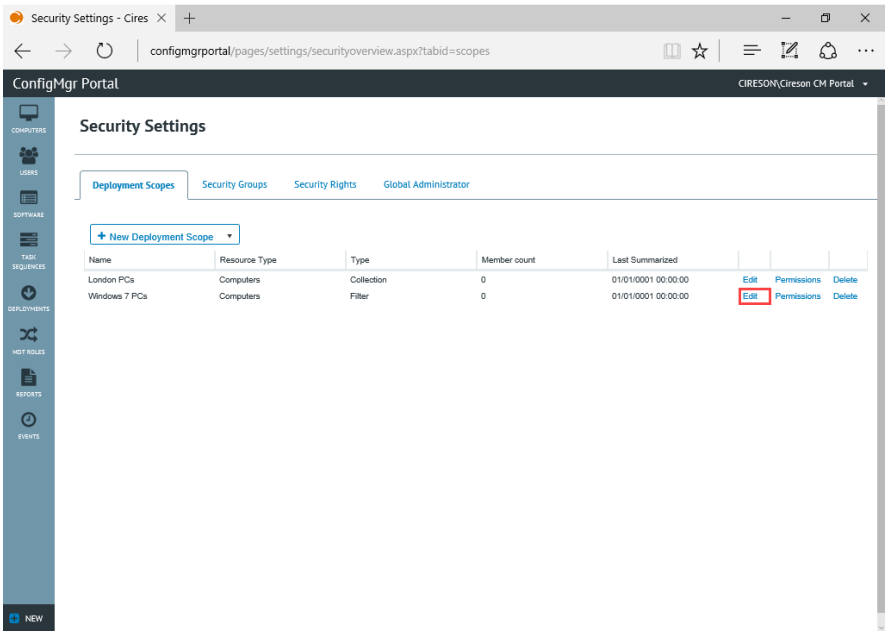
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**



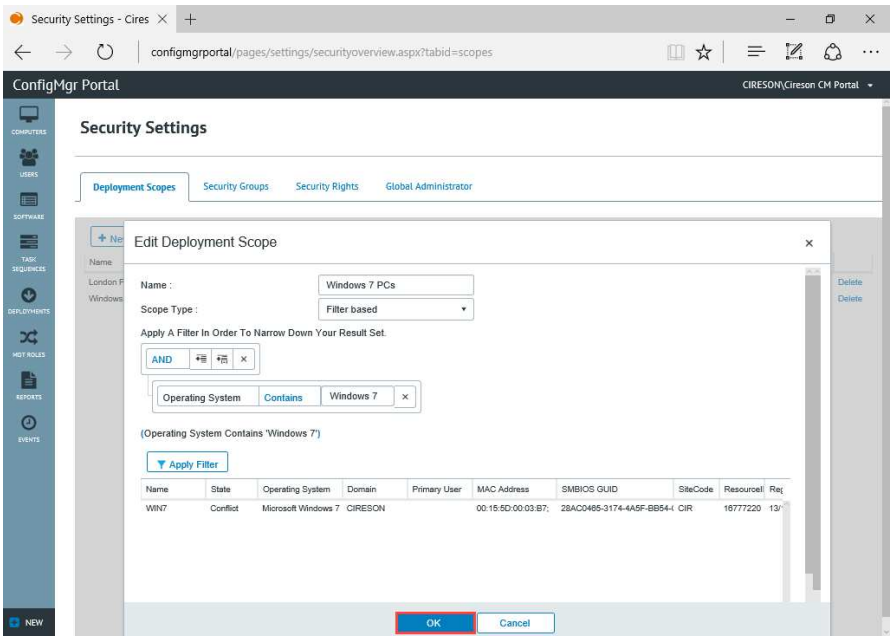
2. Click the **Deployment Scopes** tab (if it is not already selected). A list of the current Deployment Scopes is displayed.



3. Click **Edit** beside the Deployment Scope you wish to edit.



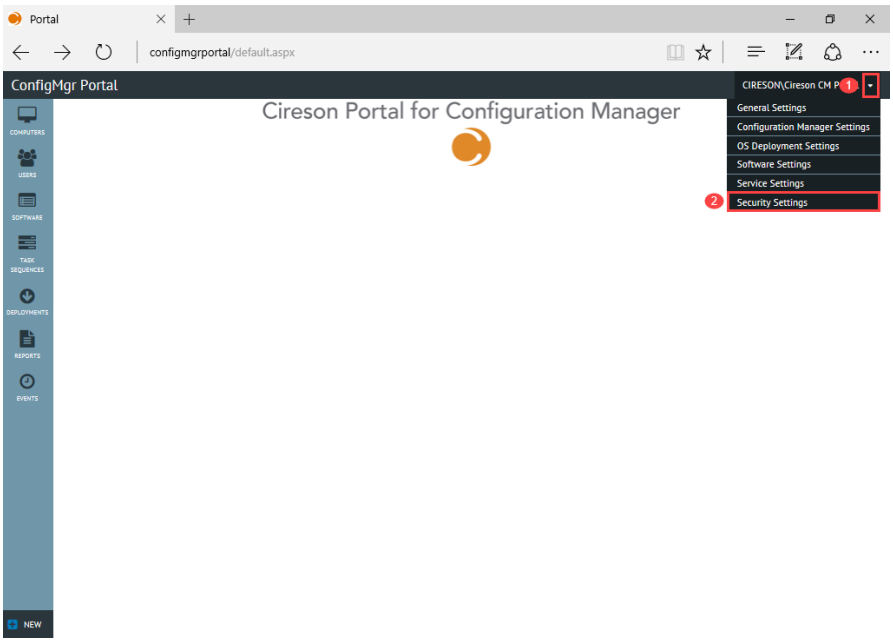
4. On the **Edit Deployment Scope** dialog box, make the required changes then click **OK** to save the changes.



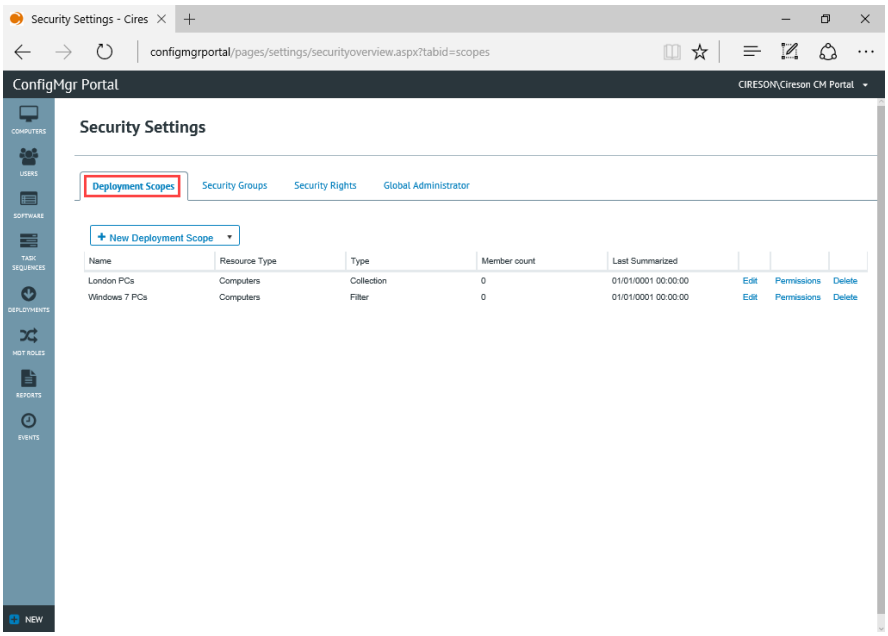
How do I manage the permissions on a Deployment Scope?

To manage the permissions on a Deployment Scope:

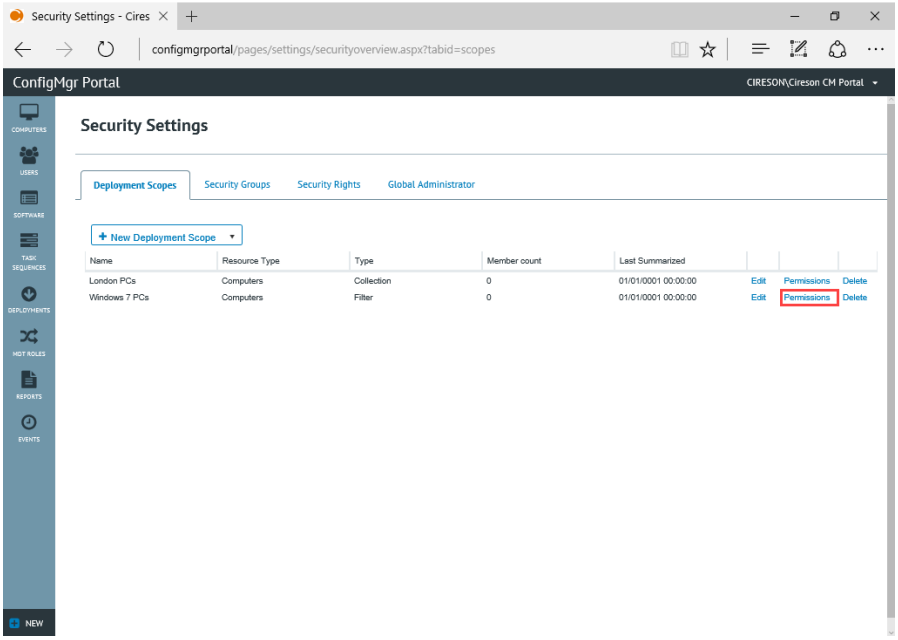
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**



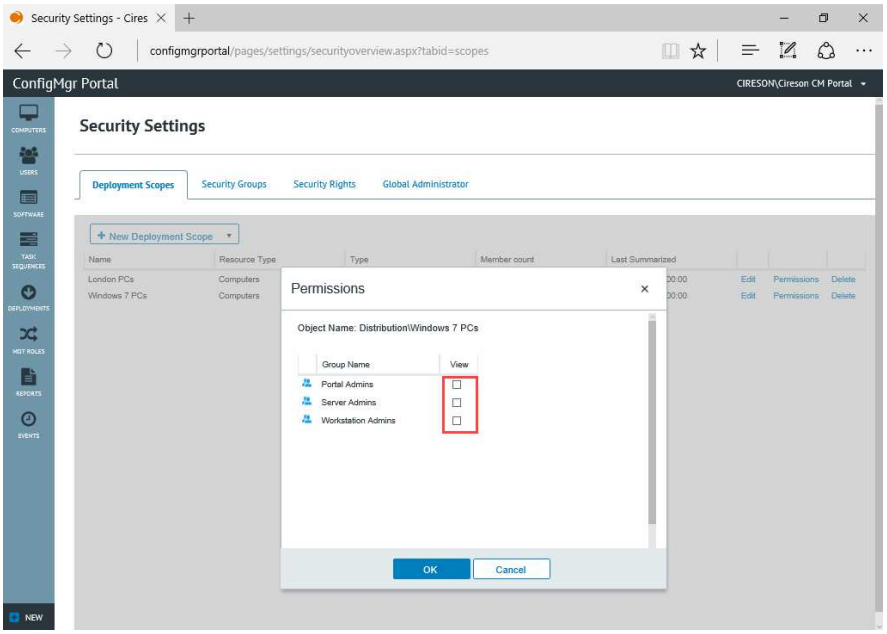
2. Click the **Deployment Scopes** tab (if it is not already selected). A list of the current Deployment Scopes is displayed.



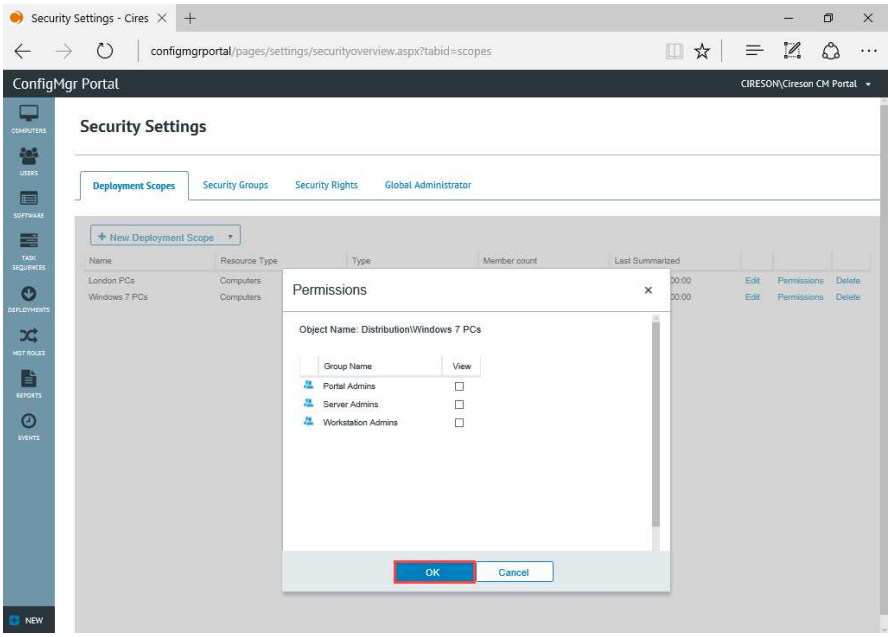
3. Click **Permissions** beside the relevant Deployment Scope whose Permissions you wish to manage.



4. On the **Permissions** dialog box, select the **View** checkbox beside the relevant Portal groups you want to be able to see the Deployment Scope.



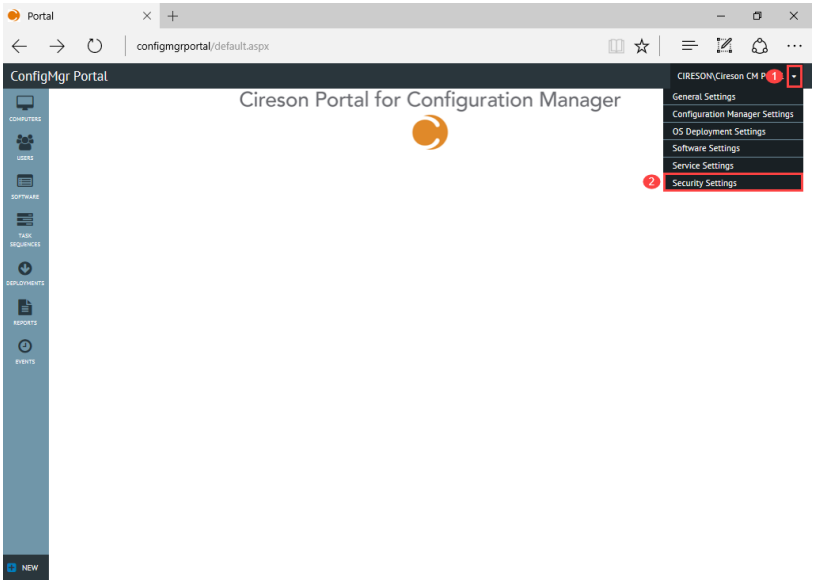
5. Click **OK**



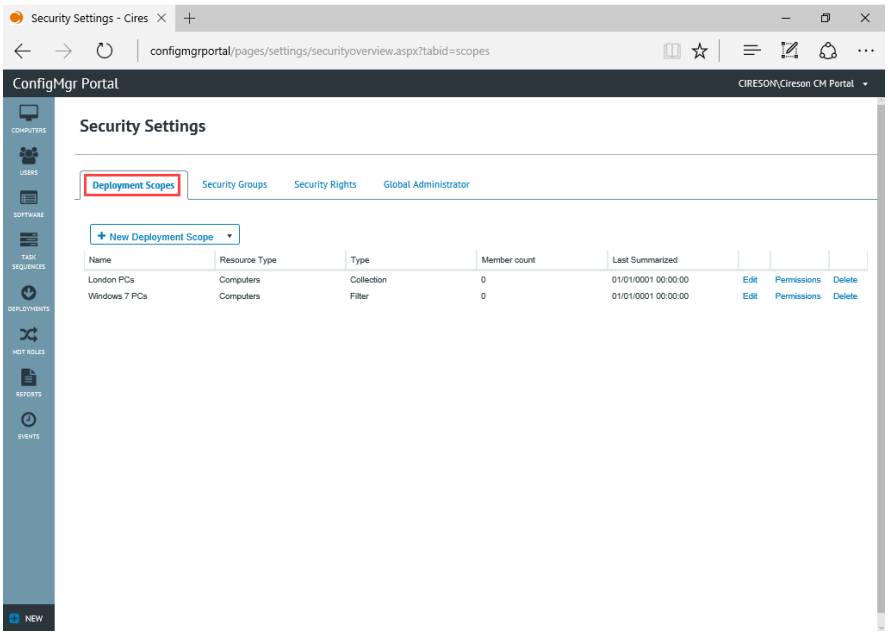
How do I delete a Deployment Scope?

To delete a Deployment Scope:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**

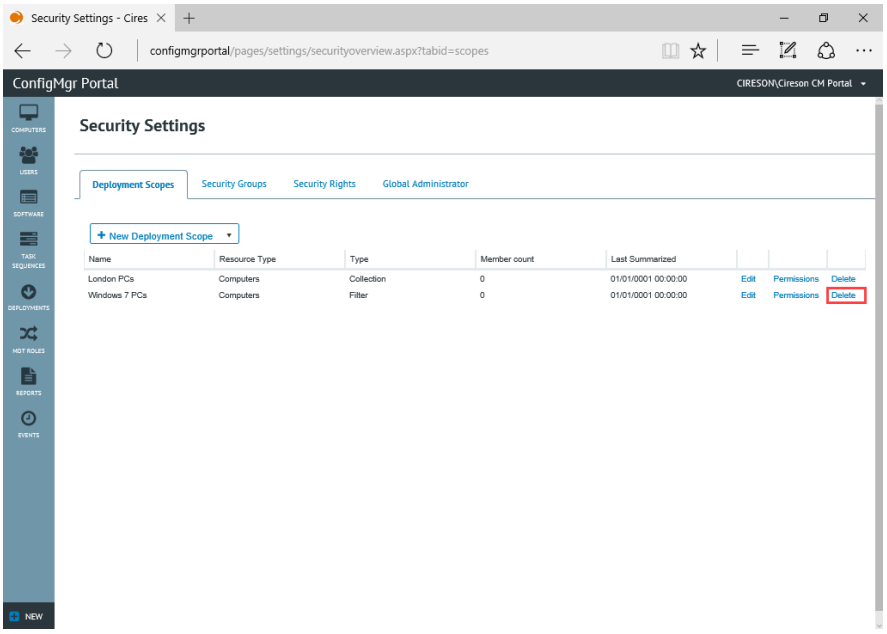


2. Click the **Deployment Scopes** tab (if it is not already selected).

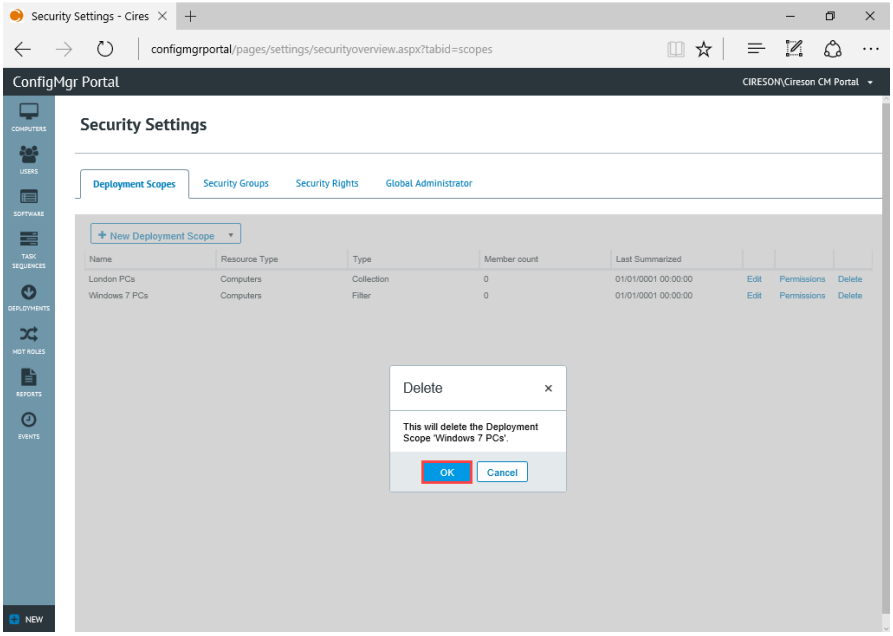


A list of the current Deployment Scopes is displayed.

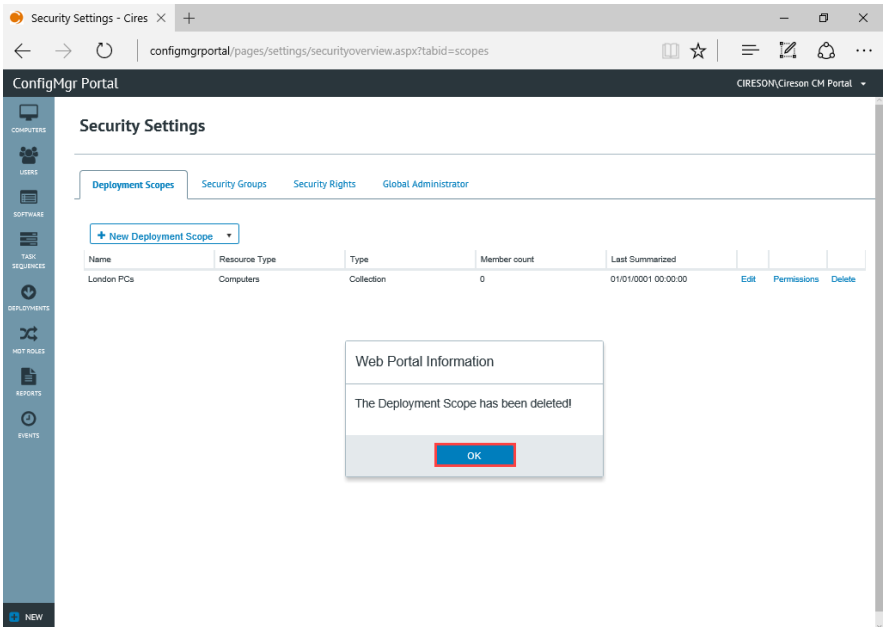
3. Click **Delete** beside the Deployment Scope you wish to delete.



4. On the **Delete** dialog box stating **This will delete the Deployment Scope '<*deployment_scope_name*>'** click **OK**



5. Click **OK** on the **Web Portal Information** dialog box stating **The Deployment Scope has been deleted!**



The **Deployment Scopes** tab automatically refreshes and the deleted Deployment Scope no longer appears.

DNS

When a computer is deleted, the Portal can also delete its corresponding record from DNS. For this to happen:

- The Portal needs to be configured with an account that has the relevant permissions to delete the computer record from DNS. See Appendix C – Configuring an Account to Delete Computer Records from DNS for details of how to create an account the Portal can use to delete computer records from DNS.
- The relevant DNS server needs to be registered with the Portal (part of the registration includes the account mentioned in the previous bullet).

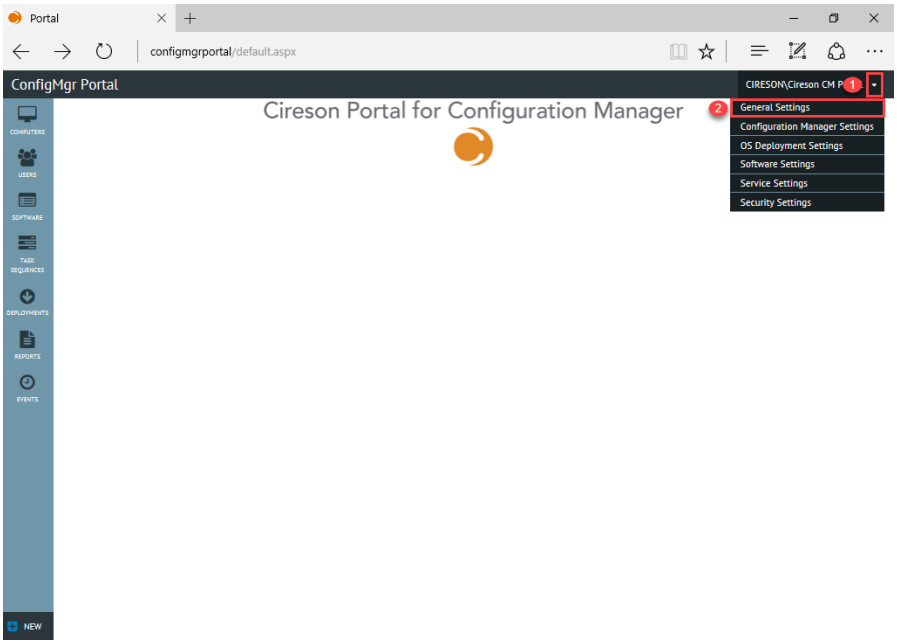
This section details the tasks related to DNS that you can perform using the Portal.

- How do I configure how the Portal manages DNS records?
- How do I register a new DNS Server?
- How do I edit a DNS Server?
- How do I unregister a DNS Server?

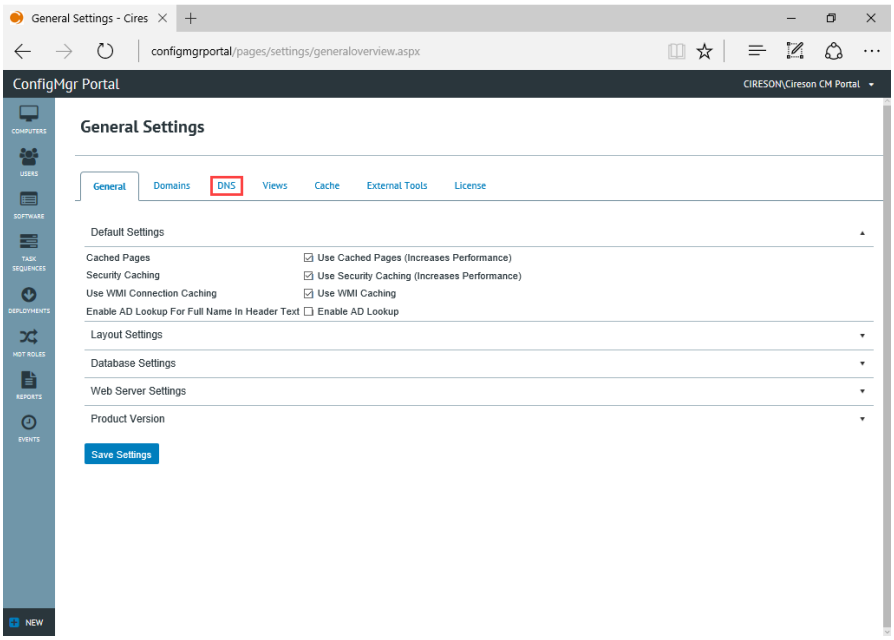
How do I configure how the Portal manages DNS records?

To configure the how the Portal manages DNS records:

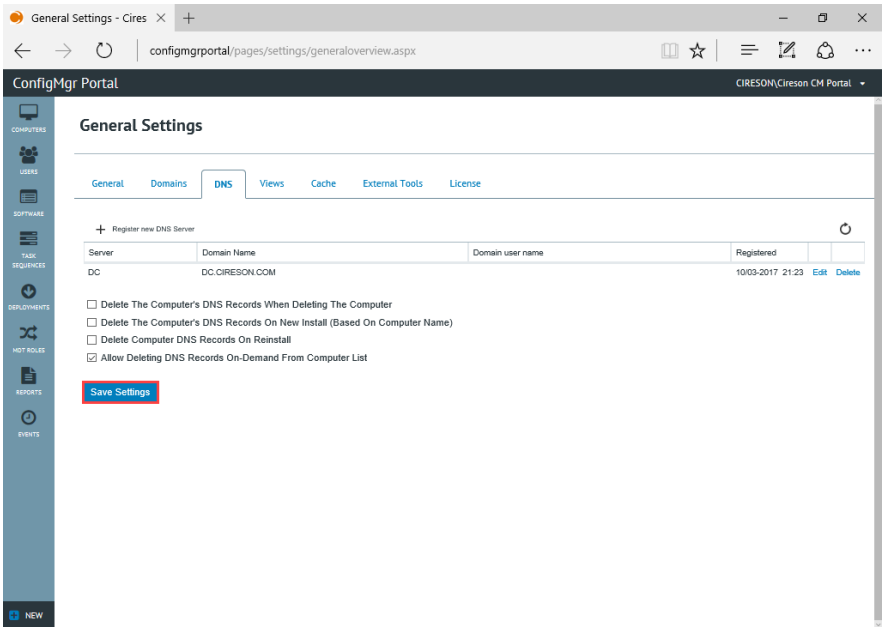
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**



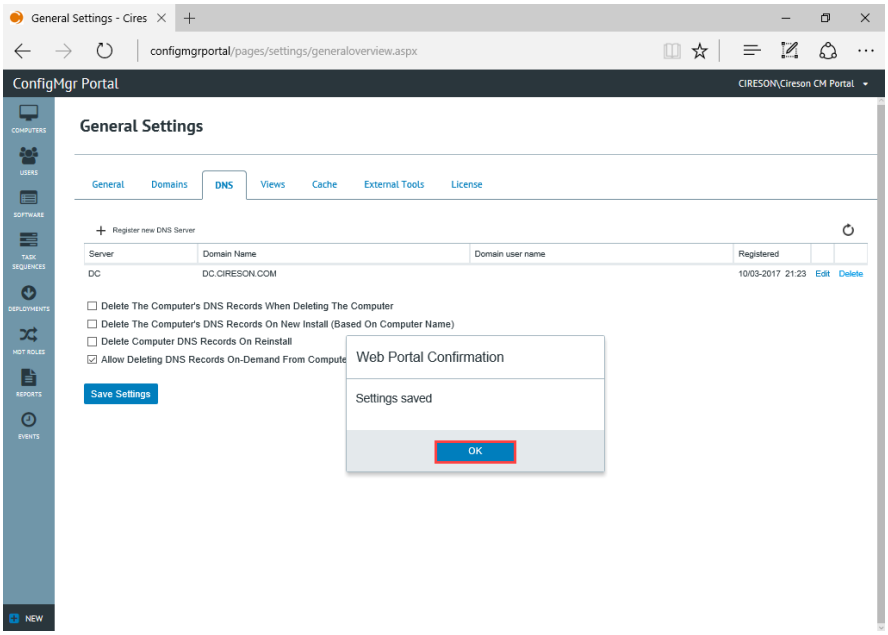
2. Click the **DNS** tab.



3. Configure the settings accordingly then click **Save Settings**



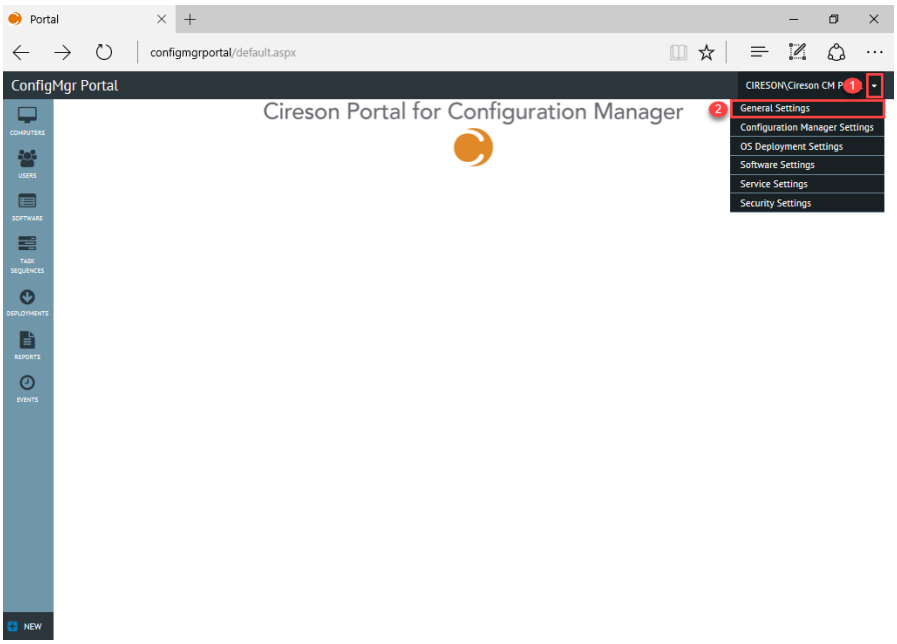
4. Click **OK** on the **Web Portal Confirmation** dialog box stating **Settings saved**



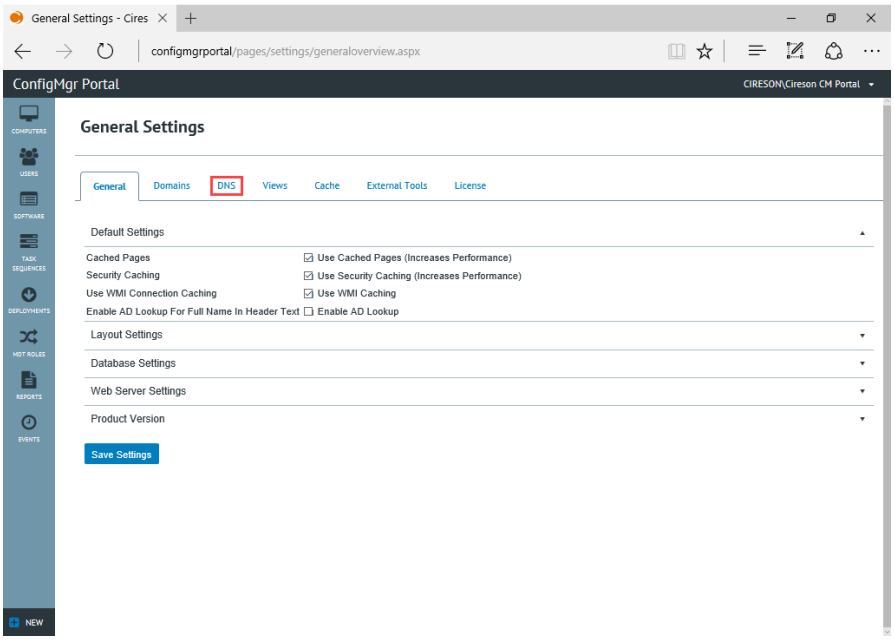
How do I register a new DNS Server?

To register a new DNS Server:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

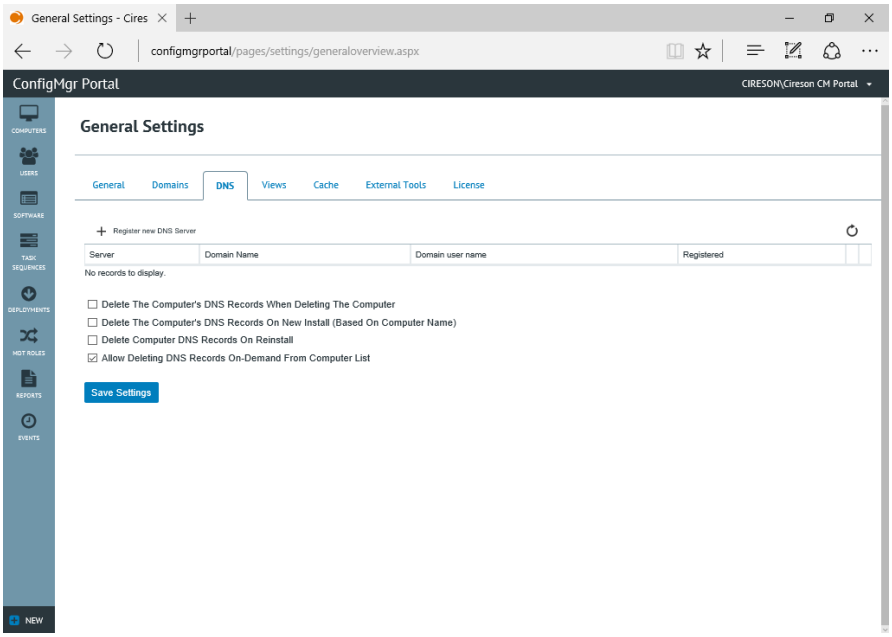


2. Click the **DNS** tab.

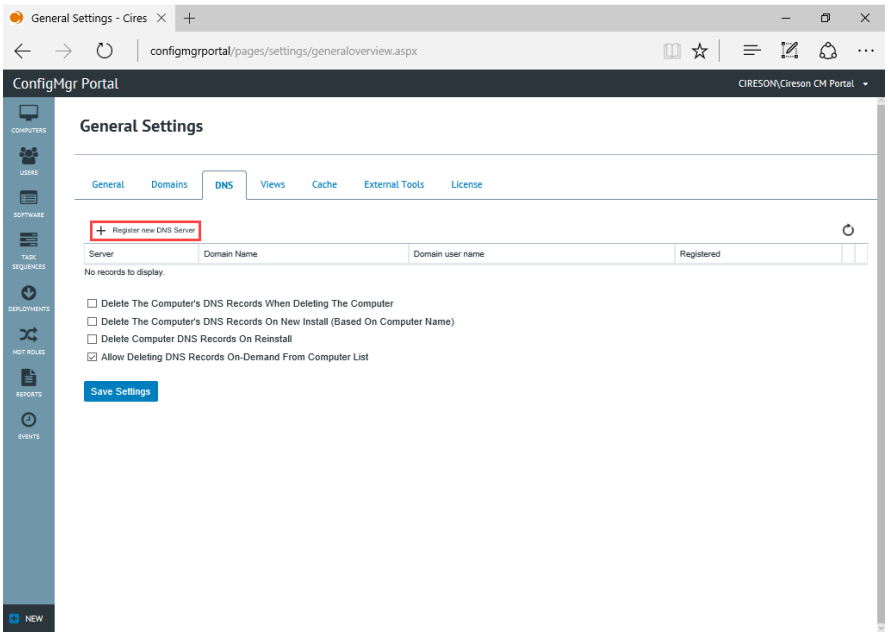


A list of the current DNS Servers is displayed.

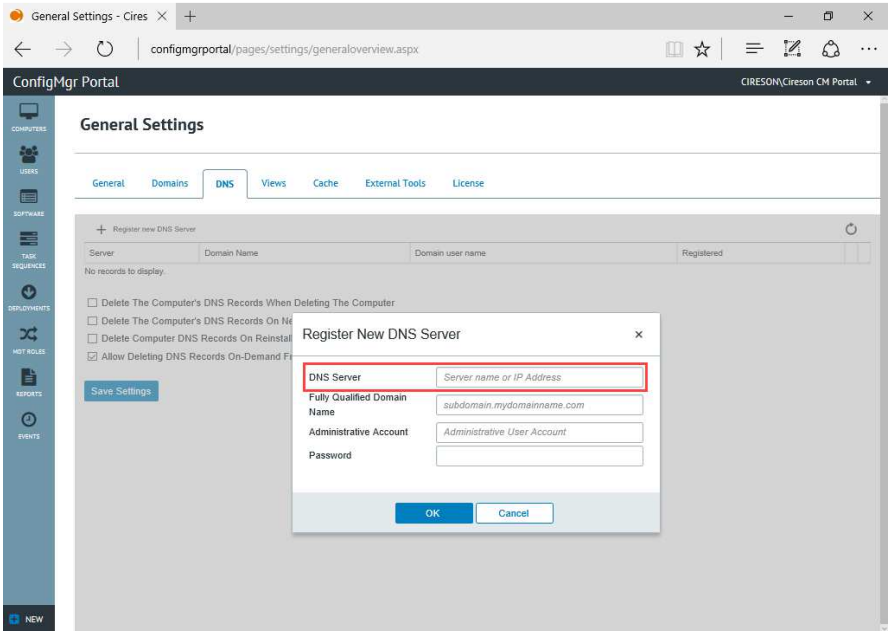
NOTE: No DNS Servers are registered with the Portal by default.



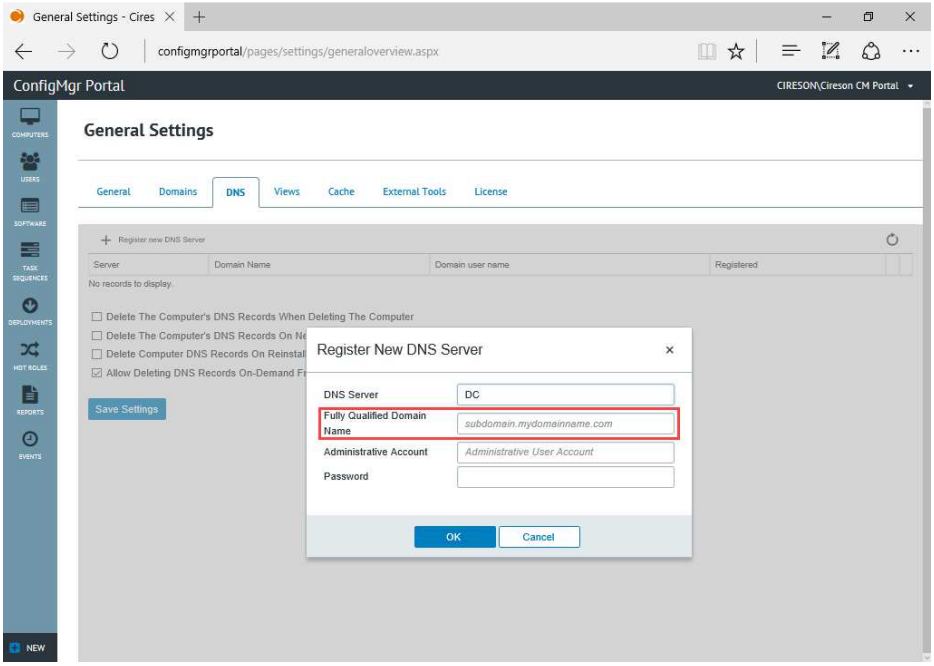
3. Click **Register new DNS Server**



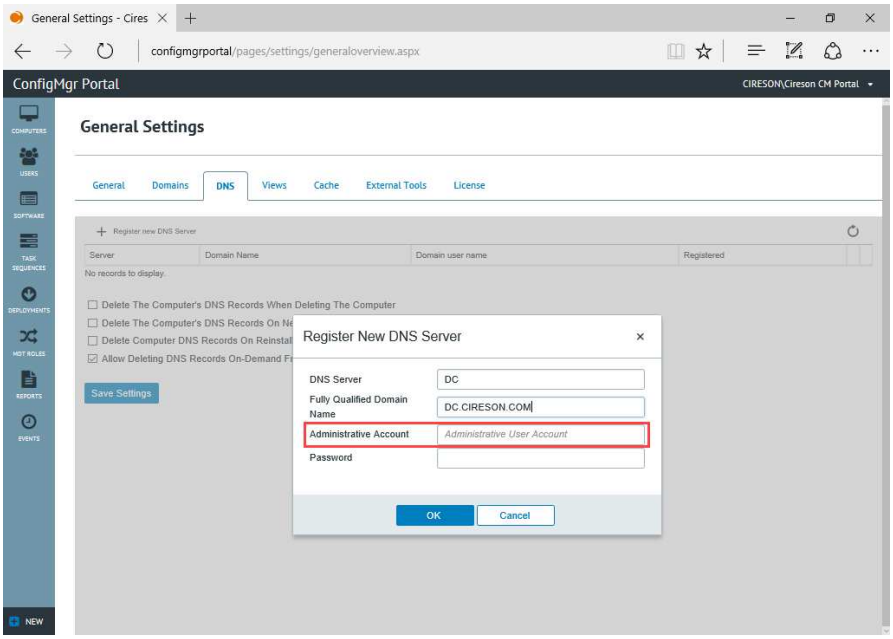
4. On the **Register New DNS Server** page, enter the server name or IP address of the new DNS Server in the **DNS Server** field.



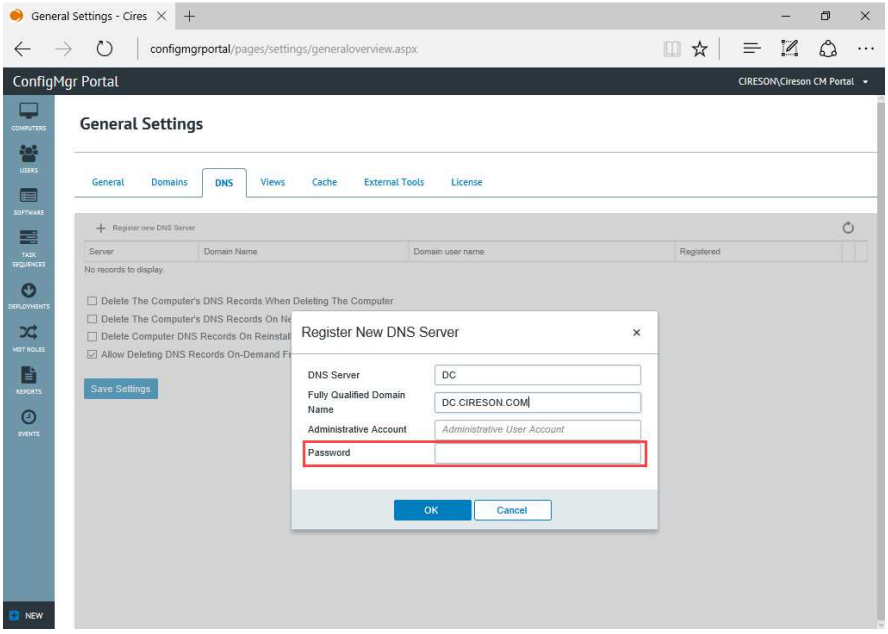
5. In the **Fully Qualified Domain Name** field, enter the Fully Qualified Domain Name (FQDN) of the server.



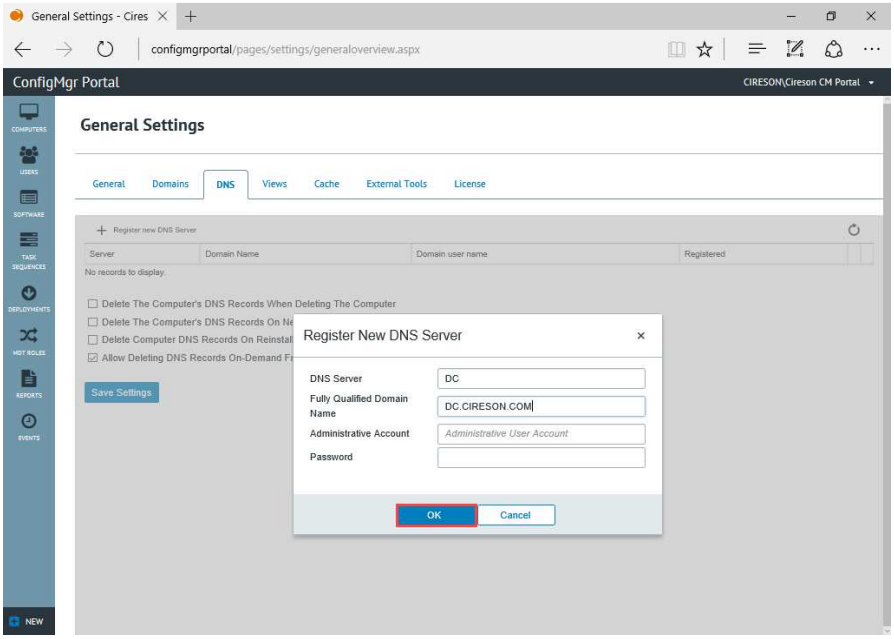
6. In the **Administrative Account** field, enter the name of an account with Administrative rights on the new DNS Server.



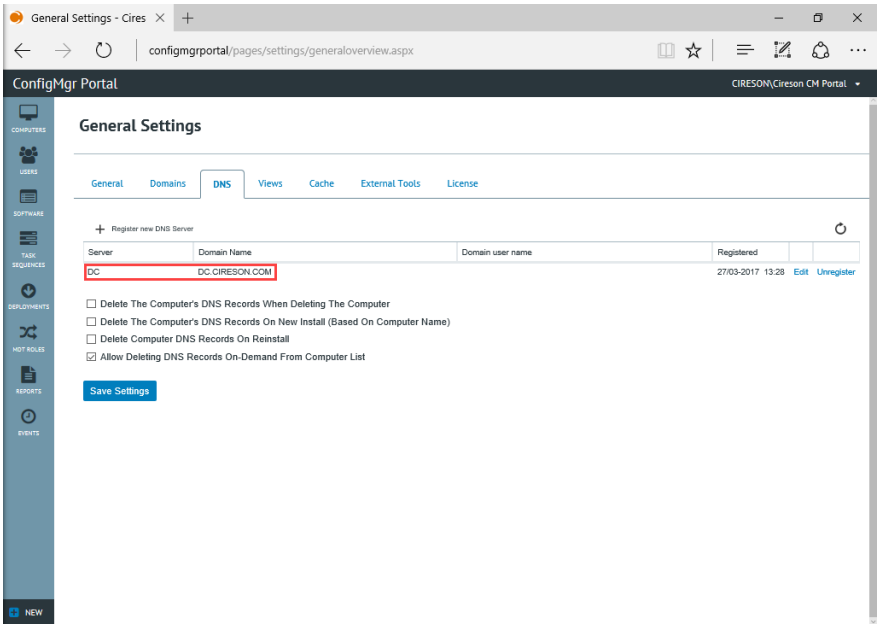
7. In the **Password** field, type the password of the Administrative account entered in the previous step.



8. Click **OK** to save the new DNS Server.



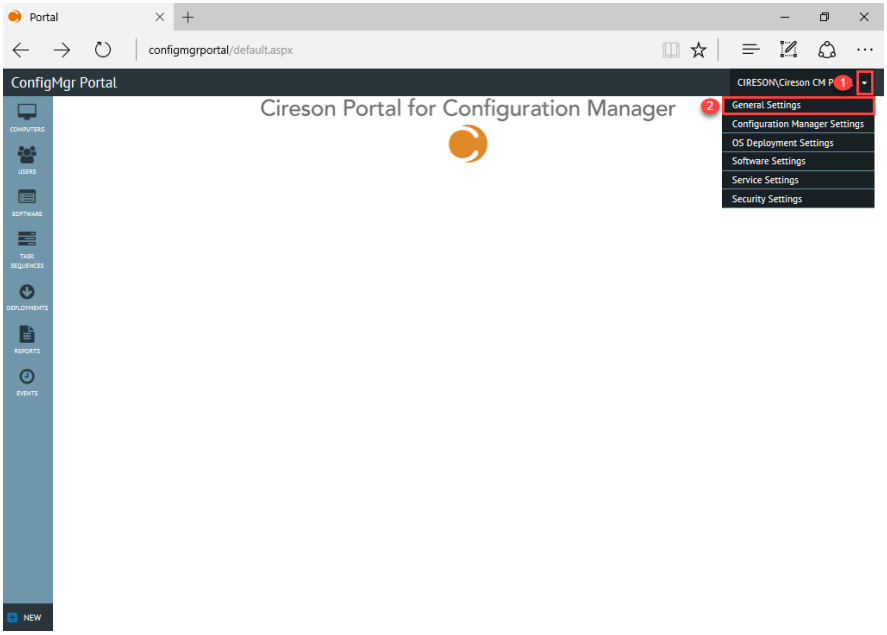
The **DNS** tab automatically refreshes showing the newly registered DNS server.



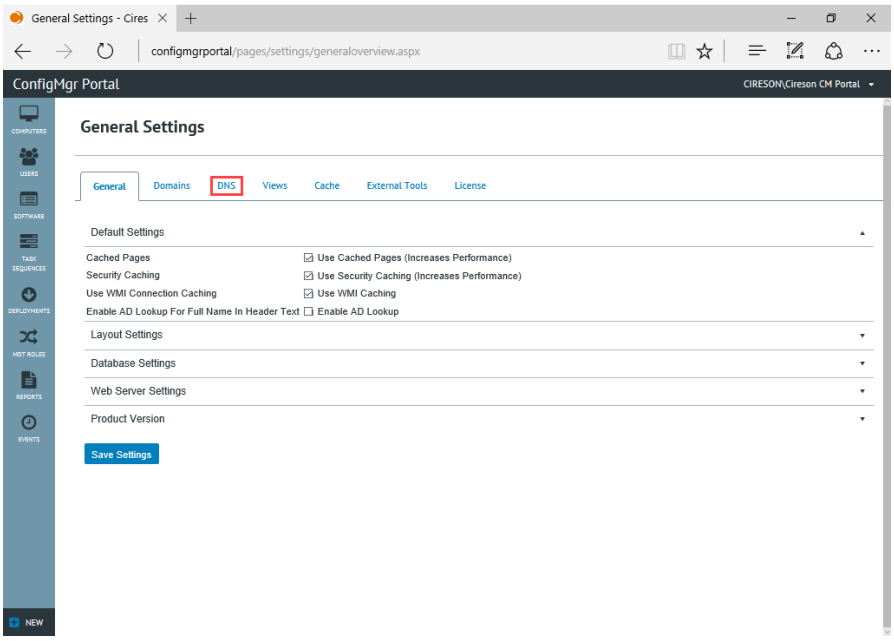
How do I edit a DNS Server?

To edit a DNS Server:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

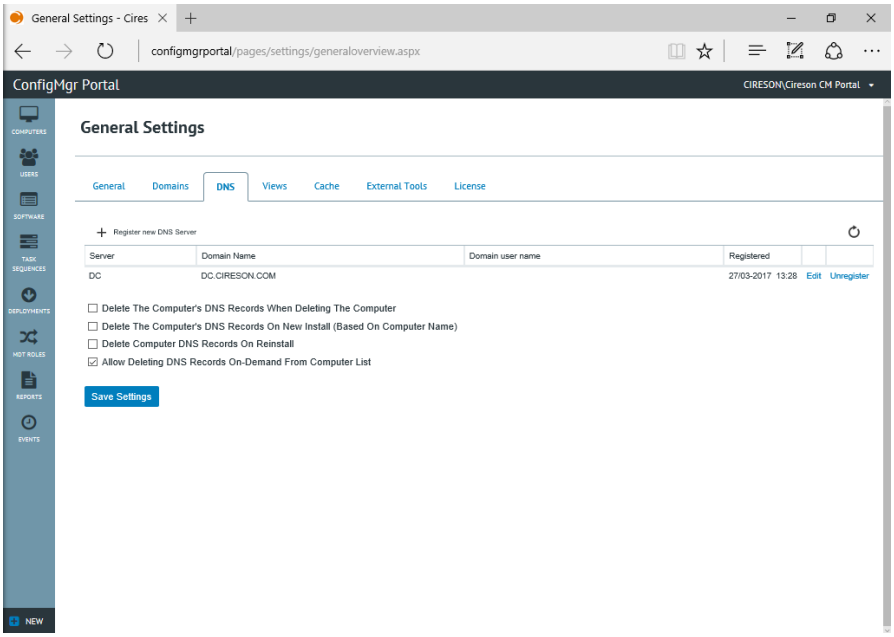


2. Click the **DNS** tab.

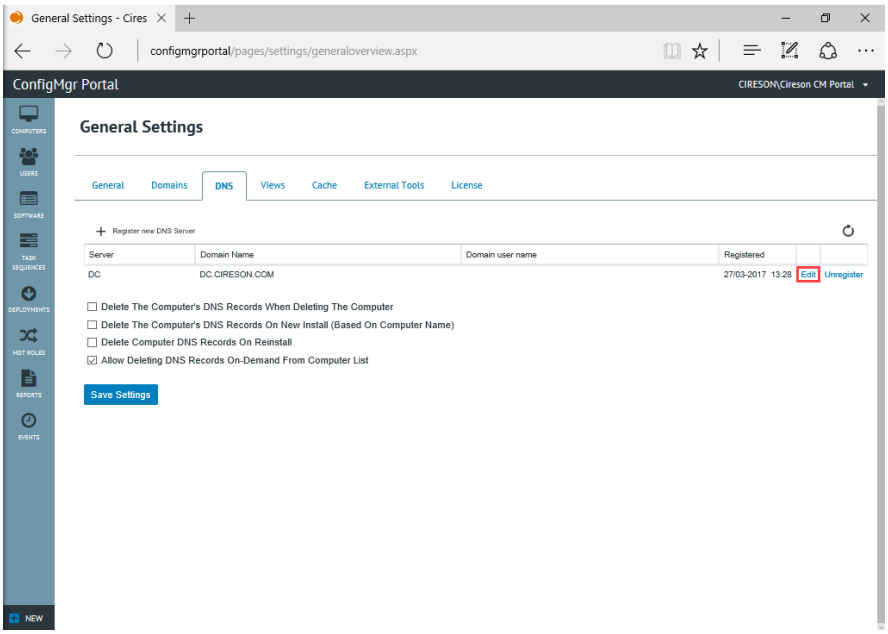


A list of the current DNS Servers is displayed.

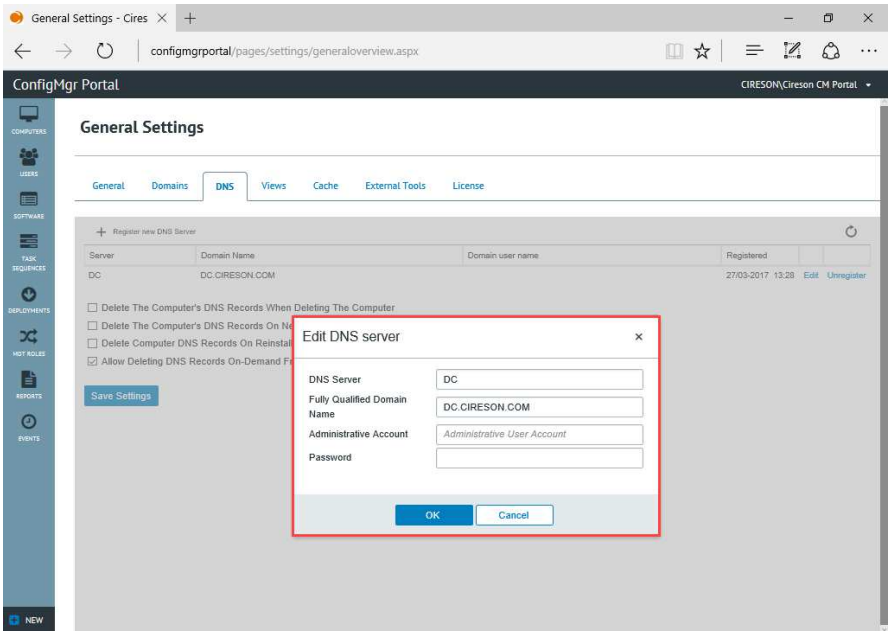
NOTE: No DNS Servers are registered with the Portal by default.



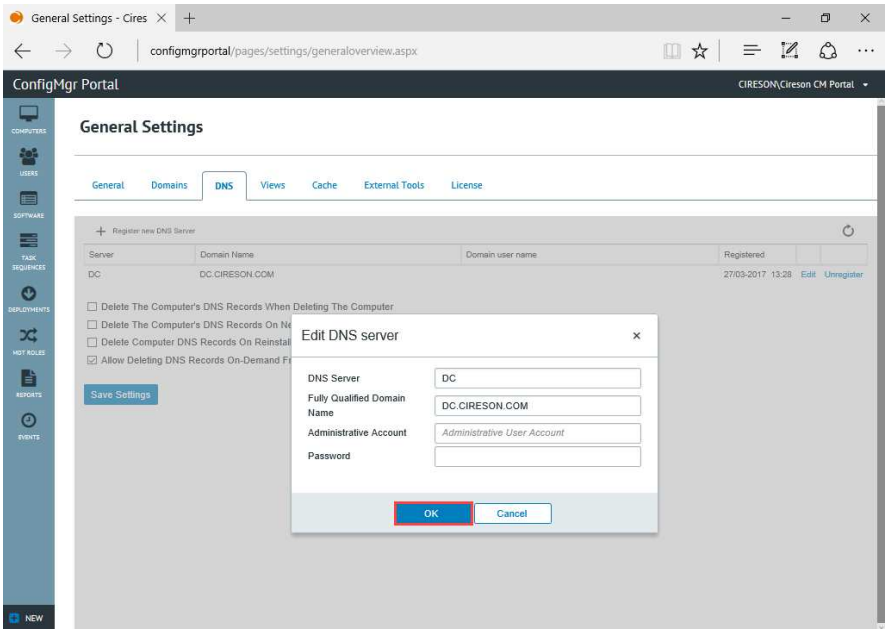
3. Click **Edit** beside the DNS Server you wish to edit.



4. On the **Edit DNS server** dialog box, make the required changes.



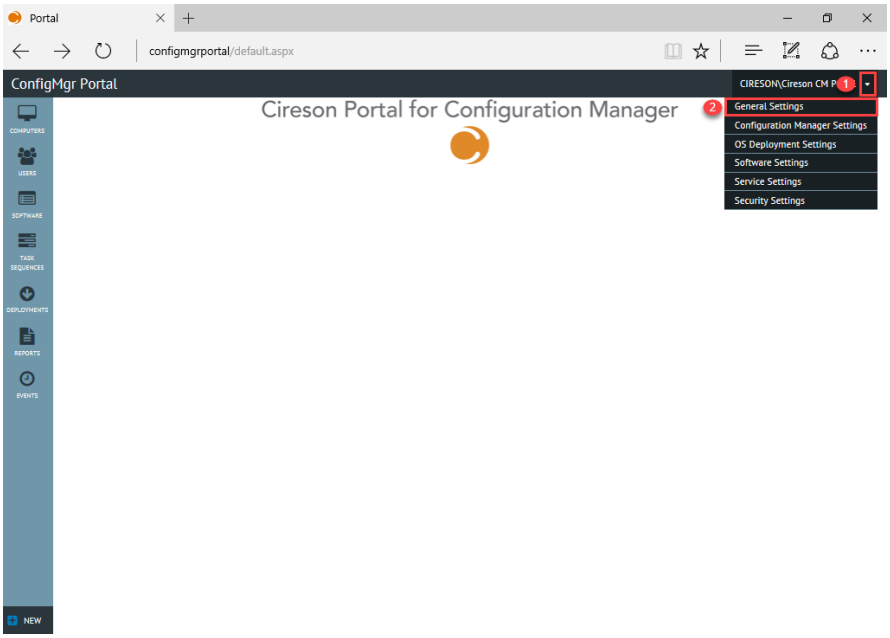
5. Click **OK** to save the changes.



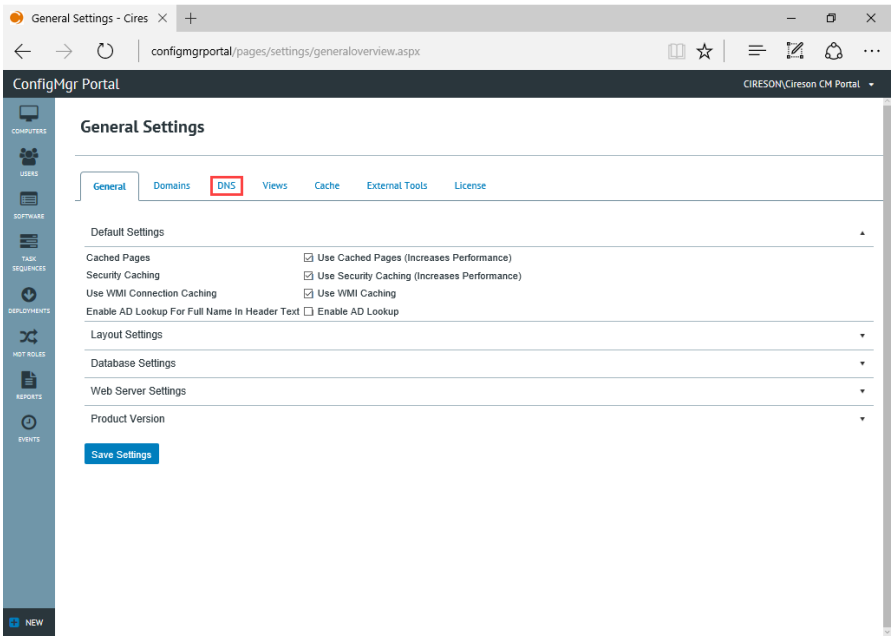
How do I unregister a DNS Server?

To unregister a DNS Server:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

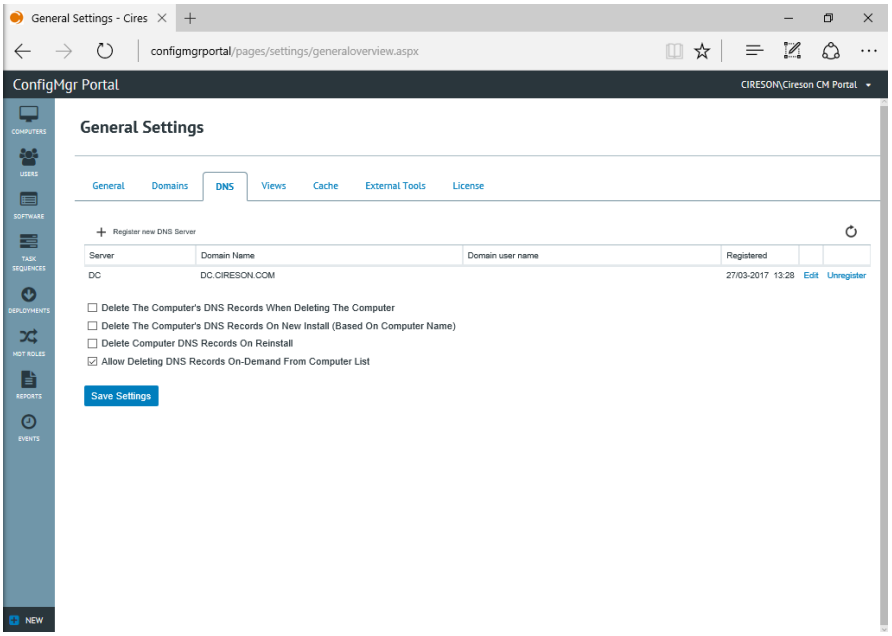


2. Click the **DNS** tab.

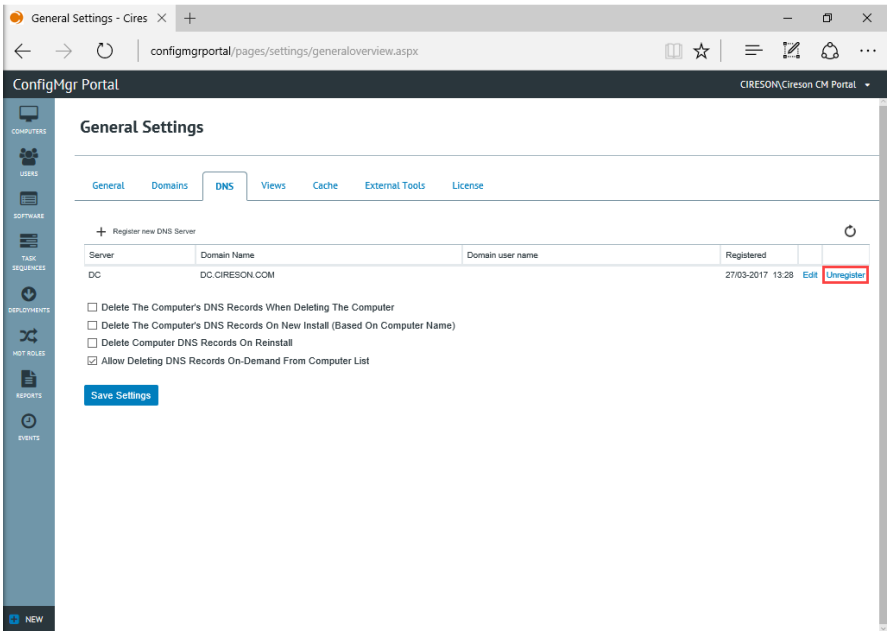


A list of the current DNS Servers is displayed.

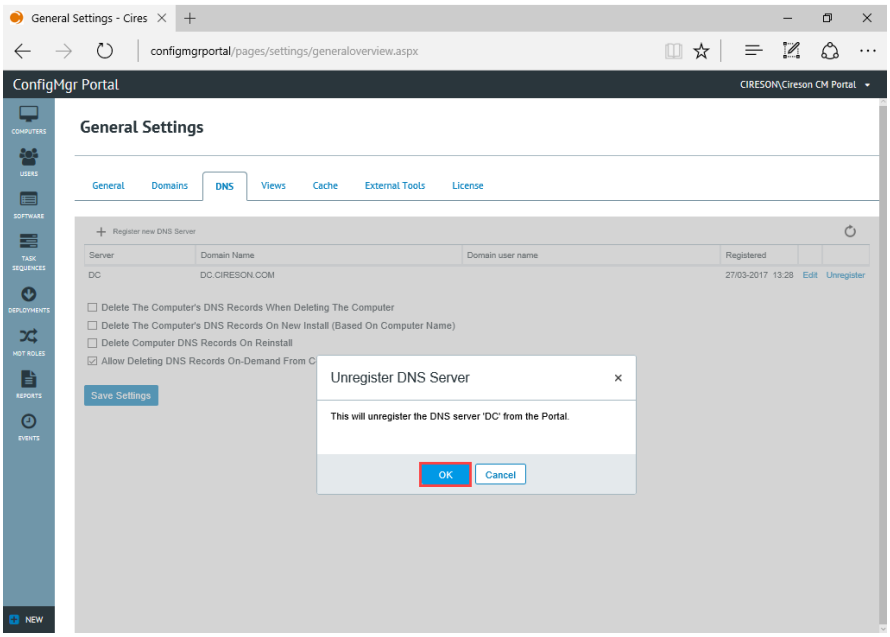
NOTE: No DNS Servers are registered with the Portal by default.



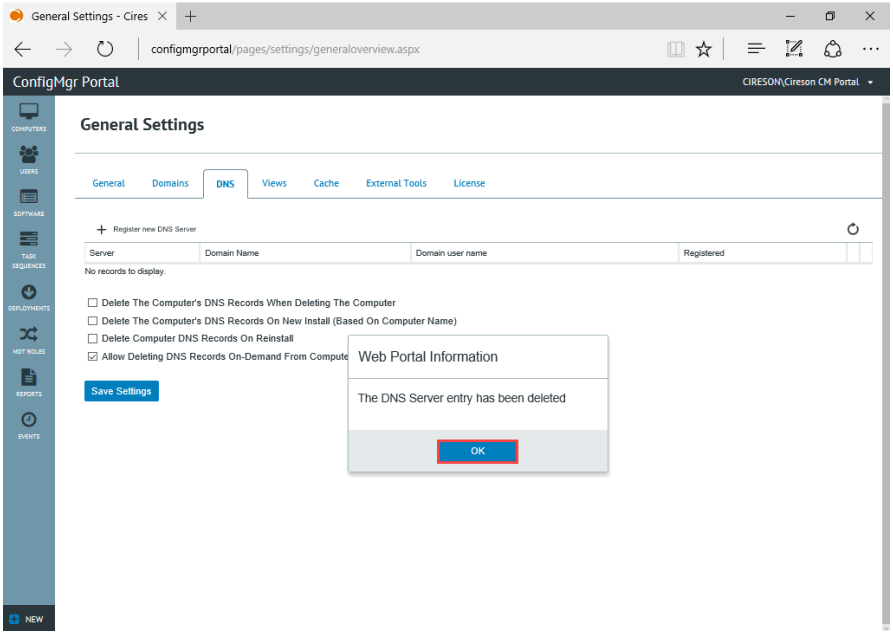
3. Click **Unregister** beside the DNS Server you wish to unregister.



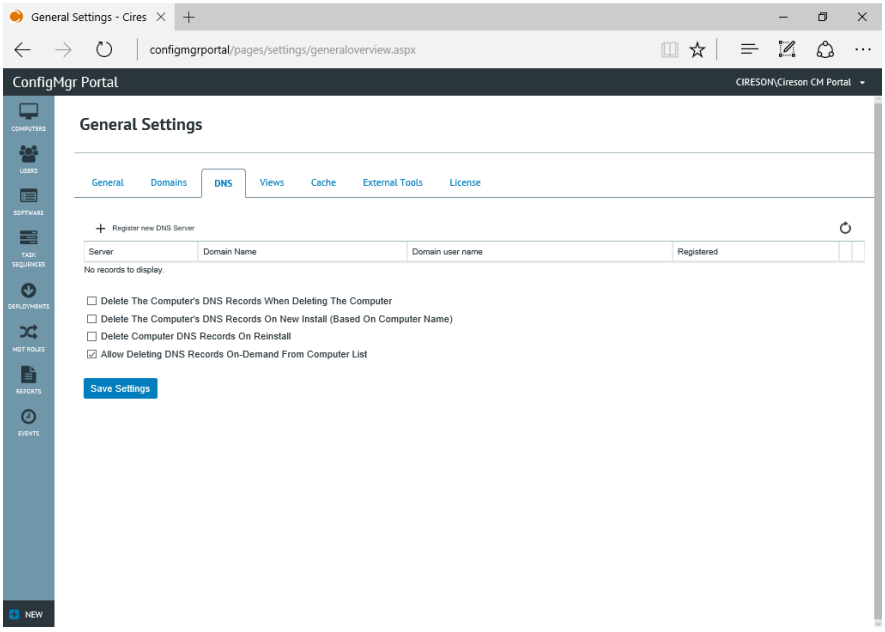
4. Click **OK** on the **Unregister DNS Server** dialog box stating **This will unregister the DNS server '*<server_name>*' from the Portal.**



5. Click **OK** on the **Web Portal Information** dialog box stating **The DNS Server entry has been unregistered**



The **DNS** tab is automatically refreshed and the unregistered DNS server is no longer displayed.



Domains

If your environment contains a ConfigMgr site server in an untrusted Active Directory domain/forests, you can register these domains/forests with the Portal. In this way, when the Portal contacts the WMI provider, it looks up its name in the ConfigMgr database to retrieve the FQDN for the site server hosting the SMS provider.

If there is a registration that corresponds to that domain name, the Portal uses the credentials stored for the domain registration instead of the IIS Application Pool account identity that is uses by default.

You should configure this option if your IIS server and SMS Provider are located in different domains and no trusts exist between them.

Registering a domain with the Portal also provides support for the scenario where you need to use a different context to communicate with ConfigMgr, instead of the IIS Application Pool account.

NOTE: The only exception to this rule is if you plan on using the Organizational Unit (OU) feature of the Portal to register OUs in the Portal to make working with them easier. In this case, you need to register the domain containing the Portal server and ConfigMgr site server in order to be able to browse Active Directory for this domain.

This section details the tasks related to Domains that you can perform using the Portal.

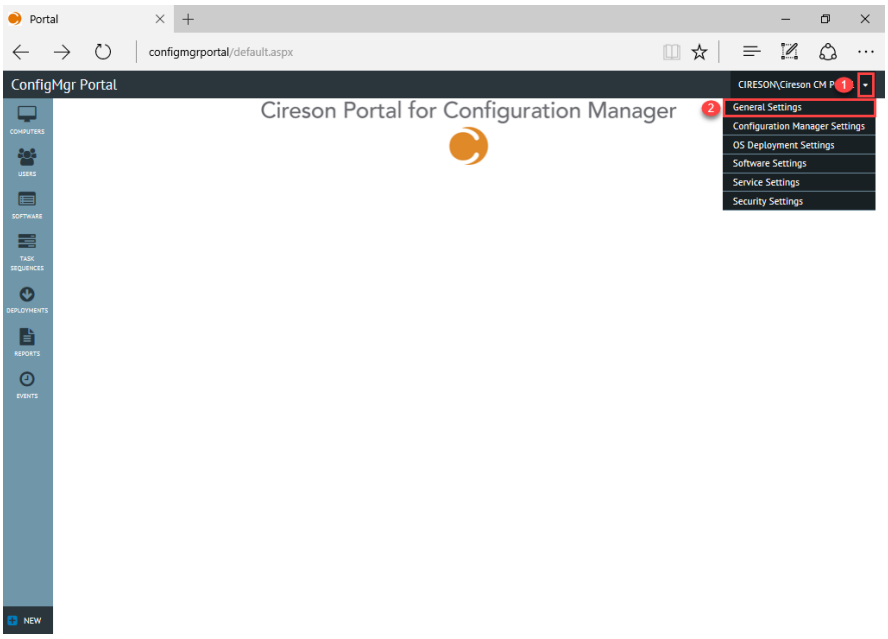
NOTE: You do not need to register the Domain the Portal is running in, provided the IIS server hosting the Portal is running on a server in the same domain as your ConfigMgr site.

- How do I register a new Domain?
- How do I edit a Domain?
- How do I delete a Domain?

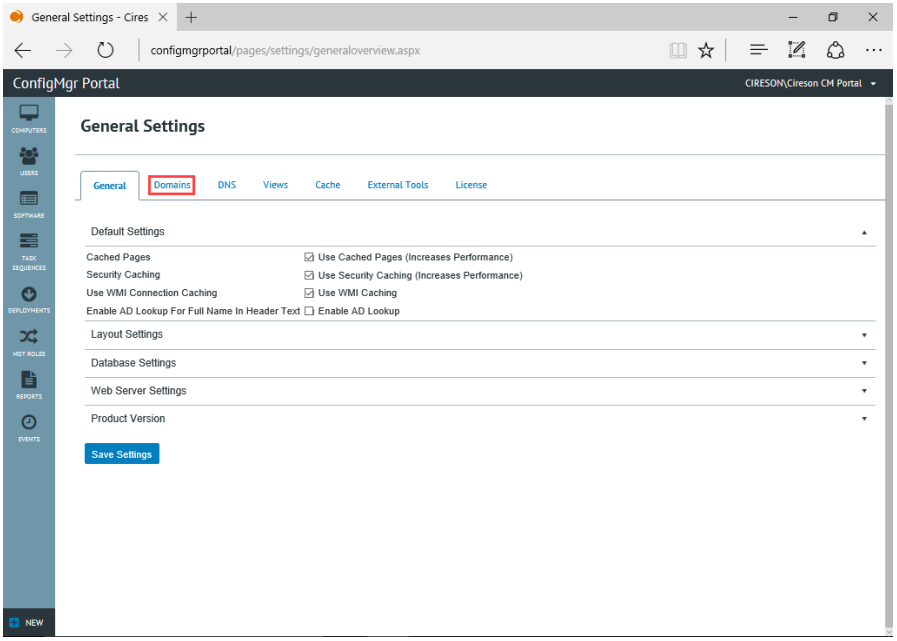
How do I register a new Domain?

To register a new Domain:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

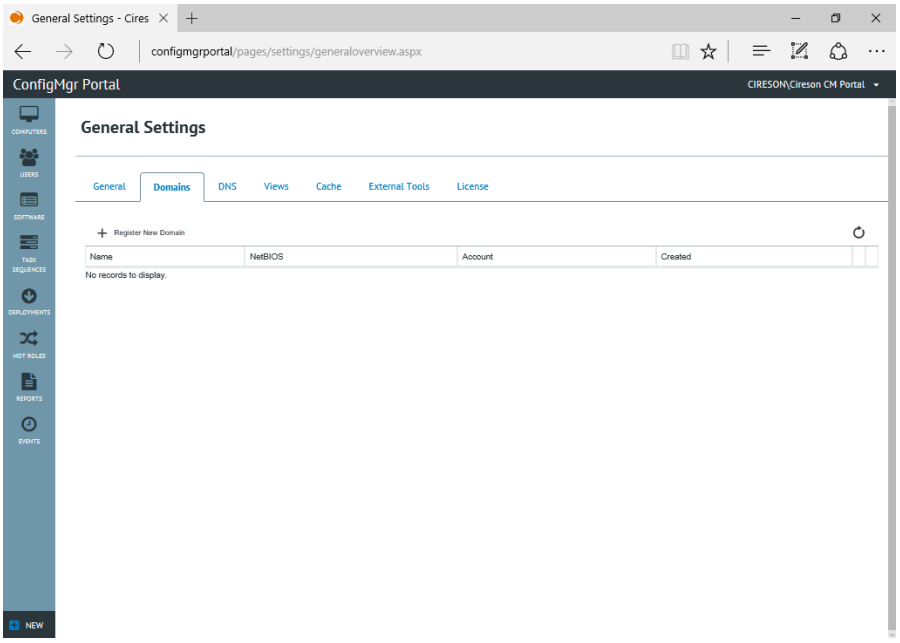


2. Click the **Domains** tab.

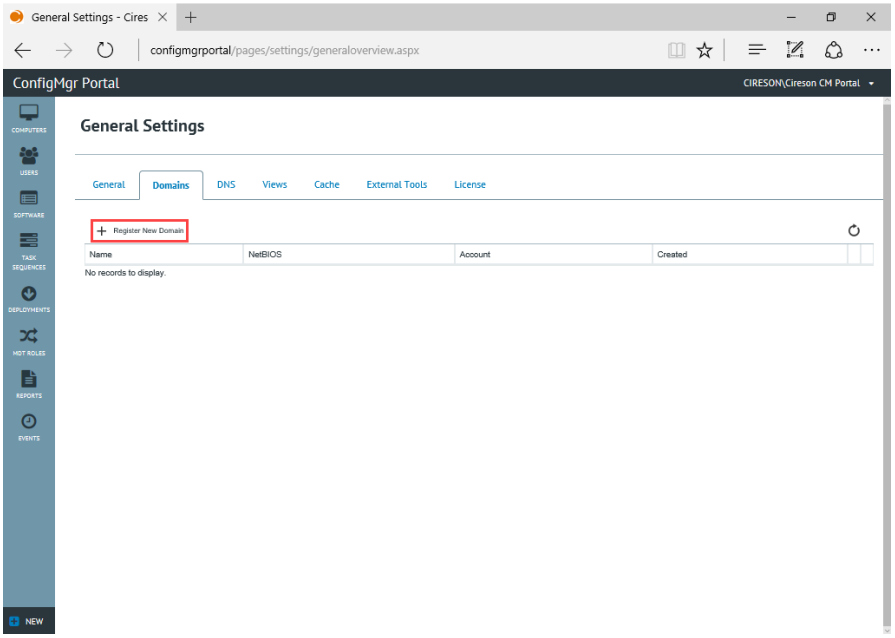


A list of existing Domains is displayed.

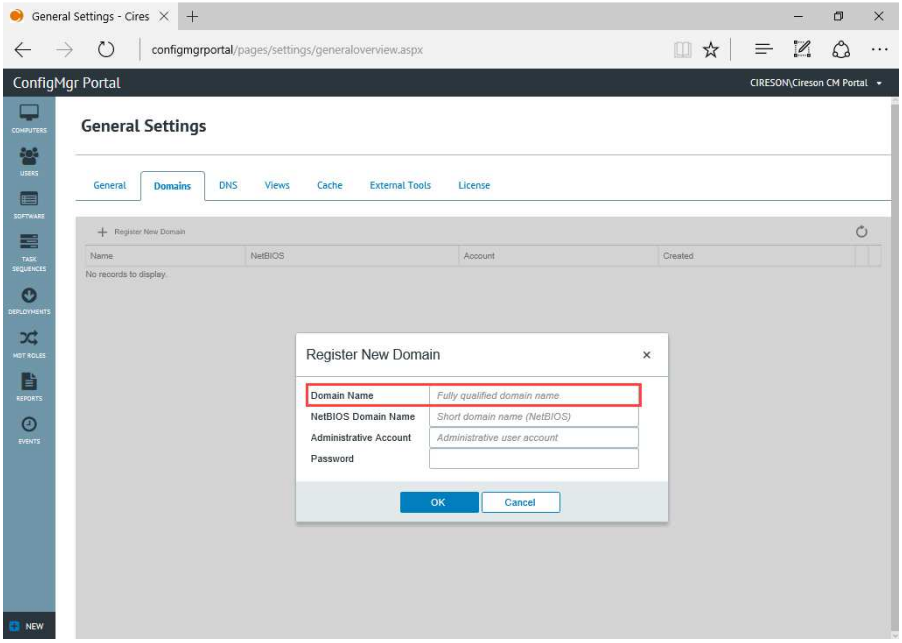
NOTE: No Domains are registered by default.



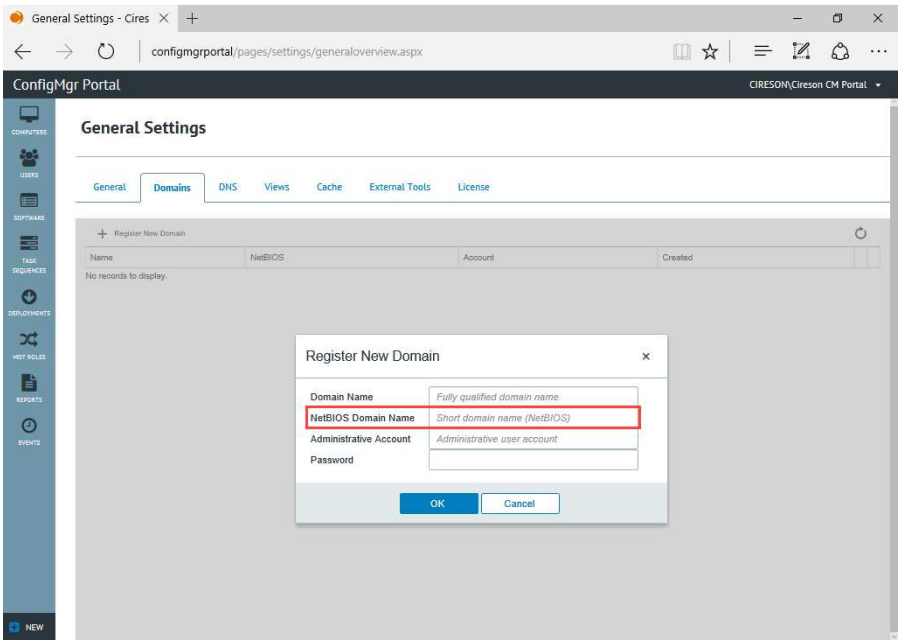
3. Click **Register New Domain**



4. On the **Register New Domain** page, enter the Fully Qualified Domain Name (FQDN) of the new Domain in the **Domain Name** field.

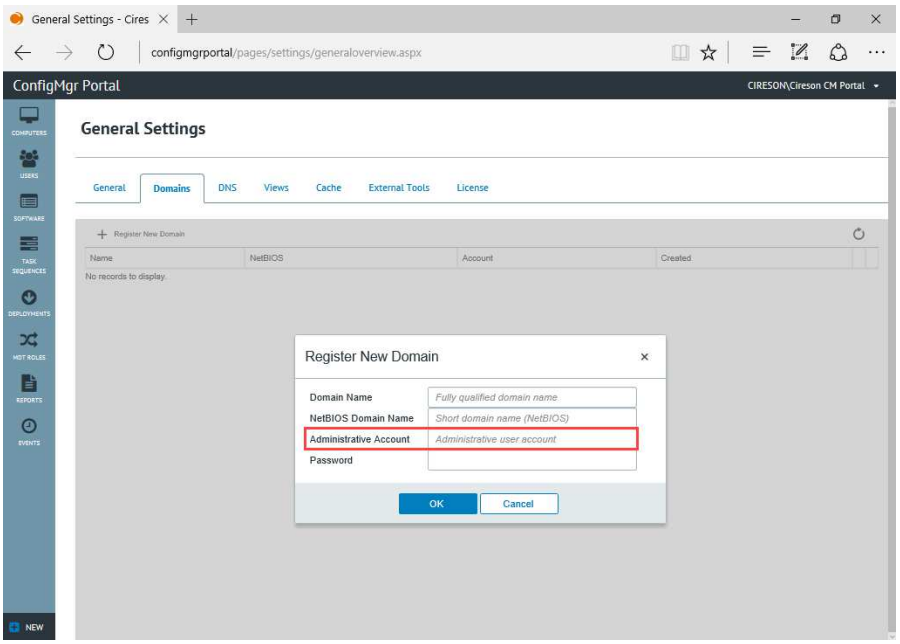


5. In the **NetBIOS Domain Name** field, enter the NetBIOS name of the Domain.

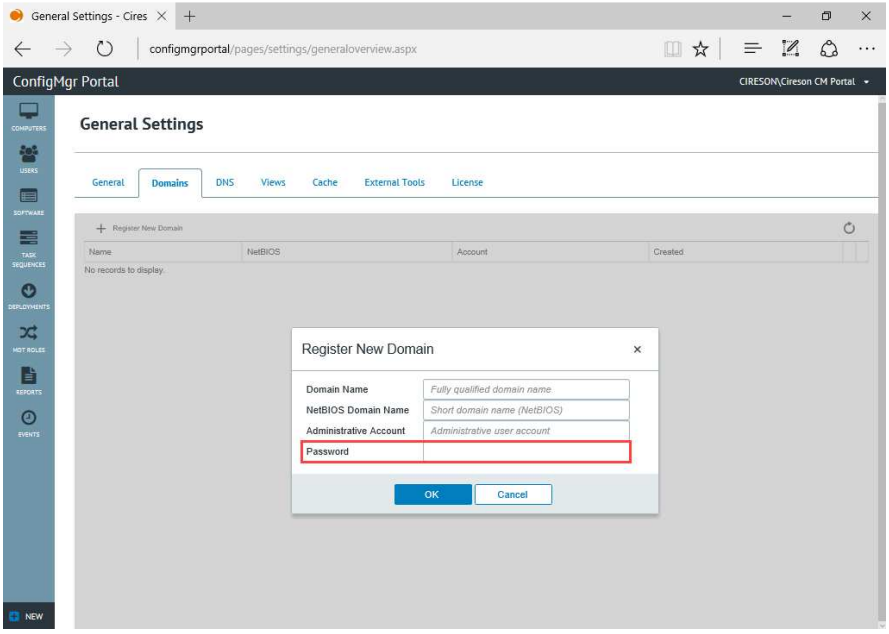


6. In the **Administrative Account** field, enter the name of an account with Administrative rights in the Domain.

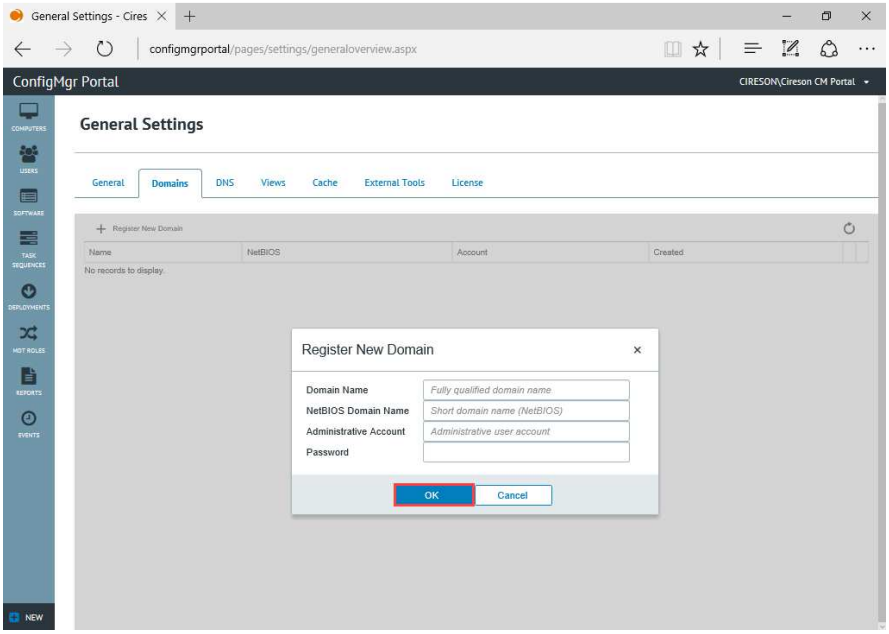
   NOTE: If you are registering the Domain containing the IIS server hosting the Portal and the ConfigMgr site server, you should enter the name of the IIS Application Pool account used for the Portal. If you use a different account, this account will be used to interact with the ConfigMgr site server instead of the IIS Application Pool account and will fail unless it has been configured as a Full Administrator in the ConfigMgr Console to gain access to the SMS Provider.



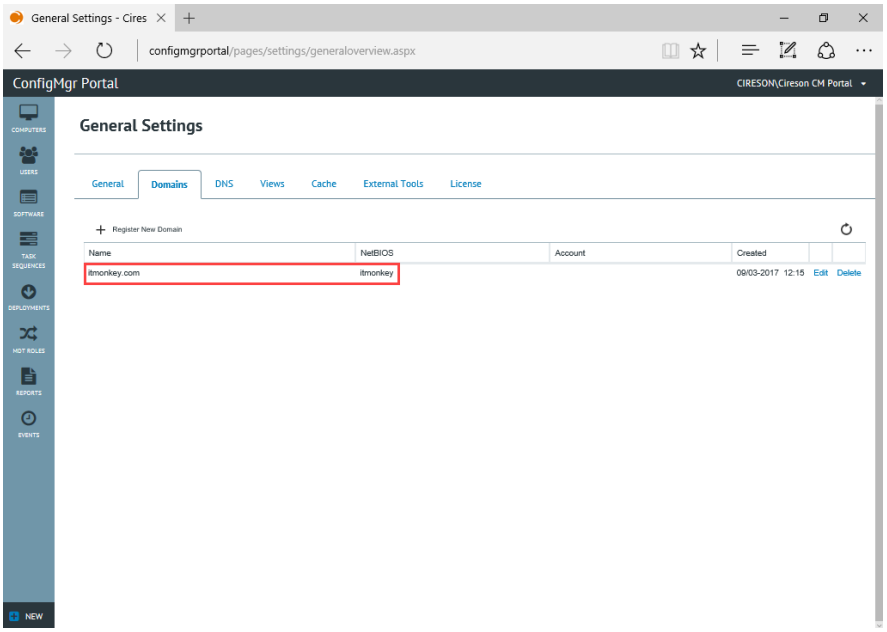
7. In the **Password** field, type the password of the Administrative account entered in the previous step.



8. Click **OK** to save the new Domain.



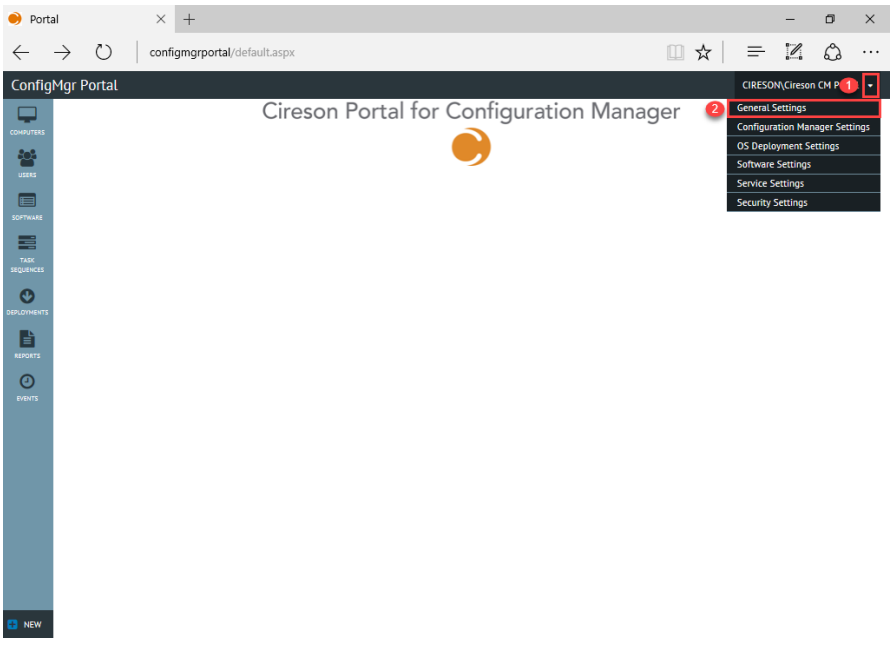
The Portal will automatically refresh showing the new Domain on the **Domains** tab.



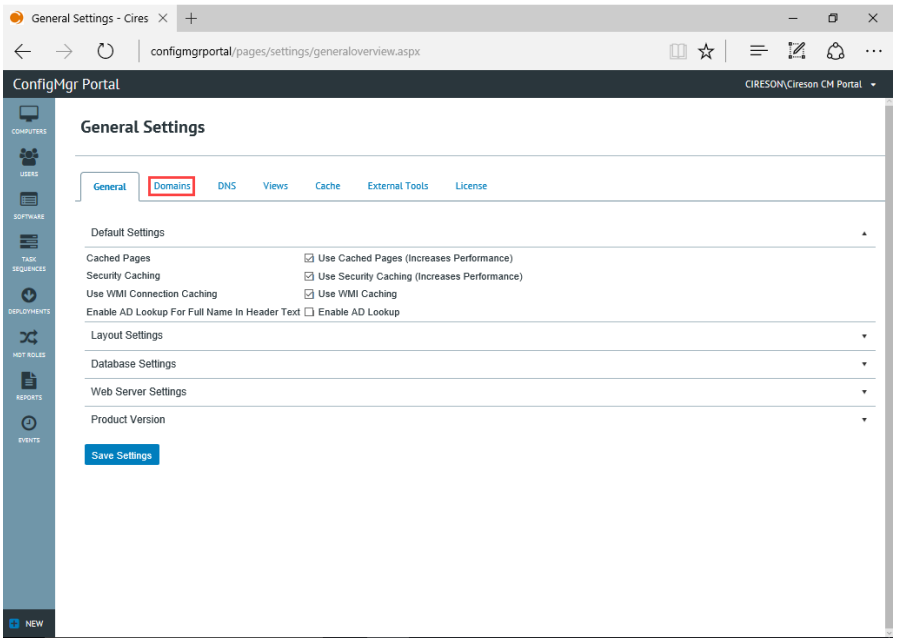
How do I edit a Domain?

To edit a Domain:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

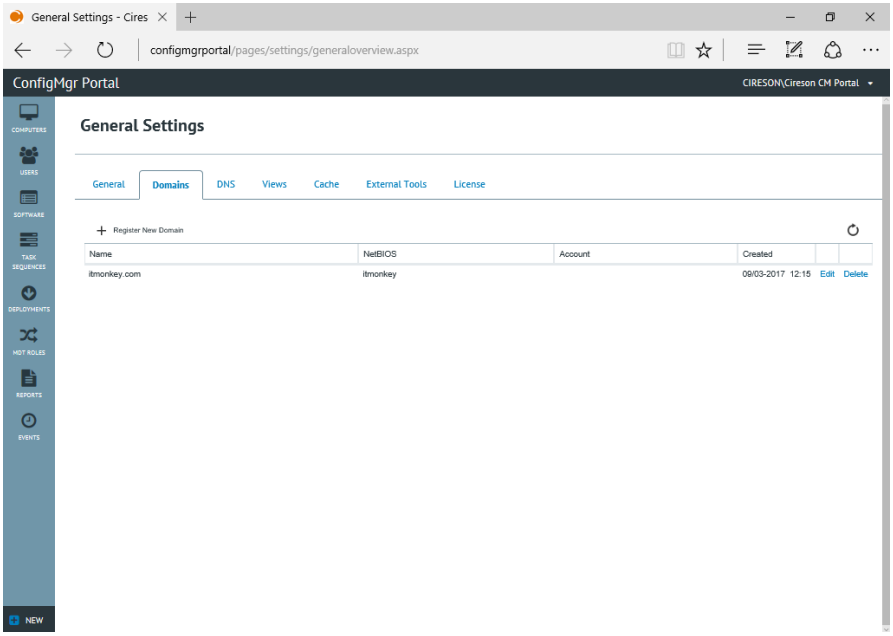


2. Click the **Domains** tab.

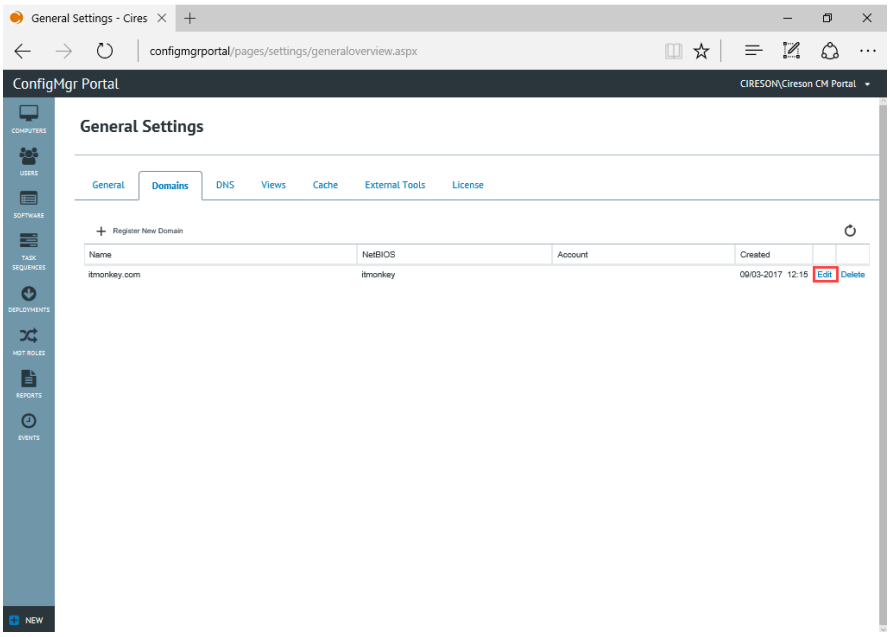


A list of existing Domains is displayed.

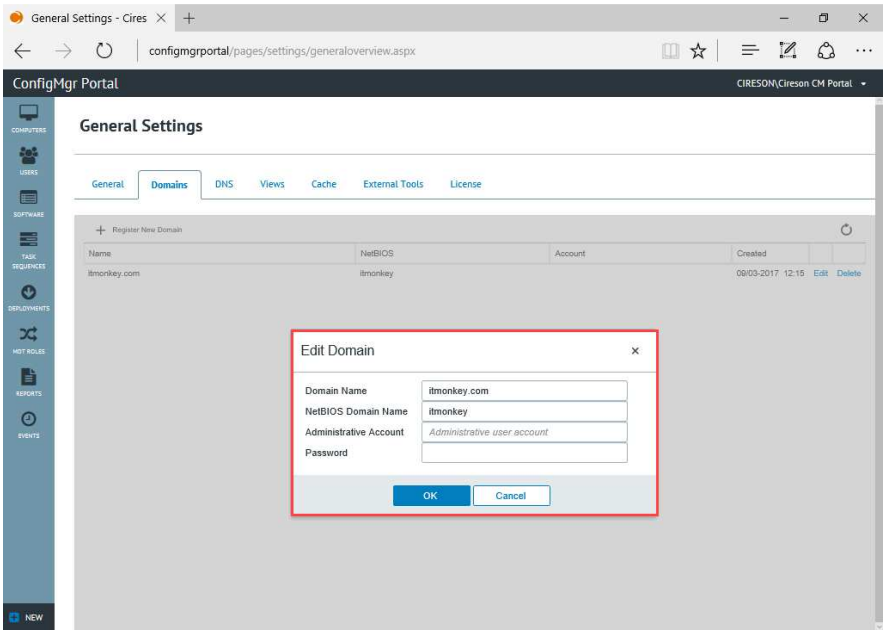
NOTE: No Domains are registered by default.



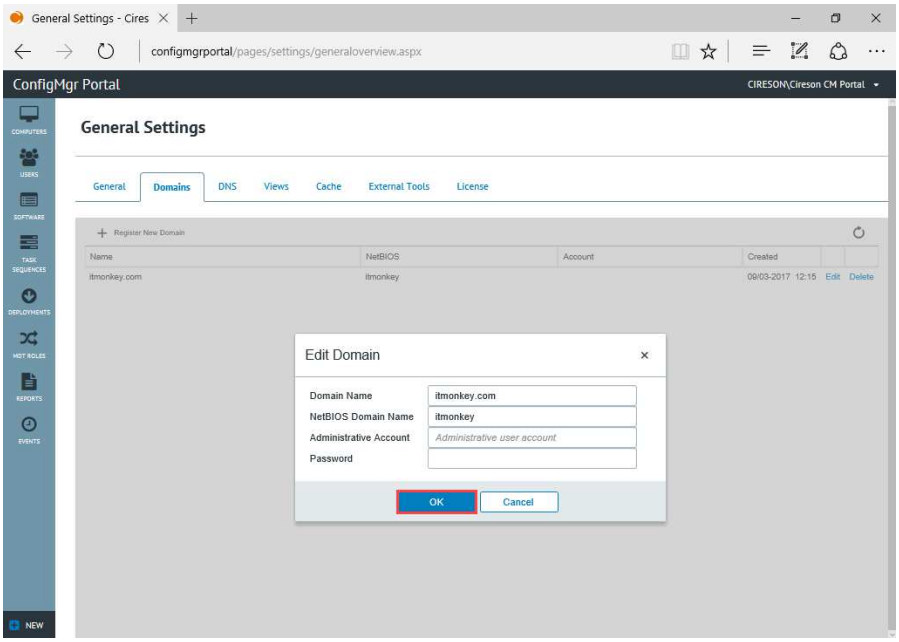
3. Click **Edit** beside the Domain you wish to edit.



4. On the **Edit Domain** dialog box, make the required changes.



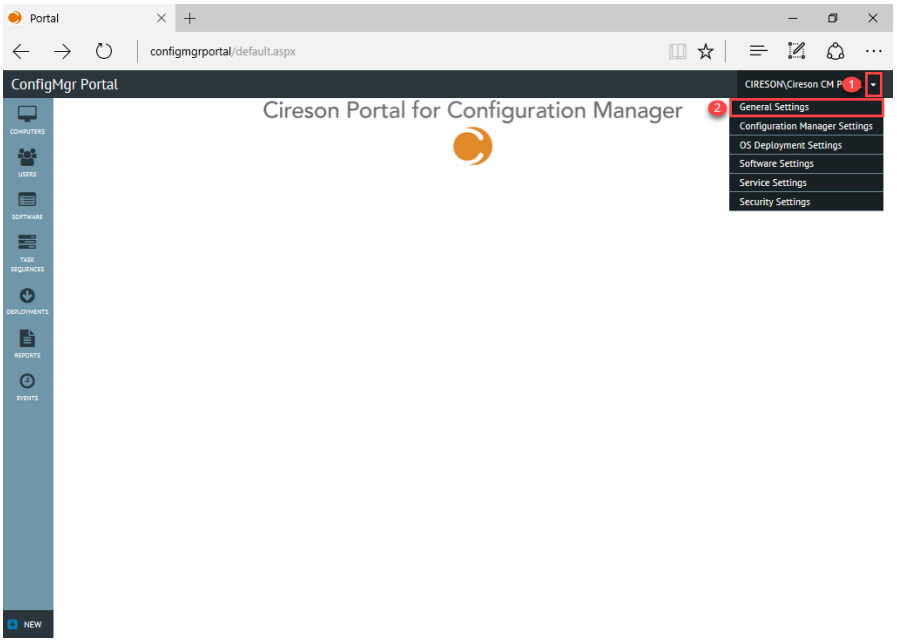
5. Click **OK** to save your changes.



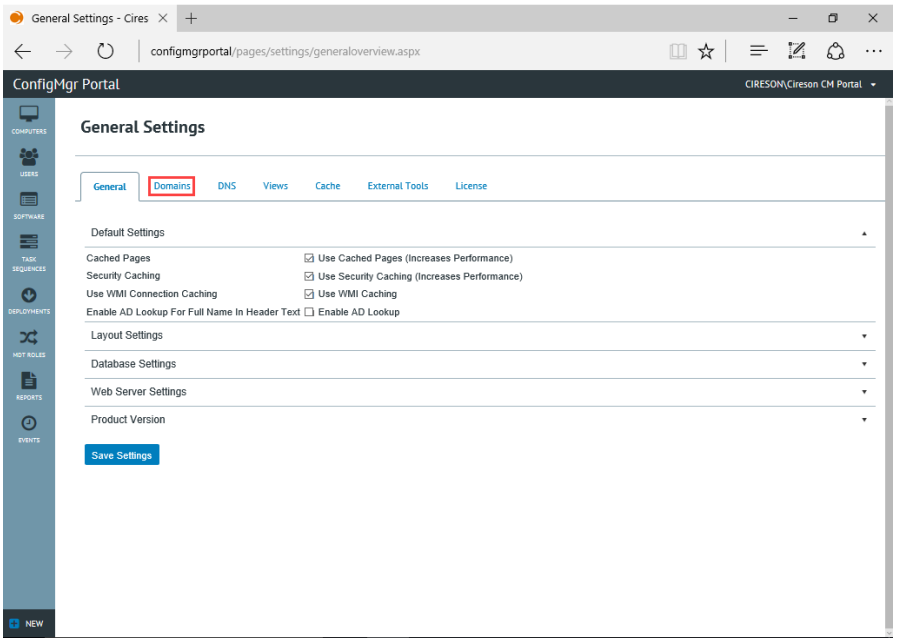
How do I delete a Domain?

To delete a Domain:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

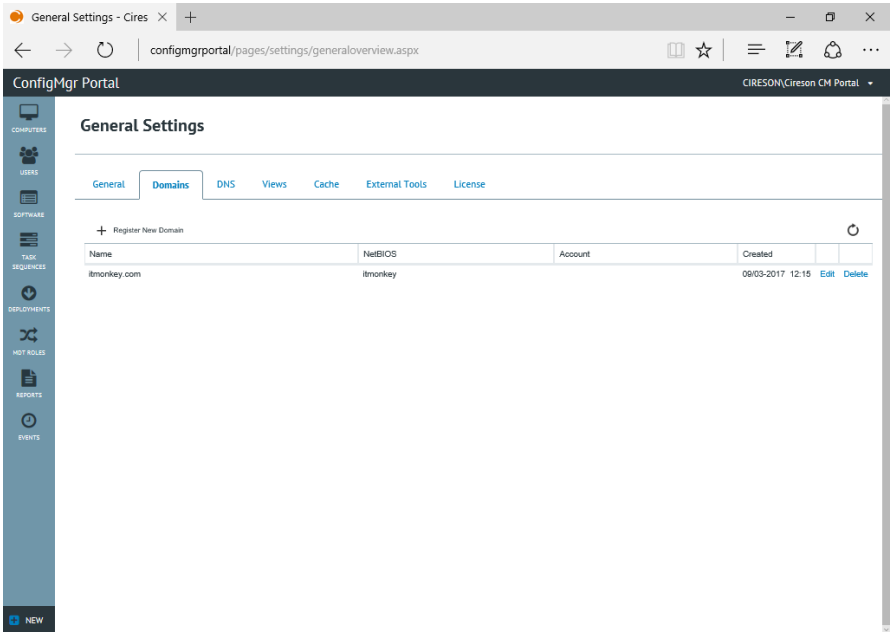


2. Click the **Domains** tab.

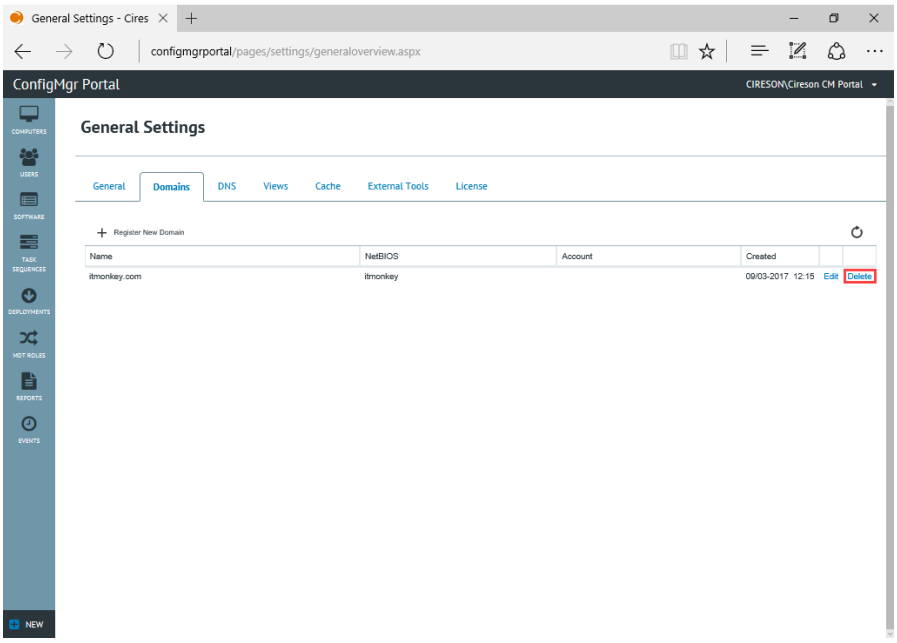


A list of existing Domains is displayed.

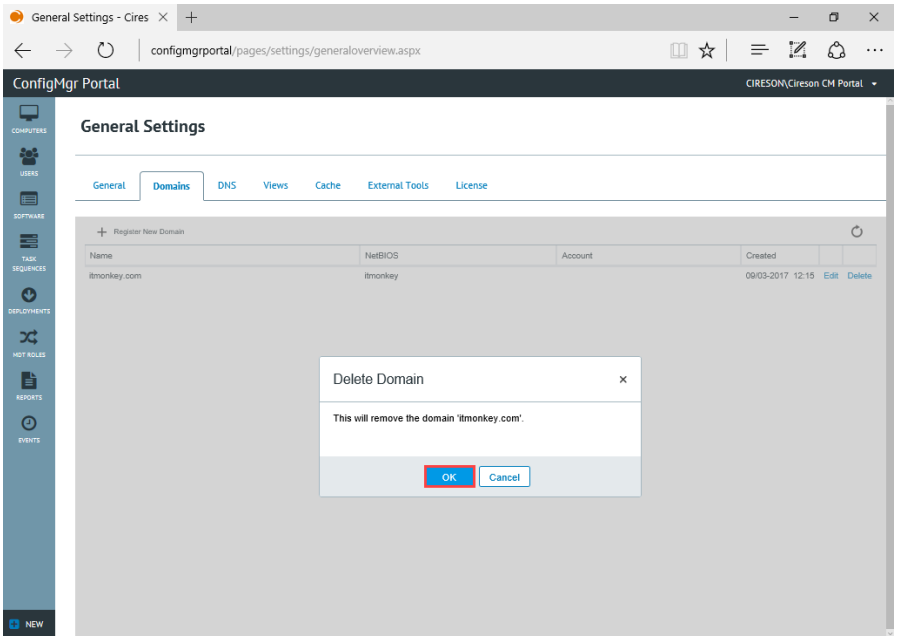
NOTE: No Domains are registered by default.



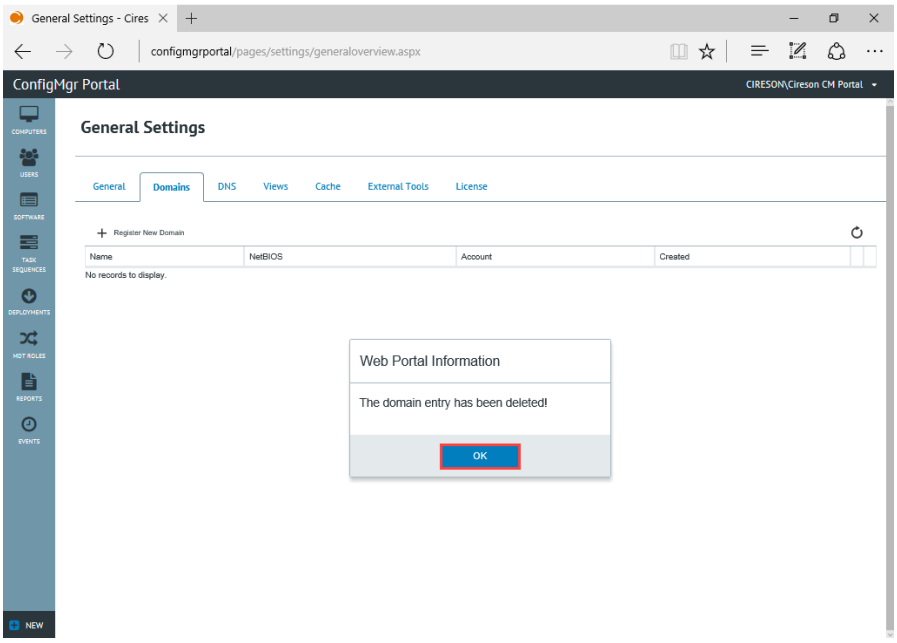
3. Click **Delete** beside the Domain you wish to delete.



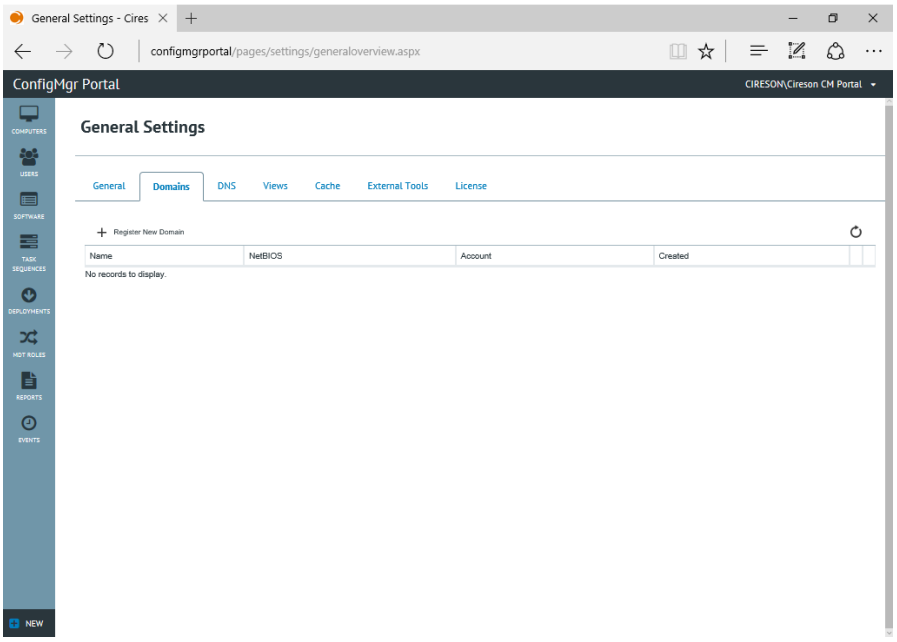
4. On the **Delete Domain** dialog box, click **OK** when prompted **This will remove the domain '*<domain_name>*'**



5. Click **OK** on the **Web Portal Information** dialog box stating **The domain entry has been deleted!**



The Domain no longer appears on the **Domains** tab.



External Tools

The Portal allows you to add tools that are external to the Portal (such as the Cireson Remote Manage app or Remote Desktop Protocol (RDP), which can be optionally run when a computer is selected.

NOTE: You can use the free Cireson App Launcher to help simplify the installation and configuration of External Tools for use with the Portal. Appendix D – How to install the Cireson App Launcher contains details of how to install and use the Cireson App Launcher.

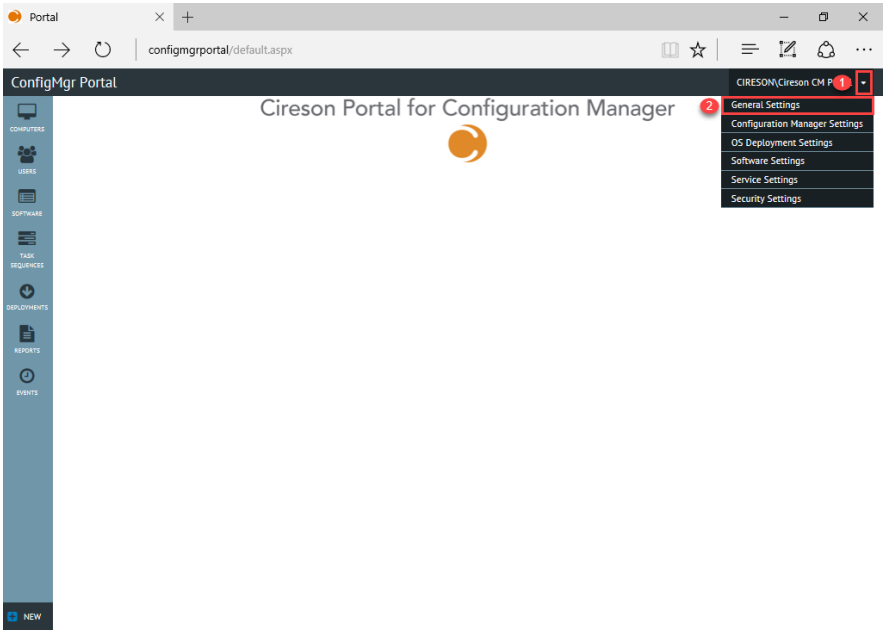
This section details the tasks related to External Tools that you can perform using the Portal.

- How do I add a new External Tool?
- How do I edit an External Tool?
- How do I manage the Permissions on an External Tool?
- How do I delete an External Tool?

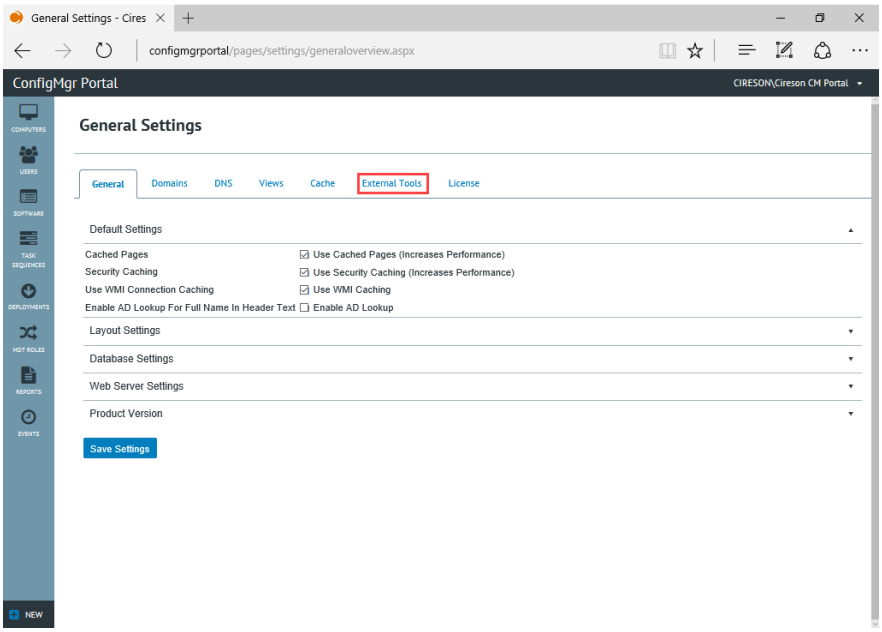
How do I add a new External Tool?

To add a new External Tool:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

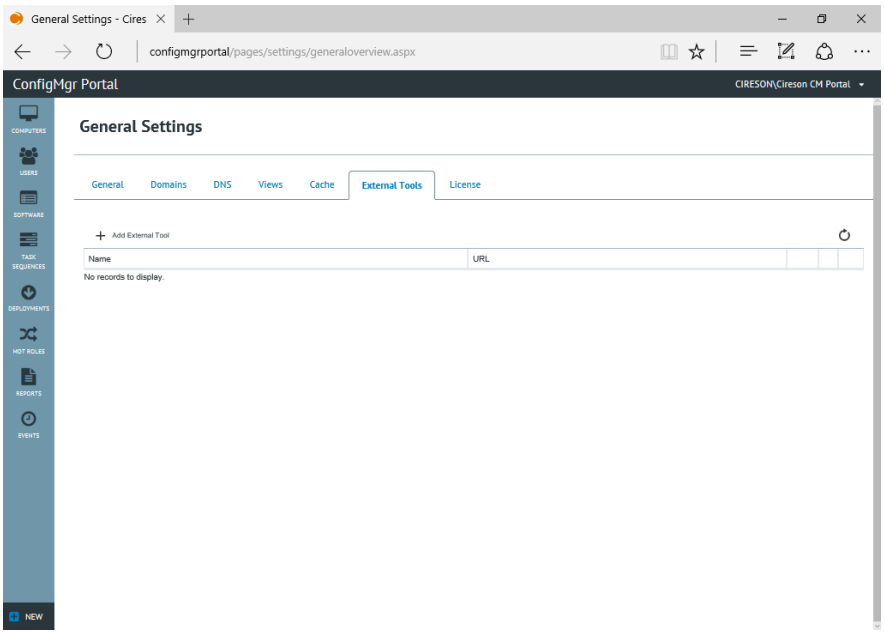


2. Click the **External Tools** tab.

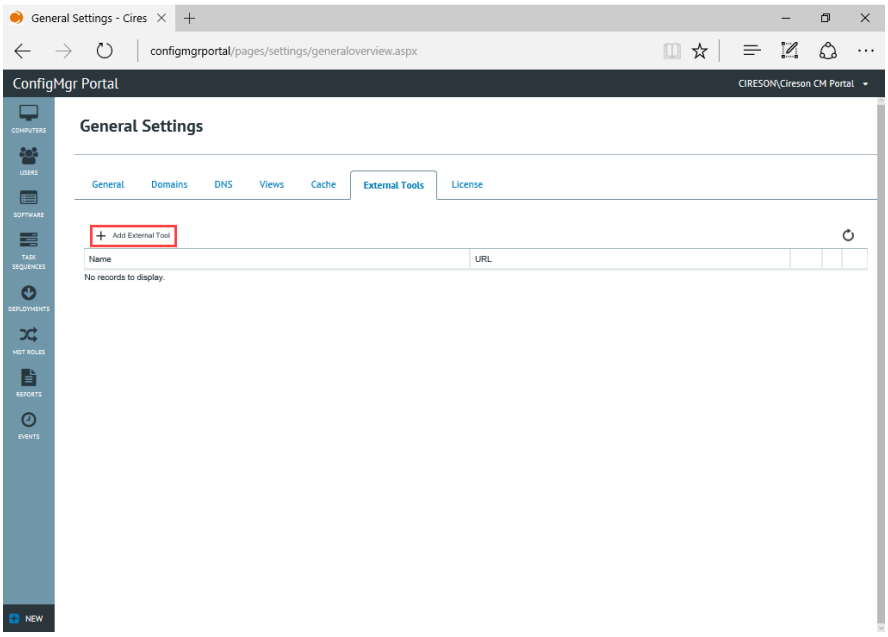


A list of the current External Tools is displayed.

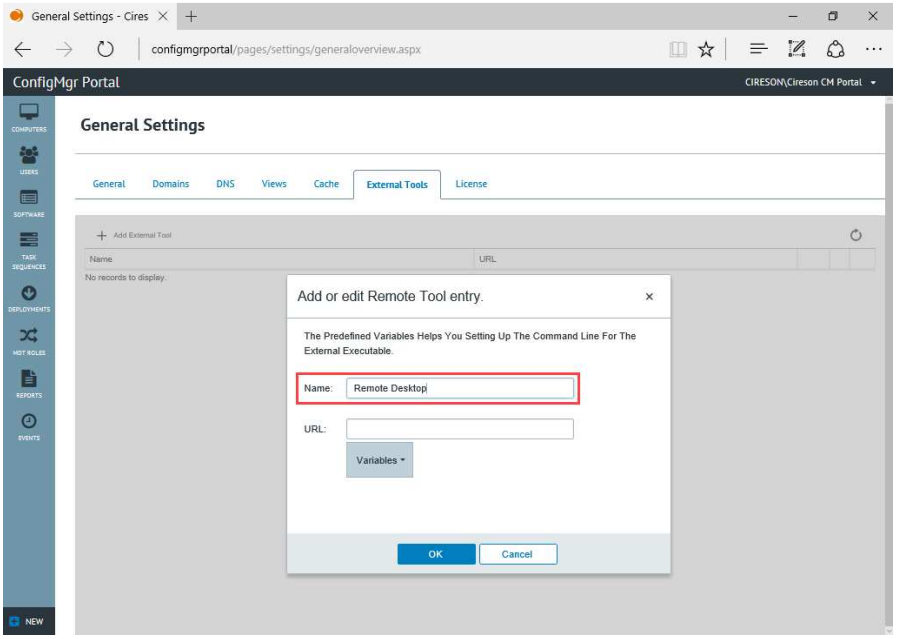
NOTE: No External Tools are configured in the Portal by default.



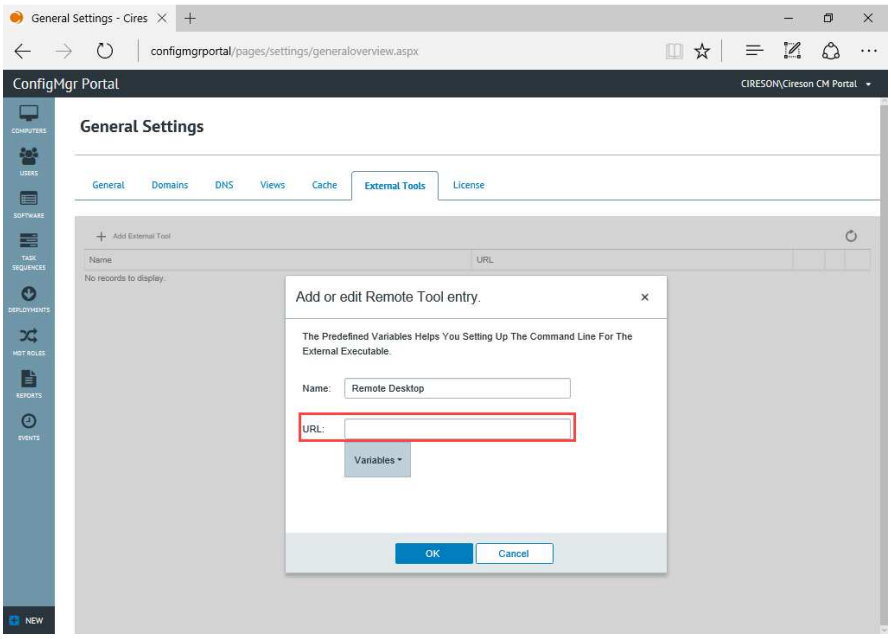
3. Click **Add External Tool**



4. On the **Add or edit Remote Tool entry** dialog box, enter the name of the new External Tool in the **Name** field as you would like it to appear in the Portal.



5. In the **URL** field, enter the command line to load the External Tool.

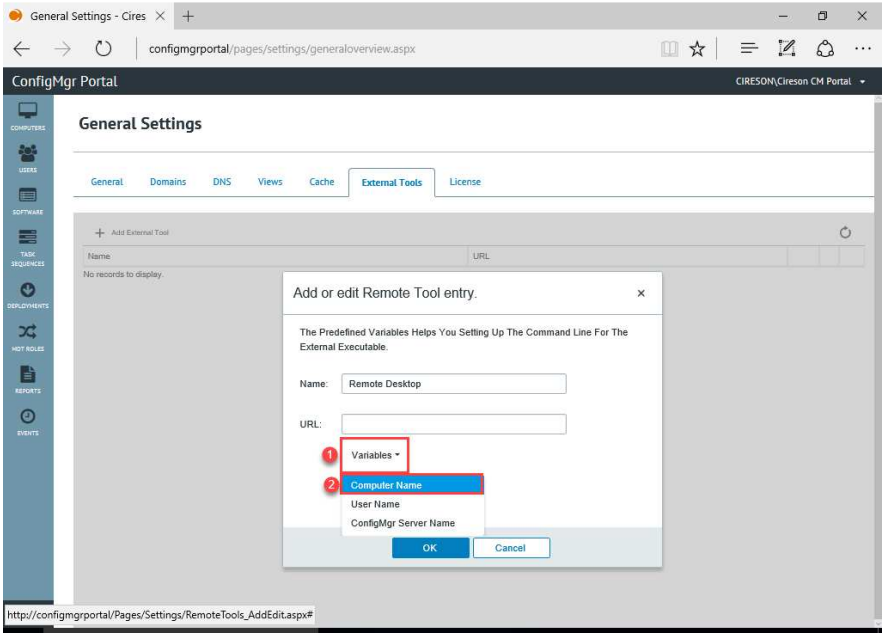


NOTE: If you are using the free Cireson App Launcher, you can easily copy and paste the URL from the tool for the tools it supports into the **URL** field.

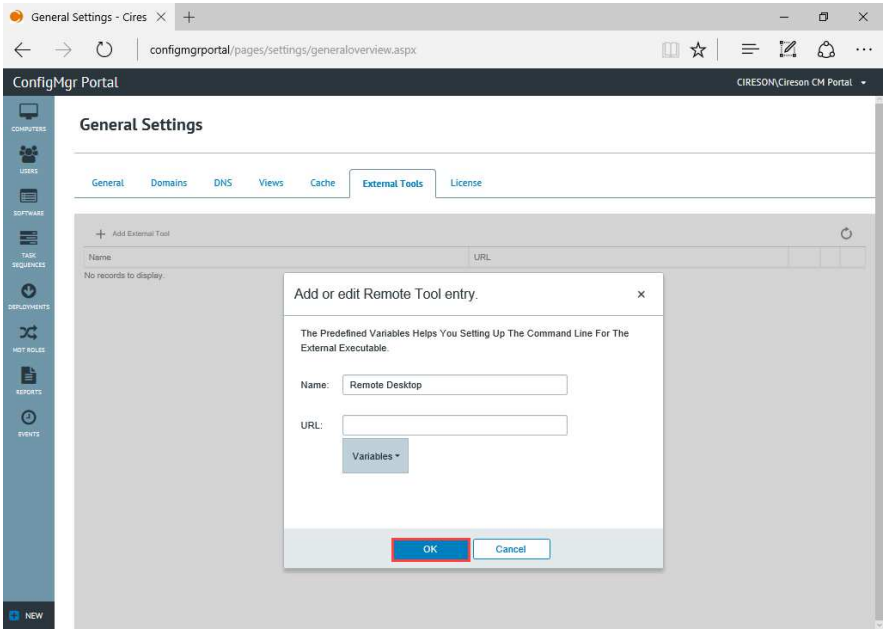
The *Triggering Remote Webhooks with CMP External Tools Commands* Knowledge Base article provides details of valid URLs:

https://support.cireson.com/KnowledgeBase/View/1377#/

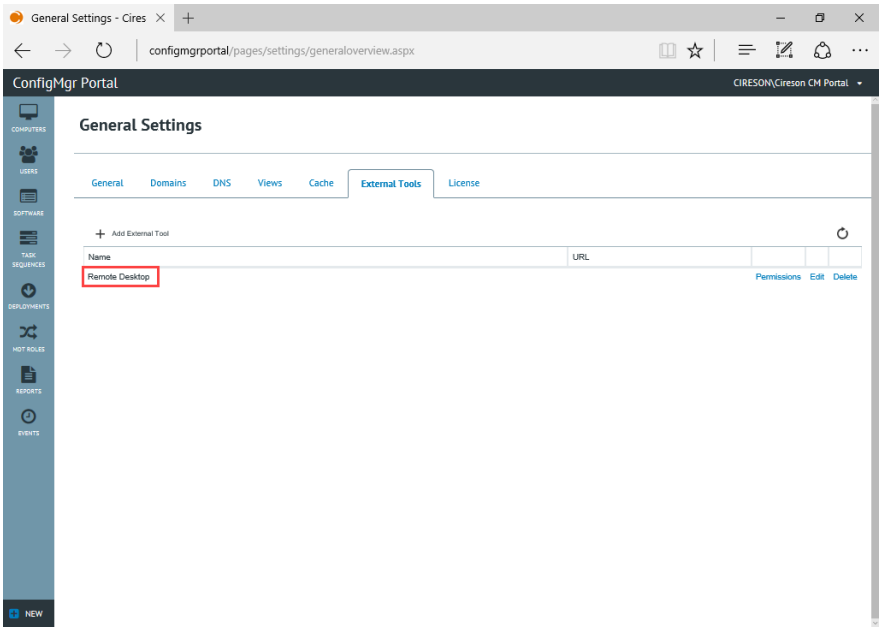
6. If the External Tool requires any variables, select the relevant value from the **Variables** dropdown.



7. Click **OK**



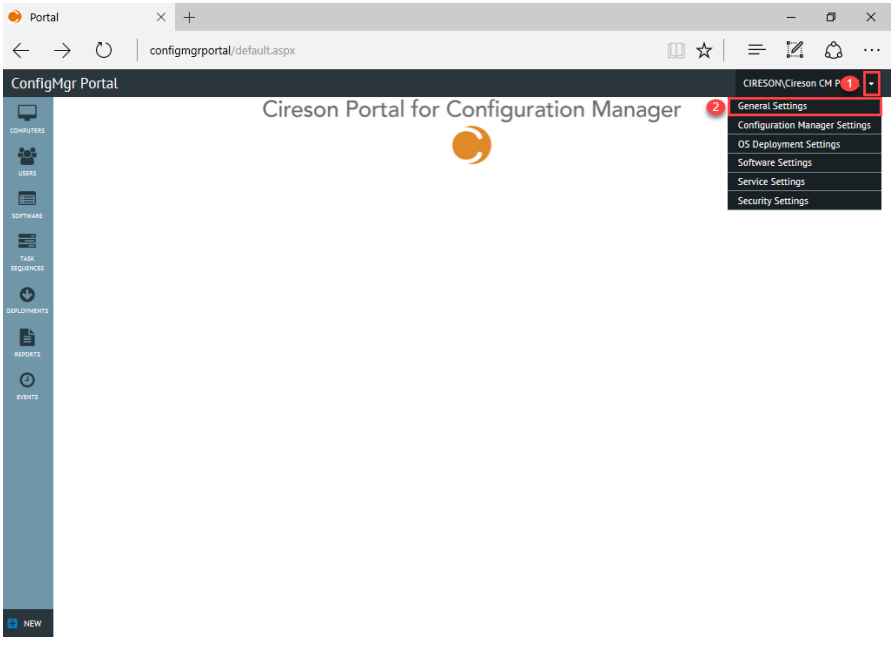
The **External Tools** tab automatically refreshes showing the newly added External Tool.



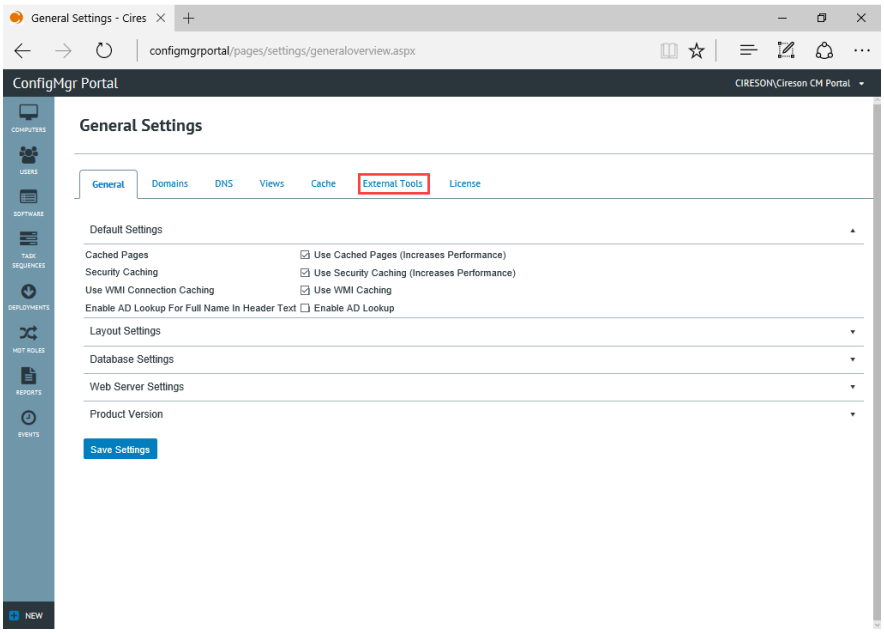
How do I edit an External Tool?

To edit an External Tool:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

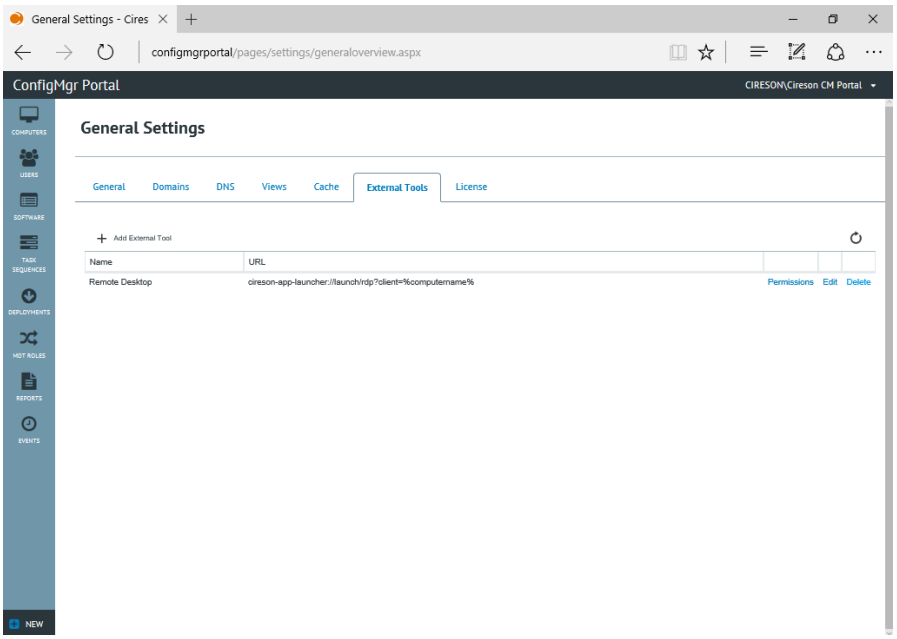


2. Click the **External Tools** tab.

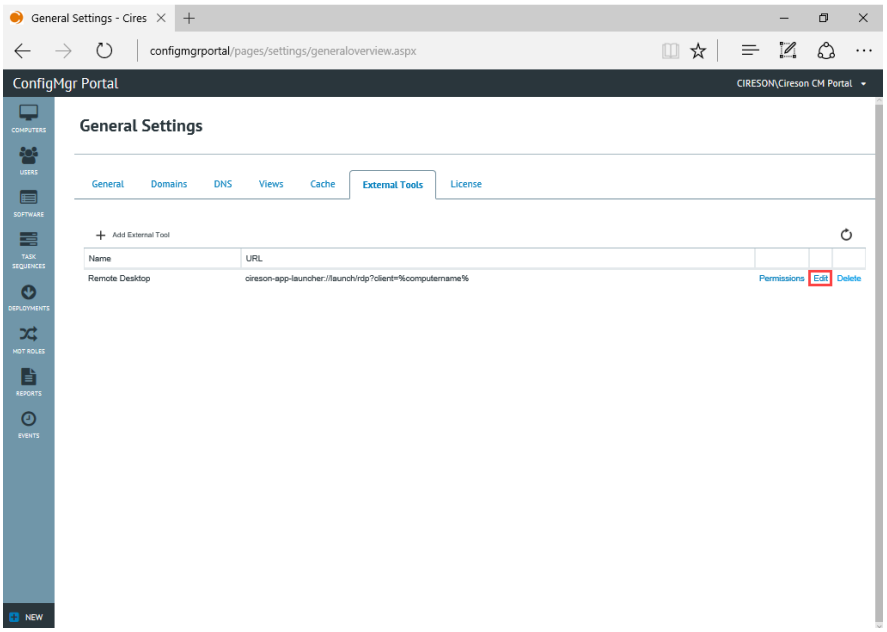


A list of the current External Tools is displayed.

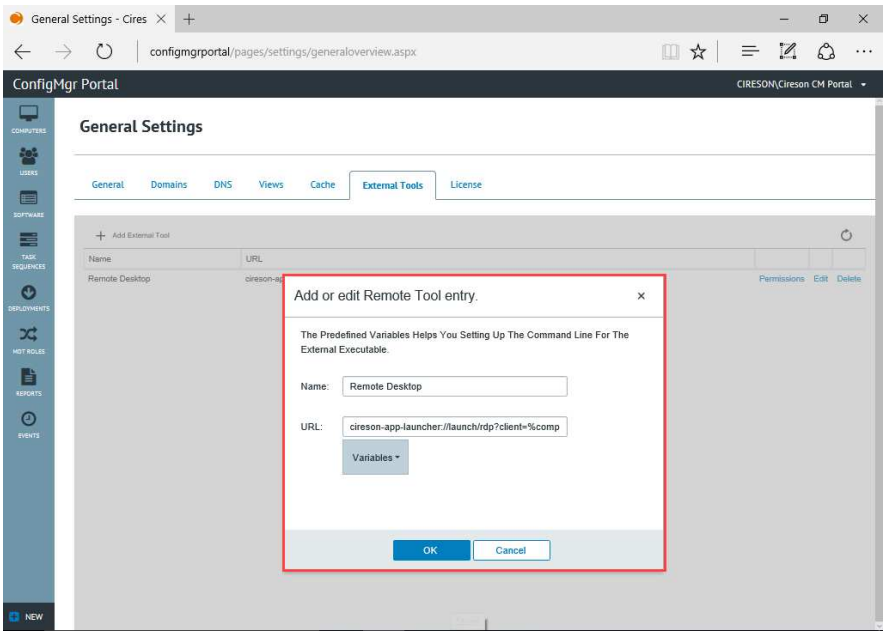
NOTE: No External Tools are configured in the Portal by default.



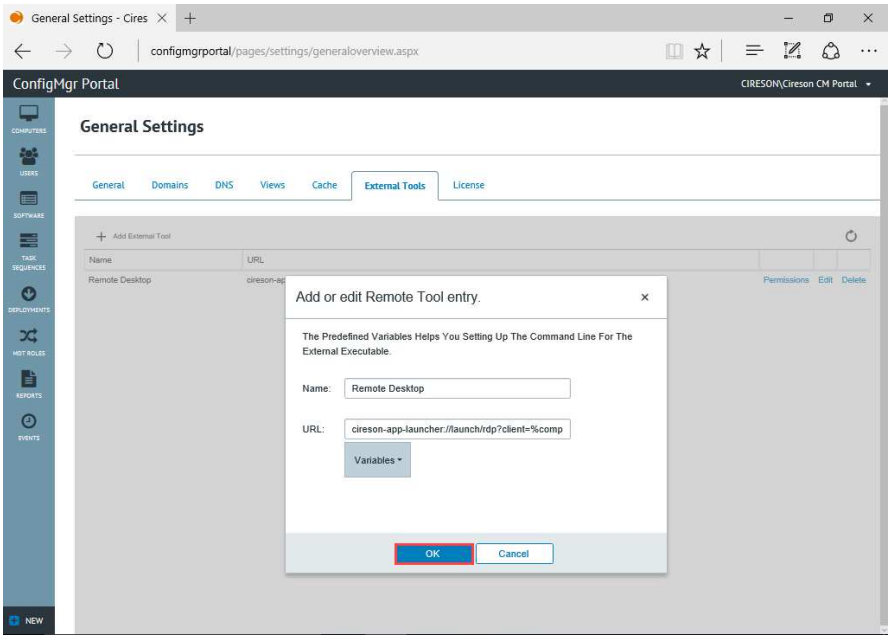
3. Click **Edit** beside the External Tool you wish to edit.



4. On the **Add or edit Remote Tool entry** dialog box make the required changes.



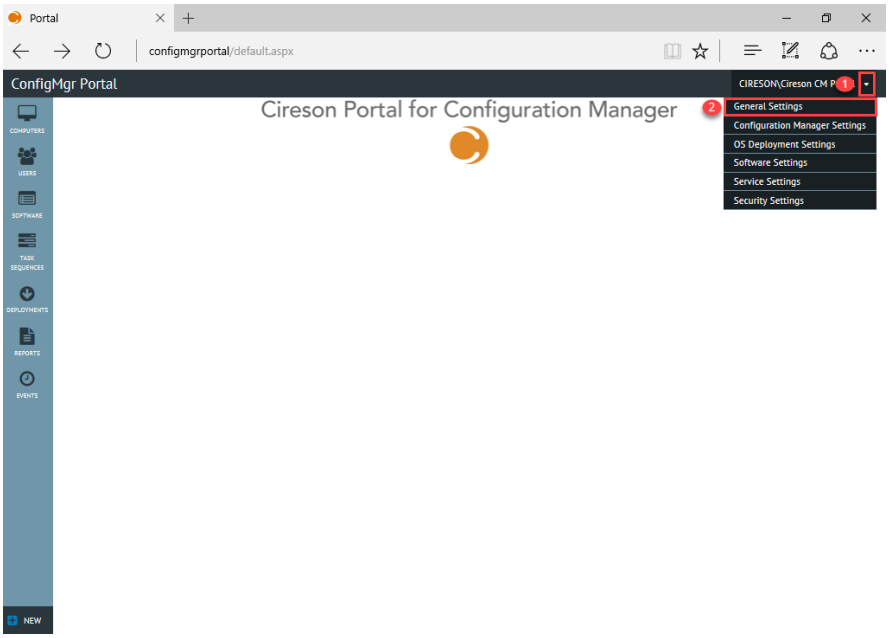
5. Click **OK** to save the changes.



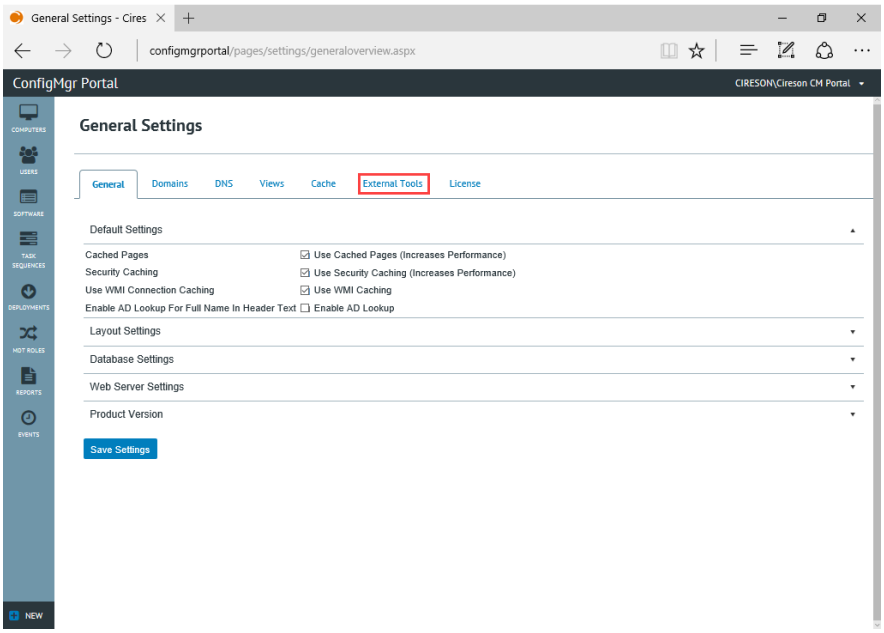
How do I manage the Permissions on an External Tool?

To manage the Permissions on an External Tool:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

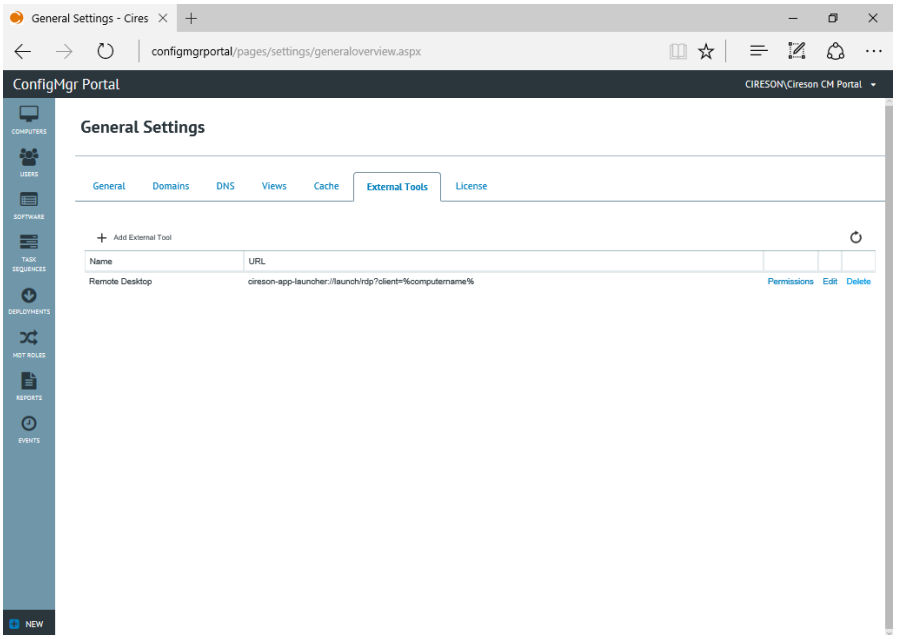


2. Click the **External Tools** tab.

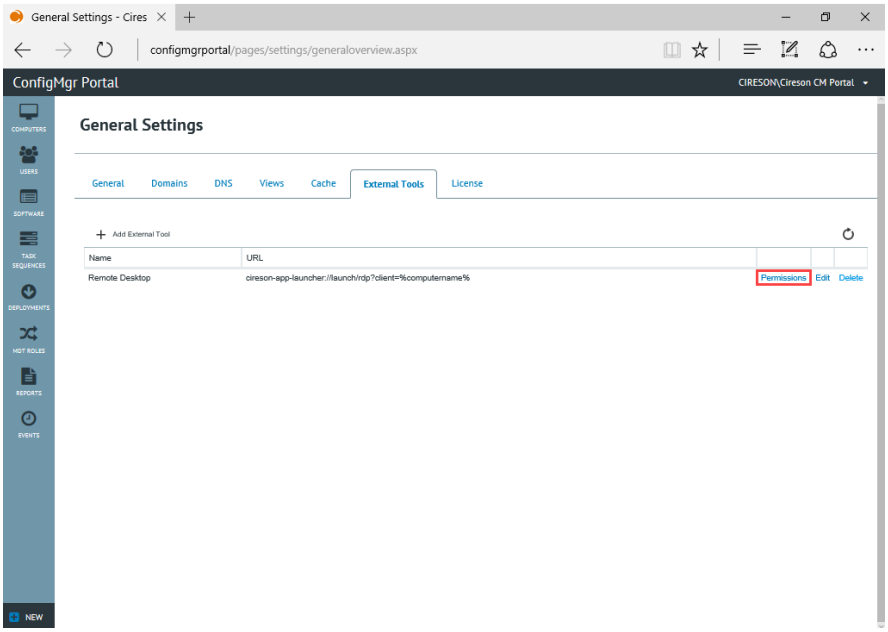


A list of the current External Tools is displayed.

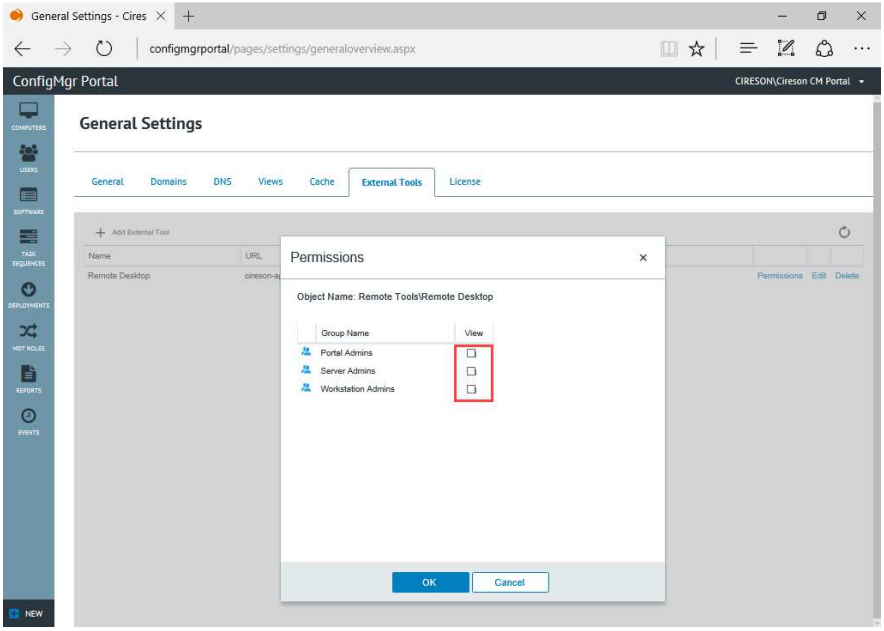
NOTE: No External Tools are configured in the Portal by default.



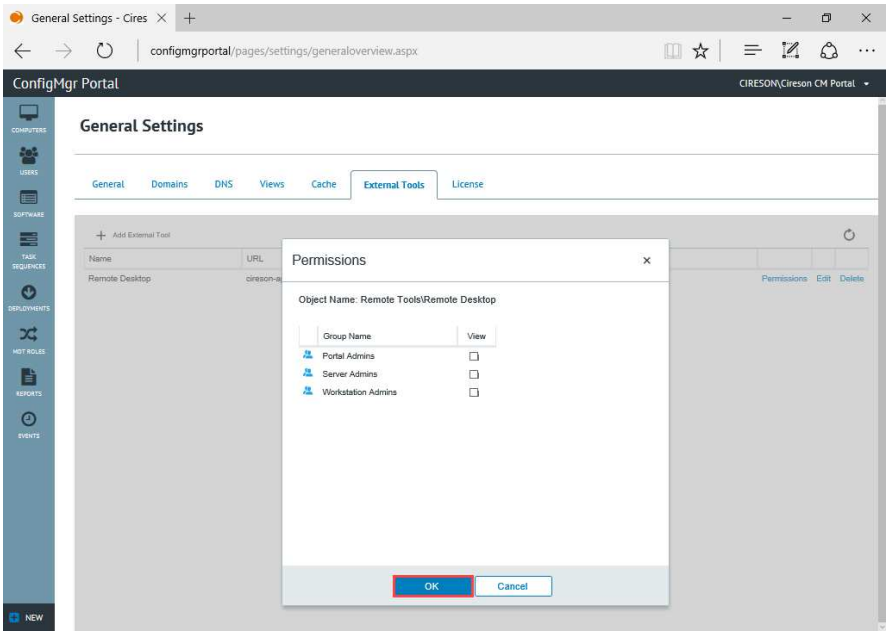
3. Click **Permissions** beside the relevant External Tool whose Permissions you wish to manage.



4. Select the **View** checkbox beside the relevant Portal groups that you want to be able to see and use the External Tool.



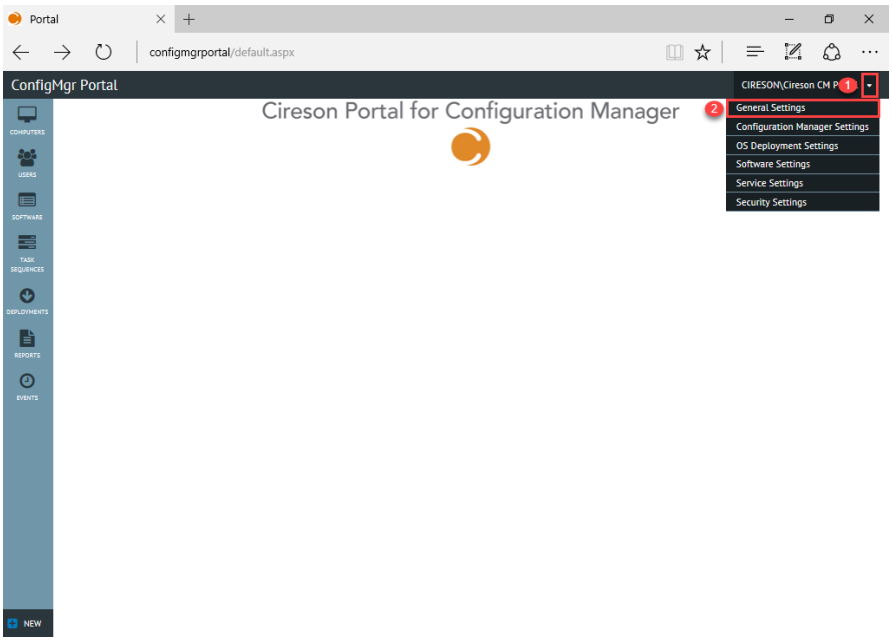
5. Click **OK** to save your changes.



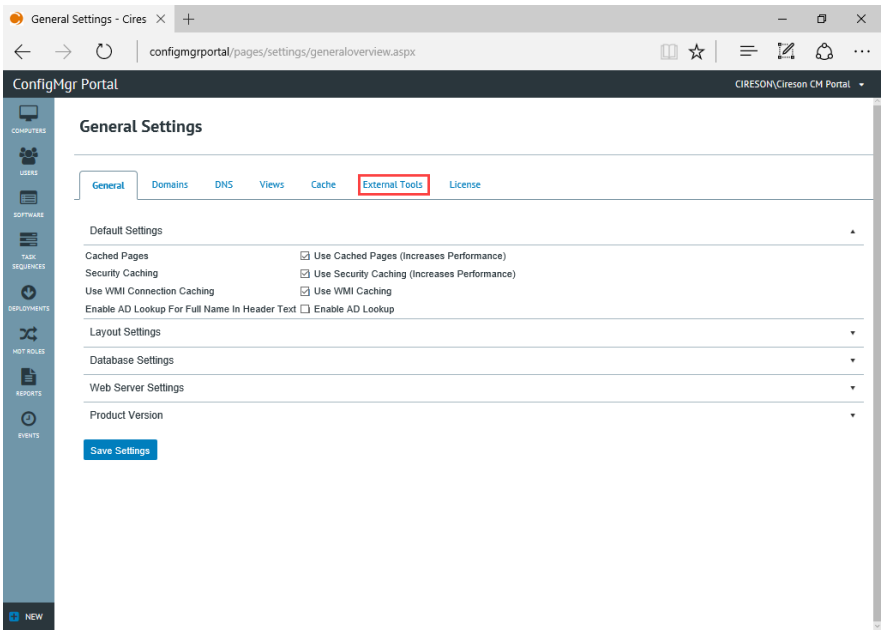
How do I delete an External Tool?

To delete an External Tool:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**

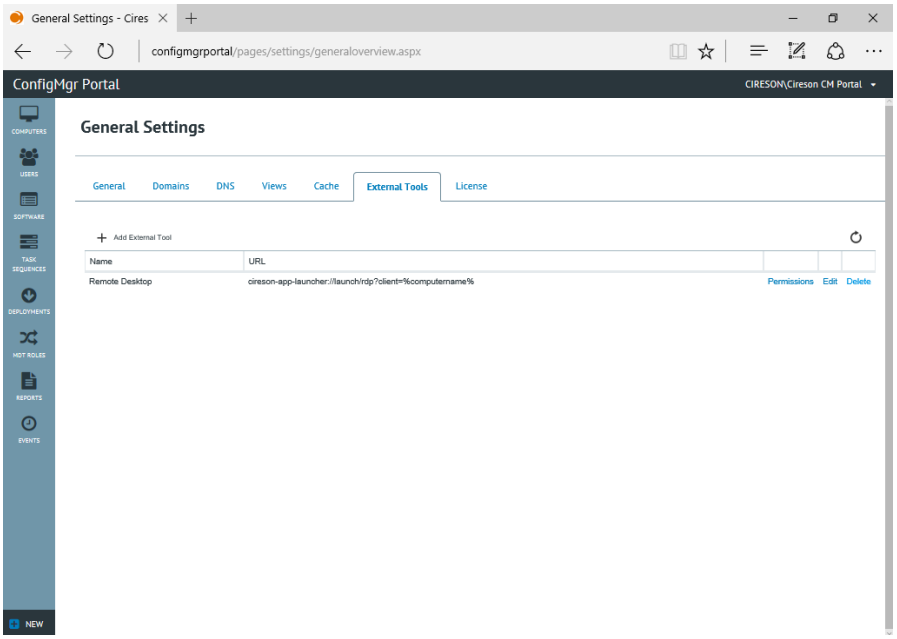


2. Click the **External Tools** tab.

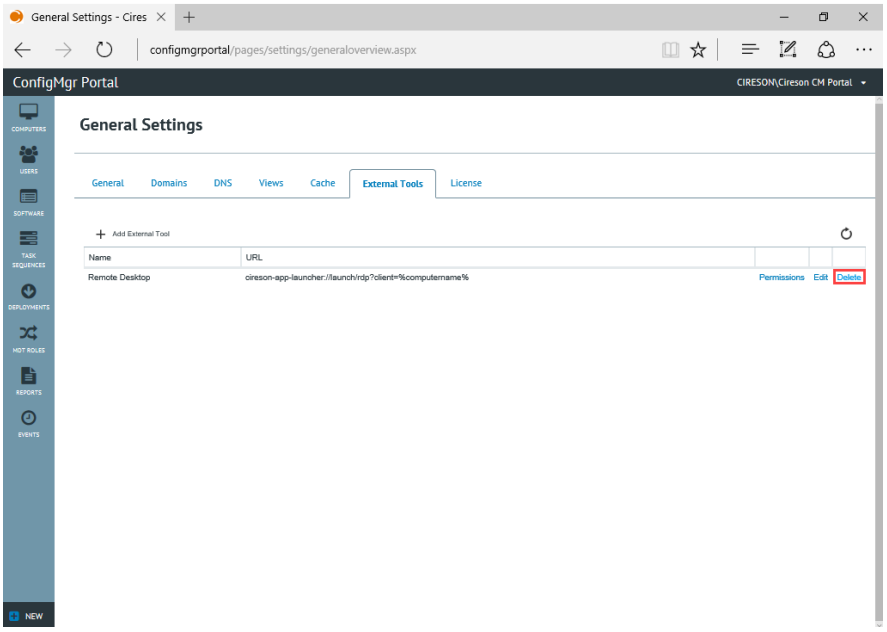


A list of the current External Tools is displayed.

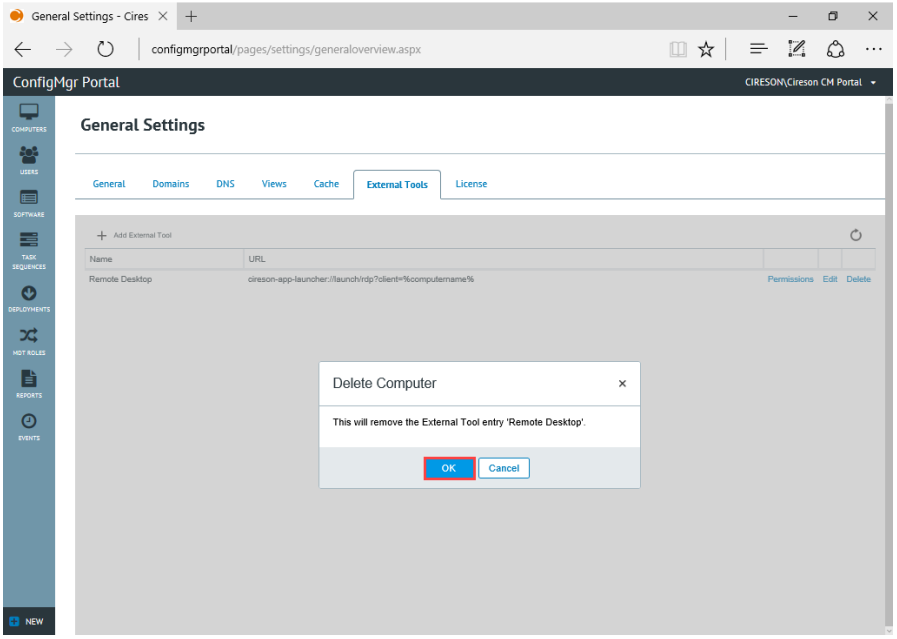
NOTE: No External Tools are configured in the Portal by default.



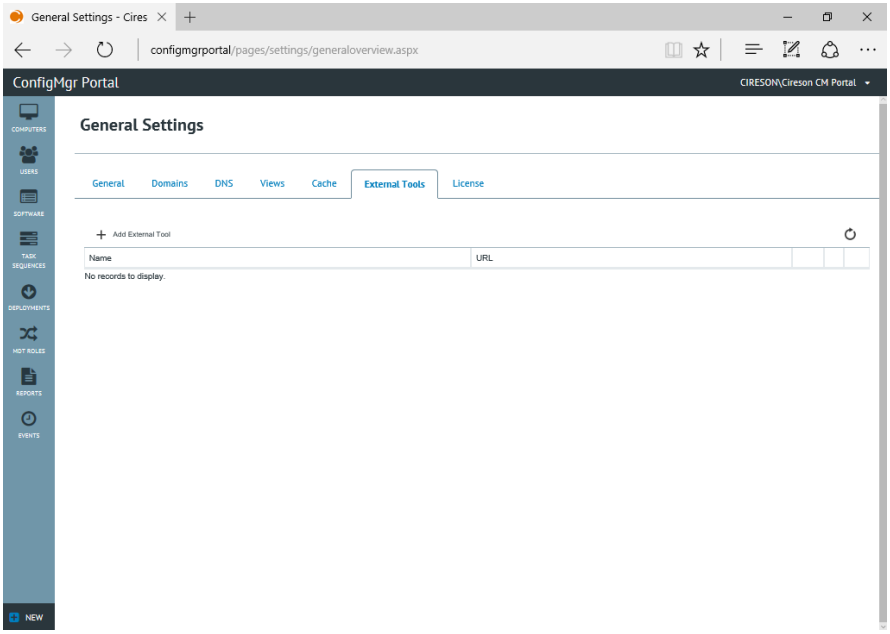
3. Click **Delete** beside the External Tool you wish to delete.



4. Click **OK** on the dialog box stating **This will remove the External Tool entry '*<external_tool_name>*'.**



The **External Tools** tab automatically refreshes and the External Tool is deleted.



Global Administrator

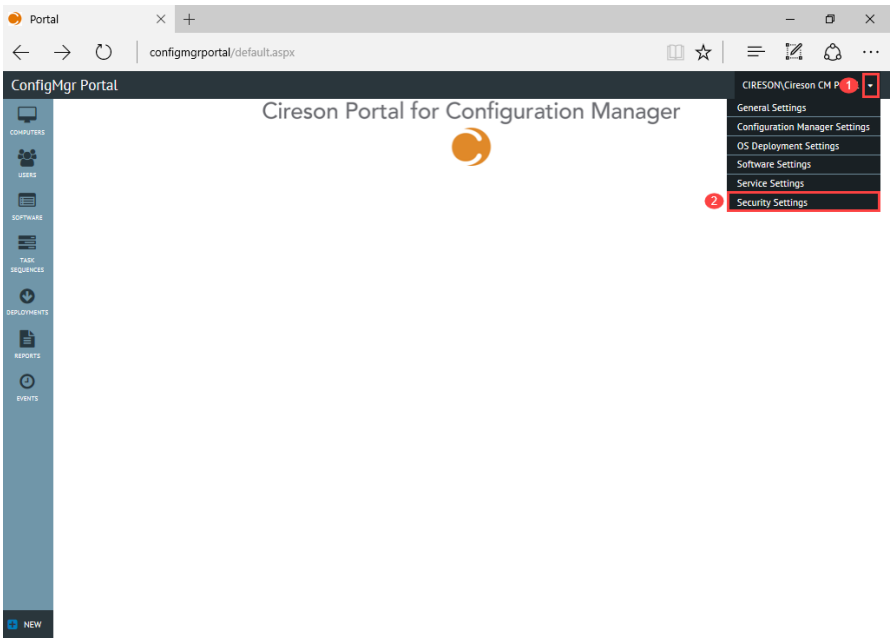
The value set for the **Global Administrator** setting controls which user/group has administrative access to the Portal. This setting is configured during the Configuration Wizard run to initially install the Portal. This section details the tasks related to the **Global Administrator** that you can perform using the Portal.

- How do I see which user/group is configured as the Global Administrator?
- How do I change the Global Administrator?

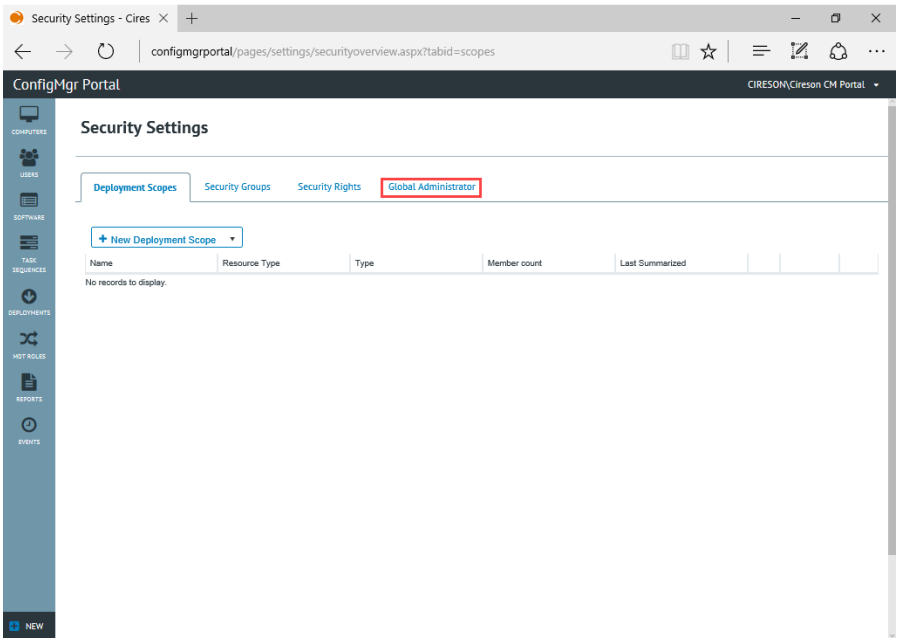
How do I see which user/group is configured as the Global Administrator?

To see which user/group is currently configured as the Global Administrator:

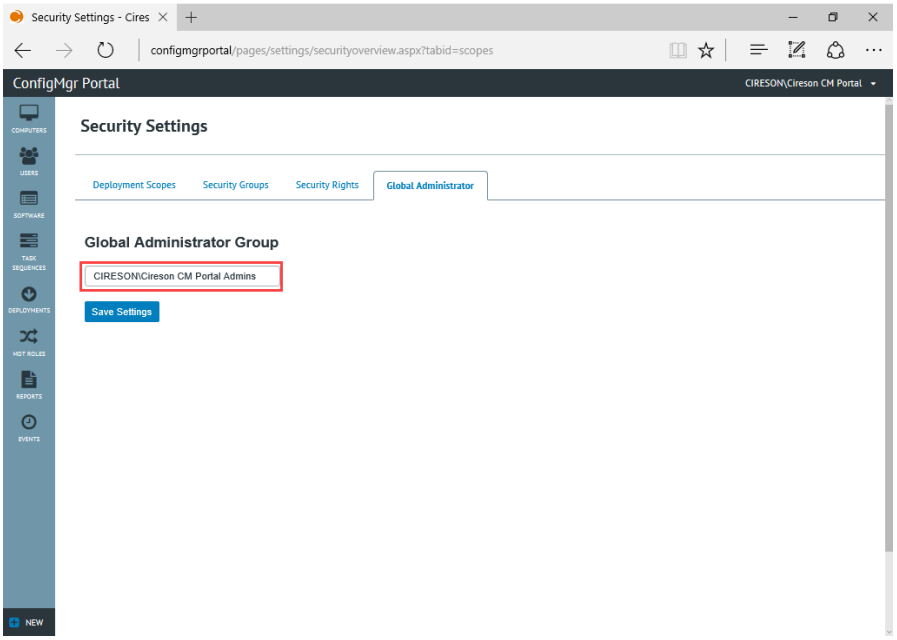
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**



2. Click the **Global Administrator** tab.



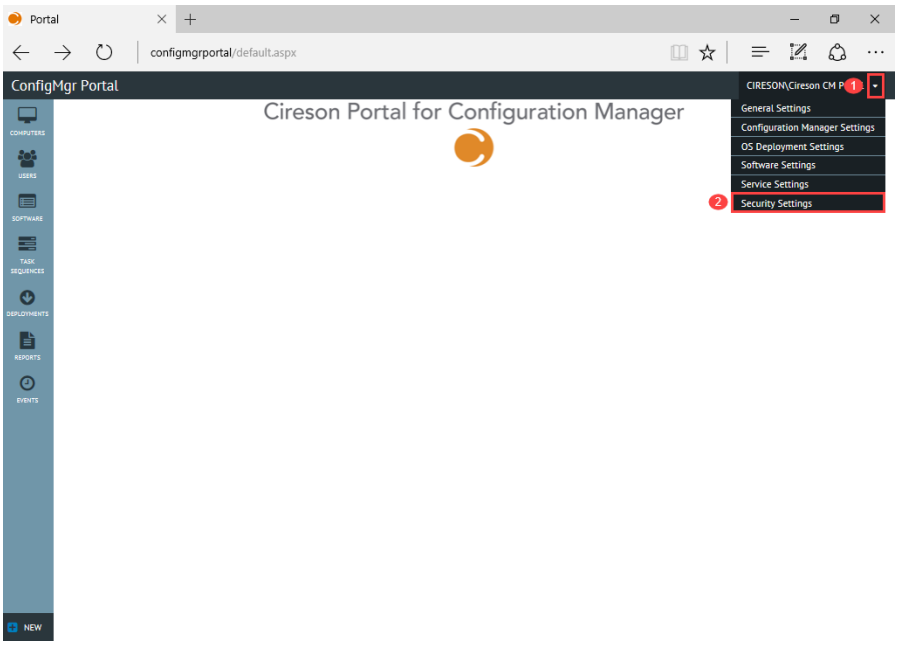
The user/group configured as the Global Administrator is shown in the **Global Administrator Group** field.



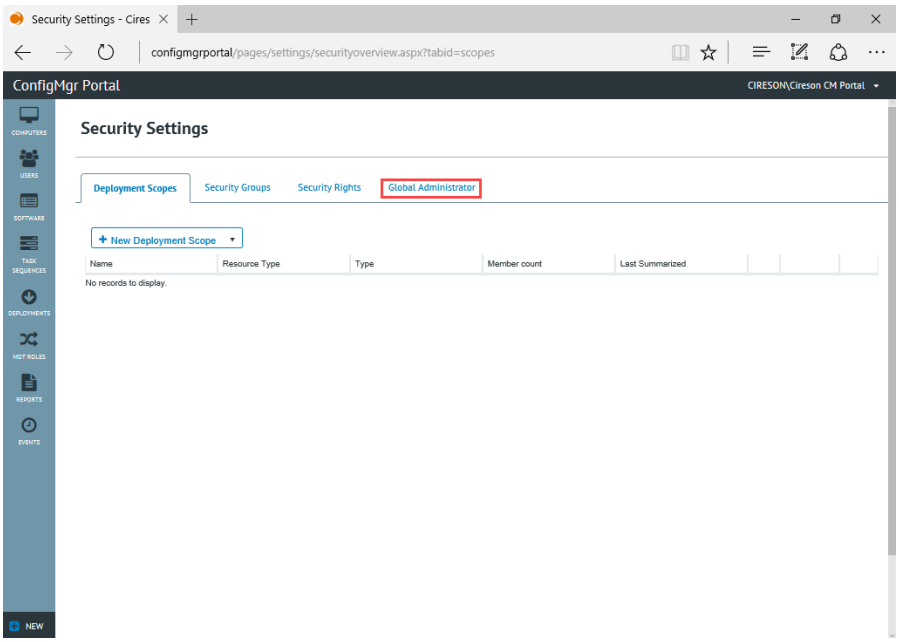
How do I change the Global Administrator?

To change the user/group configured as the Global Administrator:

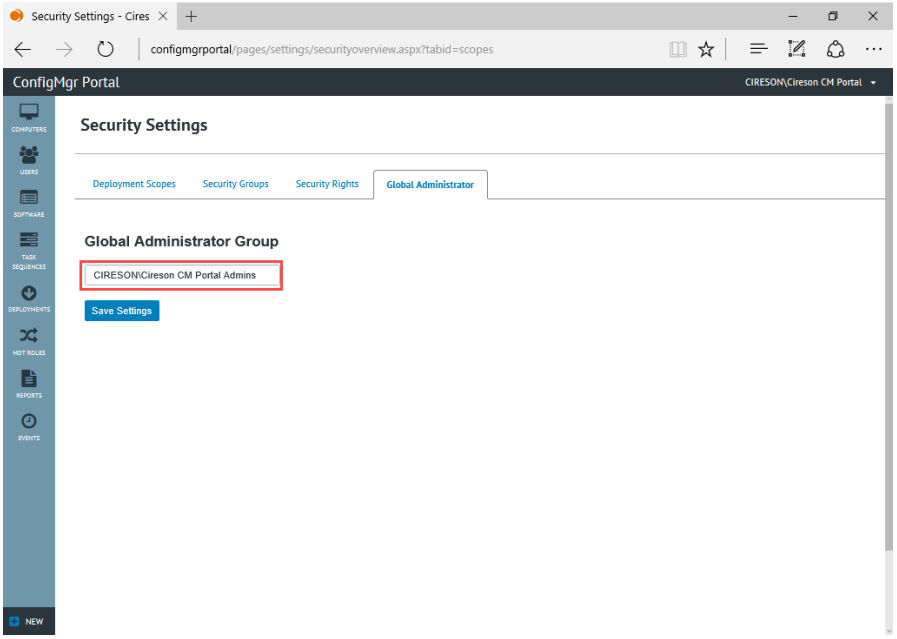
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**



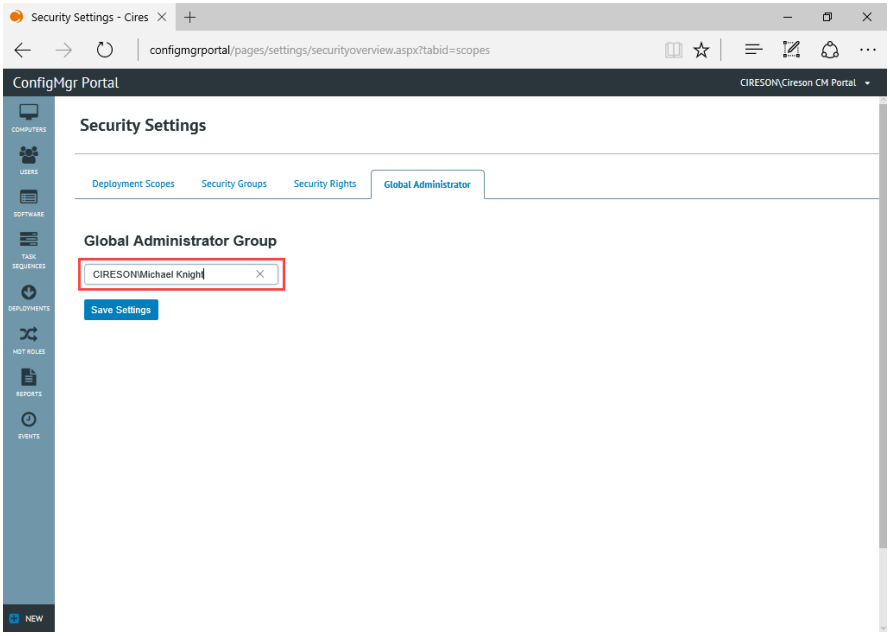
2. Click the **Global Administrator** tab.



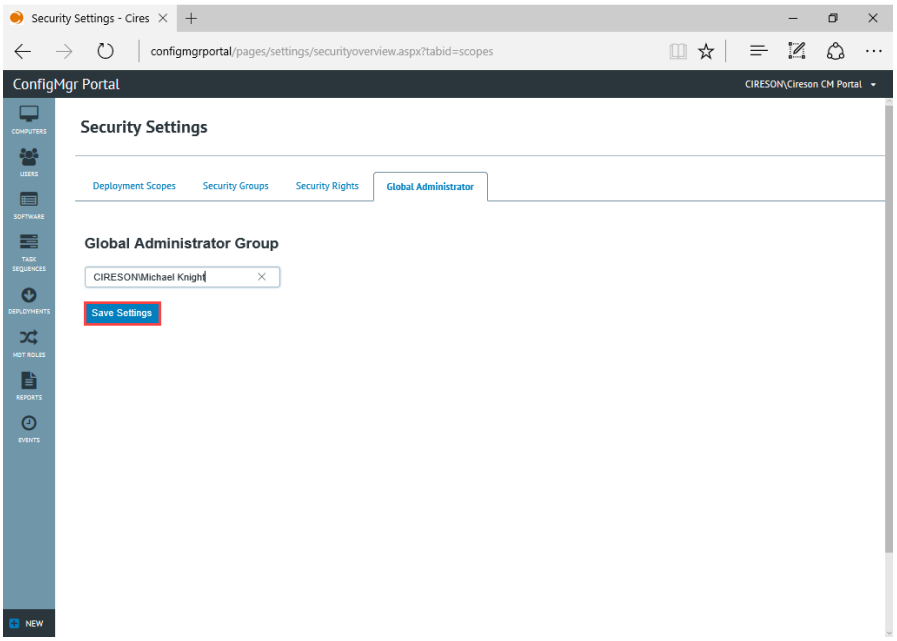
The user/group configured as the Global Administrator is shown in the **Global Administrator Group** field.



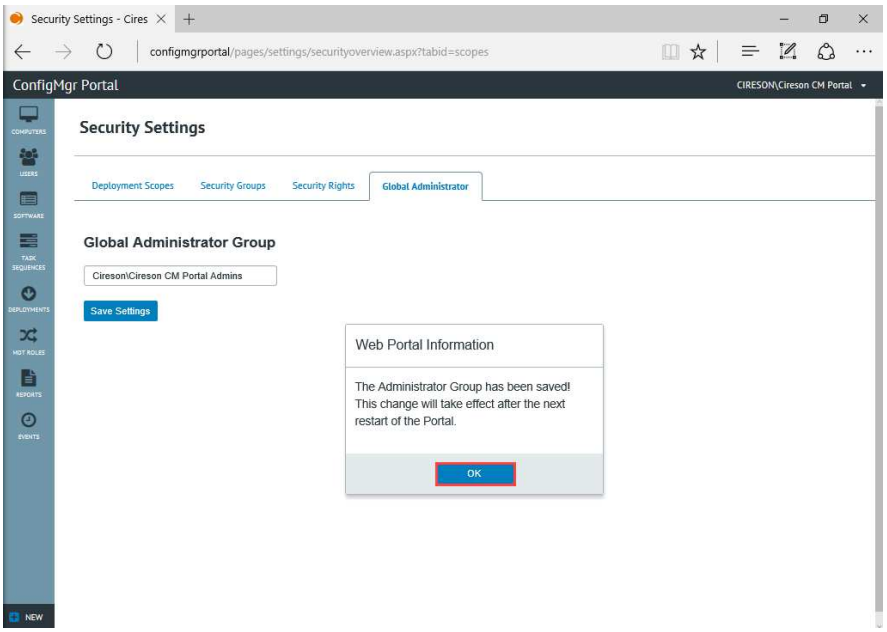
3. Enter the new user/group in the **Global Administrator Group** field.



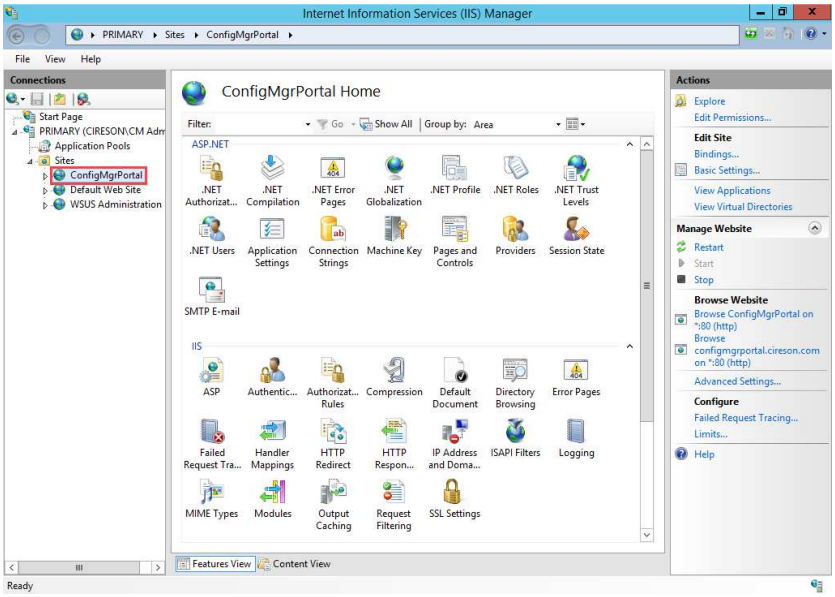
4. Click **Save Settings**



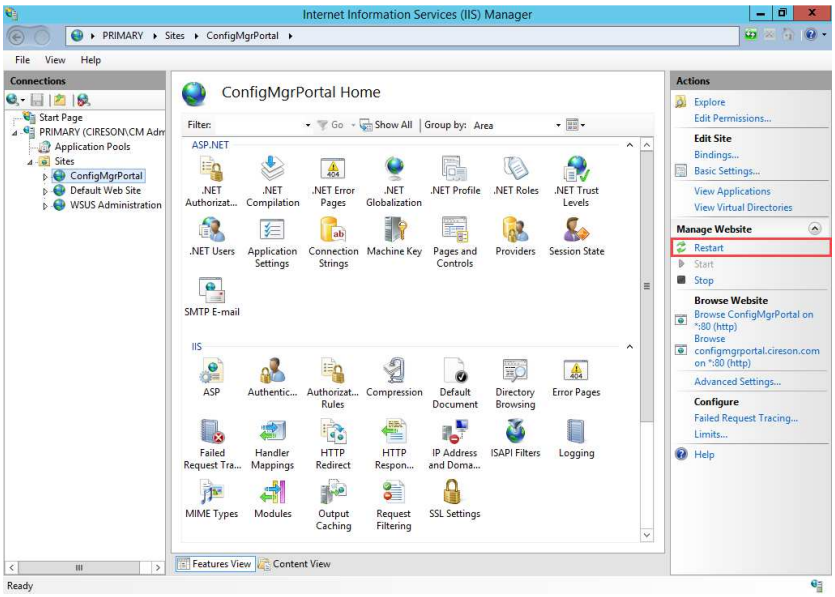
5. Click **OK** on the **Web Portal Information** dialog box stating **The Administrator Group has been saved! This change will take effect after the next restart of the Portal.**



6. Perform an IIS Reset on the server hosting the Portal for the change to take effect by either running **iisreset** from a Command prompt, or:
    a. Load **Internet Information Services (IIS) Manager**
    b. Navigate to ***<server_name>*** and expand **Sites**
    c. Click to select the Portal website (for example **ConfigMgr Portal**).



    d. Under the **Manage Website** section click **Reset**



Languages

The Cireson Portal for Configuration Manager is only currently available in English. However, the Portal allow you add additional languages for Applications and Packages with options to display time and dates in regional formats. This section details the tasks related to Languages that you can perform using the Portal.

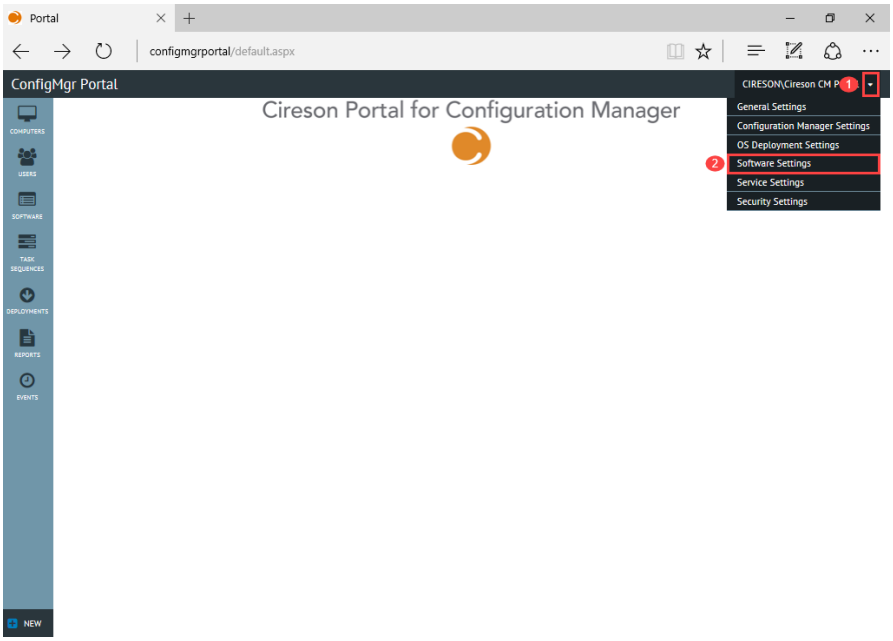
NOTE: The Portal user interface cannot be localized.

- How do I add a new Language?
- How do I edit a Language?
- How do I set the Default Language?
- How do I delete a Language?

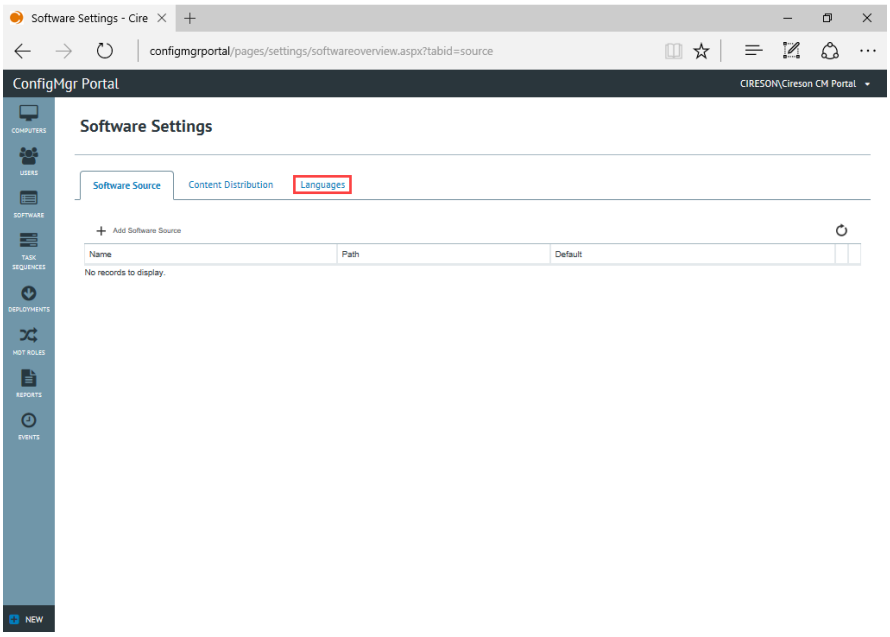
How do I add a new Language?

To add a new Language:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

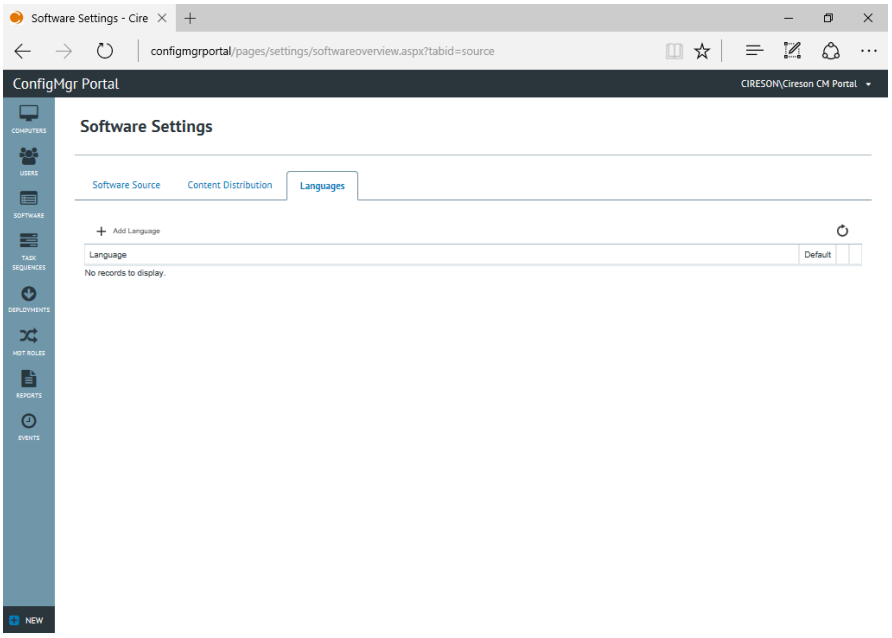


2. Click the **Languages** tab.

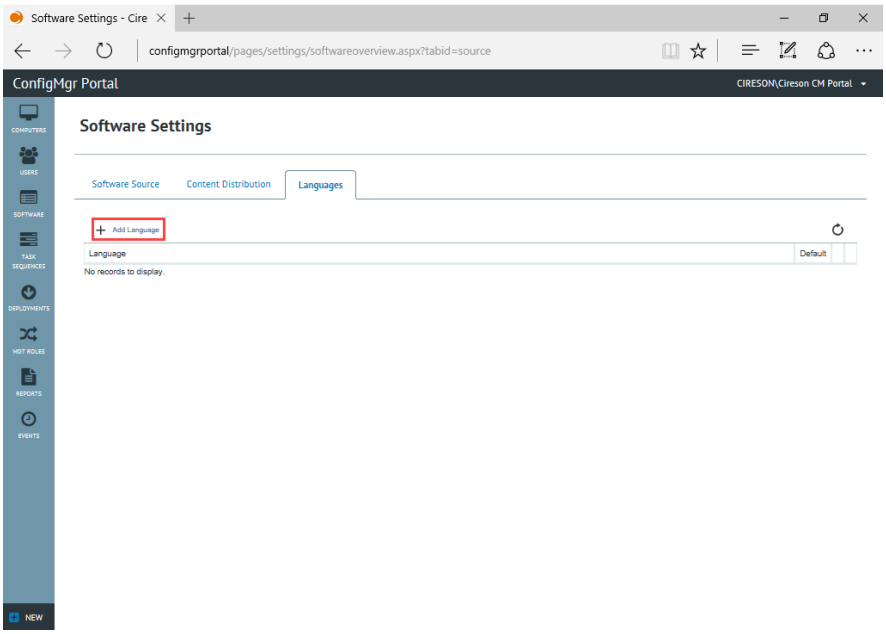


A list of the current Languages is displayed.

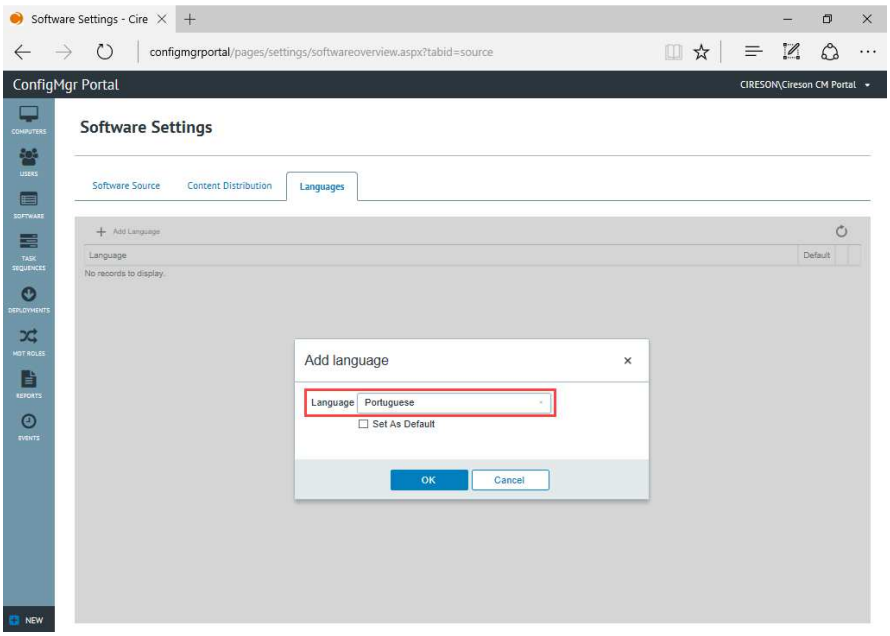
NOTE: The Portal is not configured for any Languages by default.



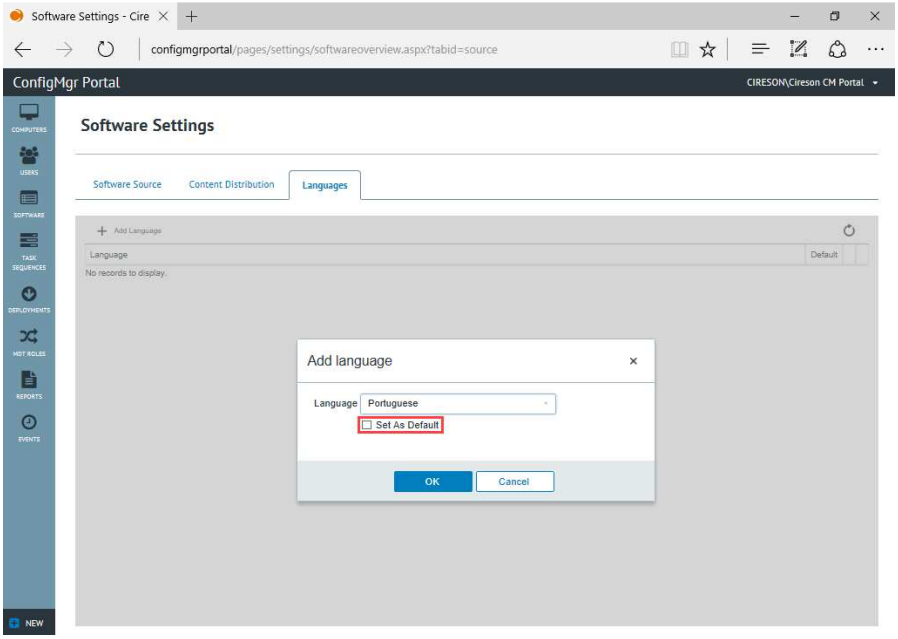
3. Click **Add Language**



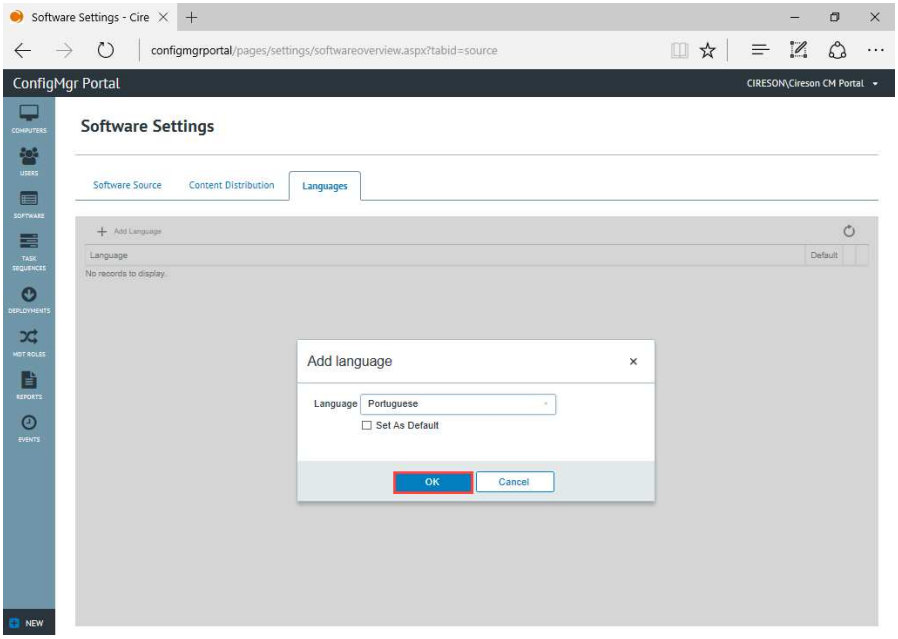
4. On the **Add language** dialog box, enter the name of the new Language in the **Language** field.



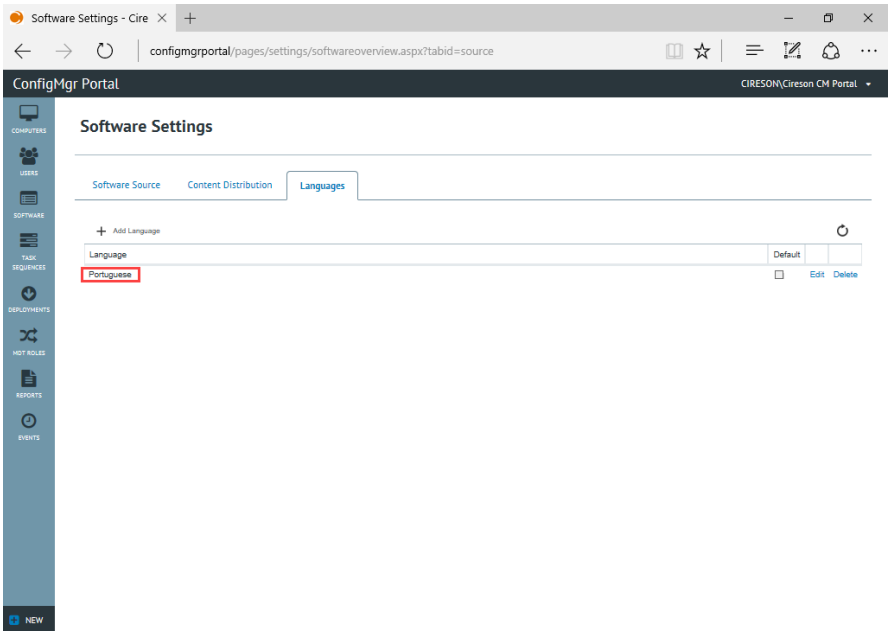
5. If required, select the **Set As default** checkbox to set this language as the default for any new applications or packages you create in the Portal.



6. Click **OK**



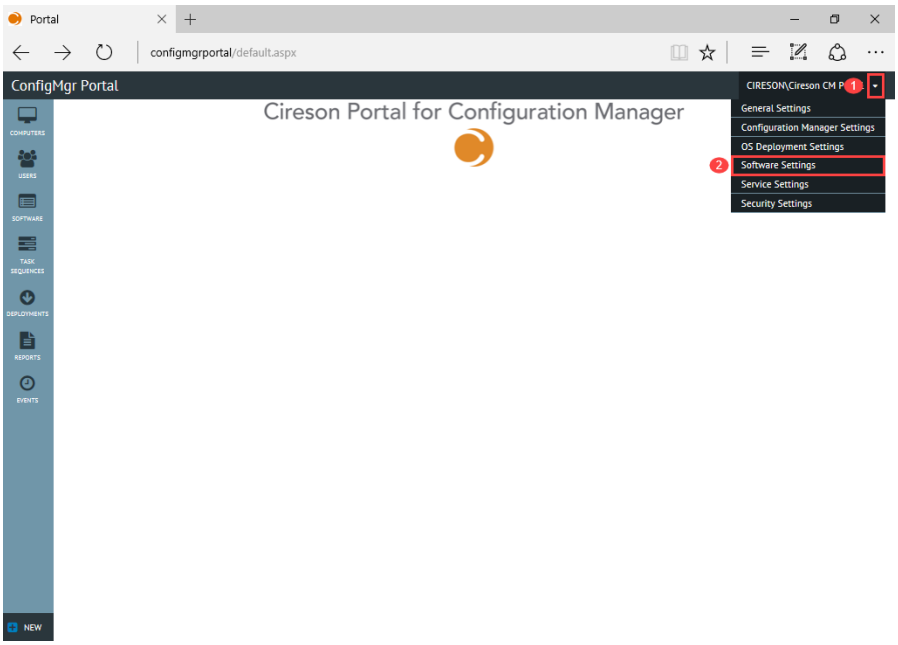
The newly added language appears in the **Languages** tab.



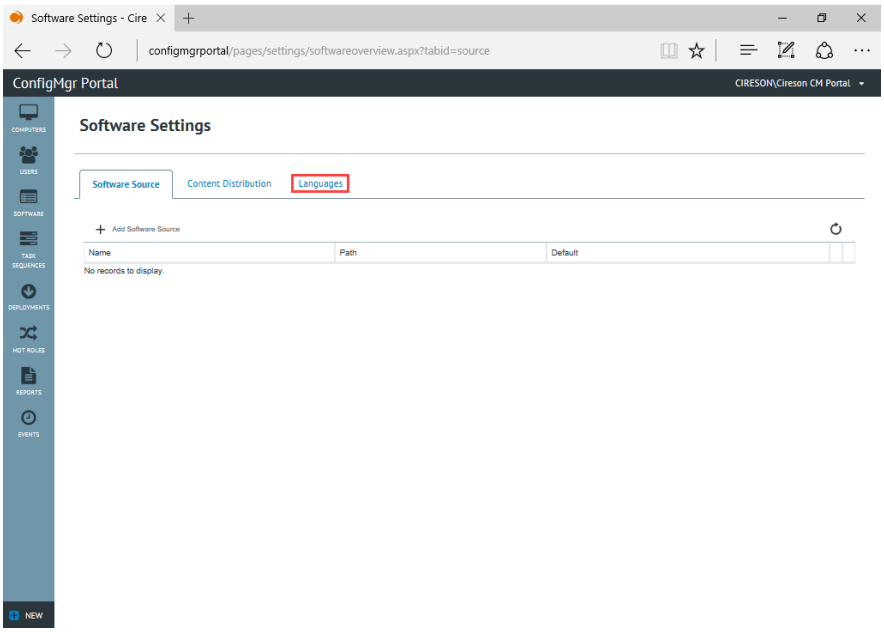
How do I edit a Language?

To edit a Language:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

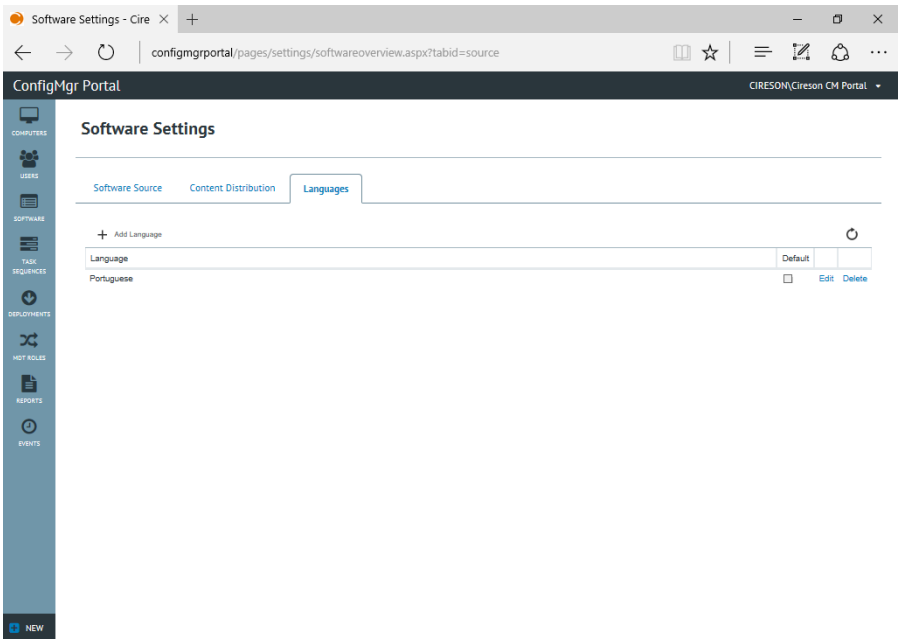


2. Click the **Languages** tab.

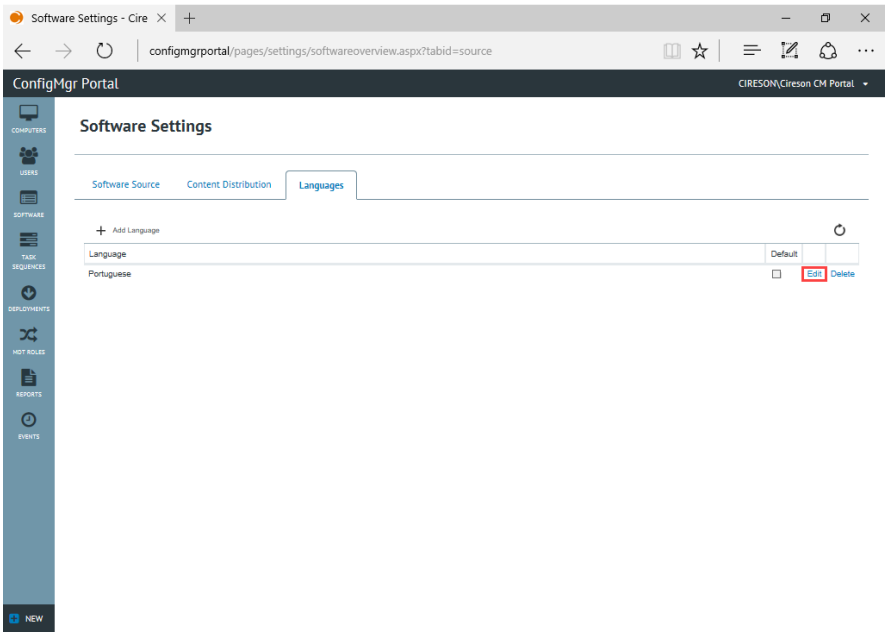


A list of the current Languages is displayed.

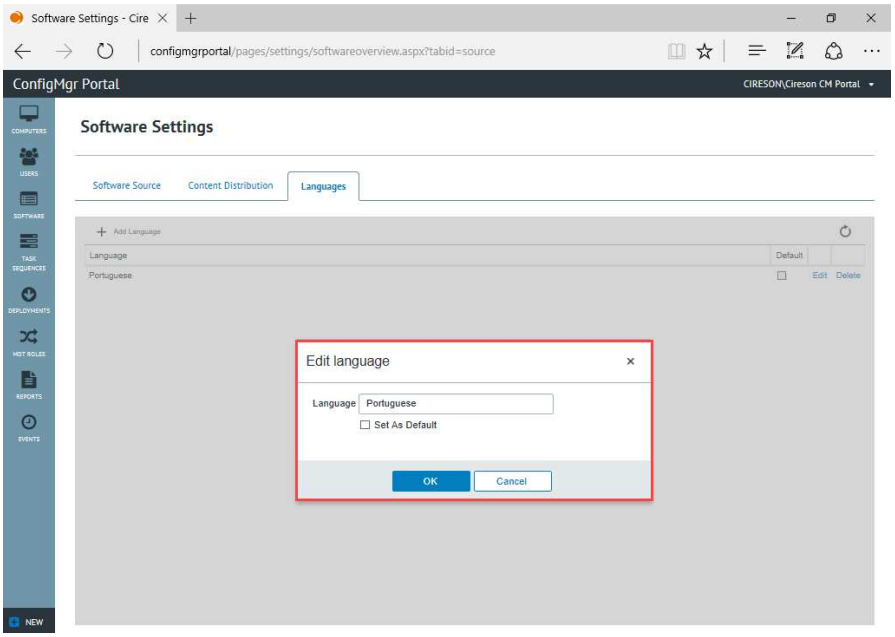
NOTE: The Portal is not configured for any Languages by default.



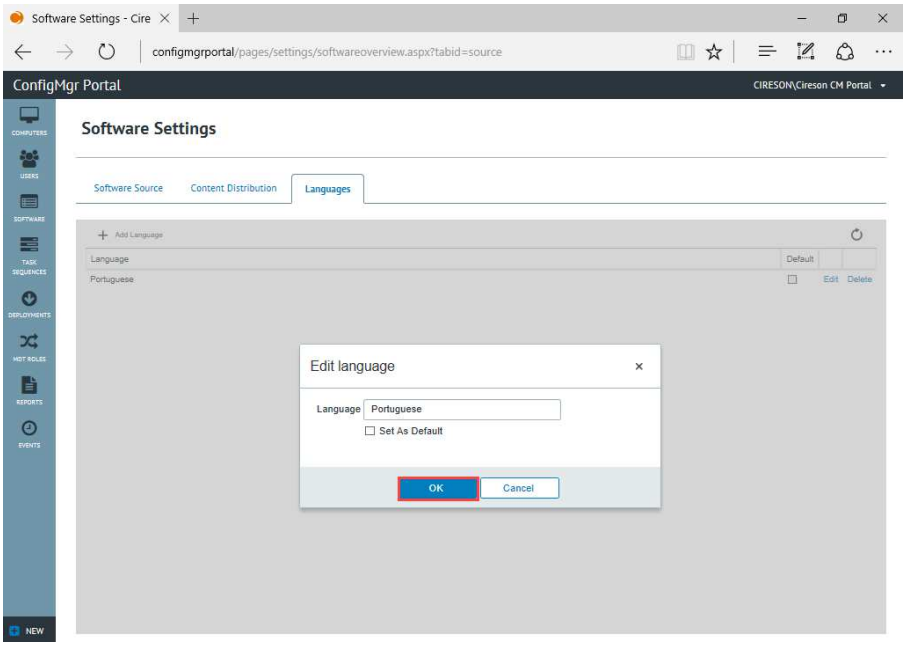
3. Click **Edit** beside the Language you want to edit.



4. On the **Edit language** dialog box, make the required changes to the Language.



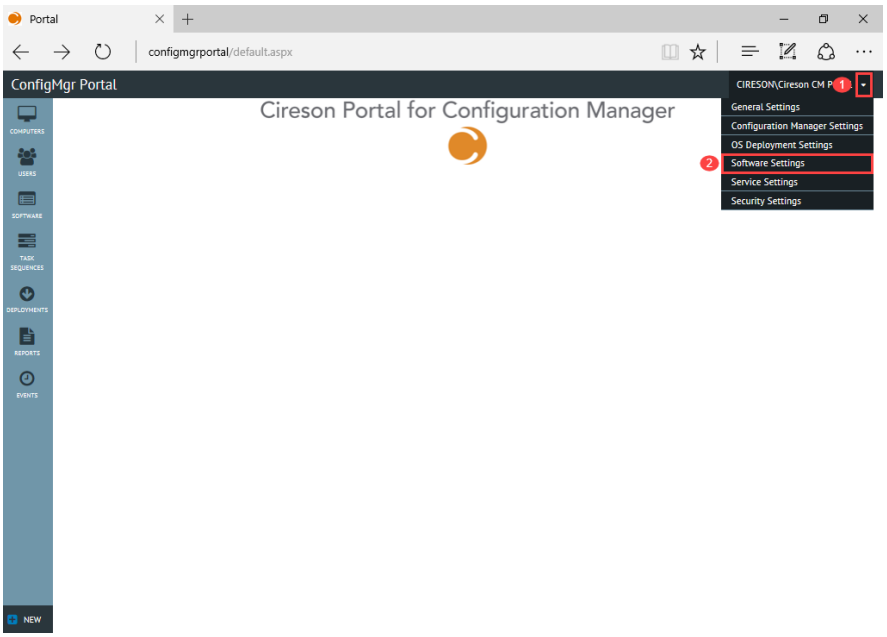
5. Click **OK** to save your settings.



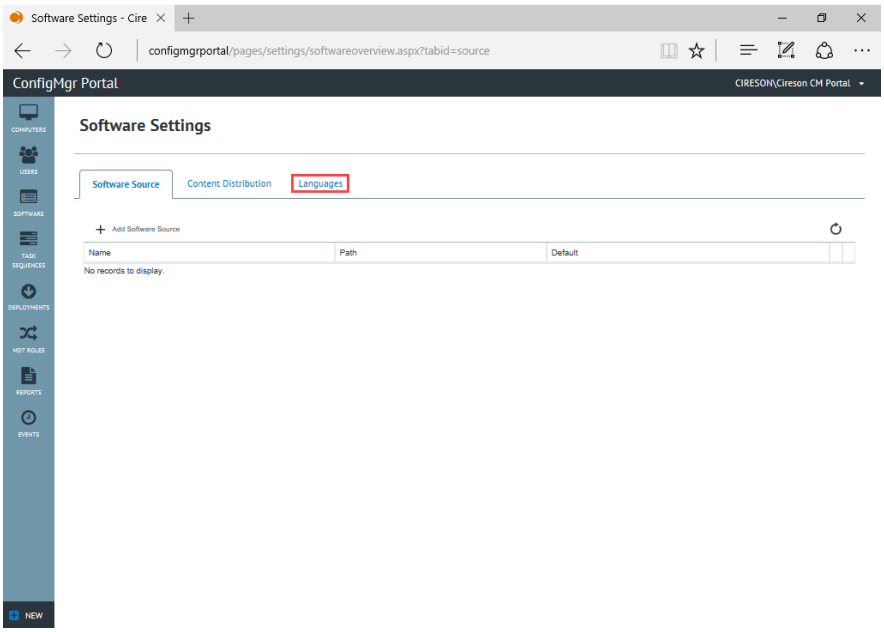
How do I set the Default Language?

To set the default Language for any Applications or Packages created via the Portal:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

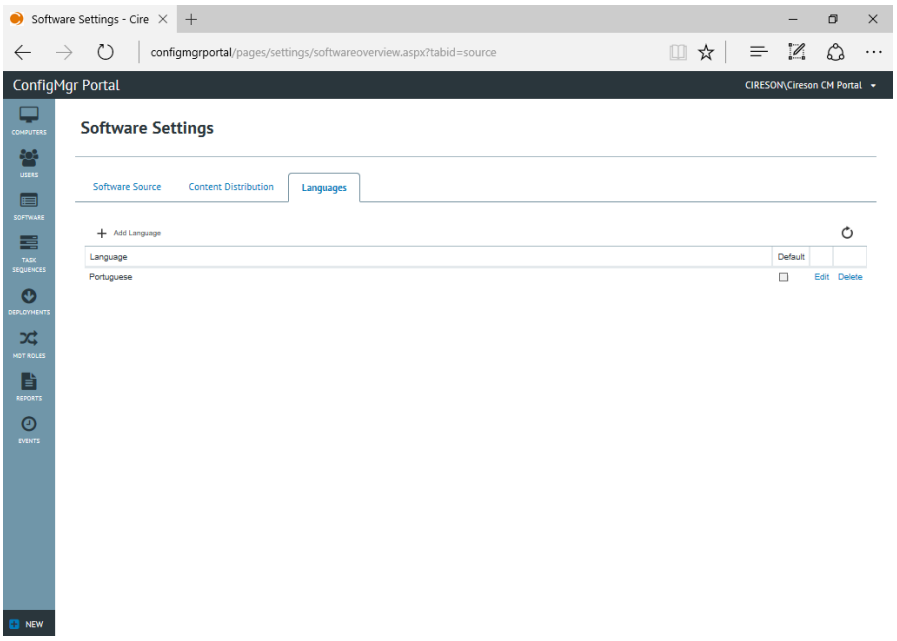


2. Click the **Languages** tab.

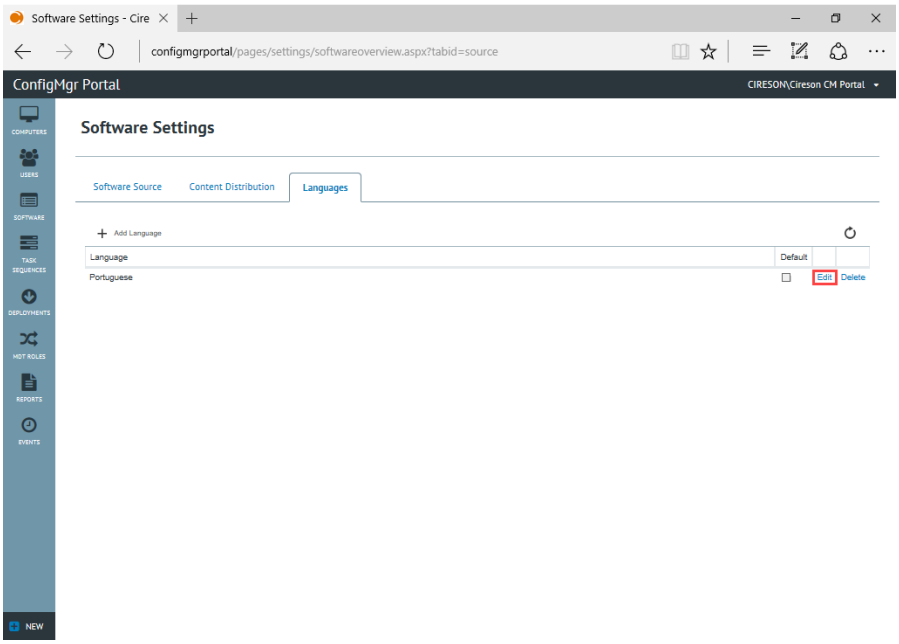


A list of the current Languages is displayed.

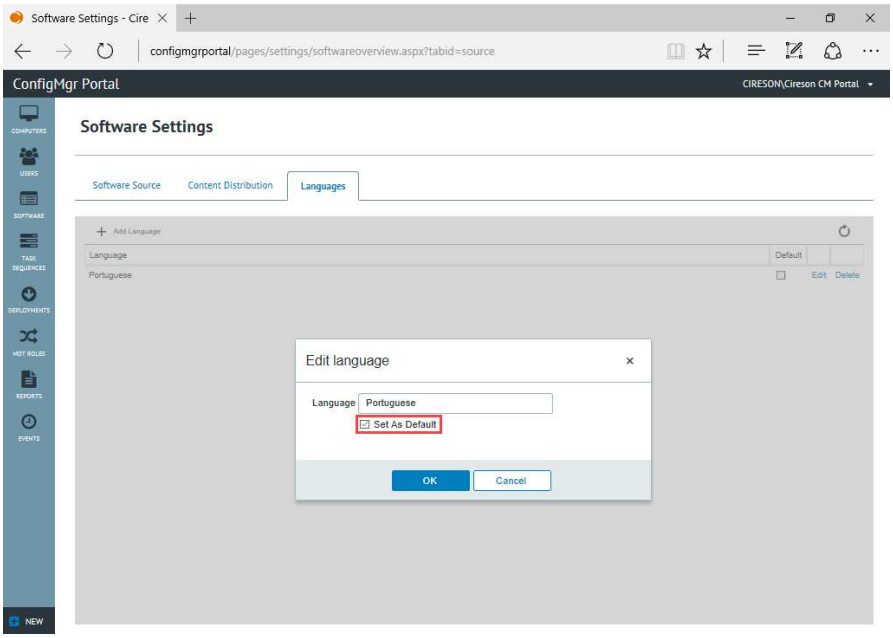
NOTE: The Portal is not configured for any Languages by default.



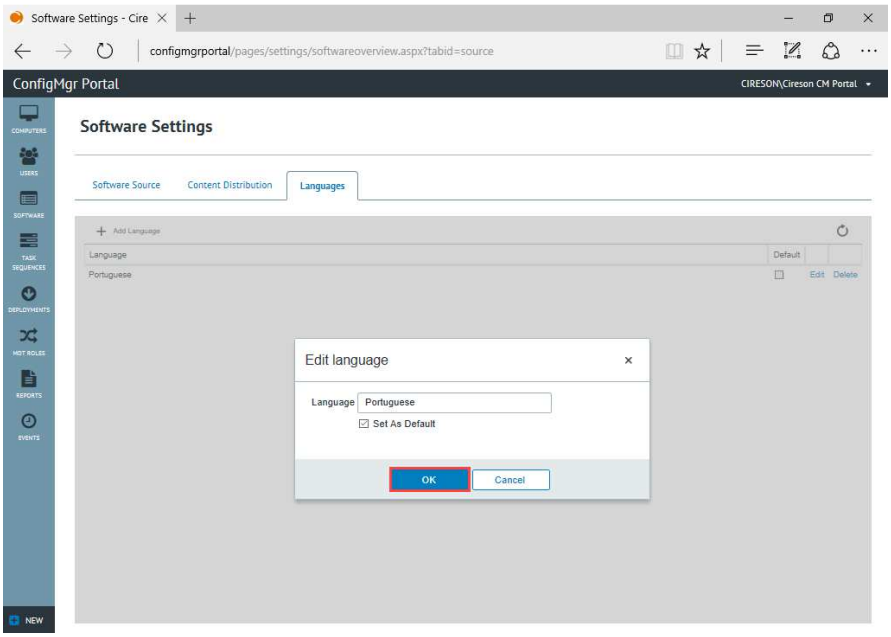
3. Click **Edit** beside the Language you want to set as the default.



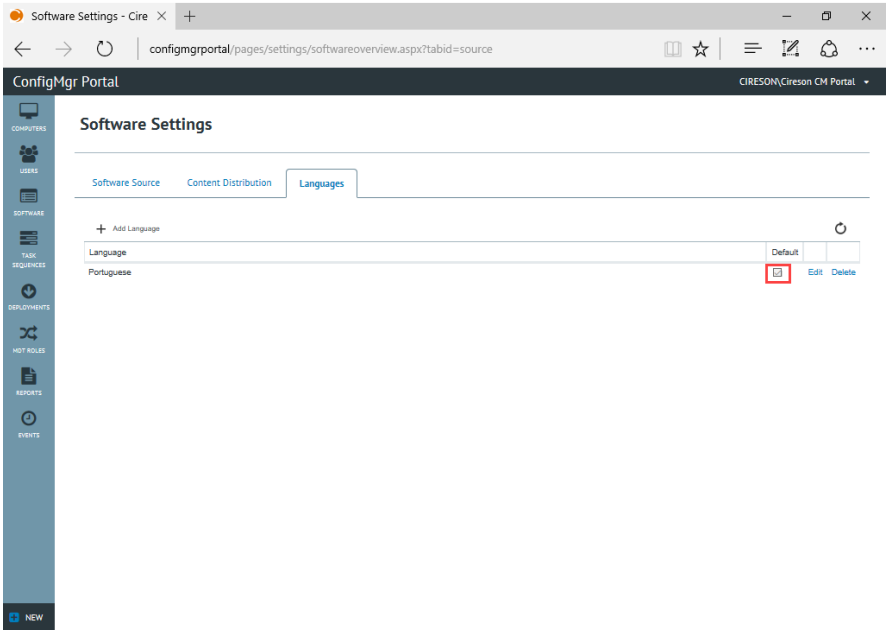
4. On the **Edit language** dialog box, check the **Set As Default** checkbox.



5. Click **OK** to save your settings.



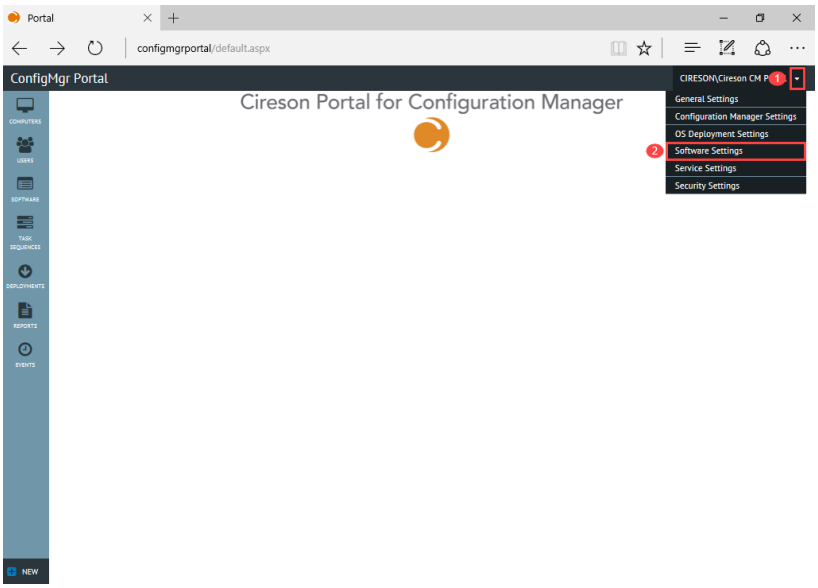
The Portal reloads showing the **Default** checkbox selected beside the Language you have just set as the default.



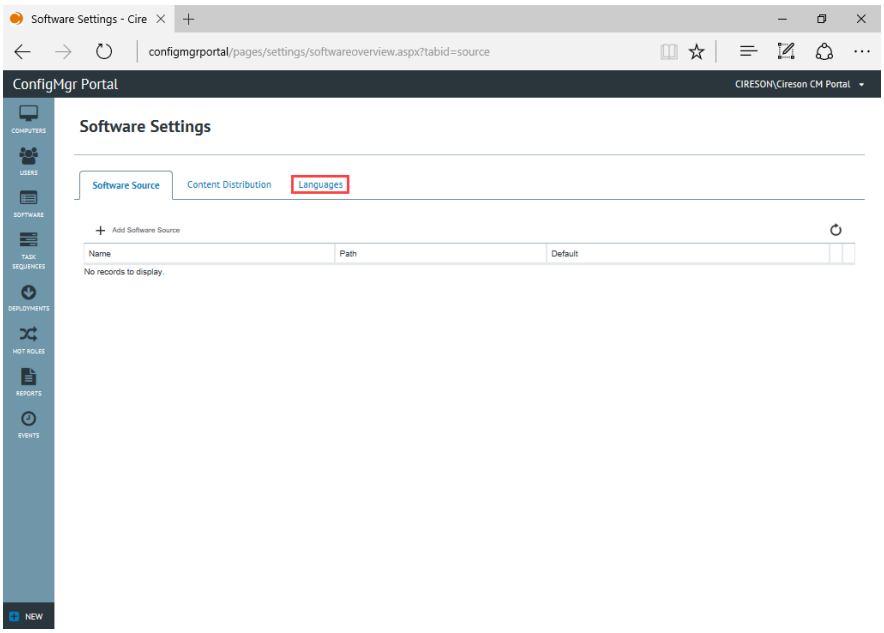
How do I delete a Language?

To delete a Language:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

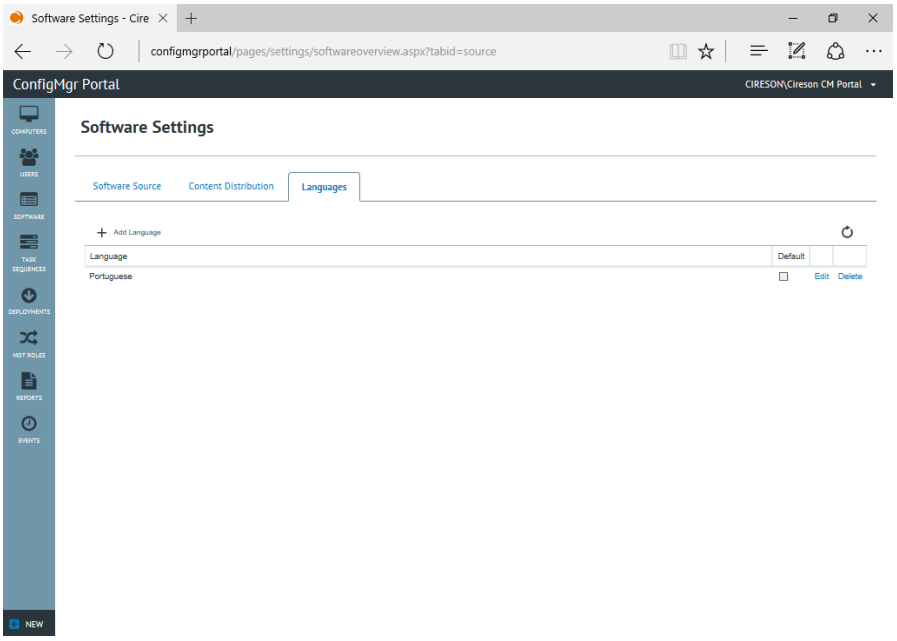


2. Click the **Languages** tab.

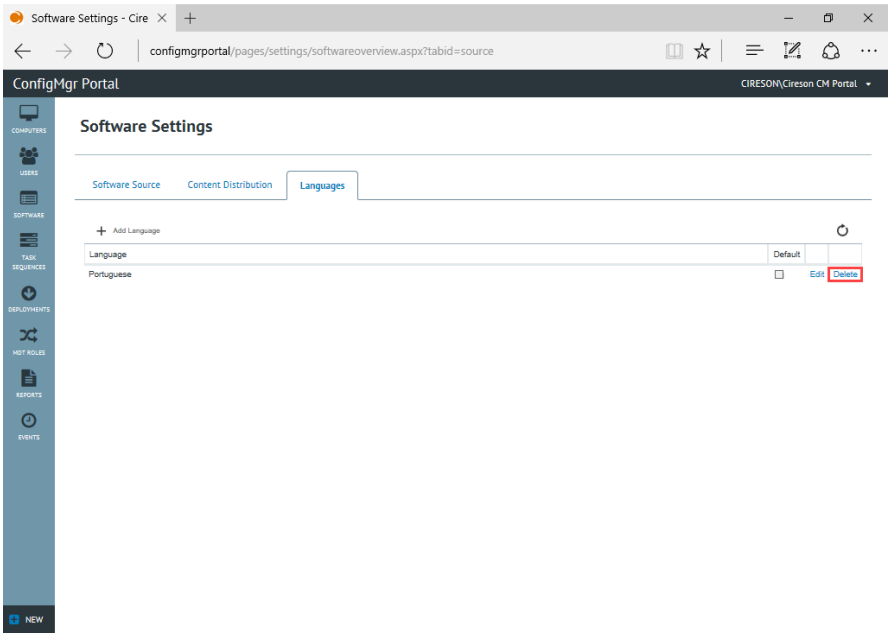


A list of the current Languages is displayed.

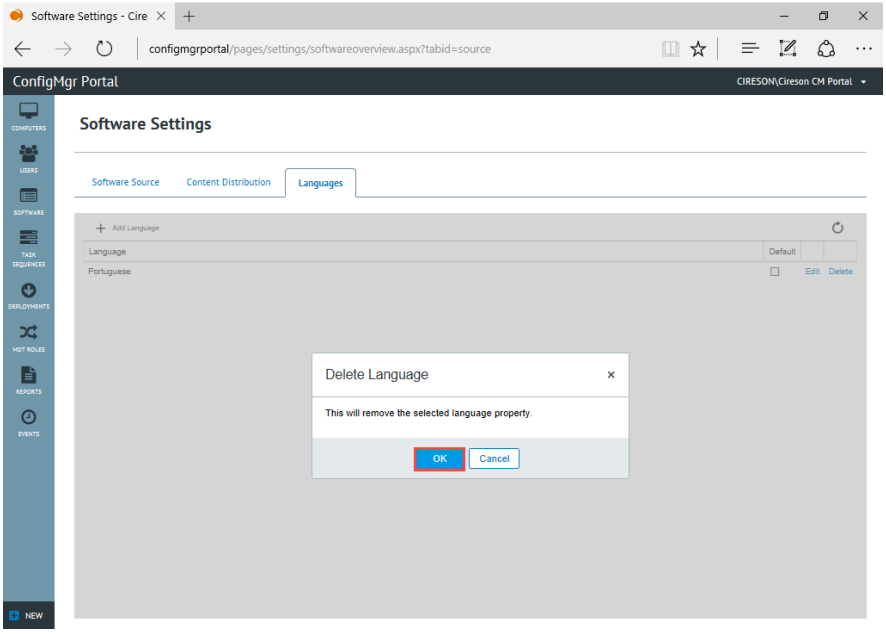
NOTE: The Portal is not configured for any Languages by default.



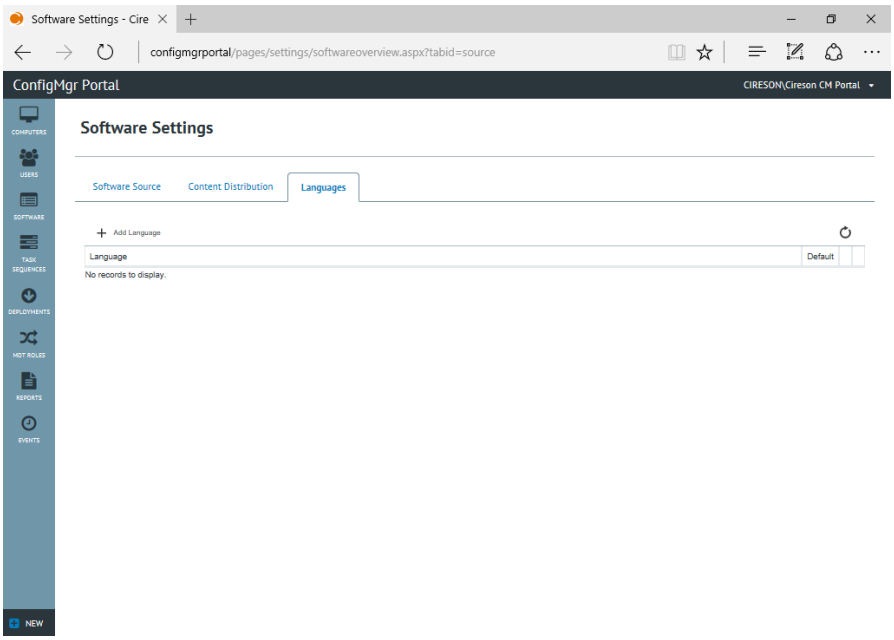
3. Click **Delete** beside the Language you want to delete.



4. Click **OK** on the **Delete Language** dialog box stating **This will remove the selected language property.**



The Language is deleted and no longer appears on the **Languages** tab.



MDT Roles

This section details the tasks related to MDT Roles that you can perform using the Portal.

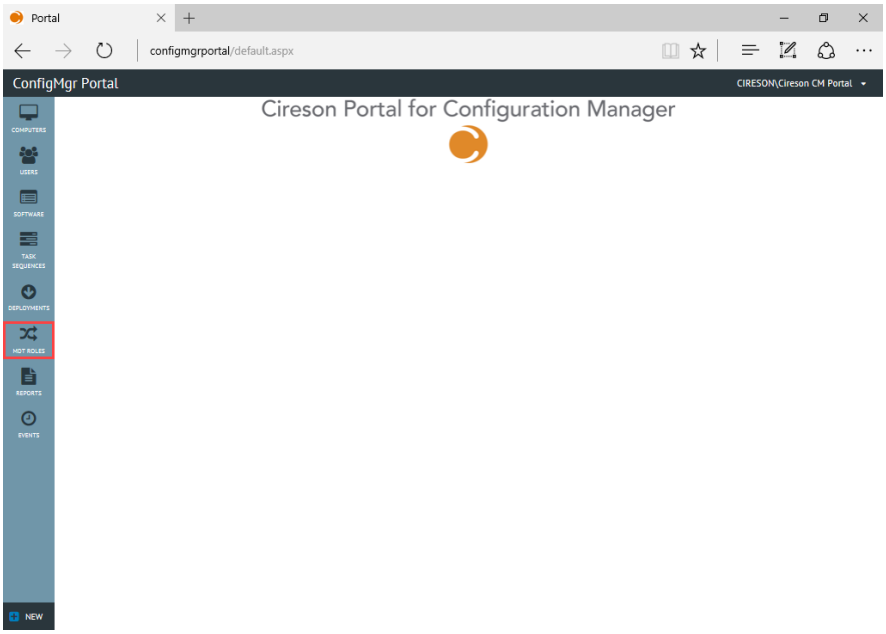
- How do I create a new MDT Role?
- How do I edit an MDT Role?
- How do I rename an MDT Role?
- How do I manage the permissions on an MDT Role?
- How do I delete an MDT Role?

How do I edit an MDT Role?

To edit an MDT Role:

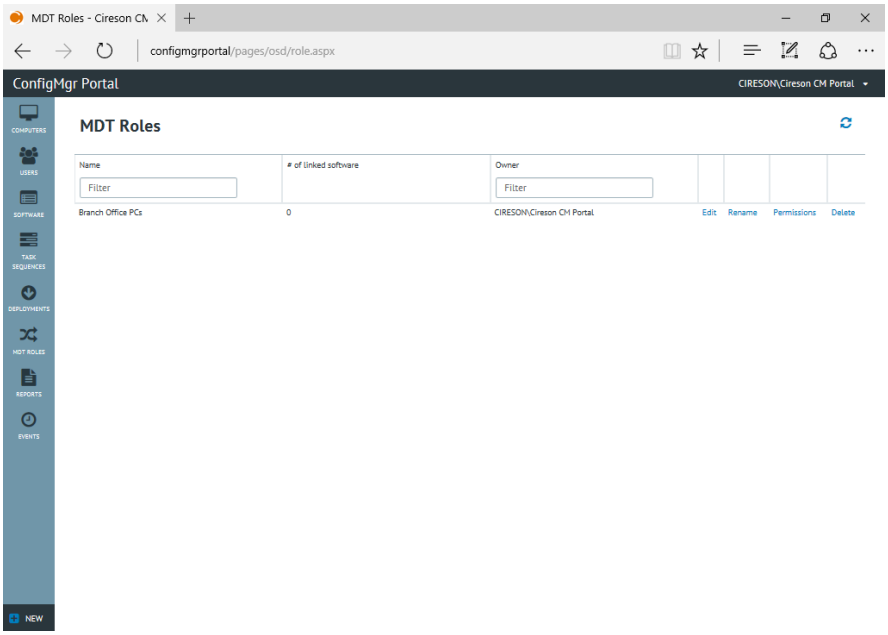
> **NOTE:** Before you can edit an MDT Role, both the MDT Role and the software you want to add to the role need to have already been created. See:
>
> - How do I create a new MDT Role?
> - How do I create a new Software Application?/How do I create a new Software Package?

1. At the bottom of the **Navigation Menu**, select **MDT Roles**

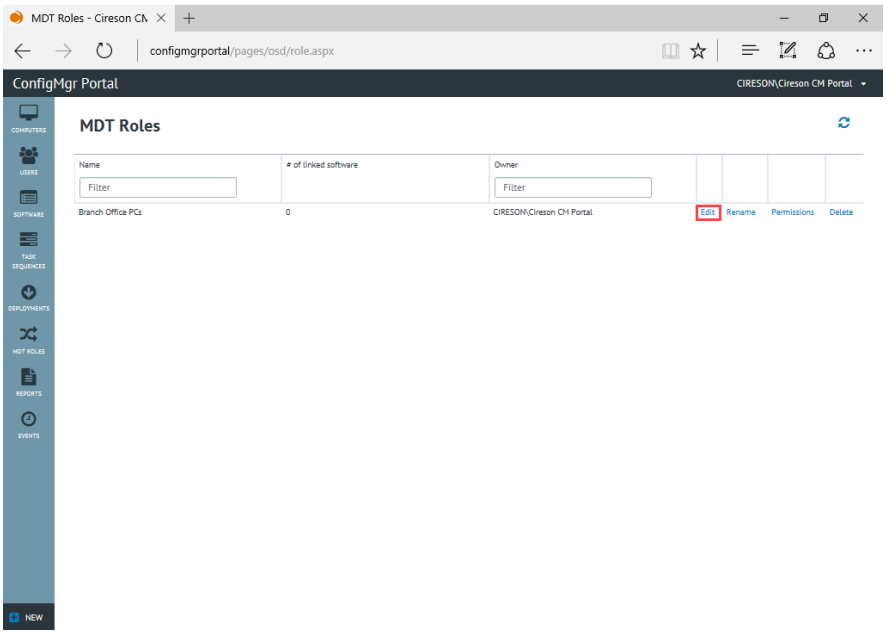


The **MDT Roles** page is then displayed showing a list of the current MDT Roles that exist.

NOTE: The Portal does not ship with any default MDT Roles.

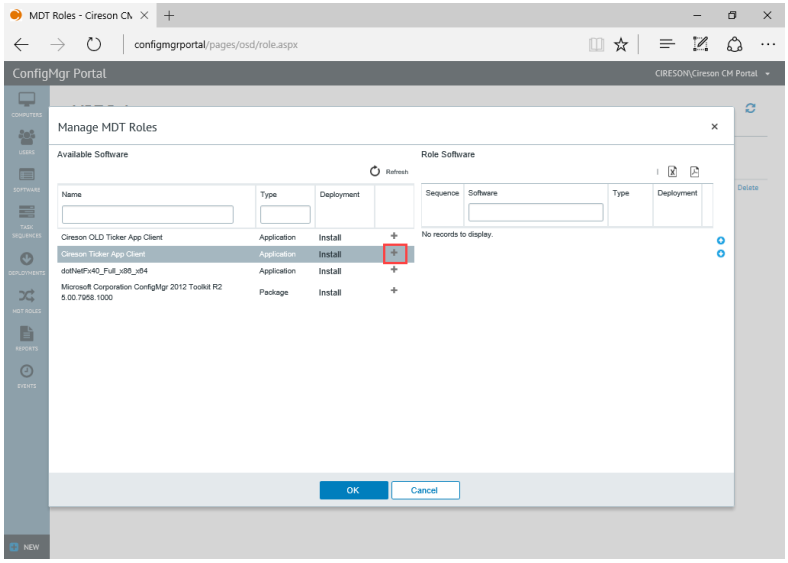


2. Click **Edit** beside the MDT Role you want to edit.

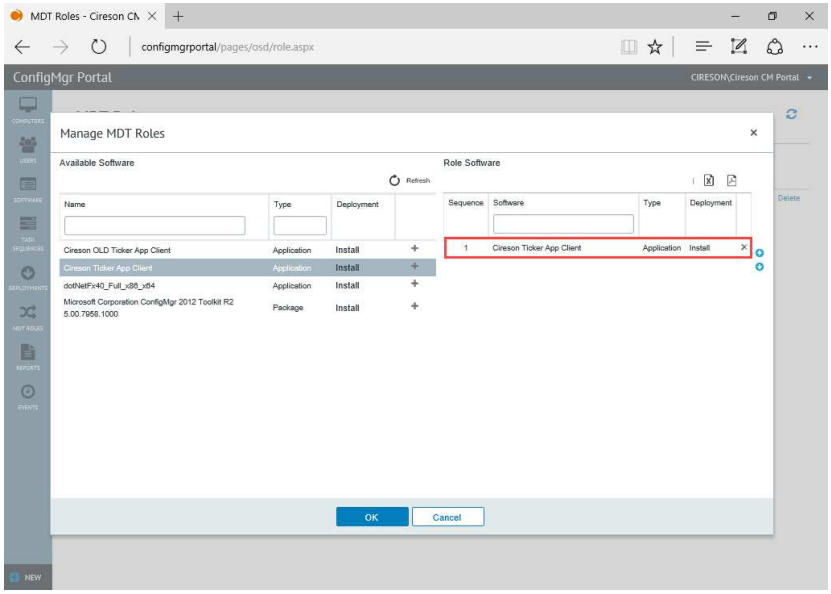


3. On the **Manage MDT Roles** page, make the required changes:

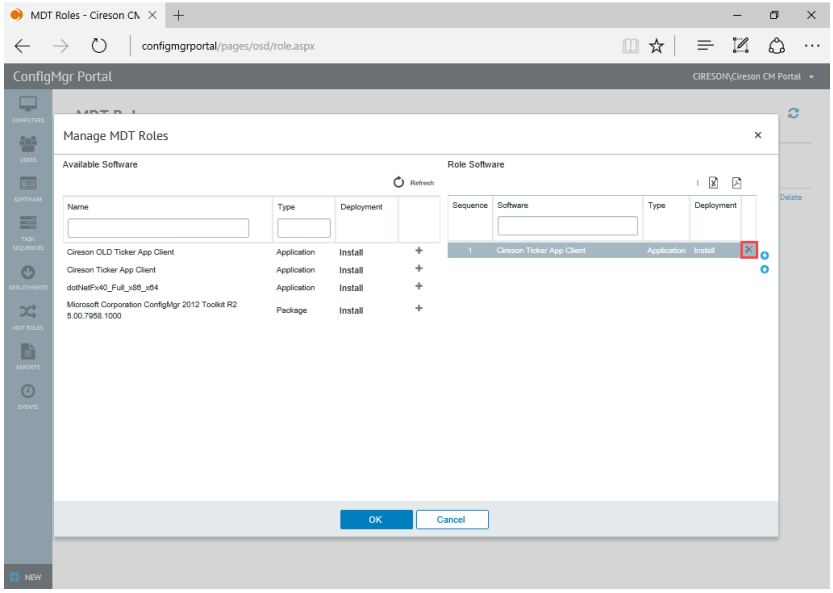
    a. To add software to the role click the **+** beside the relevant software in the **Available Software** list.



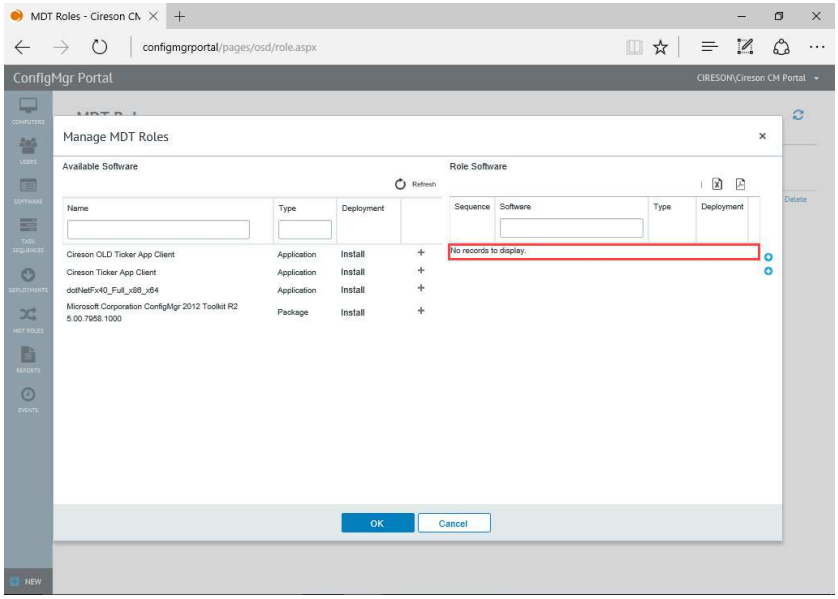
The software will be added to the **Role Software** list.



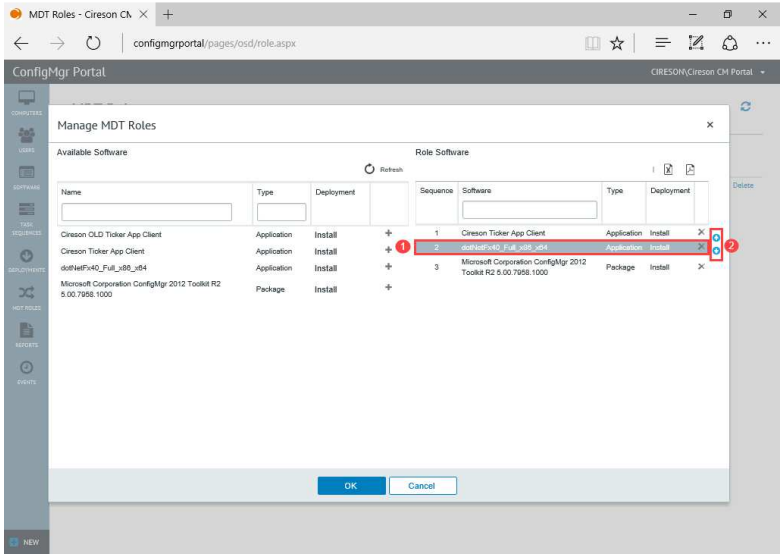
b) To remove software from the **Role Software** list, click the **x** beside the relevant software.



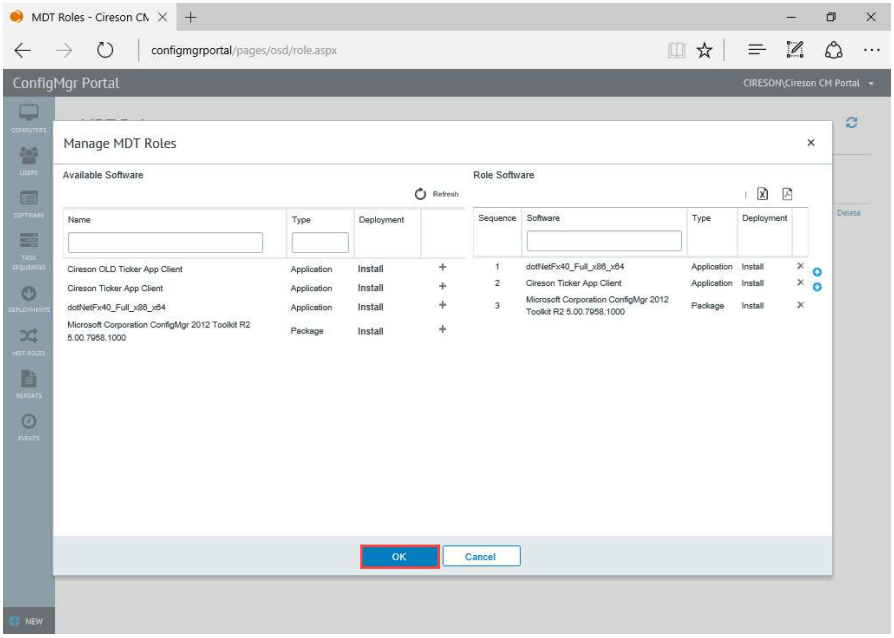
The software is removed.



c) To reorder software in the **Role Software** list, click to select the relevant piece of software, then click the up/down arrow to move it to the required position.



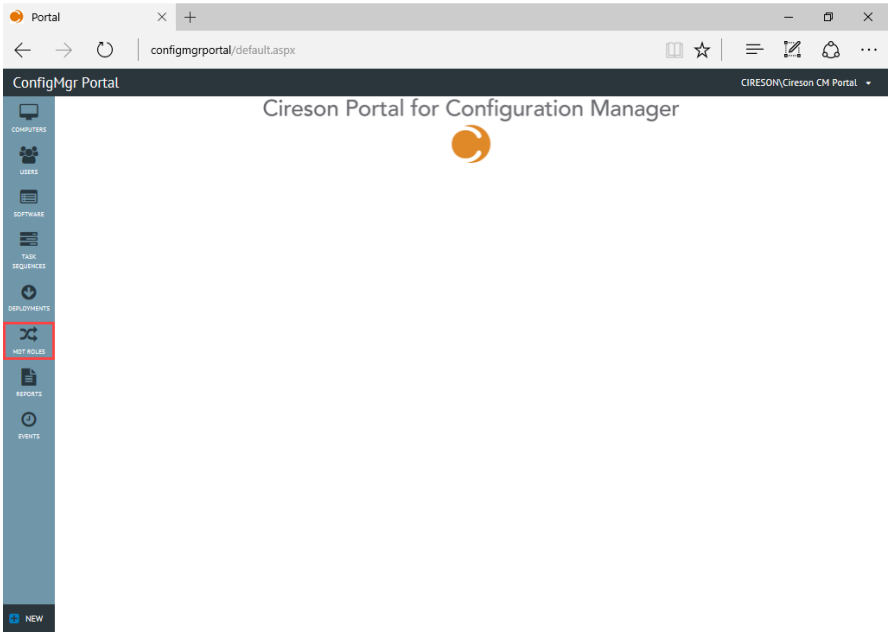
4. Click **OK** to save your changes.



How do I rename an MDT Role?

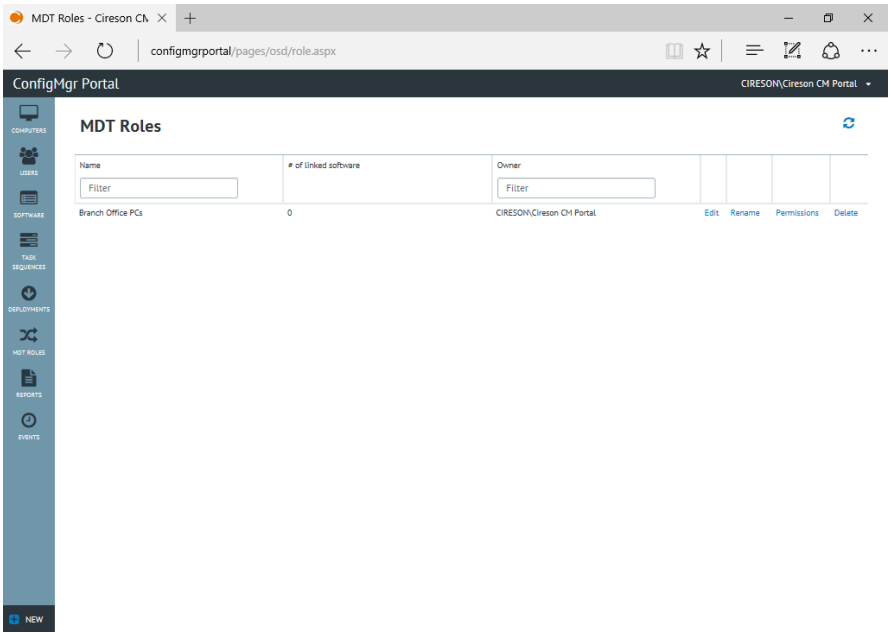
To rename an MDT Role:

1. At the bottom of the **Navigation Menu**, select **MDT Roles**

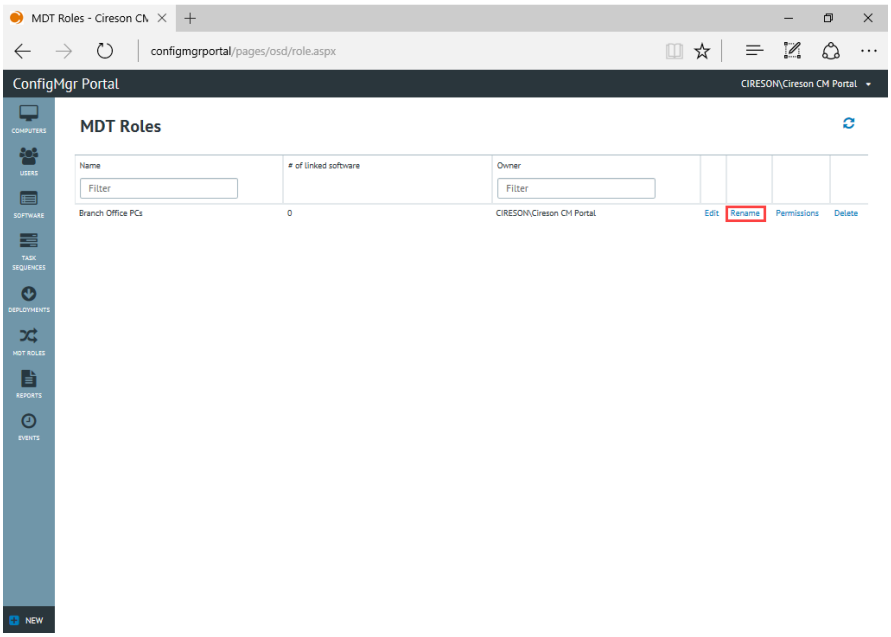


The **MDT Roles** page is then displayed showing a list of the current MDT Roles that exist.

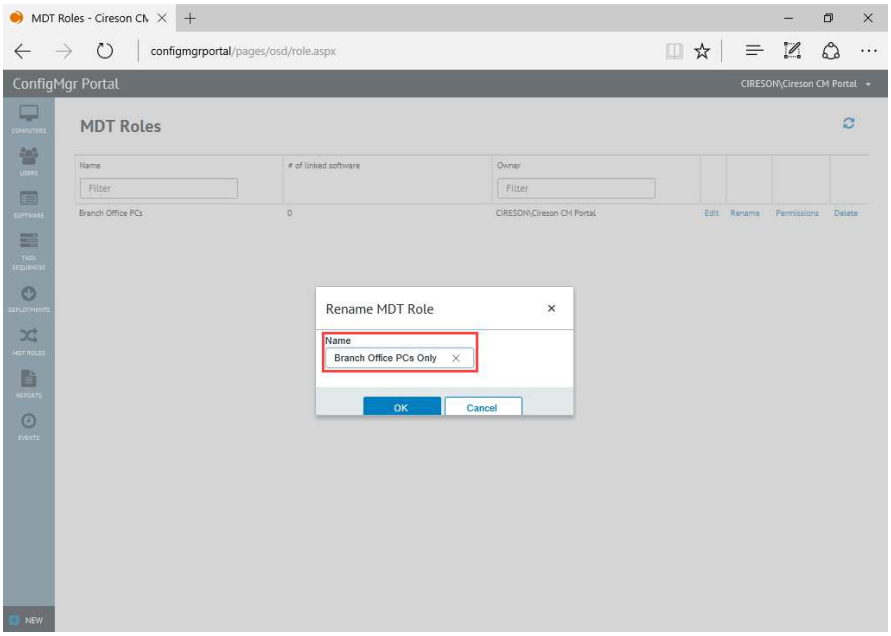
NOTE: The Portal does not ship with any default MDT Roles.



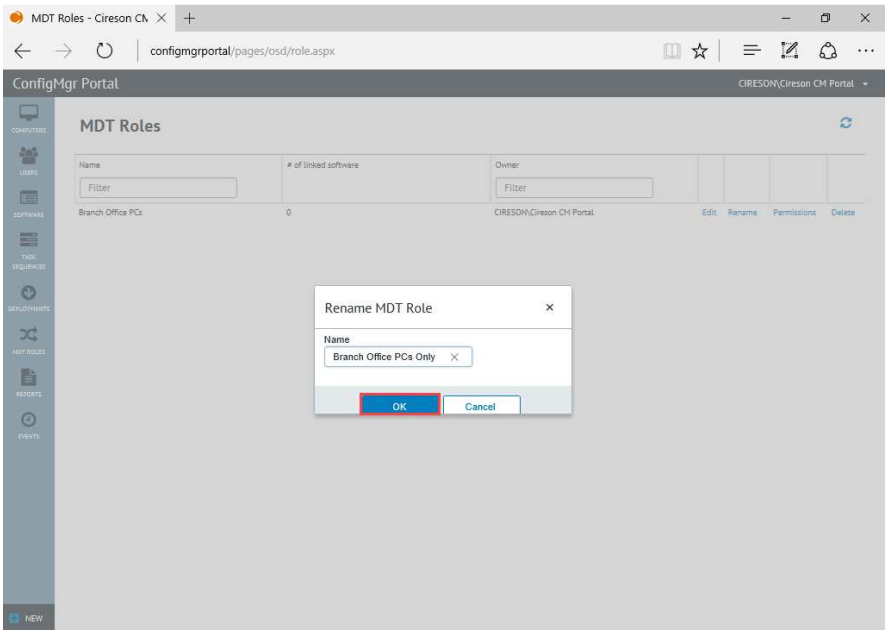
2. Click **Rename** beside the MDT Role you want to rename.



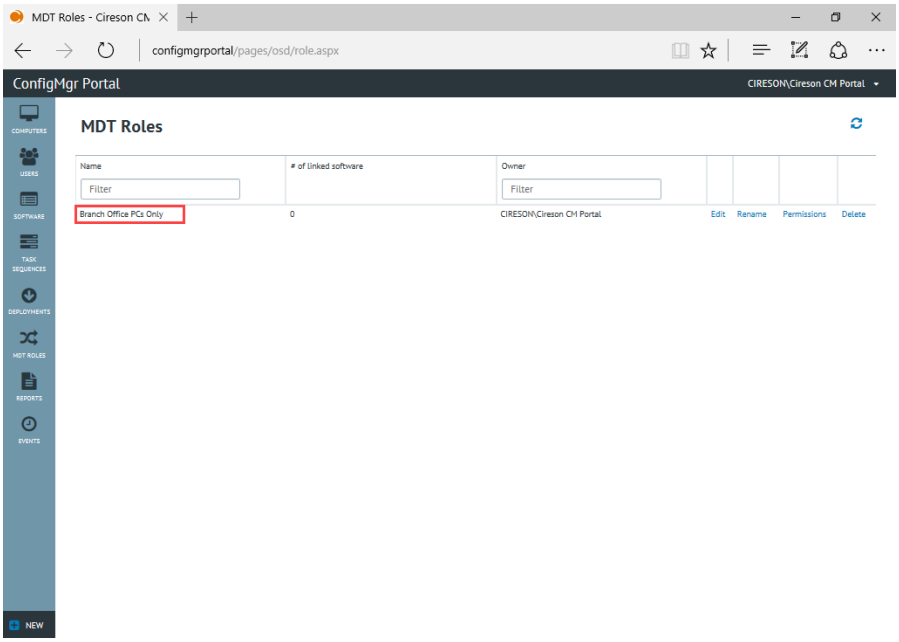
3. Enter the new name for the MDT Role on the **Rename MDT Role** dialog box.



4. Click **OK** to save your changes.



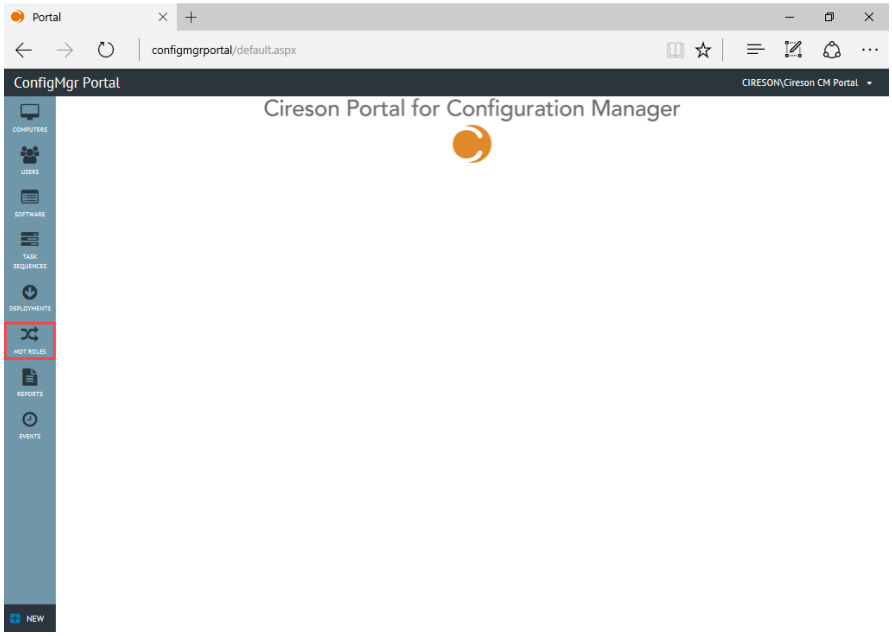
The renamed role appears on the **MDT Roles** page.



How do I manage the permissions on an MDT Role?

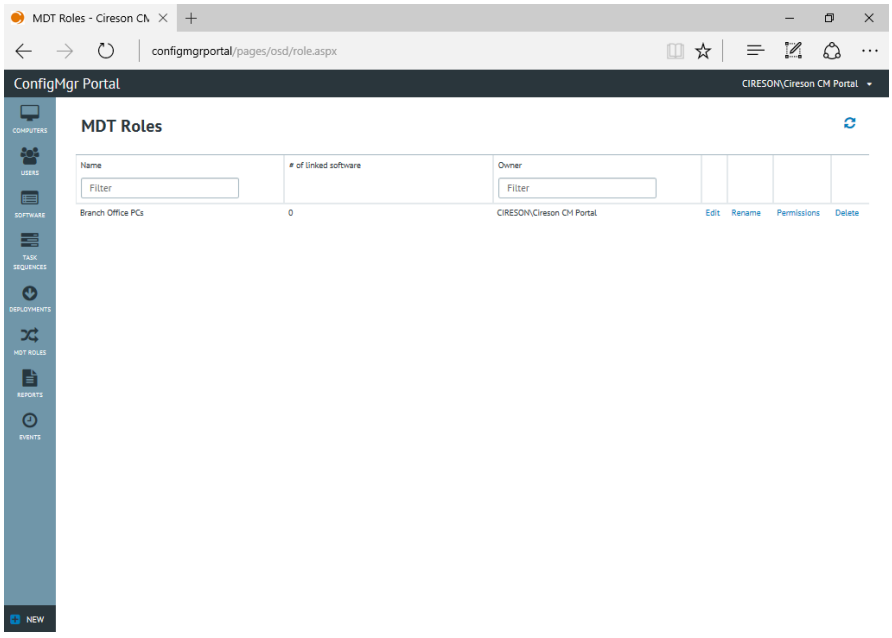
To manage the permissions on an MDT Role:

1. From the **Navigation Menu** select **MDT Roles**

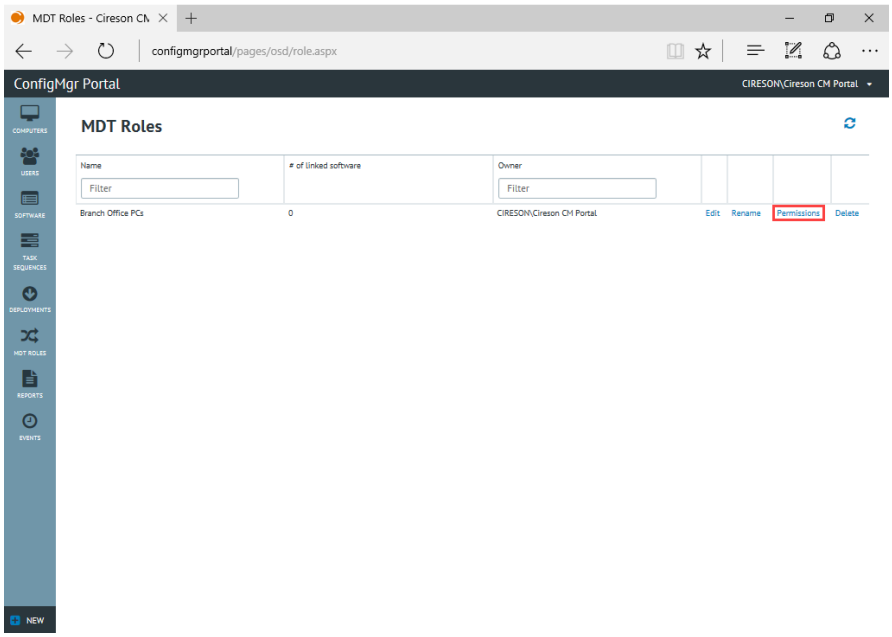


The **MDT Roles** page is then displayed showing a list of the current MDT Roles that exist.

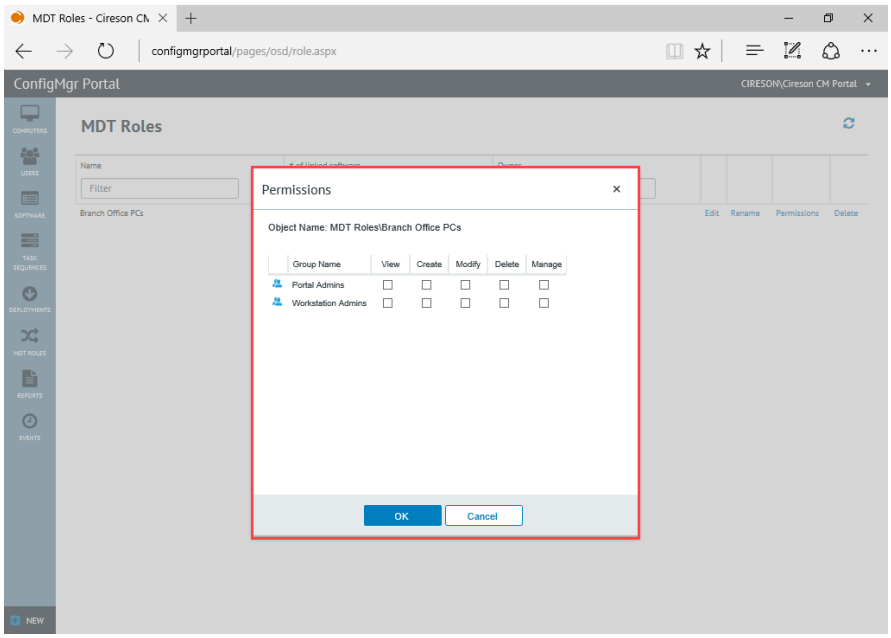
NOTE: The Portal does not ship with any default MDT Roles.



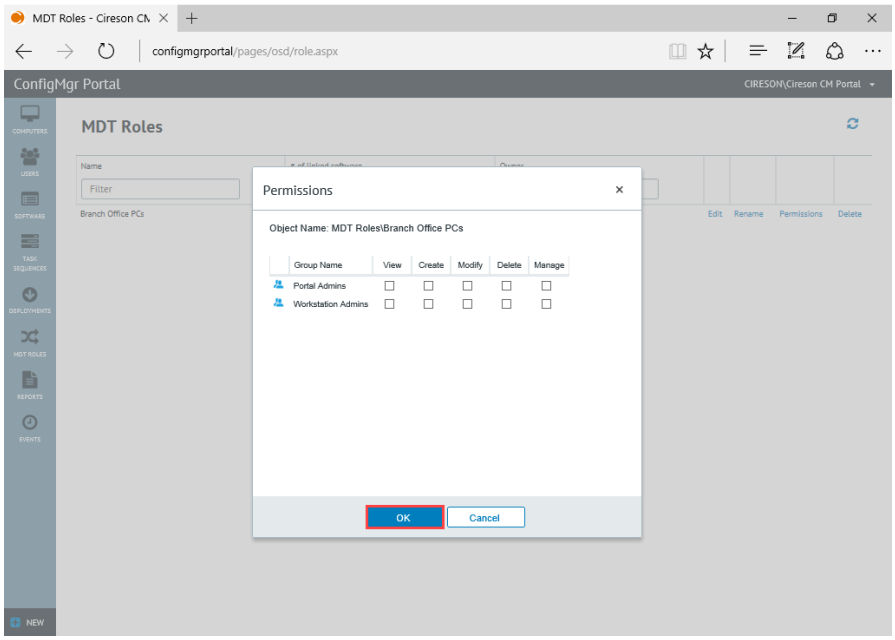
2. Click **Permissions** beside the MDT Role whose permissions you want to manage.



3. On the **Permissions** dialog box, set the relevant permissions for the appropriate Portal groups (a group requires a minimum of **View** to be able to see and use the MDT Role).



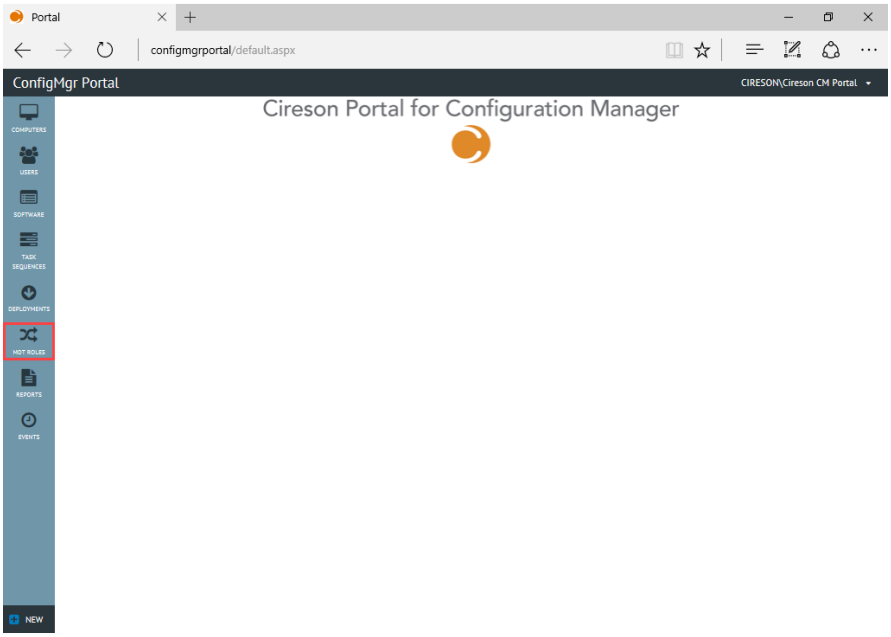
4. Click **OK** to save your changes.



How do I delete an MDT Role?

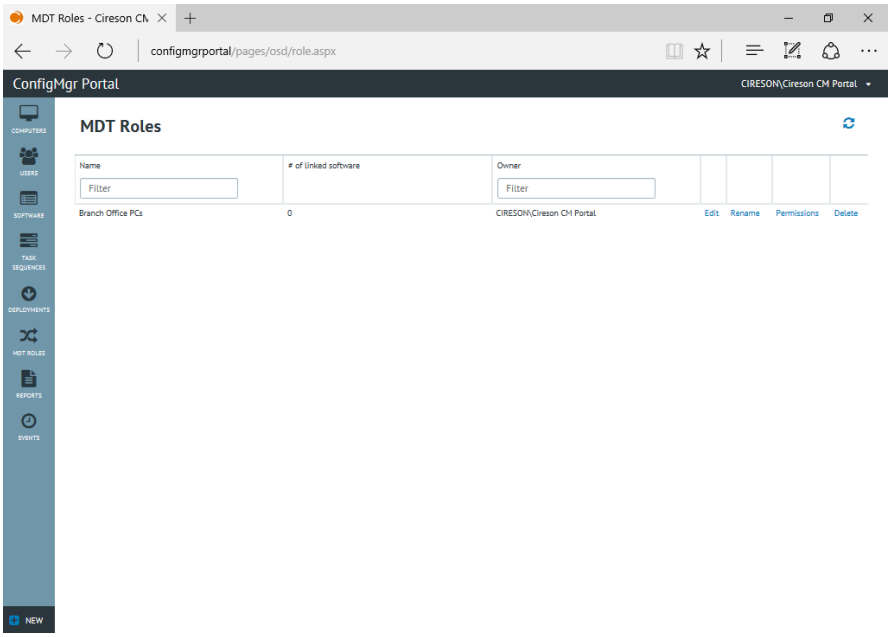
To delete an MDT Role:

1. From the **Navigation Menu** select **MDT Roles**

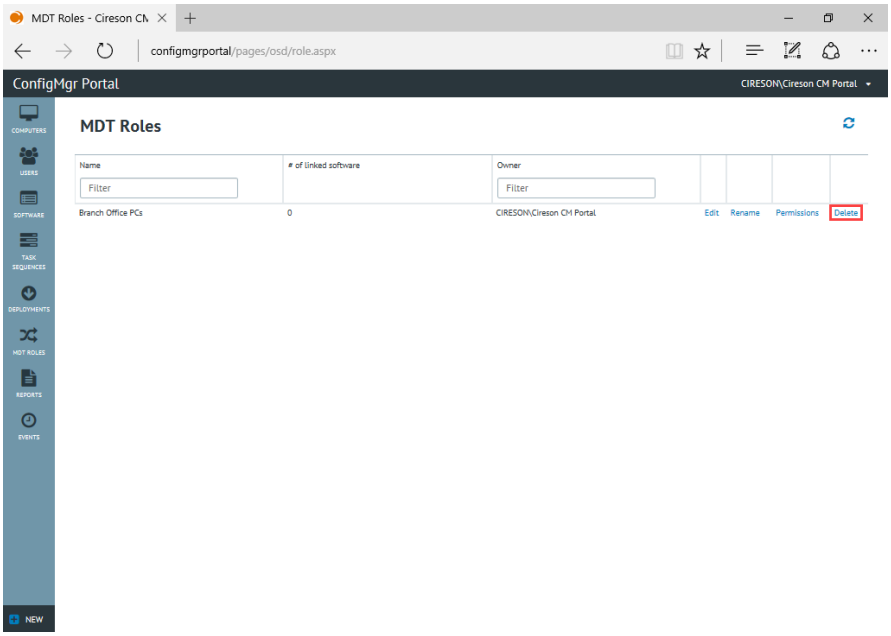


The **MDT Roles** page is then displayed showing a list of the current MDT Roles that exist.

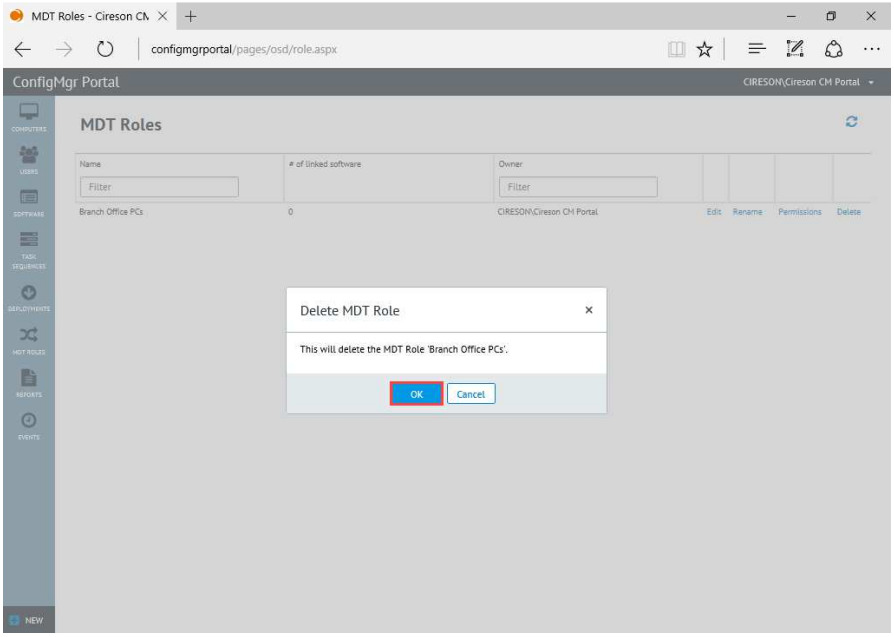
NOTE: The Portal does not ship with any default MDT Roles.



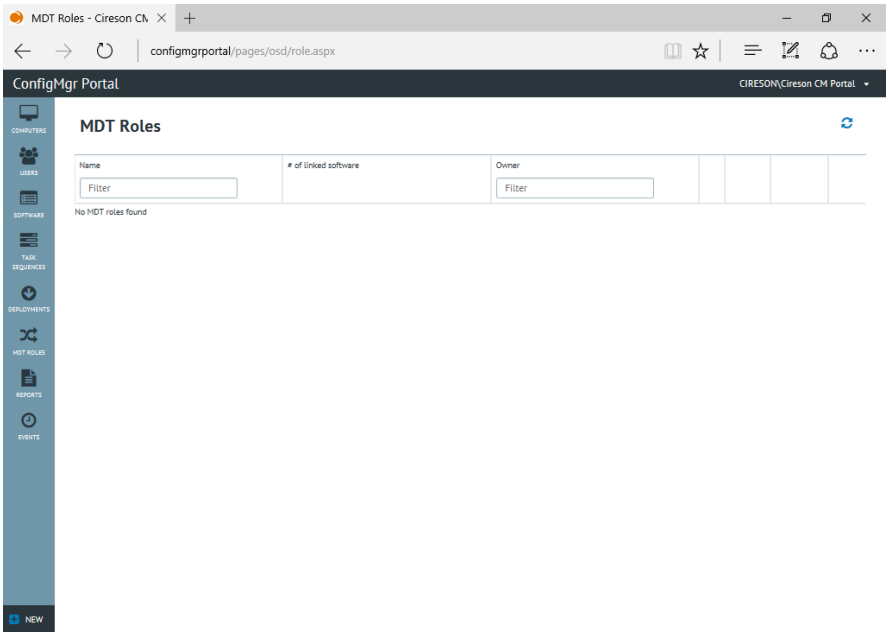
2. Click **Delete** beside the MDT Role you want to delete.



3. Click **OK** on the **Delete MDT Role** dialog box stating **This will delete the MDT Role '<*mdt_role_name*>'.**



The MDT Role is deleted and no longer shown on the **MDT Roles** page.



Number Sequencing Series

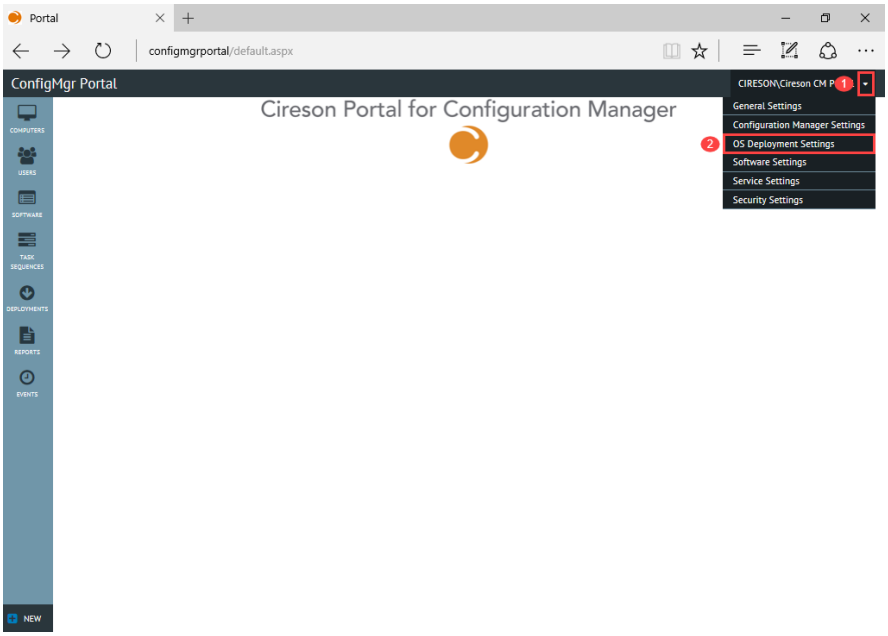
Using this feature, you can define number sequences that can be used during the deployment of operating systems to your environment. For example, you may have one numbering series to easily identify your servers and a different series for your desktops. This section details the tasks related to Number Sequencing Series that you can perform using the Portal.

- How do I create a new Number Sequencing Series?
- How do I edit a Number Sequencing Series?
- How do I manage the permissions on a Number Sequencing Series?
- How do I delete a Number Sequencing Series?

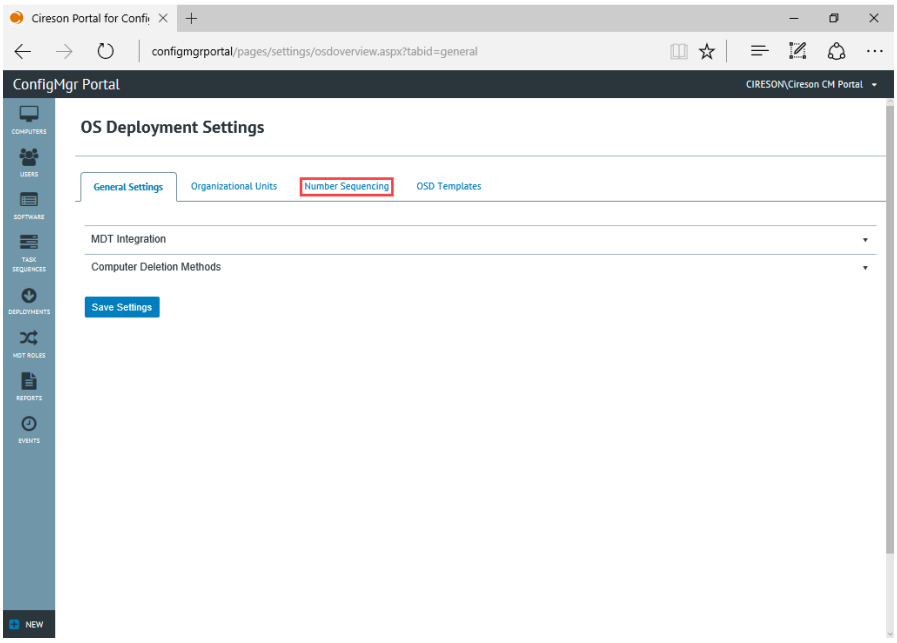
How do I create a new Number Sequencing Series?

To create a new Number Sequencing Series:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

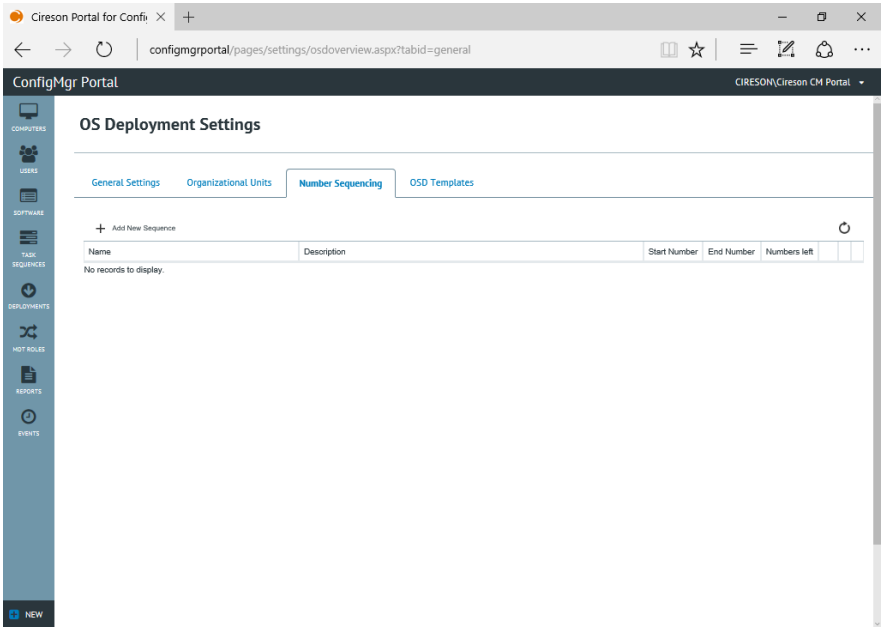


2. Click the **Number Sequencing** tab.

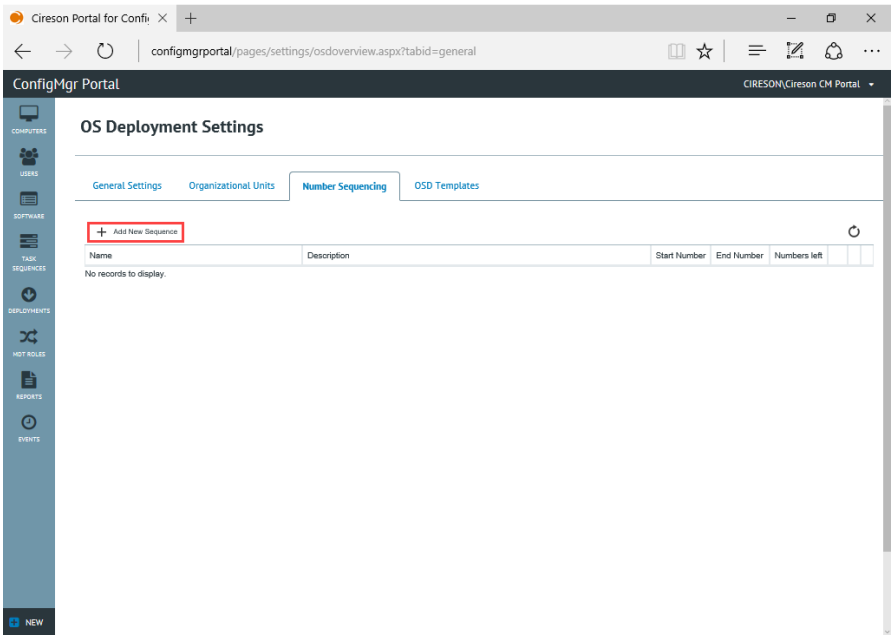


A list of the current Number Sequences is displayed.

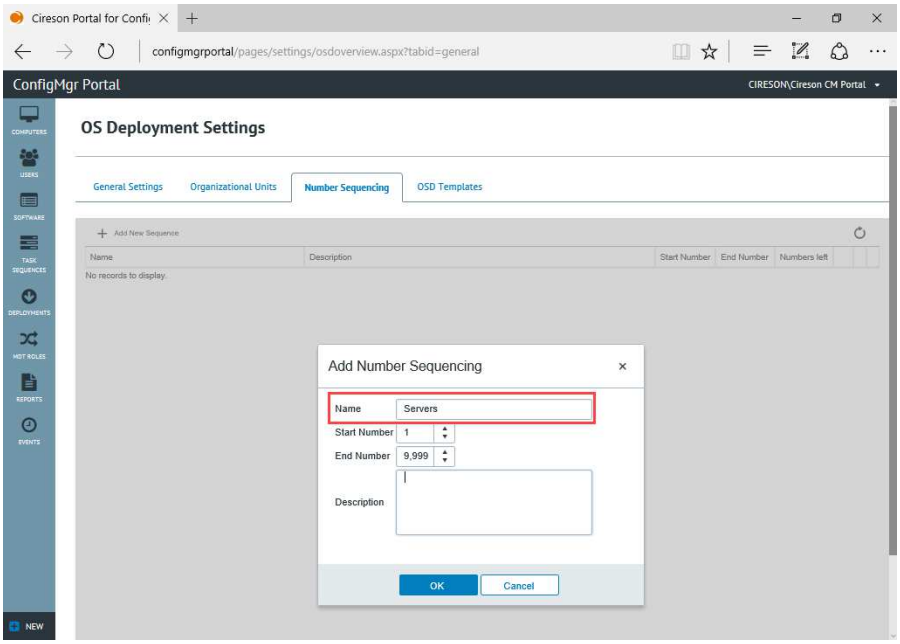
NOTE: The Portal does not ship with any default Number Sequences.



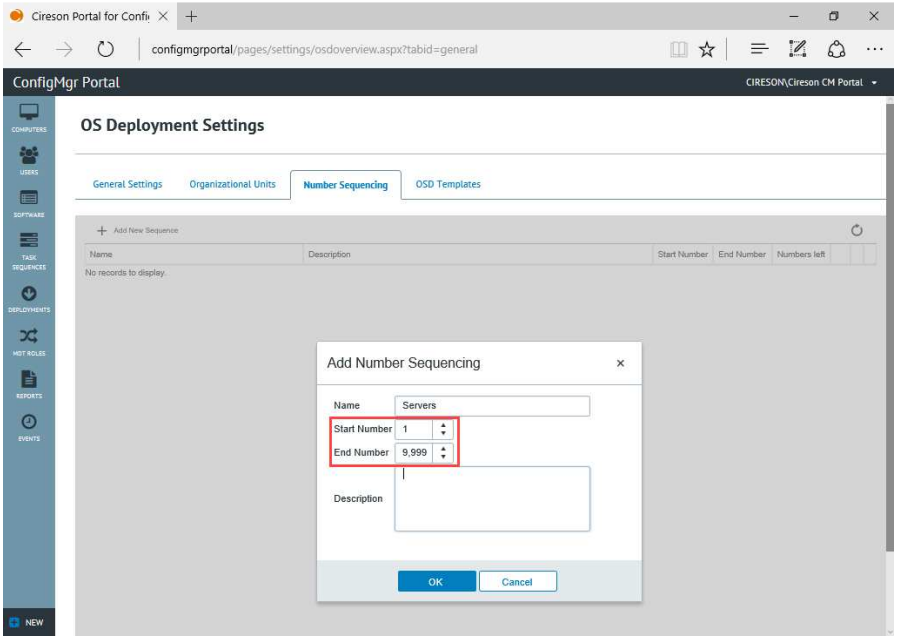
3. Click **Add New Sequence**



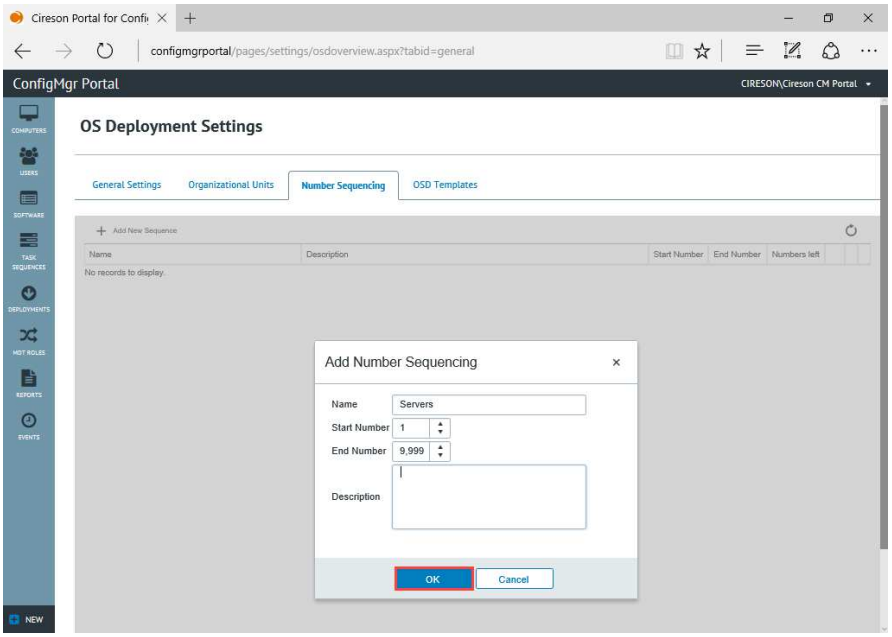
4. On the **Add Number Sequencing** page, enter the name of the new Number Sequencing Series in the **Name** field.



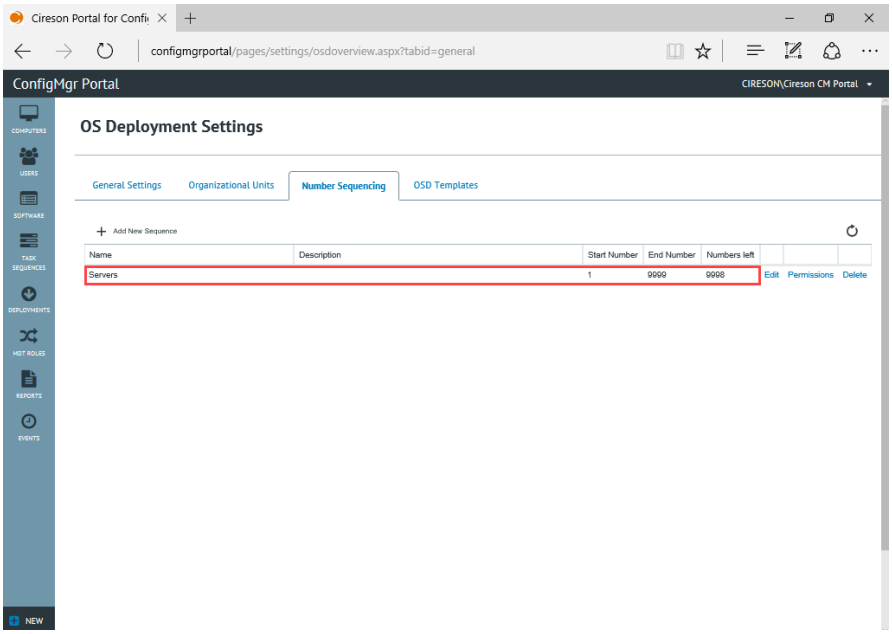
5. Set the values for the **Start Number** and **End Number** settings to their values, adding a description if relevant.



6. Click **OK**



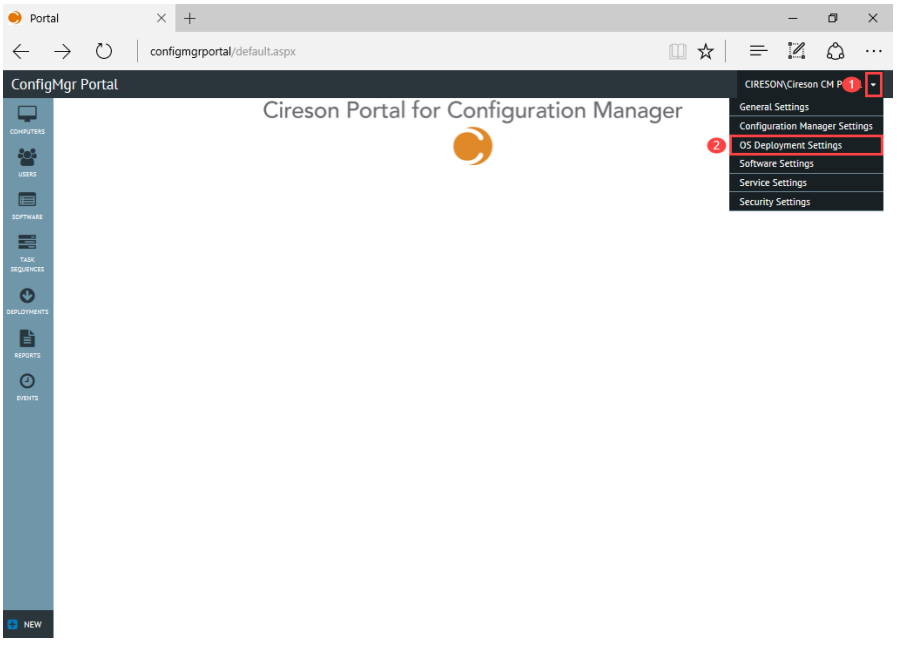
The newly added sequence is shown on the **Number Sequencing** tab.



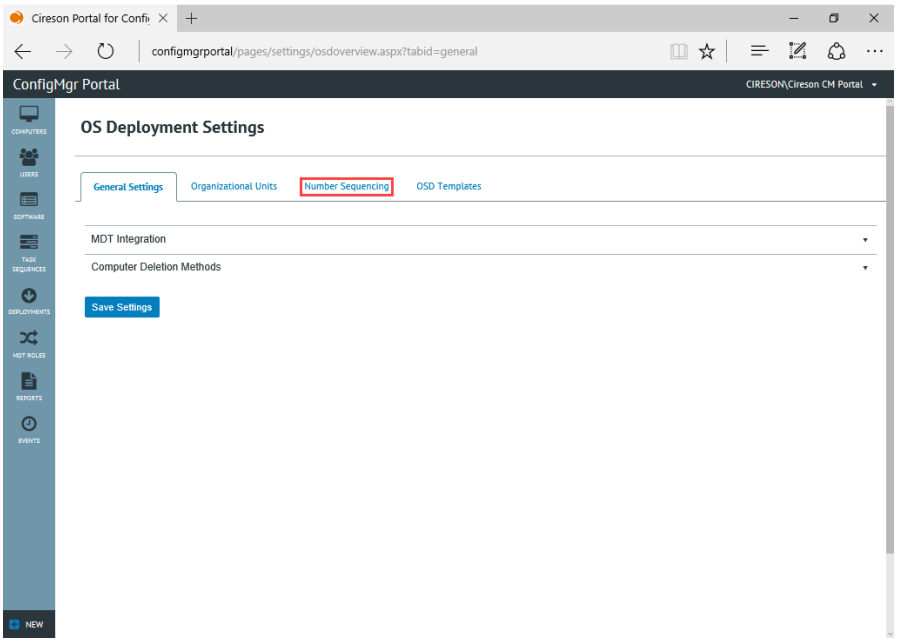
How do I edit a Number Sequencing Series?

To edit a Number Sequencing Series:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

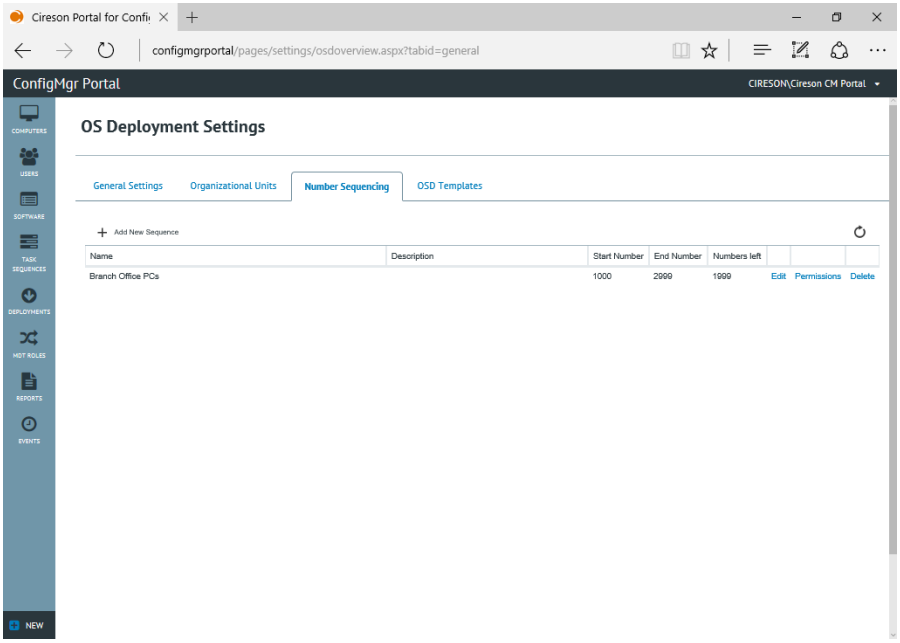


2. Click the **Number Sequencing** tab.

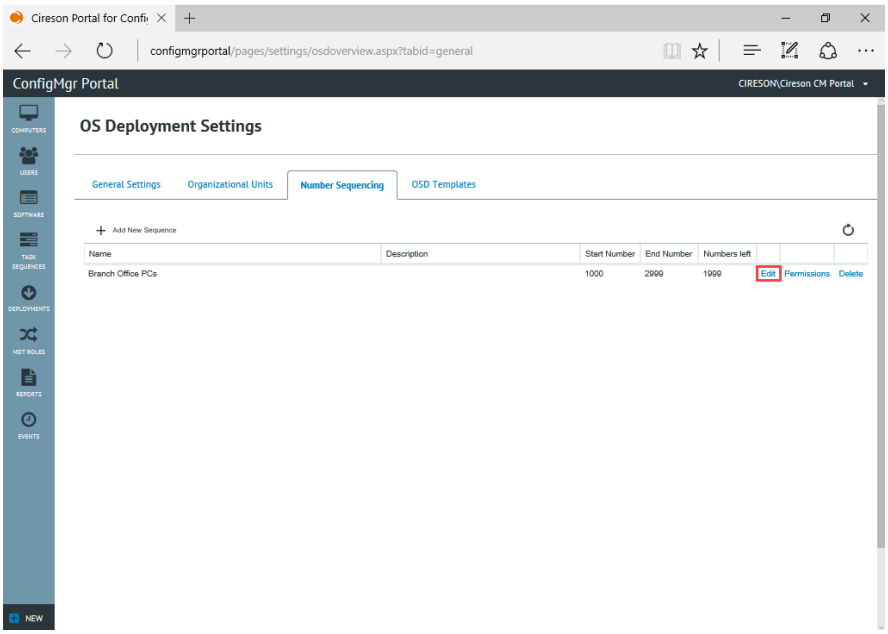


A list of the current Number Sequences is displayed.

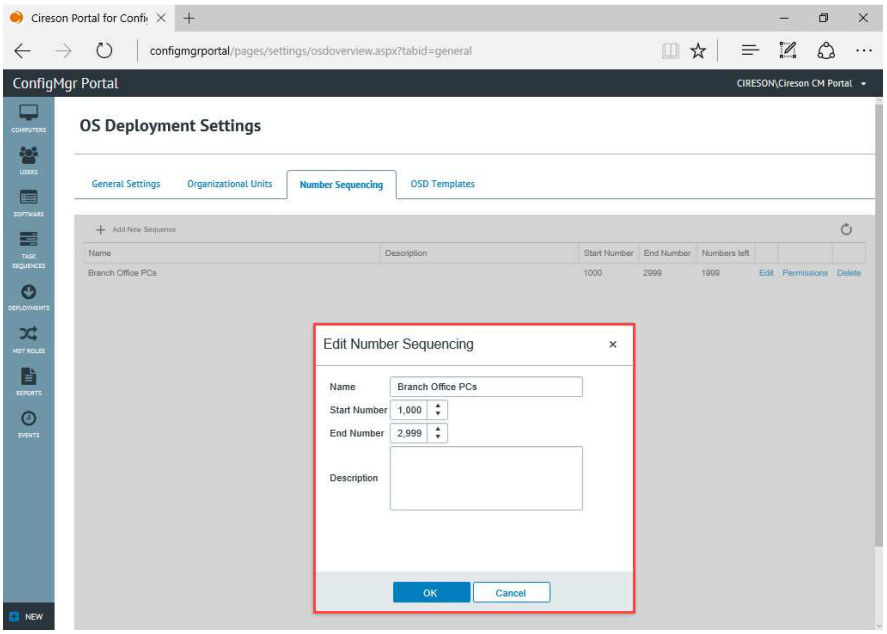
NOTE: The Portal does not ship with any default Number Sequences.



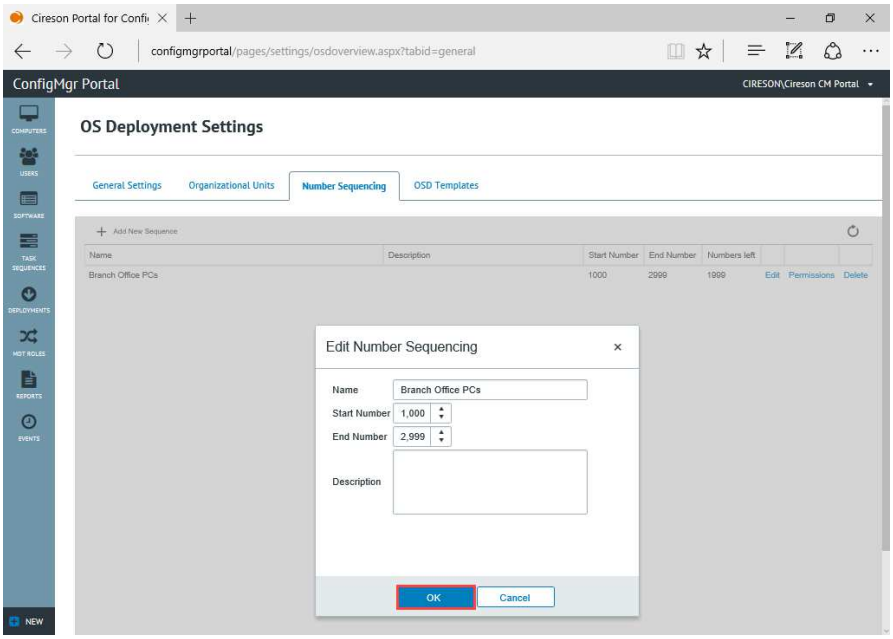
3. Click **Edit** beside the Number Sequencing Series you want to edit.



4. On the **Edit Number Sequencing** dialog box, make the required changes to the Number Sequencing Series.



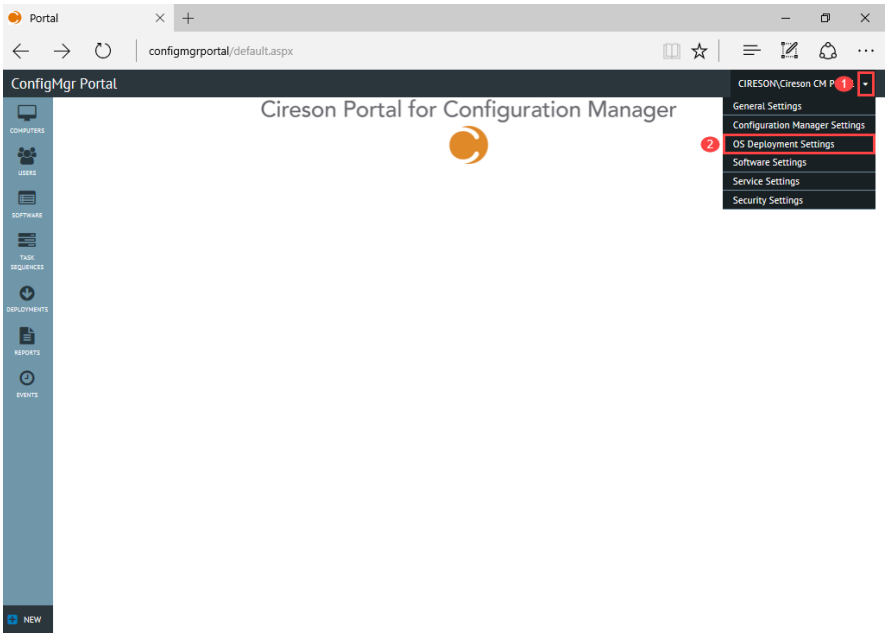
5. Click **OK** to save your settings.



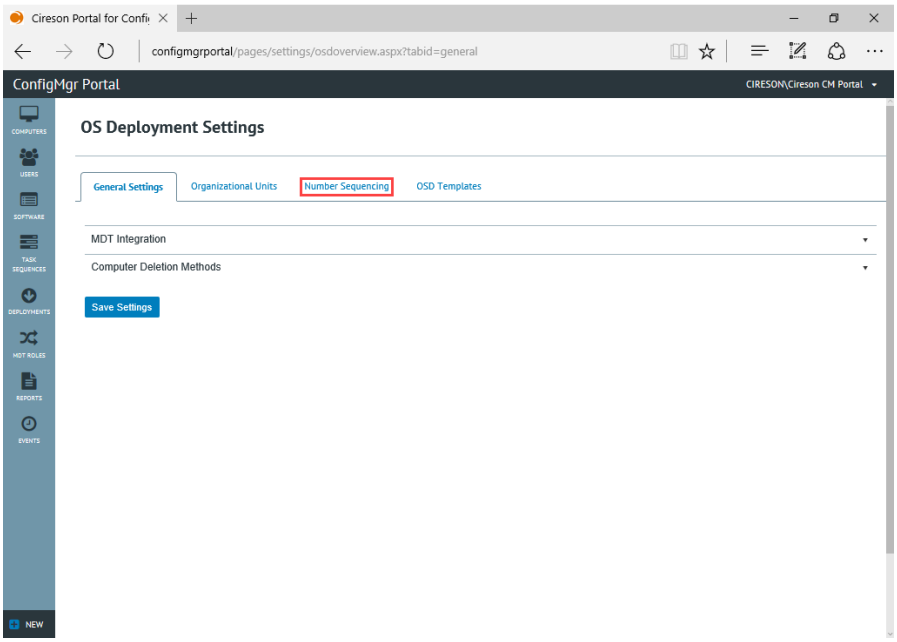
How do I manage the permissions on a Number Sequencing Series?

To manage the Permissions on a Number Sequencing Series:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

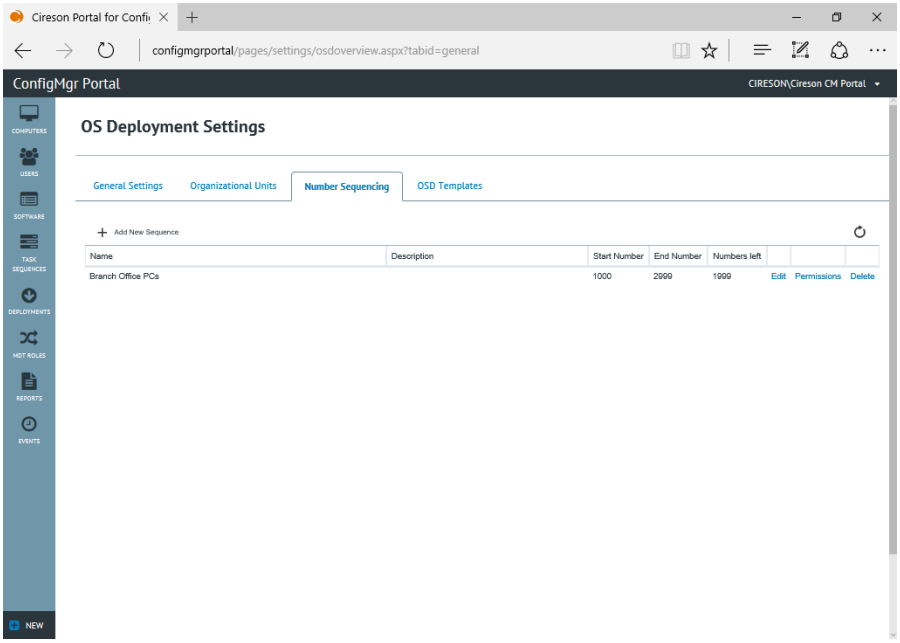


2. Click the **Number Sequencing** tab.

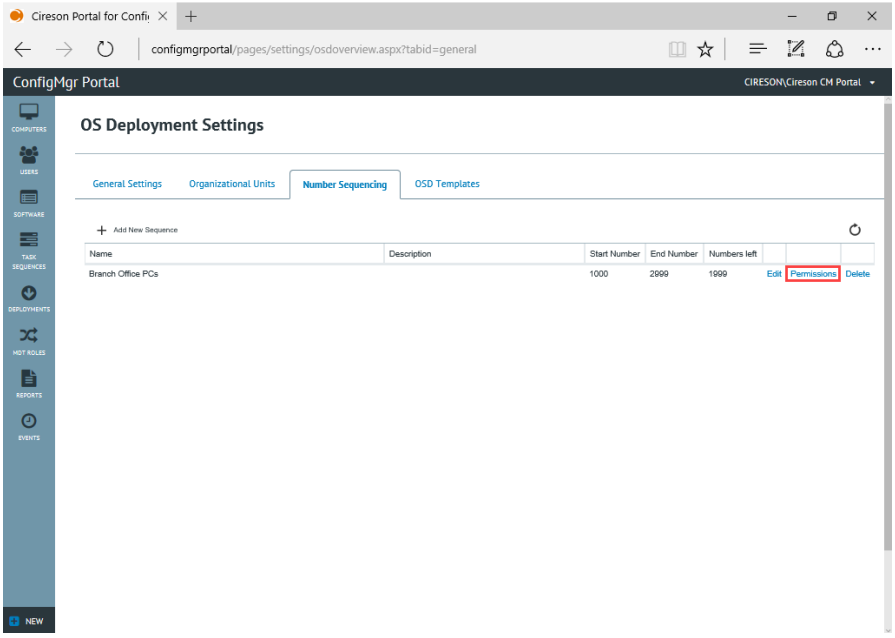


A list of the current Number Sequences is displayed.

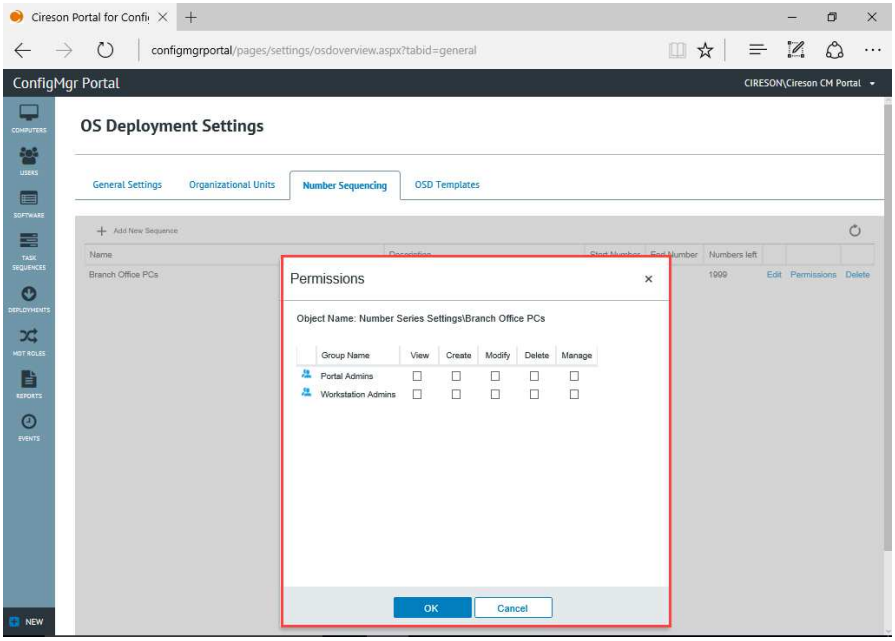
NOTE: The Portal does not ship with any default Number Sequences.



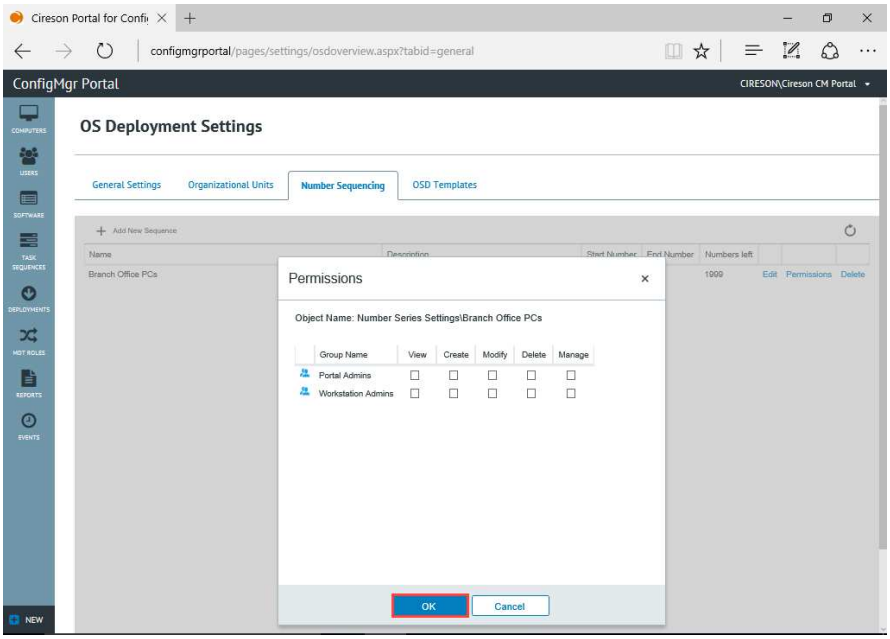
3. Click **Permissions** beside the Number Sequencing Series whose permissions you want to manage.



4. On the **Permissions** dialog box, set the relevant permissions for the appropriate Portal groups (a group requires a minimum of **View** to be able to see and use the Number Sequencing Series).



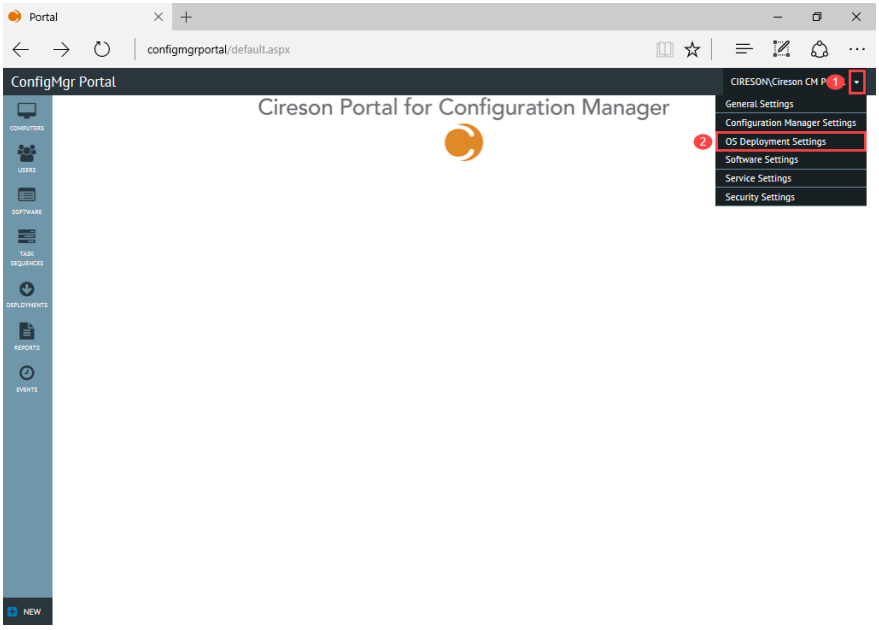
5. Click **OK** to save your changes.



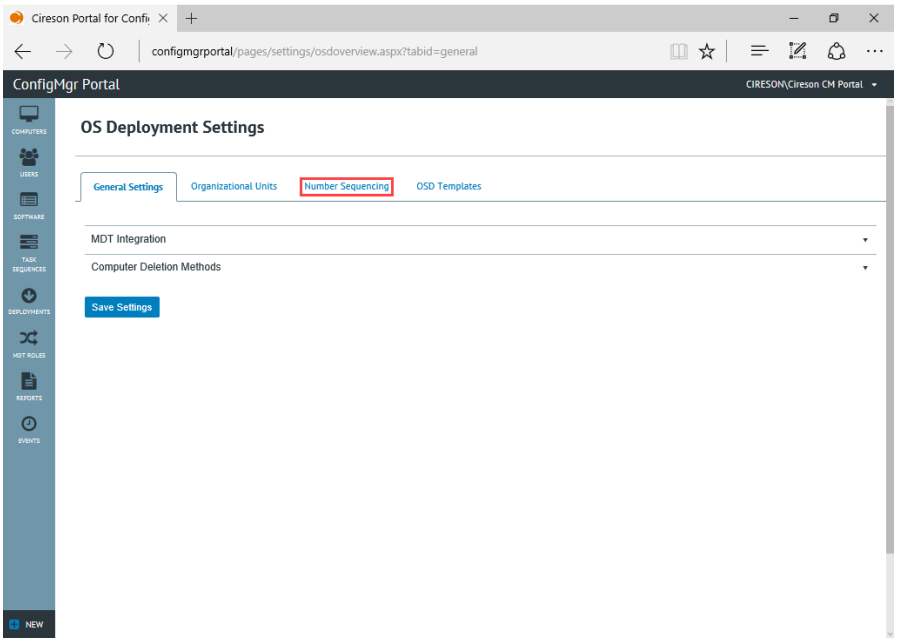
How do I delete a Number Sequencing Series?

To delete a Number Sequencing Series:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

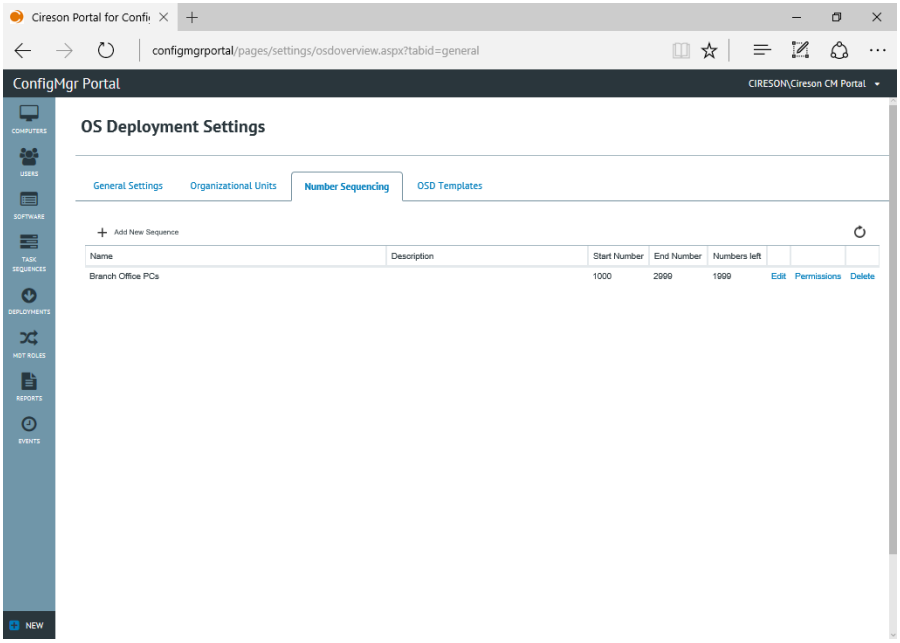


2. Click the **Number Sequencing** tab.

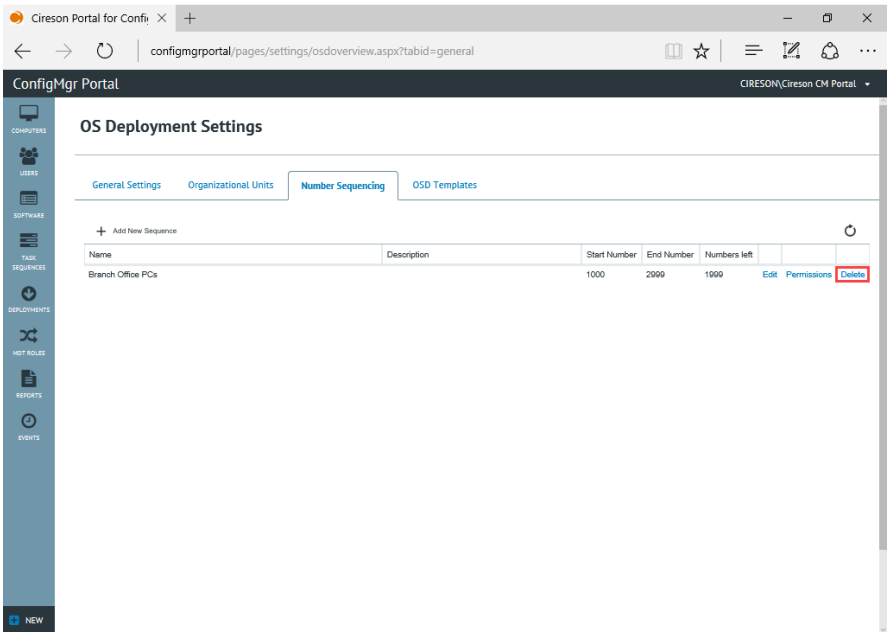


A list of the current Number Sequences is displayed.

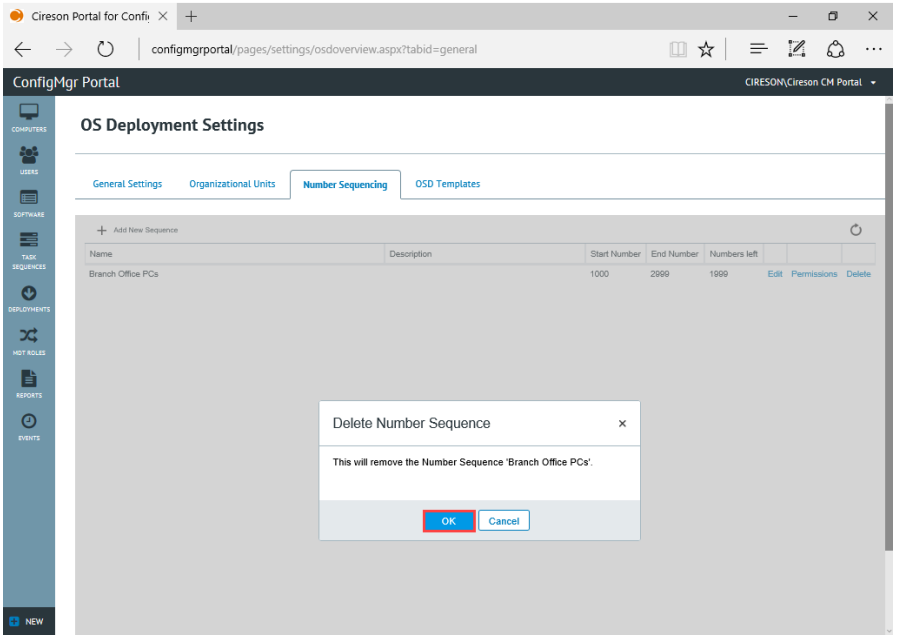
NOTE: The Portal does not ship with any default Number Sequences.



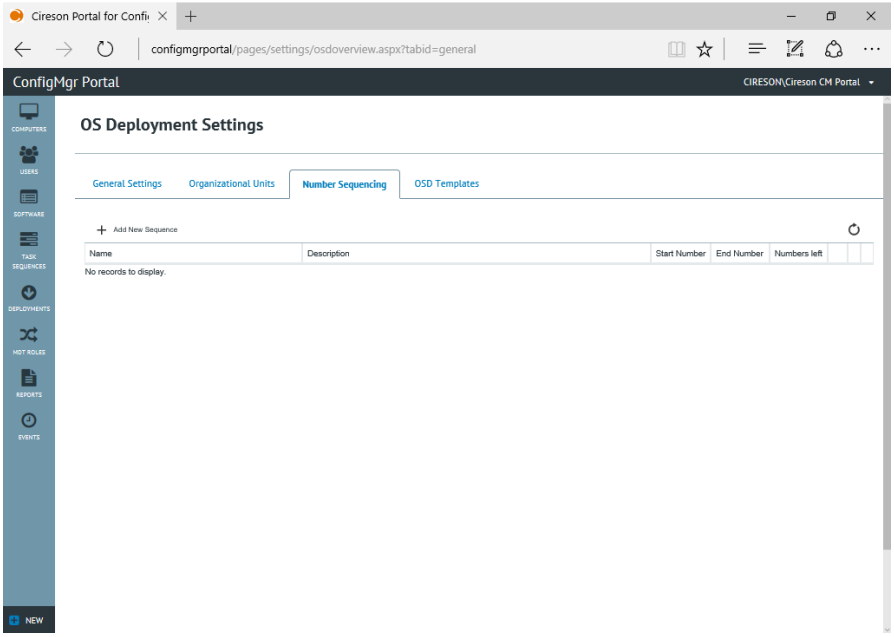
3. Click **Delete** beside the Number Sequencing Series you want to delete.



4. Click **OK** on the **Delete Number Sequence** dialog box stating **This will remove the Number Sequence '*<number_sequencing_series_name>*'**.



The Number Sequencing Series is deleted and no longer appears on the **Number Sequencing** tab.



Organizational Units

The Portal allows you to register existing Active Directory Organizational Units (OUs) with it to help simplify the deployment of computers using operating system deployment. Registering an OU in the Portal allows you to select a specific LDAP path that new computers should be placed into without the Portal user having to know the exact path. For example, you could have an existing OU in Active Directory called **Lisbon PCs** which you could register with the Portal. Then, when a Portal user deploys a new PC, they simply chose **Lisbon PCs** without having to know the exact LDAP path.

It is also possible to set Permissions on the OUs registered with the Portal. For example, you may only want certain Portal users/groups to be able to deploy computers to certain OUs for security or political reasons.

NOTE: Registering an OU with the Portal does not create it in Active Directory.

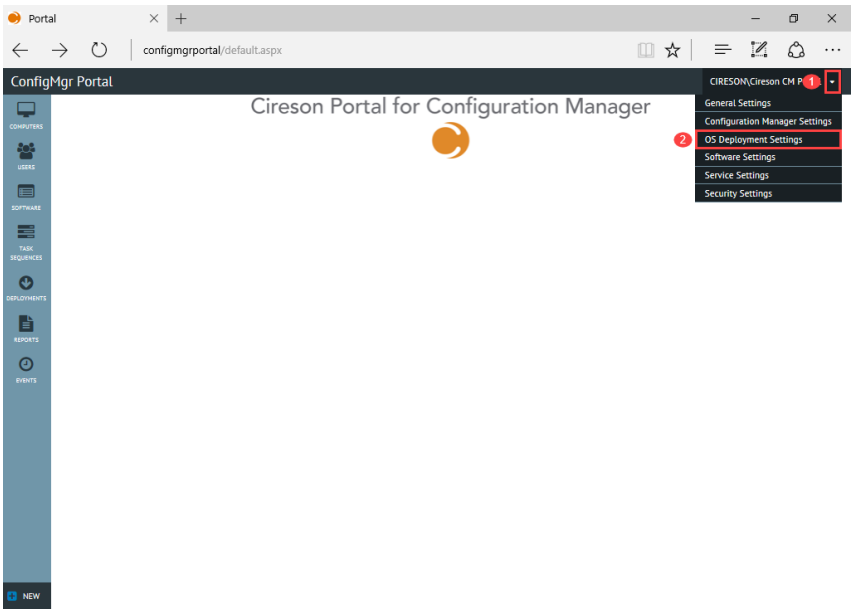
This section details the tasks related to Organizational Units that you can perform using the Portal.

- How do I register a new Organizational Unit?
- How do I edit an Organizational Unit?
- How do I manage the permissions on an Organizational Unit?
- How do I delete an Organizational Unit?

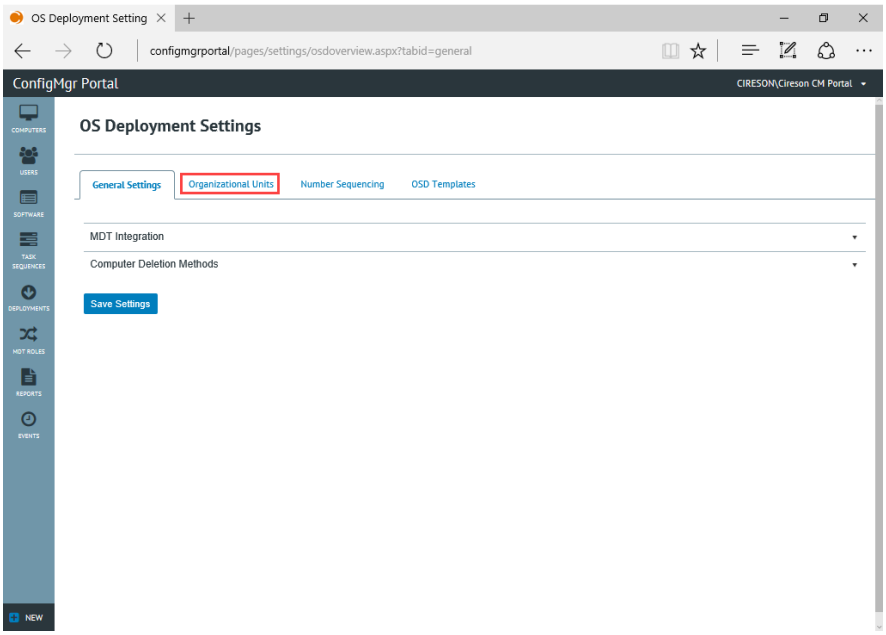
How do I register a new Organizational Unit?

To register a new Organizational Unit:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

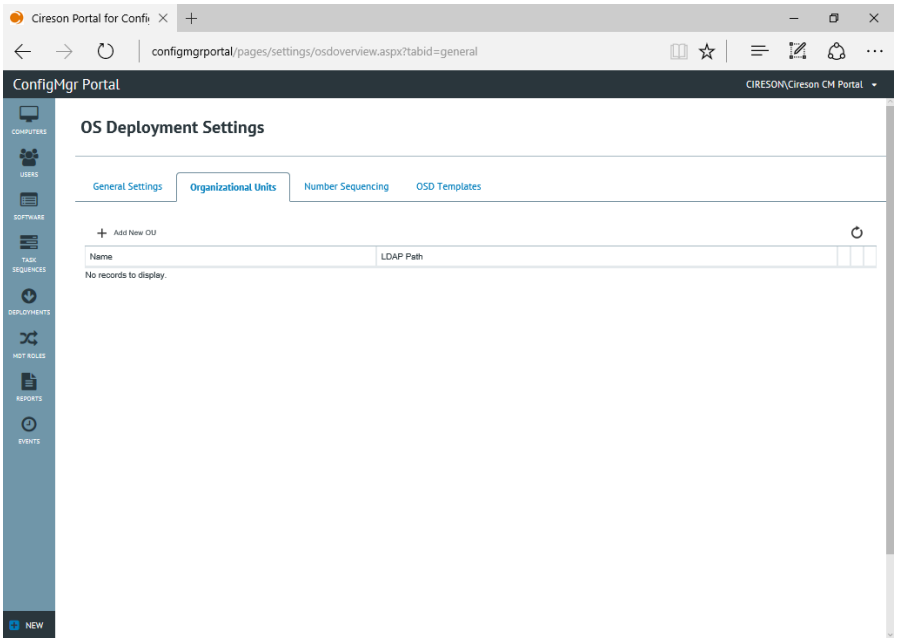


2. Click the **Organizational Units** tab.

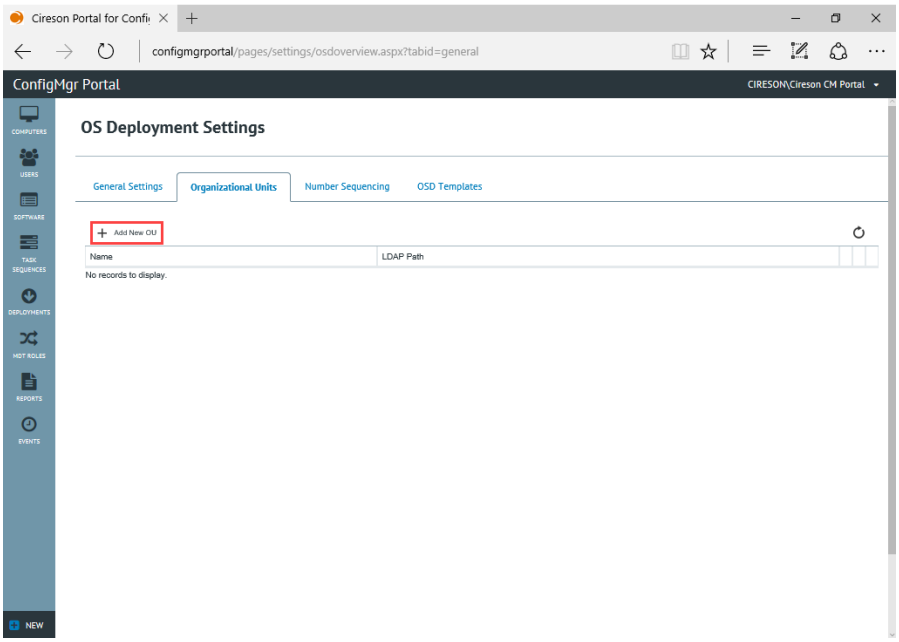


A list of the current Organizational Units is displayed.

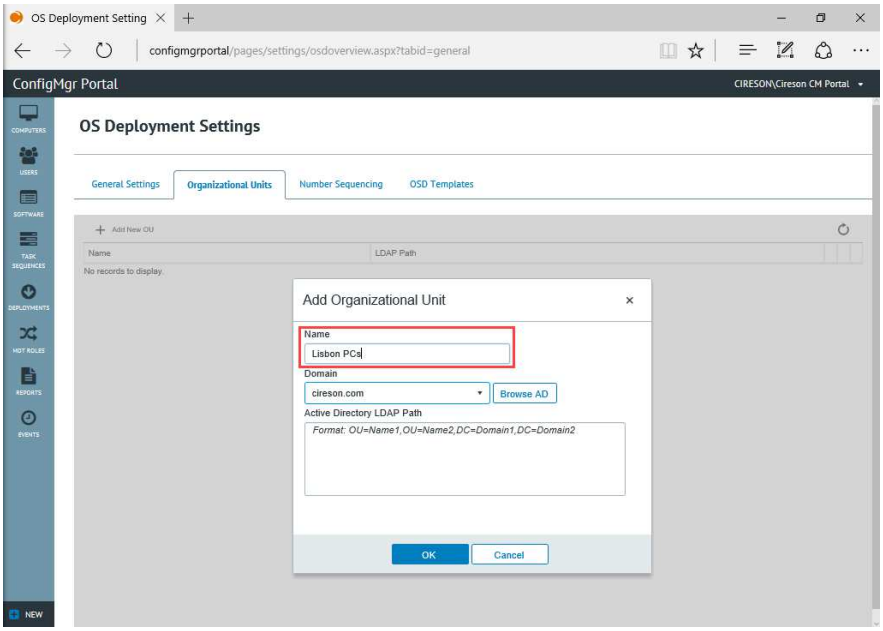
NOTE: The Portal does not ship with any Organizational Units defined.



3. Click **Add New OU**



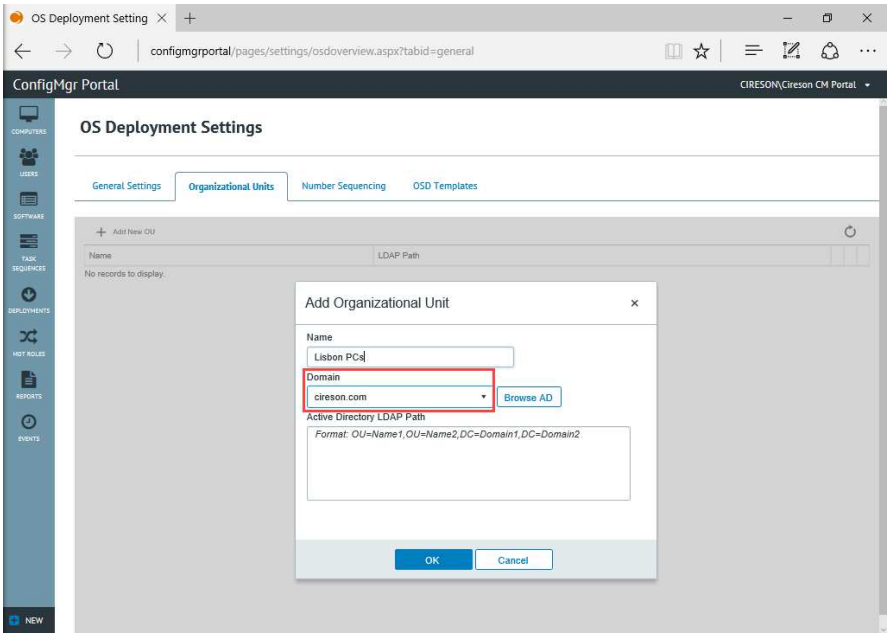
4. On the **Add Organizational Unit** page enter the name of the new Organizational Unit in the **Name** field as you want it to appear in the Portal.



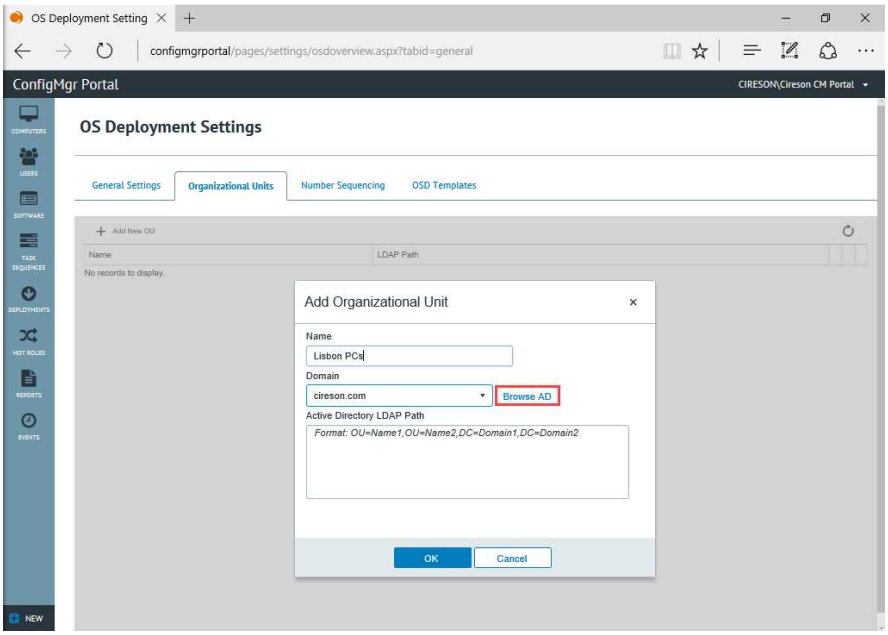
5. From the **Domain** dropdown, select the relevant Domain if it is not selected already.

   NOTE: If the **Domain** dropdown list is empty, the local Domain containing the IIS Server running the Portal and the ConfigMgr site server have not been registered with the Portal as detailed in How do I register a new Domain?

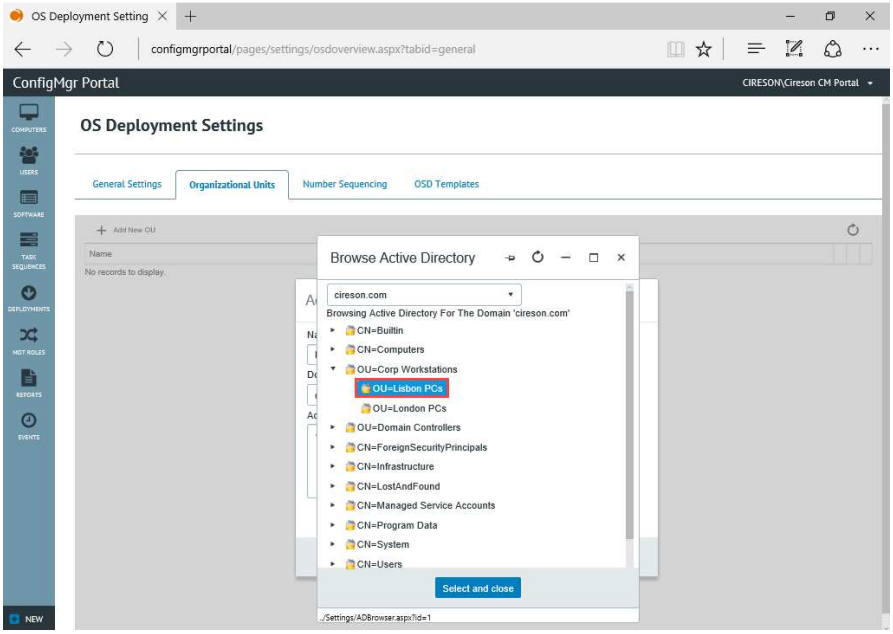
   Registering this Domain merely provides the ability to browse Active Directory. The Portal fully supports you bypassing browsing and instead just typing/pasting the LDAP path to the OU in the **Active Directory LDAP Path** field.



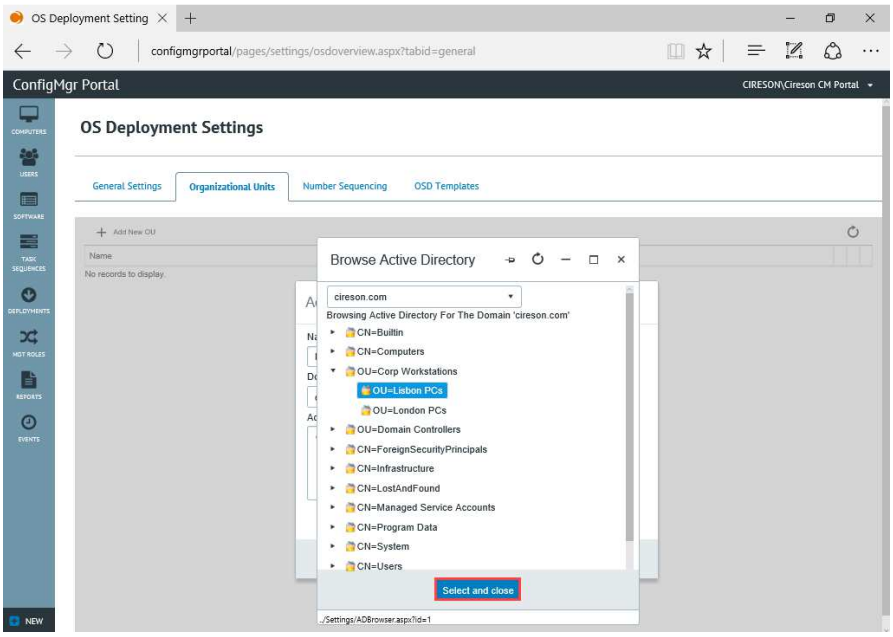
6. Click **Browse AD**



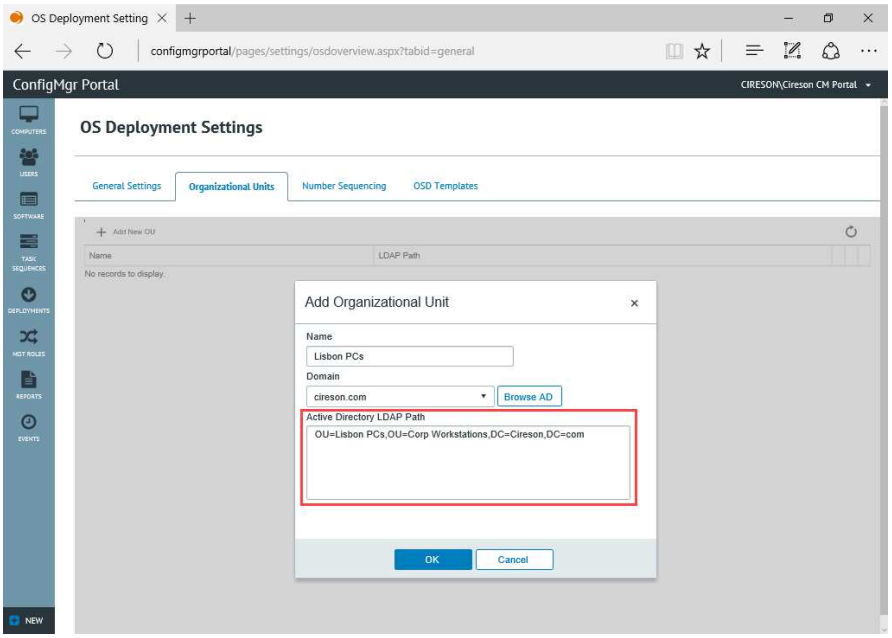
7. Using the **Browse Active Directory** window (which you can resize), navigate to the location containing the existing Organizational Unit.



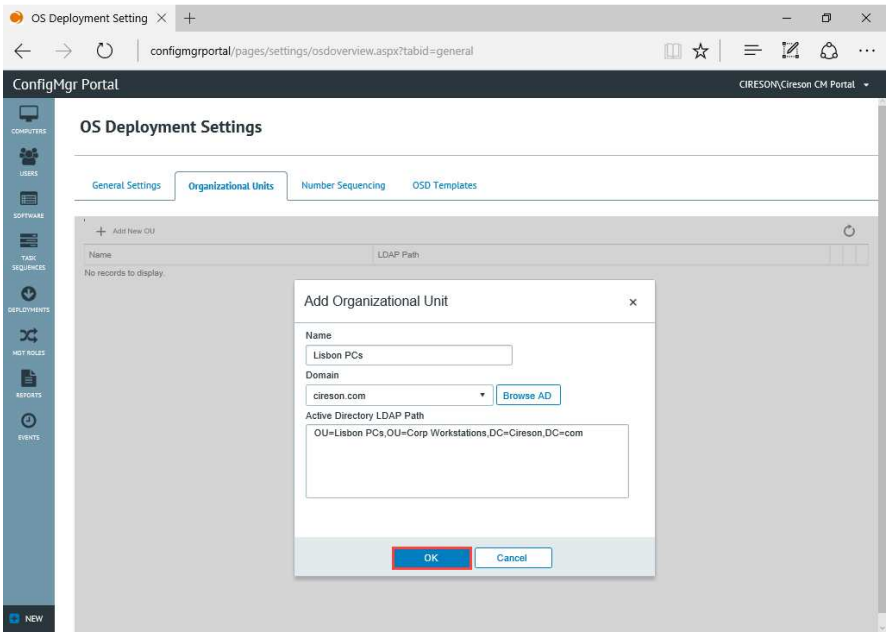
8. Click **Select and close**



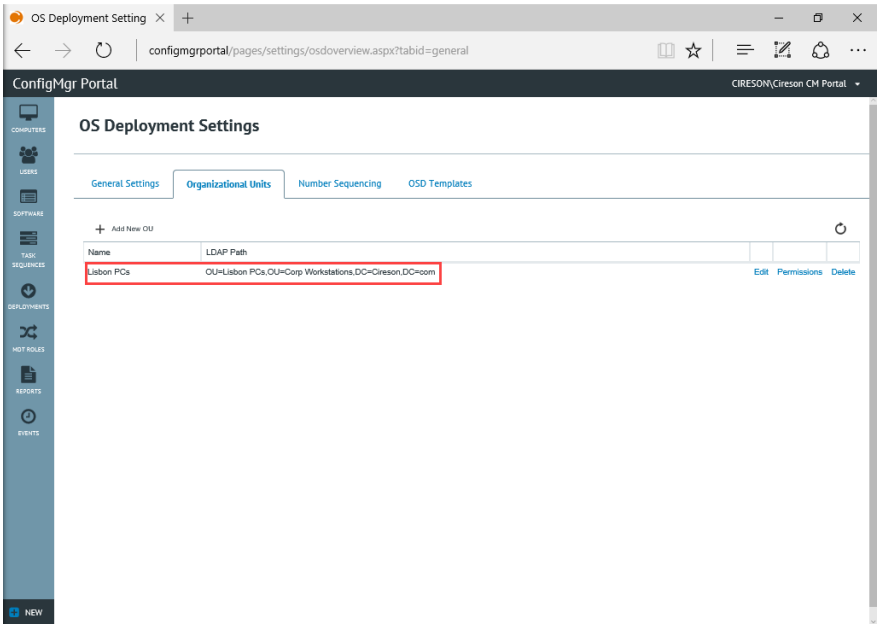
The **Active Directory LDAP Path** field will be updated with the path to the OU.



9. Click **OK** to save the new Organizational Unit.



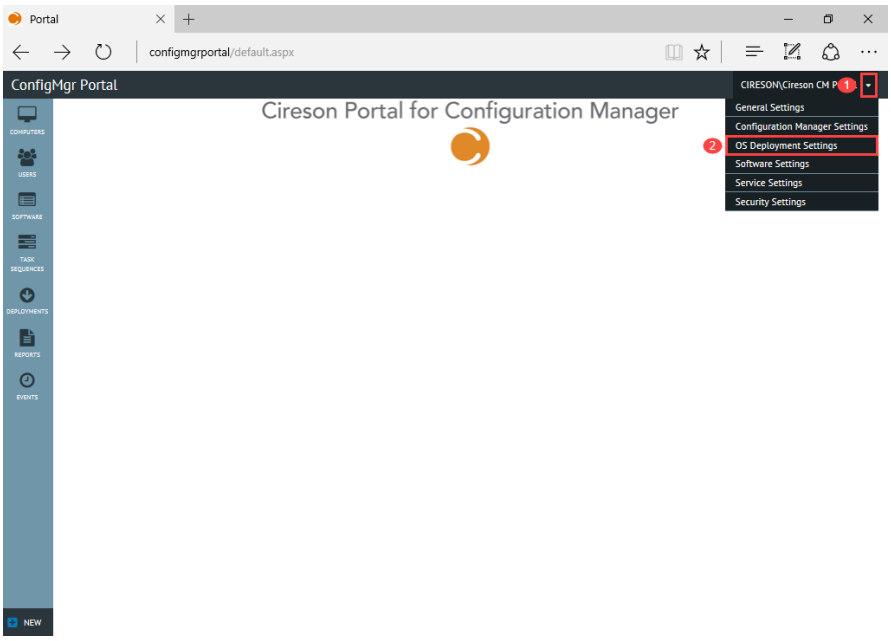
The newly created OU is shown on the **Organizational Units** tab.



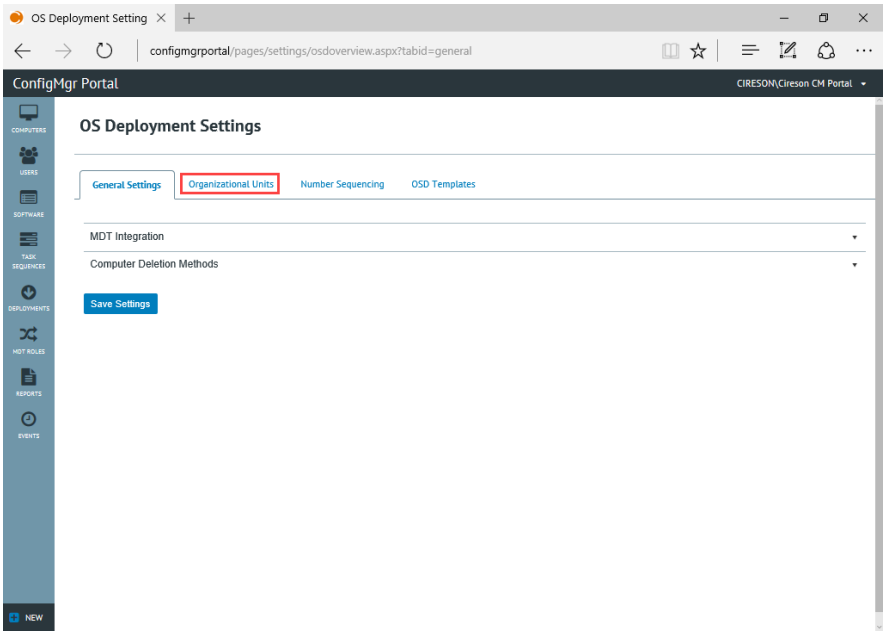
How do I edit an Organizational Unit?

To edit an Organizational Unit:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

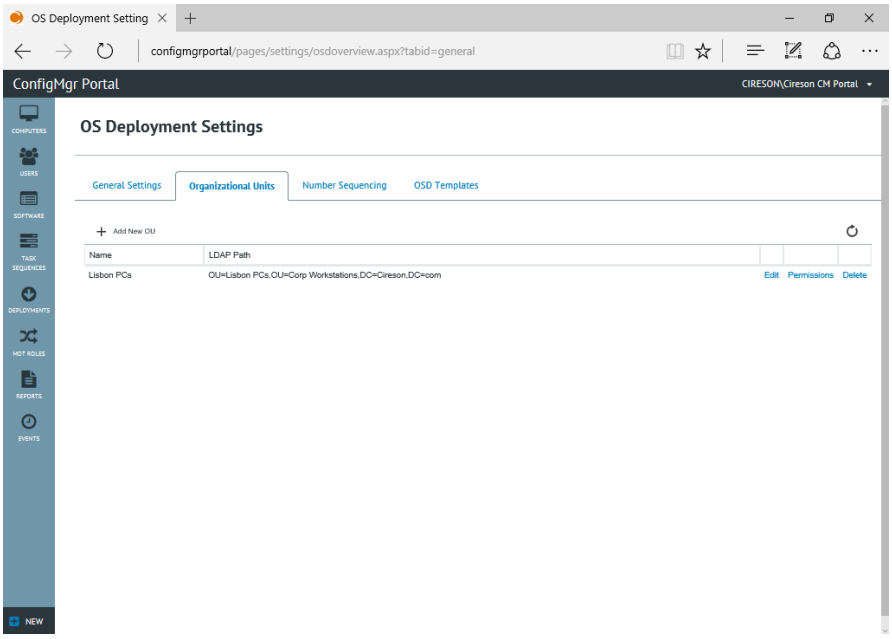


2. Click the **Organizational Units** tab.

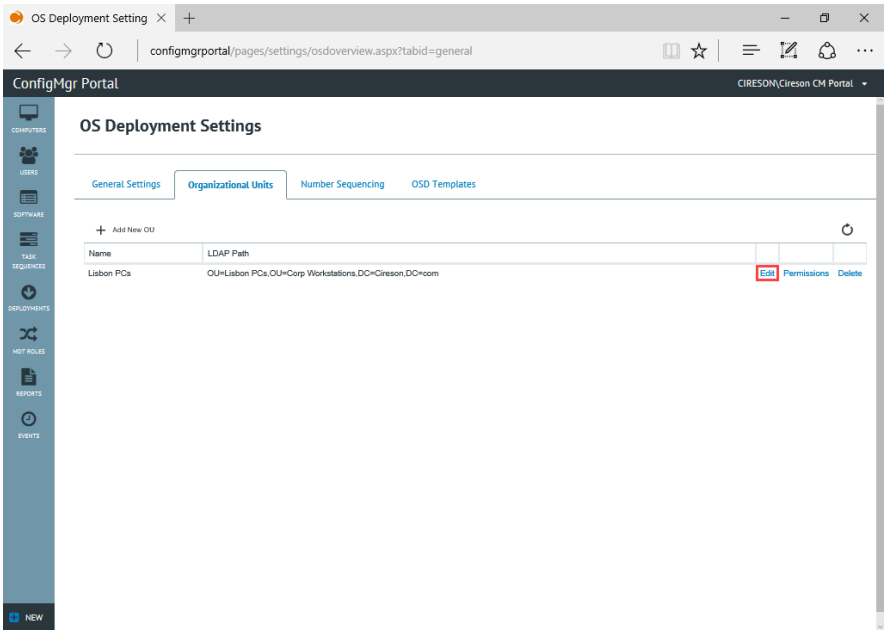


A list of the current Organizational Units is displayed.

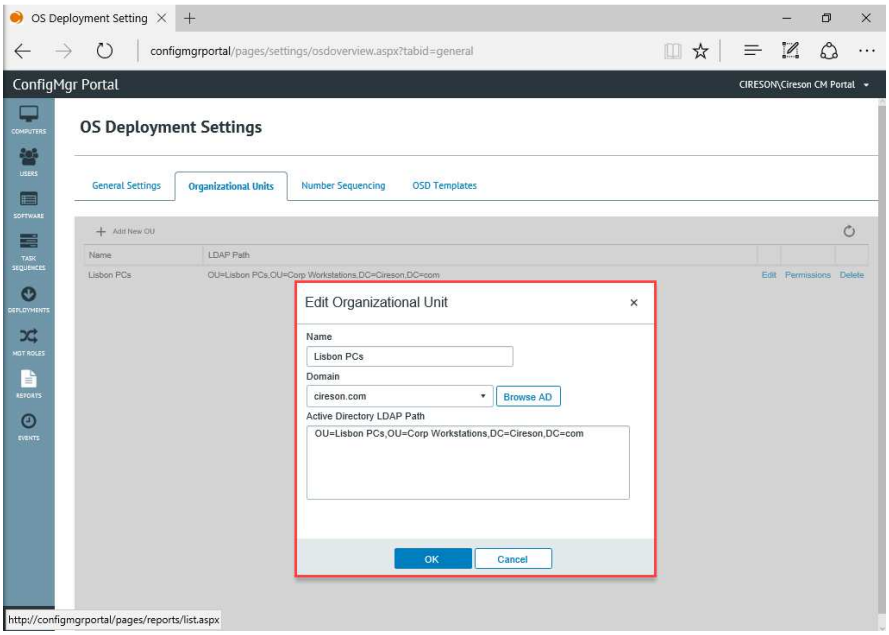
NOTE: The Portal does not ship with any Organizational Units defined.



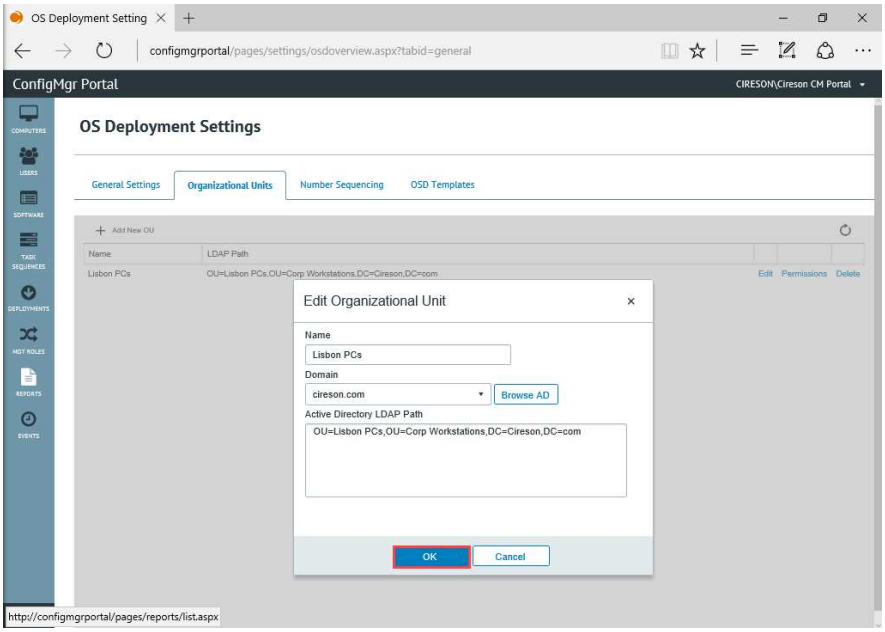
3. Click **Edit** beside the Organizational Unit you want to edit.



4. On the **Edit Organizational Unit** dialog box, make the required changes.



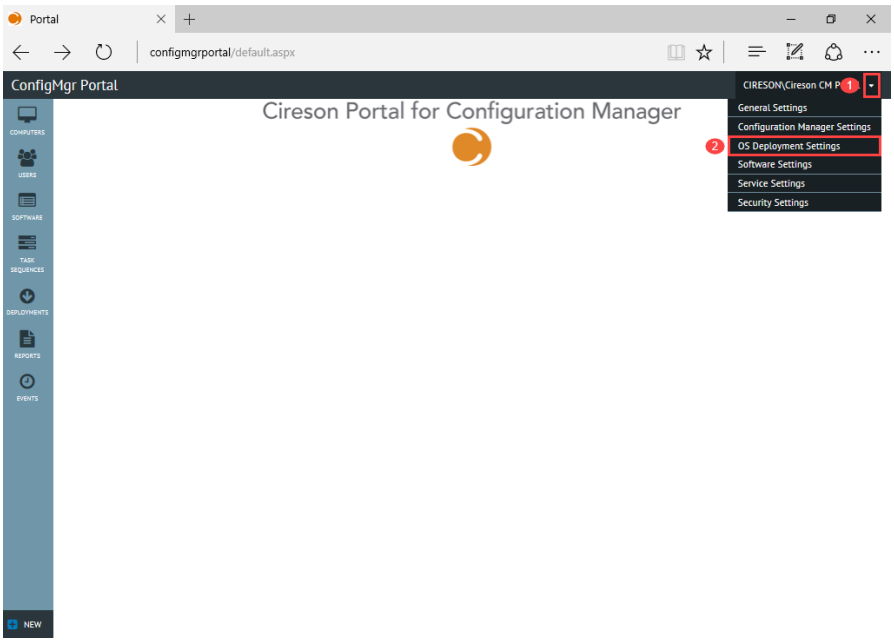
5. Click **OK** to save your changes.



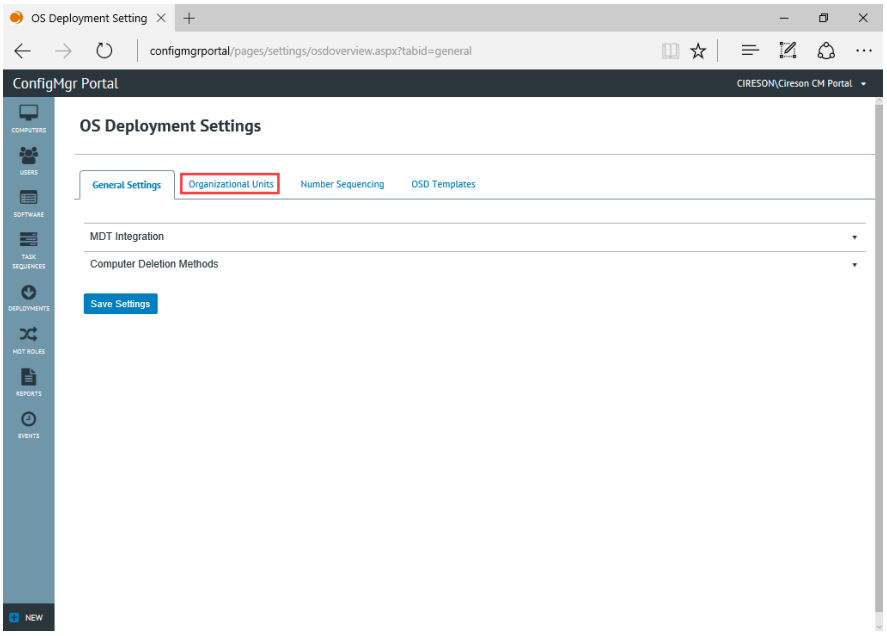
How do I manage the permissions on an Organizational Unit?

To manage the permissions on an Organizational Unit:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

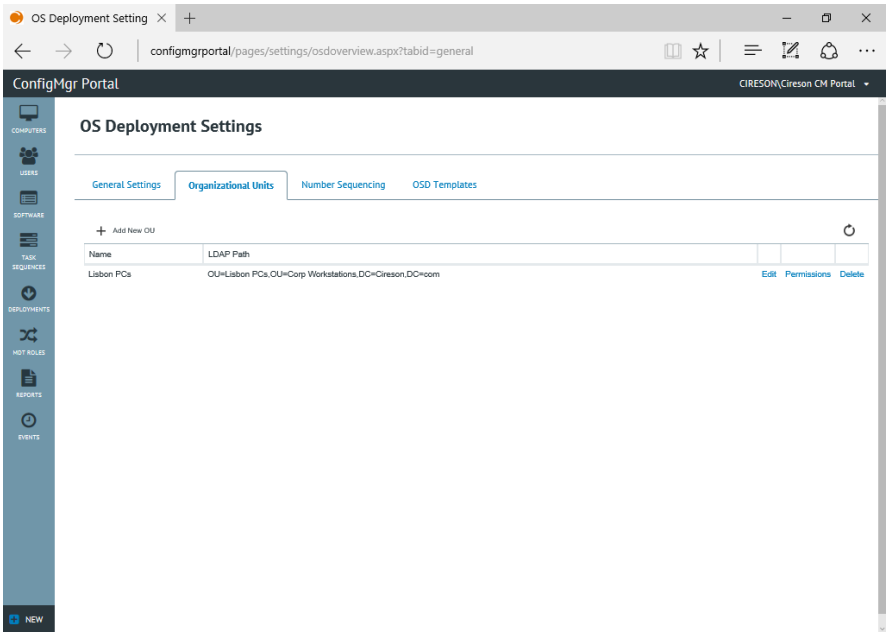


2. Click the **Organizational Units** tab.

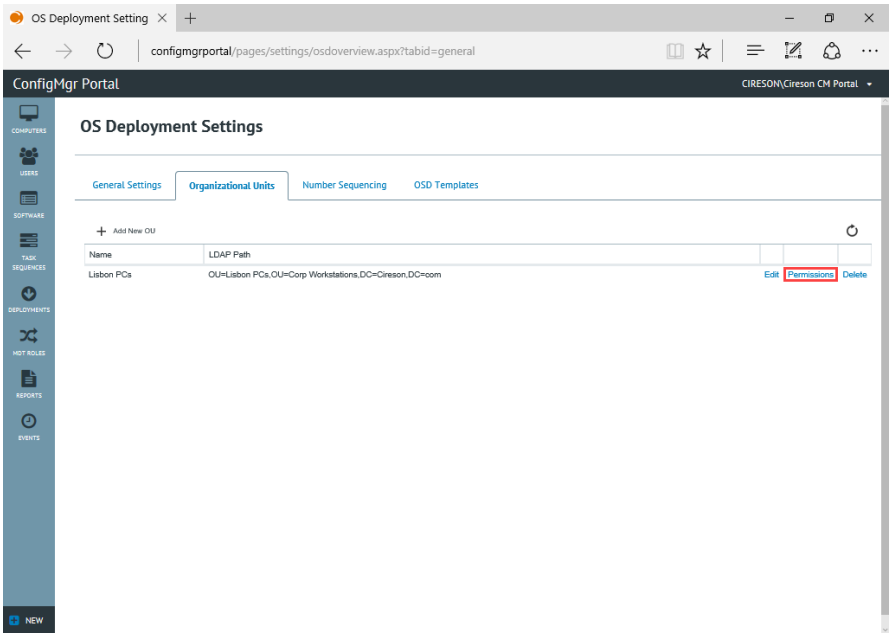


A list of the current Organizational Units is displayed.

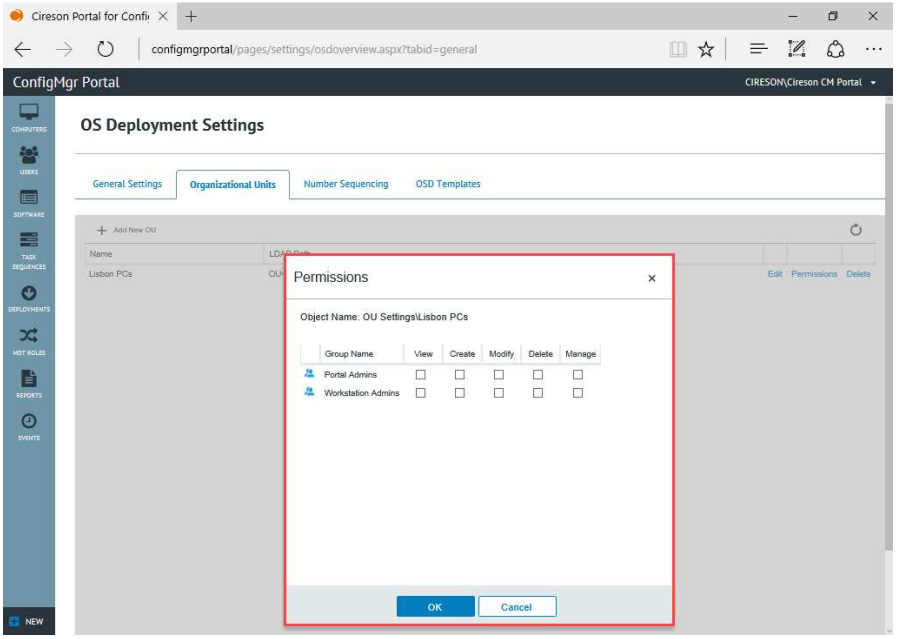
NOTE: The Portal does not ship with any Organizational Units defined.



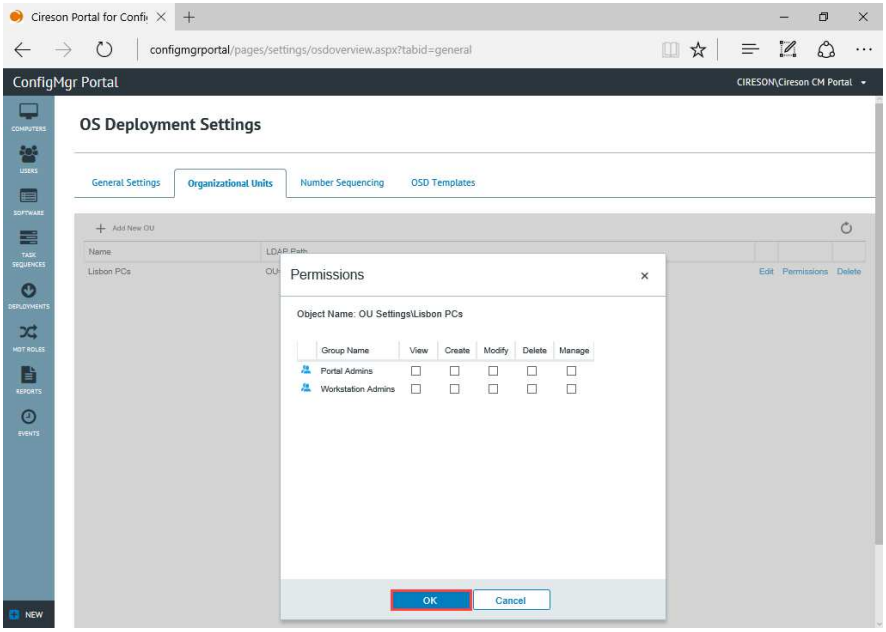
3. Click **Permissions** beside the Organizational Unit whose permissions you want to manage.



4. On the **Permissions** dialog box, set the relevant permissions for the appropriate Portal groups (a group requires a minimum of **View** to be able to see and use the Organizational Unit).



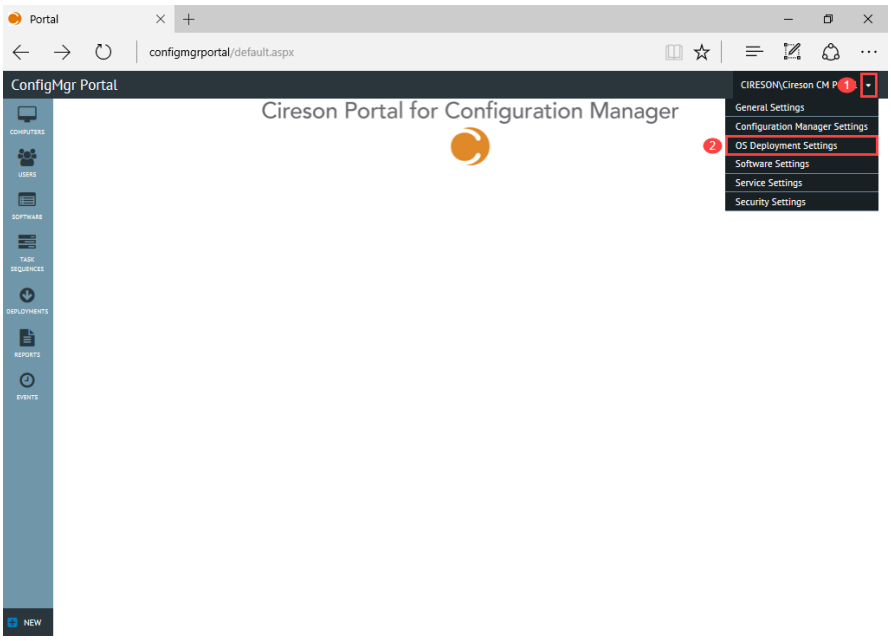
5. Click **OK** to save the changes.



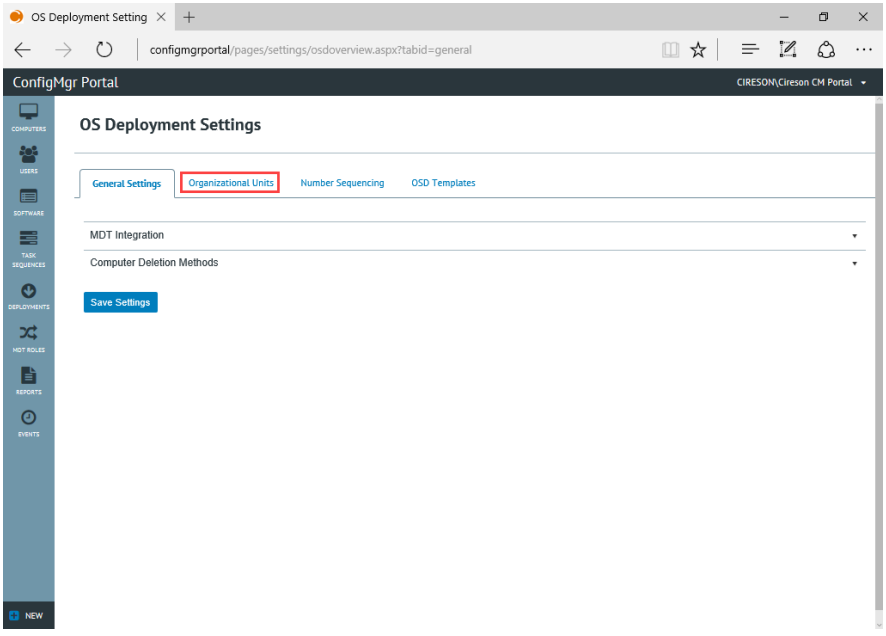
How do I delete an Organizational Unit?

To delete an Organizational Unit:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

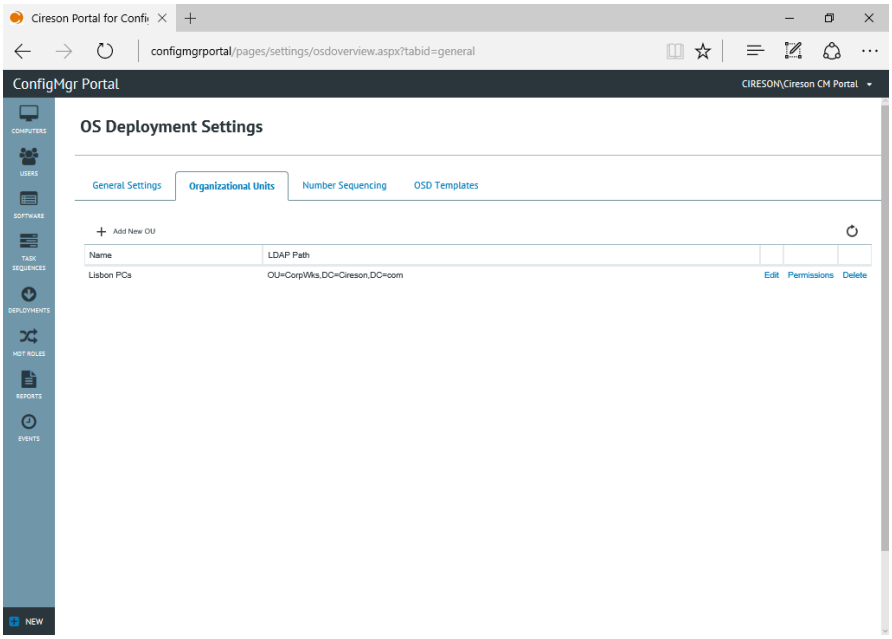


2. Click the **Organizational Units** tab.

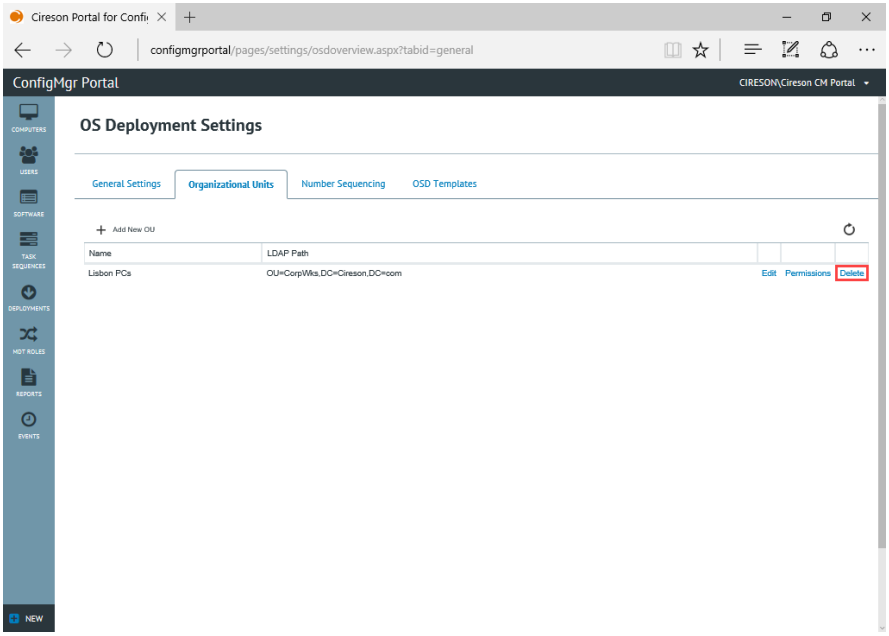


A list of the current Organizational Units is displayed.

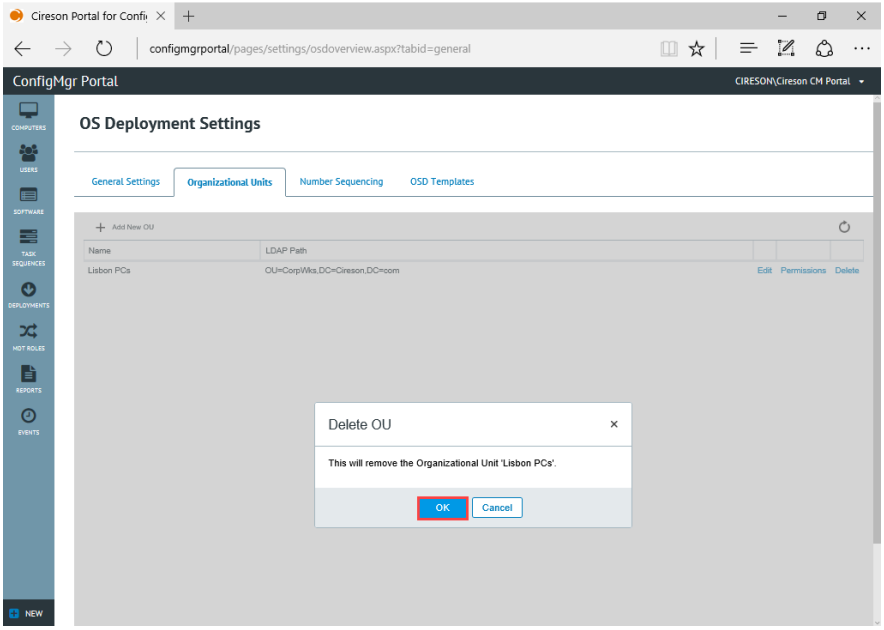
NOTE: The Portal does not ship with any Organizational Units defined.



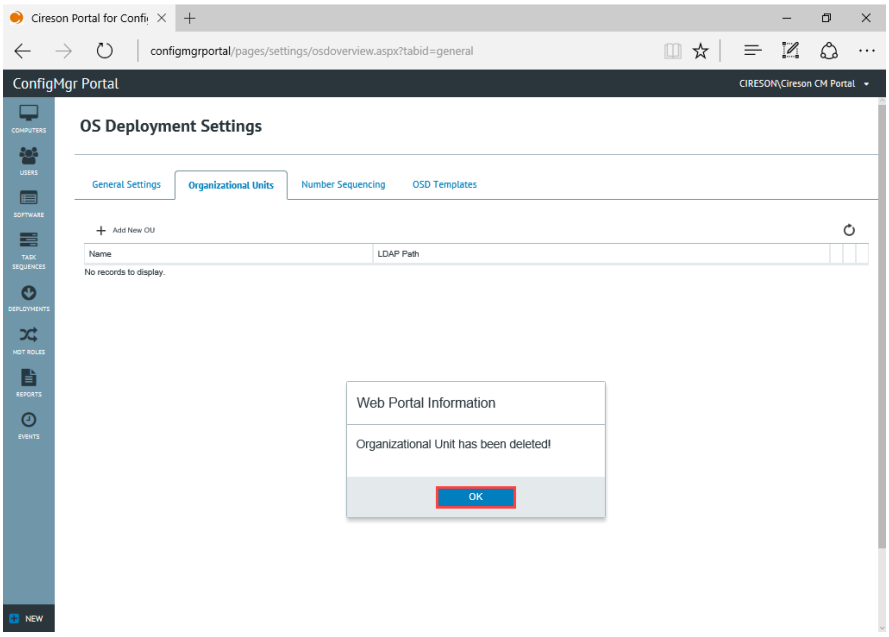
3. Click **Delete** beside the Organizational Unit you want to delete.



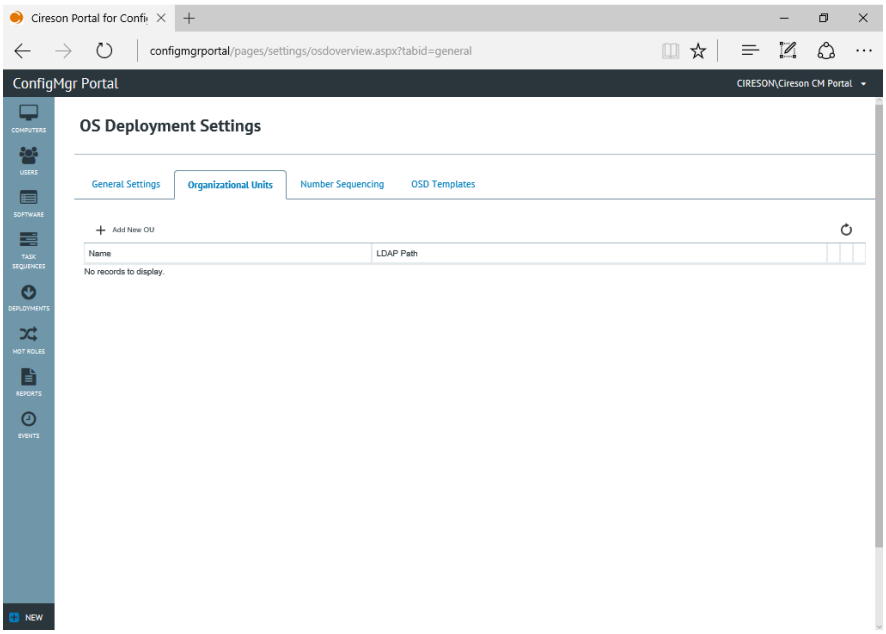
4. Click **OK** on the **Delete OU** dialog box stating **This will remove the Organizational Unit '<*organizational_unit_name*>'**.



5. Click **OK** on the **Web Portal Information** dialog box stating **Organizational Unit has been deleted!**



The Organizational Unit is deleted and is no longer shown on the **Organizational Units** tab.



OSD Templates

The Portal allows you to create different Operating System Deployment (OSD) Templates containing appropriate settings for OSD such as ConfigMgr Site, the Organizational Unit the computer should be placed into, Naming format, etc. Then the next time you use OSD, you can select the relevant OSD Template from a list which will then automatically perform OSD using the settings defined in the Template. This section details the tasks related to OSD Templates that you can perform using the Portal.

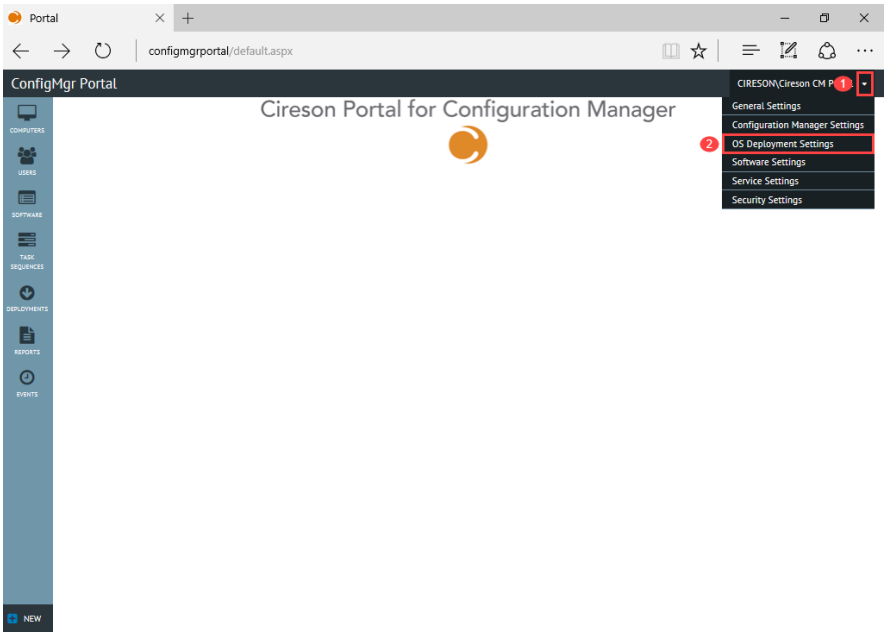
NOTE: Although they have similar names, OSD Templates are different to OSD Task Sequence Templates. OSD Task Sequence Templates allow you to define presets for an OSD Task Sequence such as the image to use, domain to join, ConfigMgr client package to use, etc. For more information see Templates.

- How do I create a new OSD Template?
- How do I edit an OSD Template?
- How do I manage the permissions on an OSD Template?
- How do I delete an OSD Template?

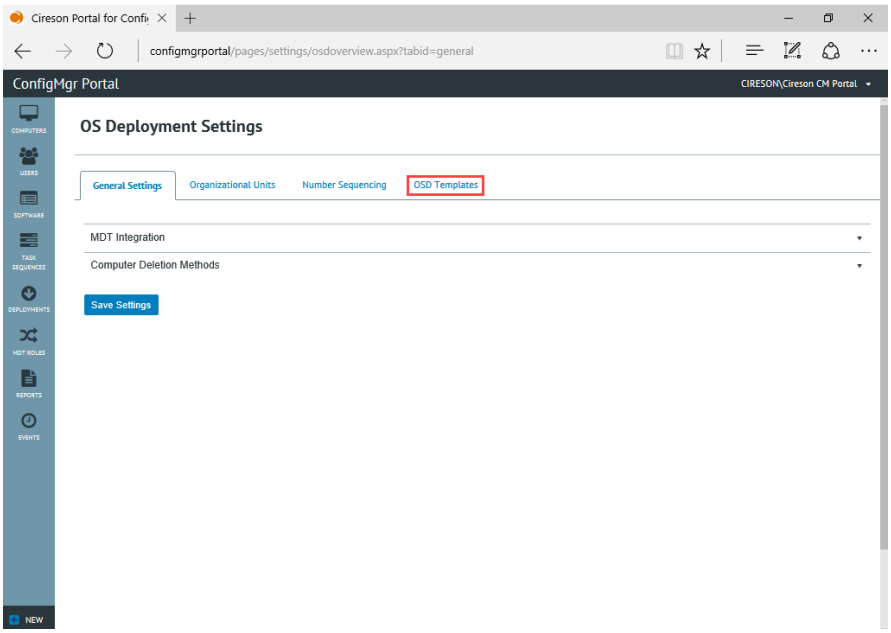
How do I create a new OSD Template?

To create a new OSD Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**



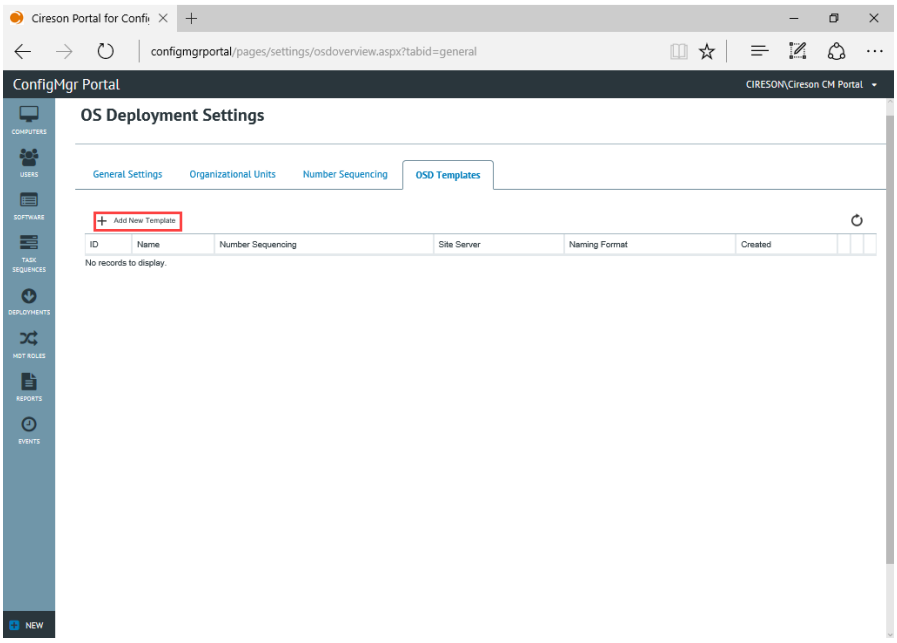
2. Click the **OSD Templates** tab.



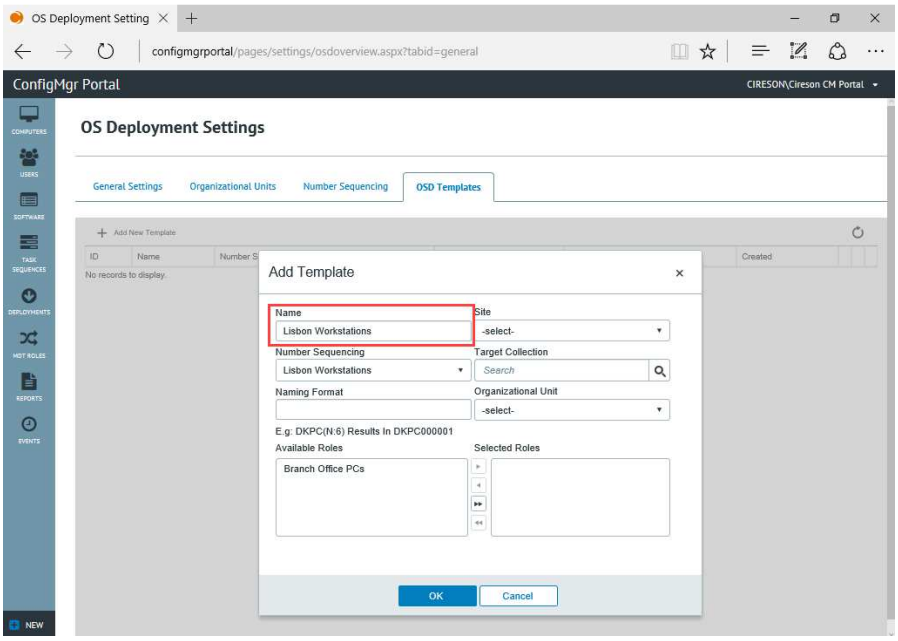
A list of the current OSD Templates is displayed.

NOTE: The Portal does not ship with any default OSD Templates.

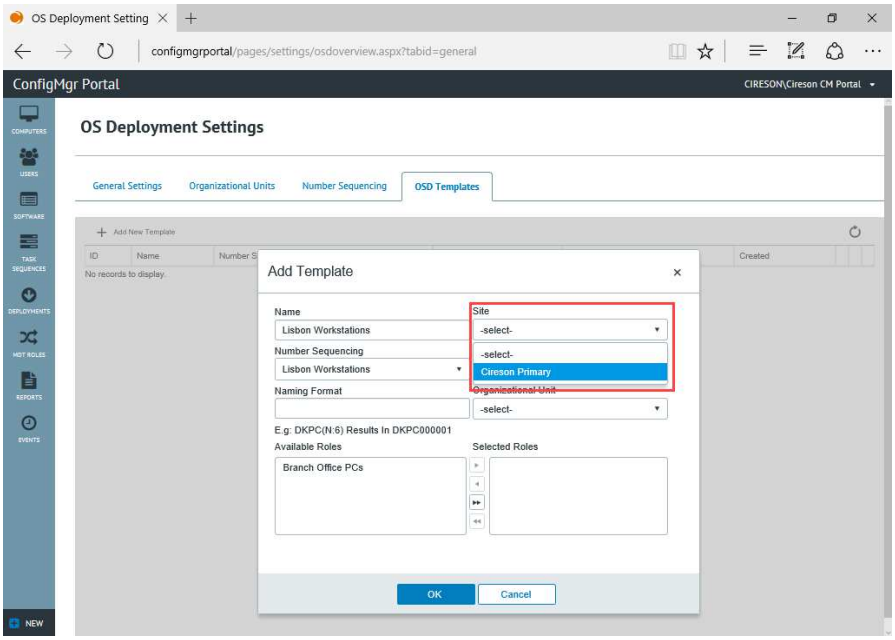
3. Click **Add New Template**



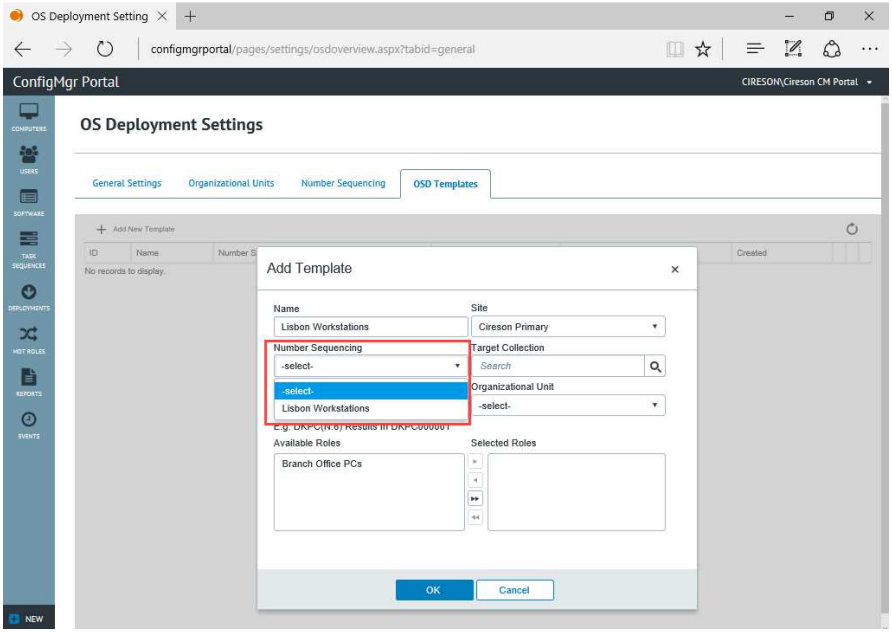
4. On the **Add Template** page, enter the name of the new OSD Template in the **Name** field.



5. From the **Site** dropdown, select the relevant ConfigMgr Site.

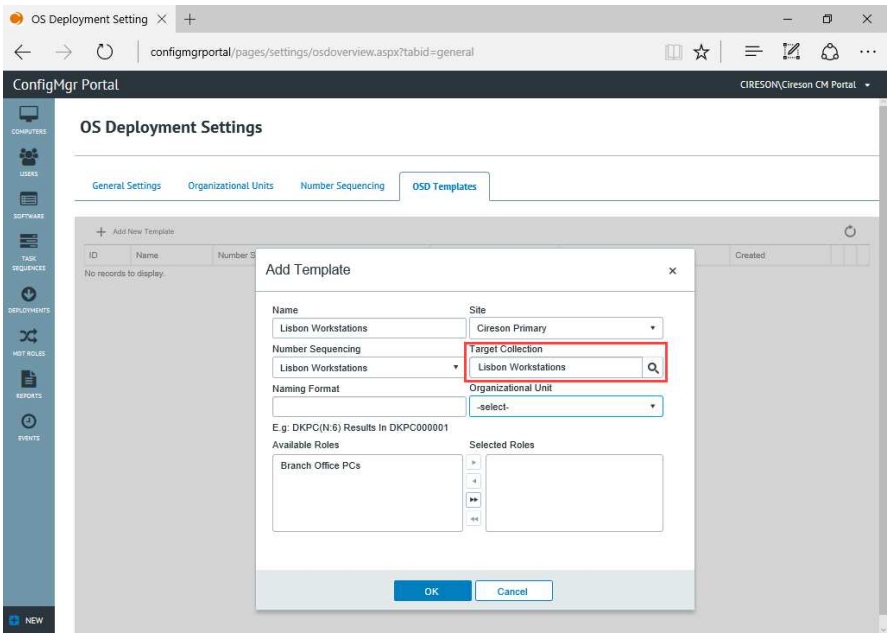


6. From the **Number Sequencing** dropdown, select the relevant Number Sequencing Series created previously (How do I create a new Number Sequencing Series?).

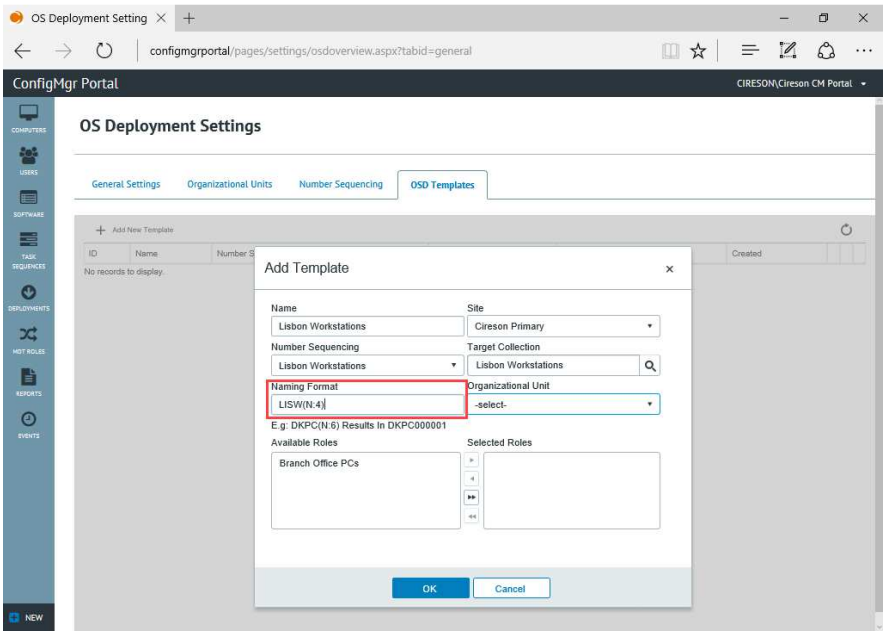


7. In the **Target Collection** field, enter the name of the collection that the OSD task sequence should be targeted to.

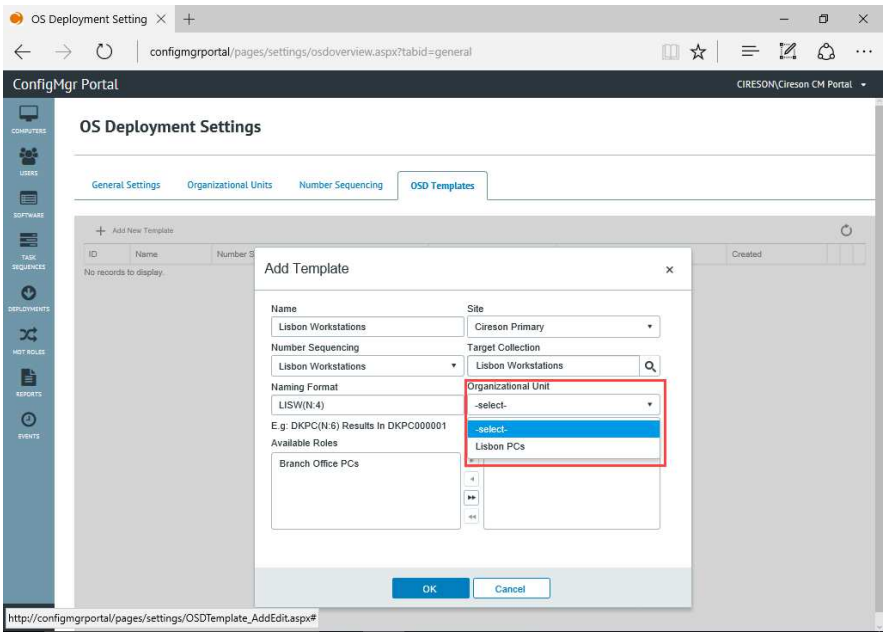
   TIP: As you start typing the name, a list of matching collections will be shown for you to select from.



8. In the **Naming Format** field, type the desired naming format.

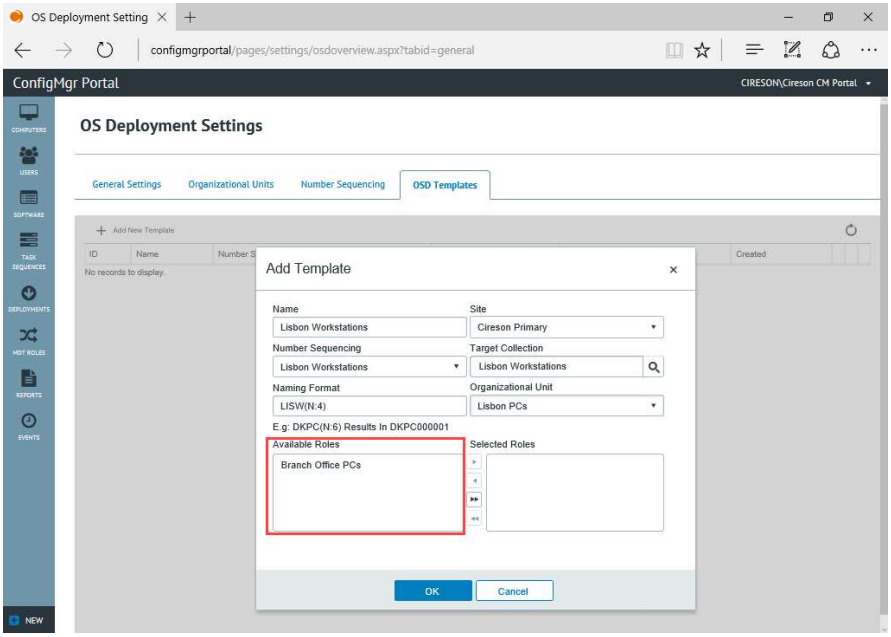


9. From the **Organizational Unit** dropdown, select the Organizational Unit previously created (How do I register a new Organizational Unit?).

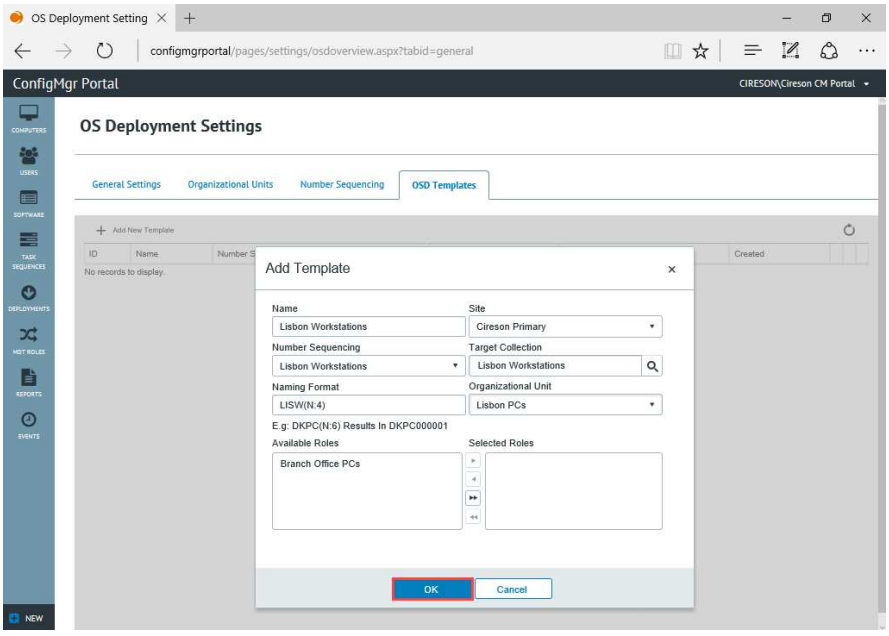


10. Optionally add any required MDT Roles under the **Available Roles** section.

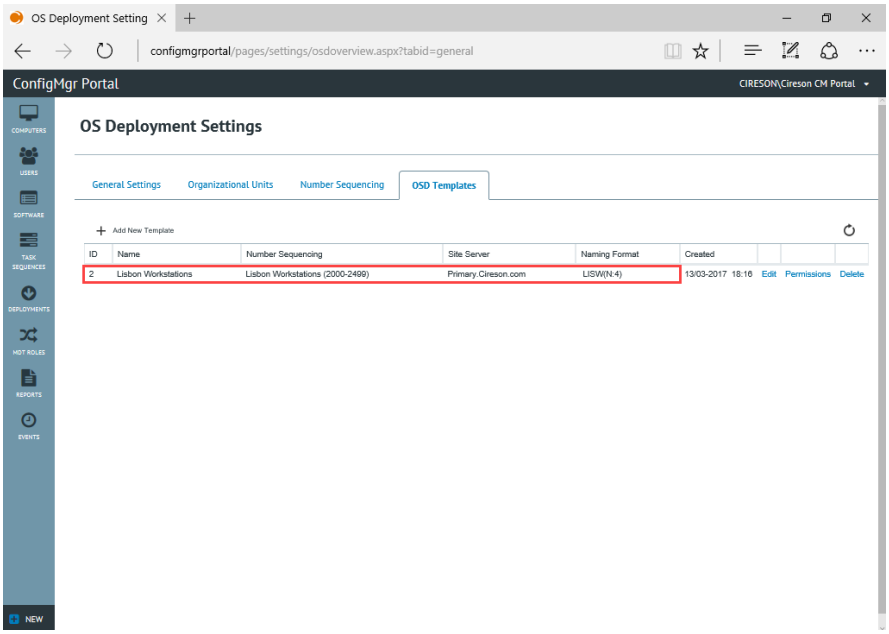
    NOTE: To add a role, first select it in the **Available Roles** section then click the right arrow ( ) to move it over to the **Selected Roles** section.



11. Click **OK** to save the new OSD Template.



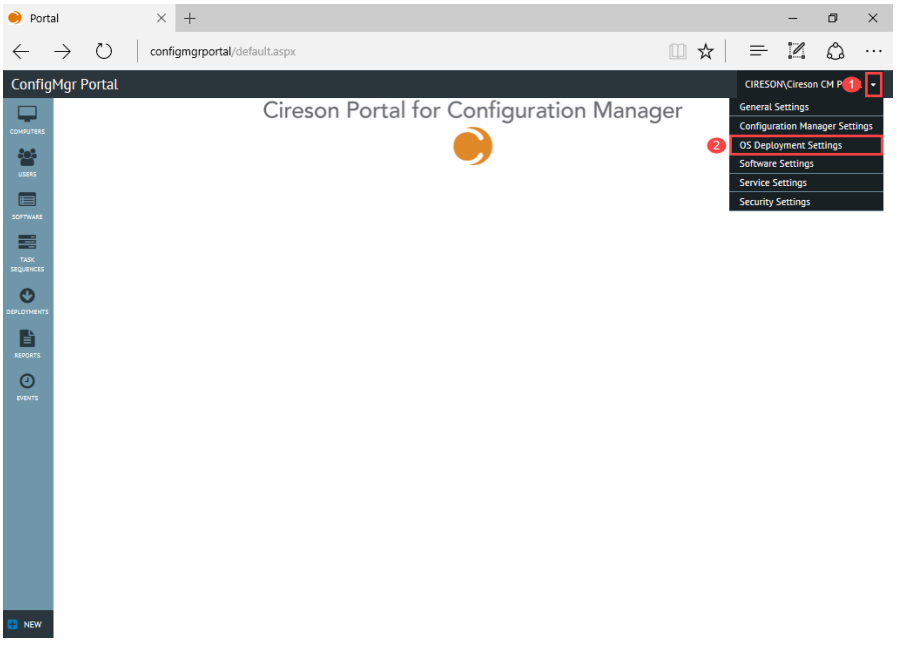
The **OSD Templates** tab automatically refreshes displaying the newly added OSD Template.



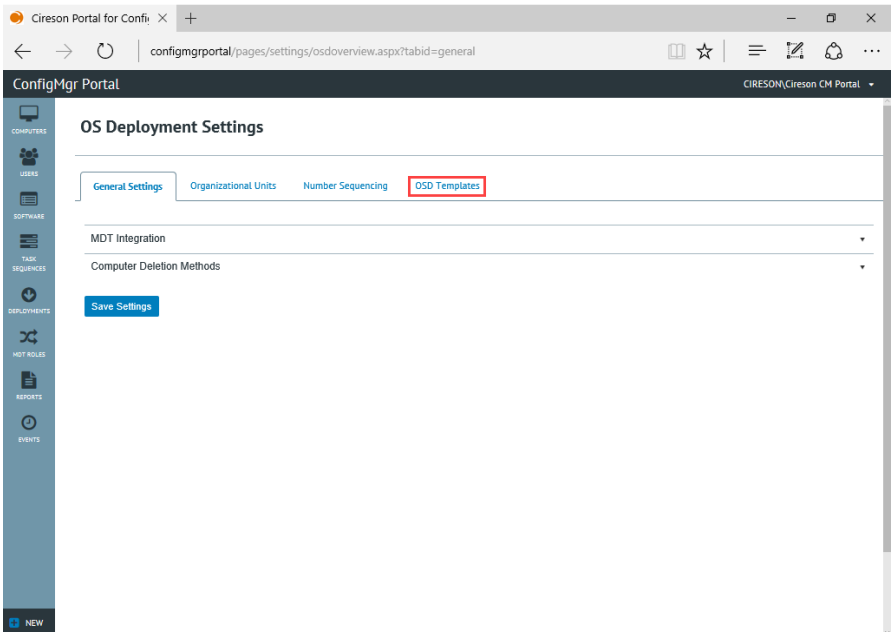
How do I edit an OSD Template?

To edit an OSD Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

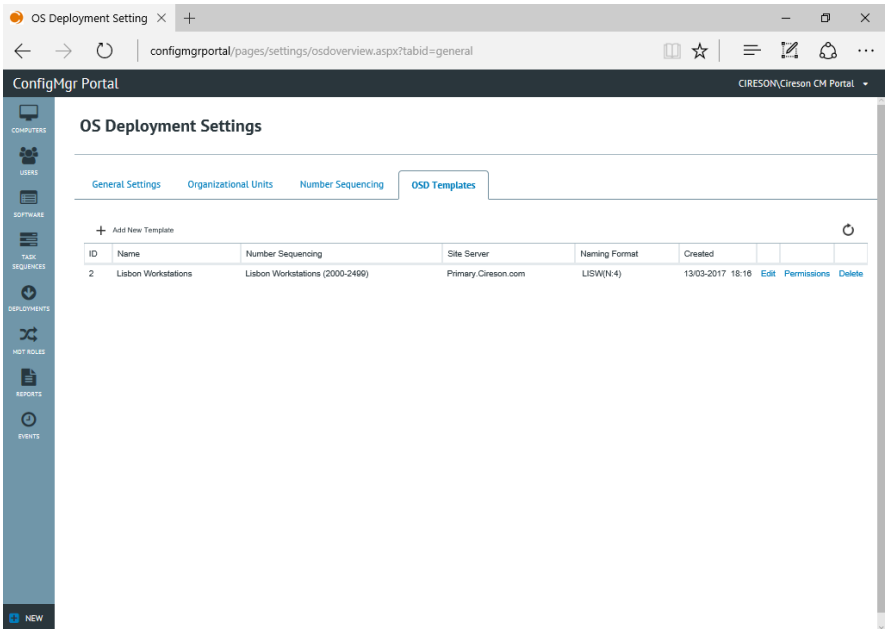


2. Click the **OSD Templates** tab.

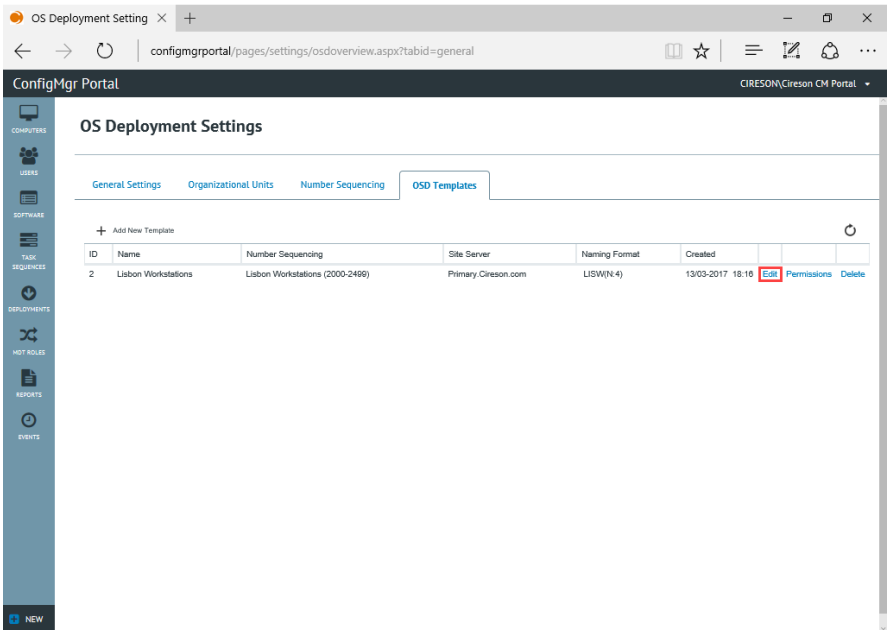


A list of the current OSD Templates is displayed.

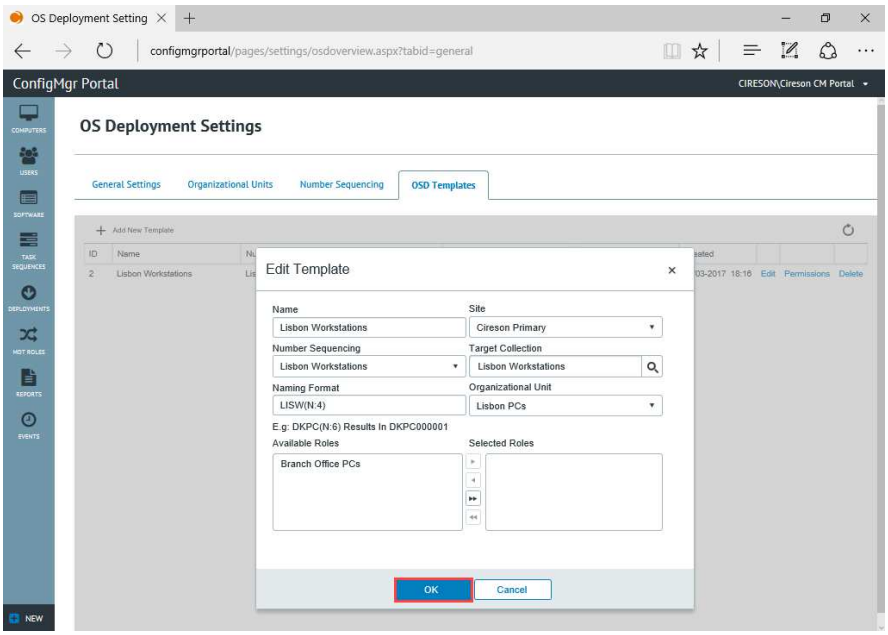
NOTE: The Portal does not ship with any default OSD Templates.



3. Click **Edit** beside the OSD Template you want to edit.



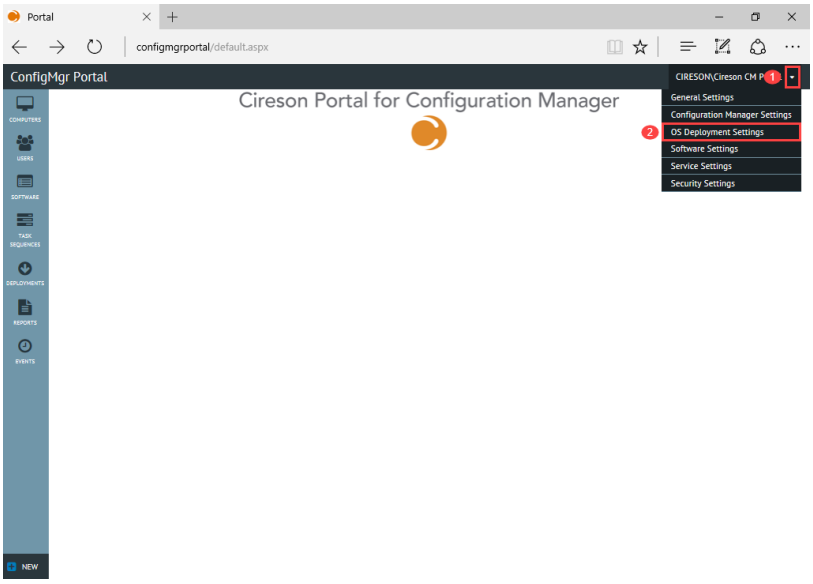
4. On the **Edit Template** dialog box, make the required changes to the OSD Template then click **OK** to save the changes.



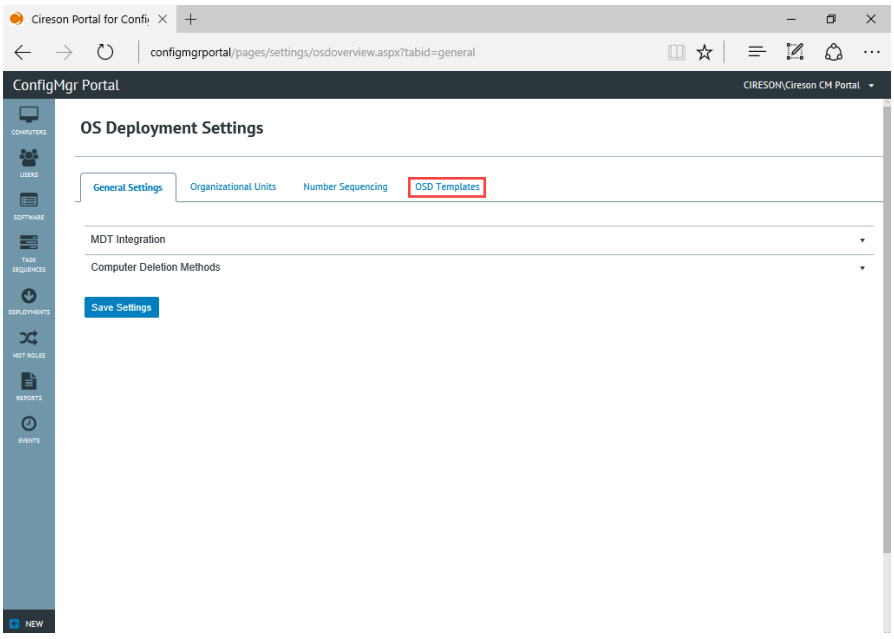
How do I manage the permissions on an OSD Template?

To manage the permissions on an OSD Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

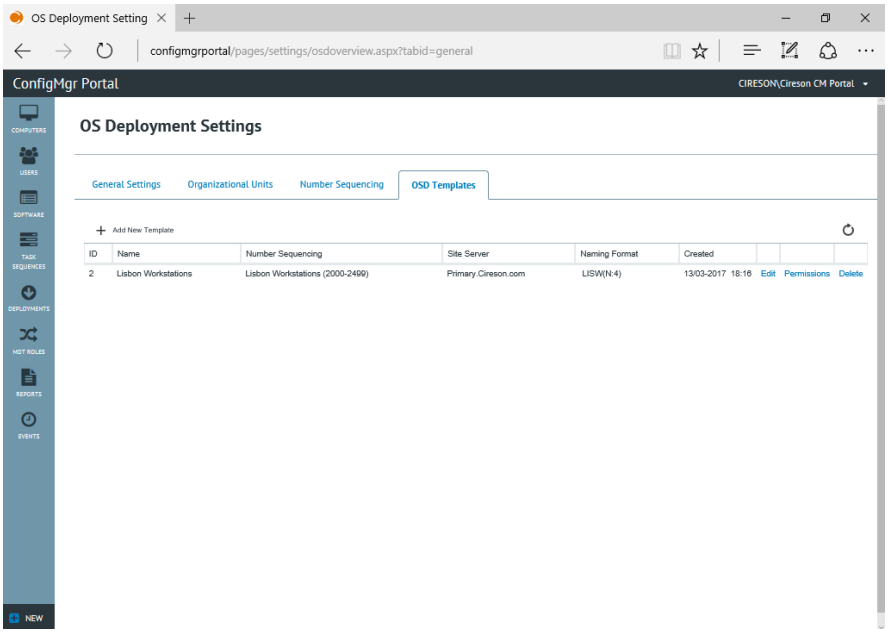


2. Click the **OSD Templates** tab.

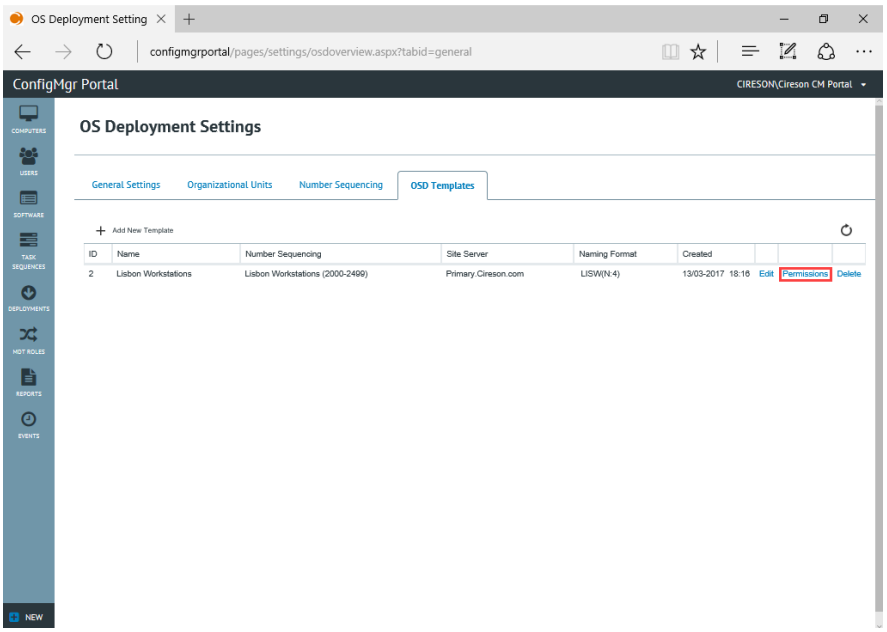


A list of the current OSD Templates is displayed.

NOTE: The Portal does not ship with any default OSD Templates.

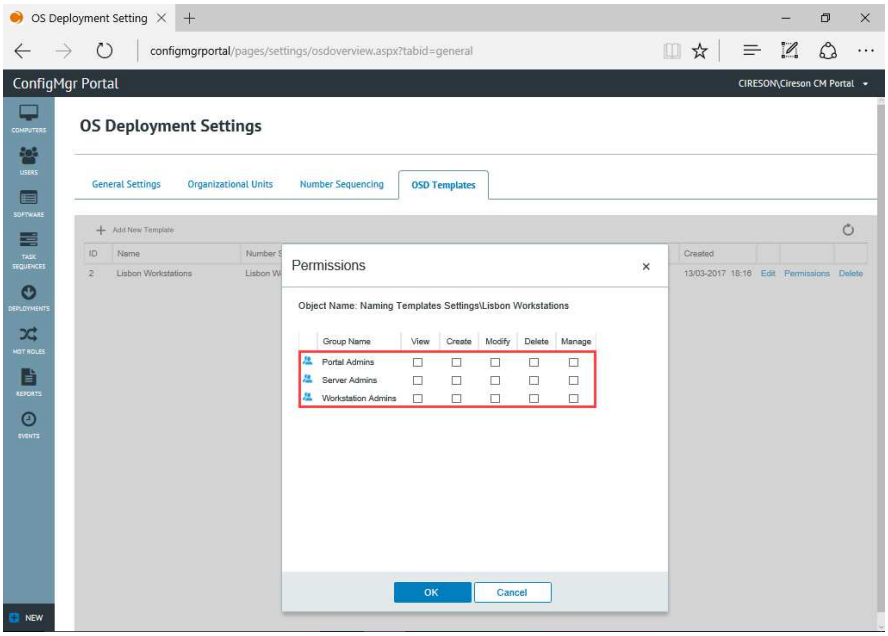


3. Click **Permissions** beside the OSD Template whose permissions you want to change.

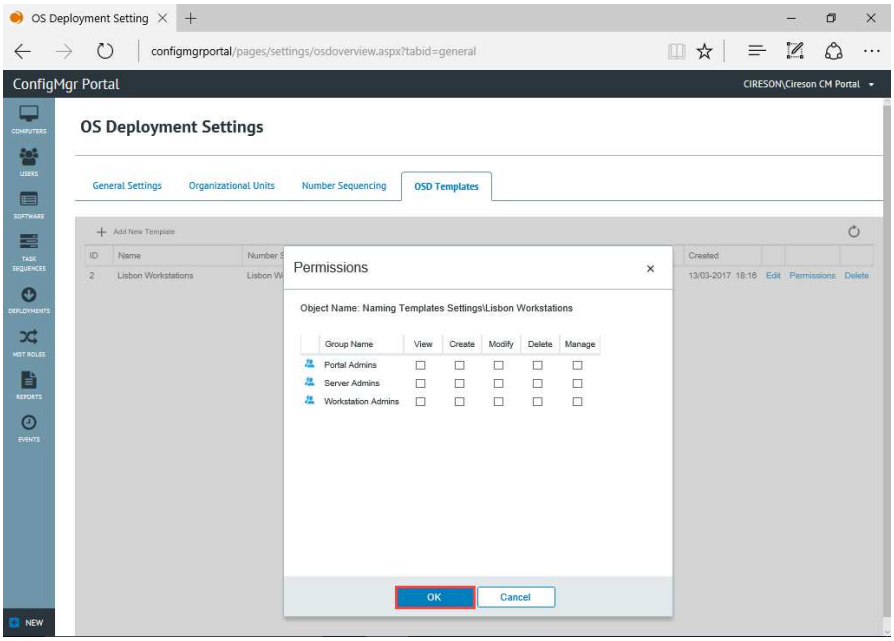


4. Select the relevant checkboxes you want to grant to each Portal group to use the OSD Template.

   NOTE: A Portal Group needs a minimum of the **View** permission to be able to see the OS Template in the Portal.



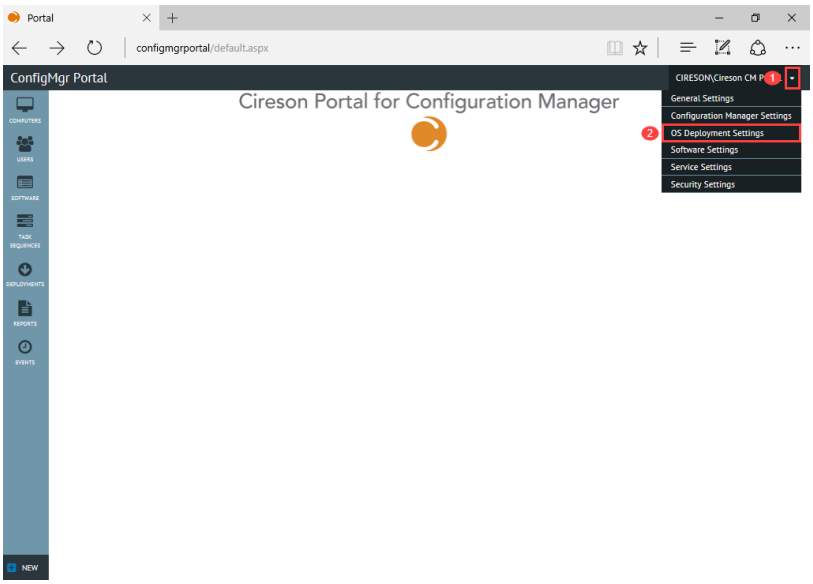
5. Click **OK** to save the changes.



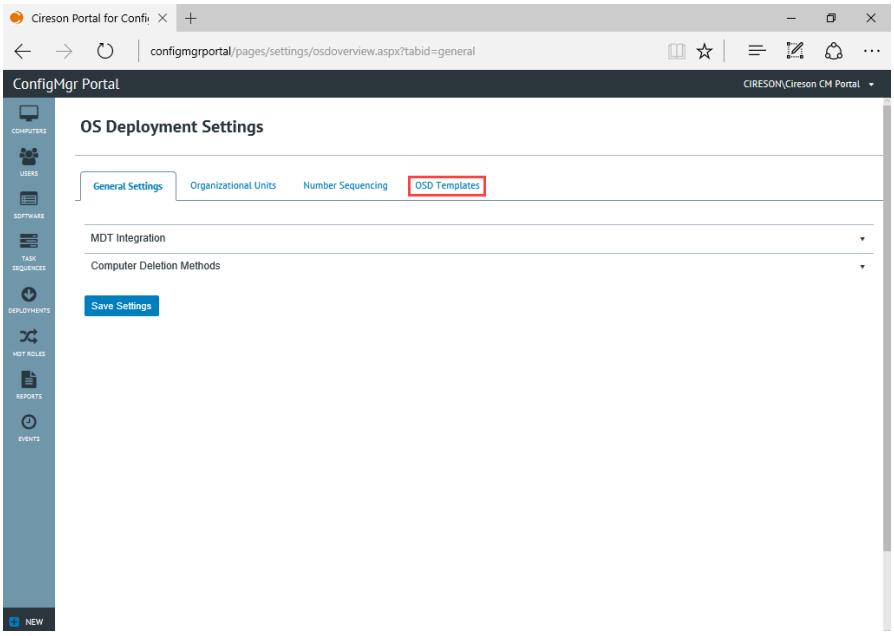
How do I delete an OSD Template?

To delete an OSD Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **OS Deployment Settings**

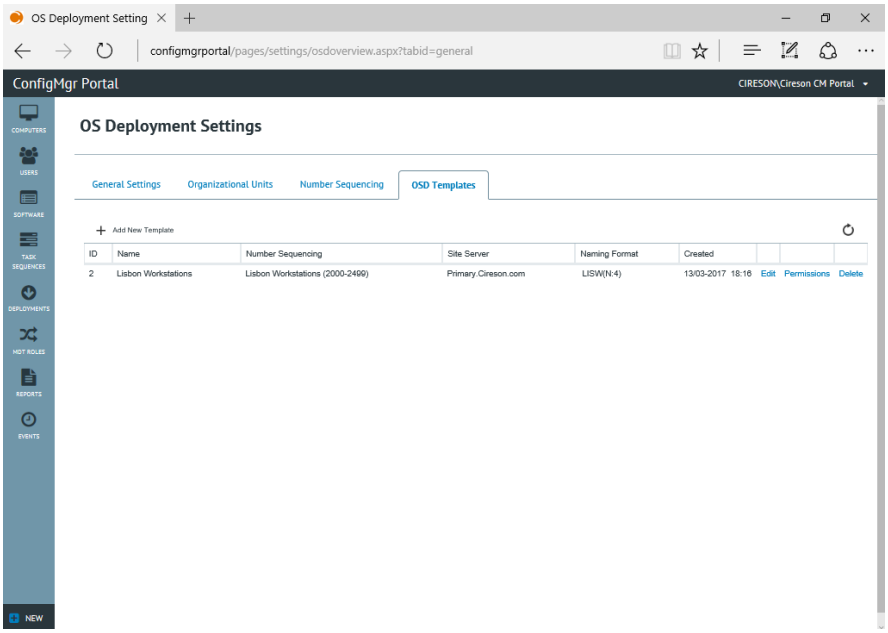


2. Click the **OSD Templates** tab.

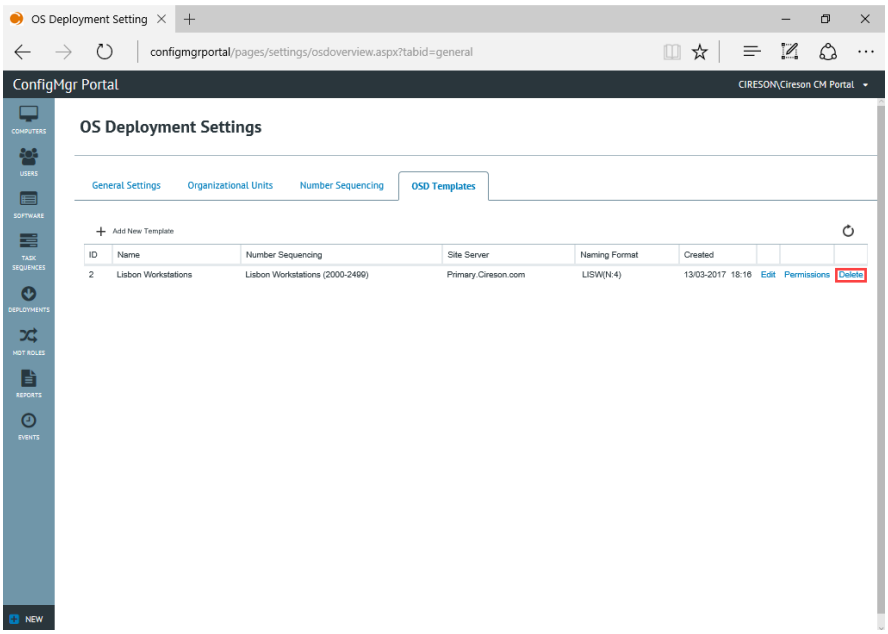


A list of the current OSD Templates is displayed.

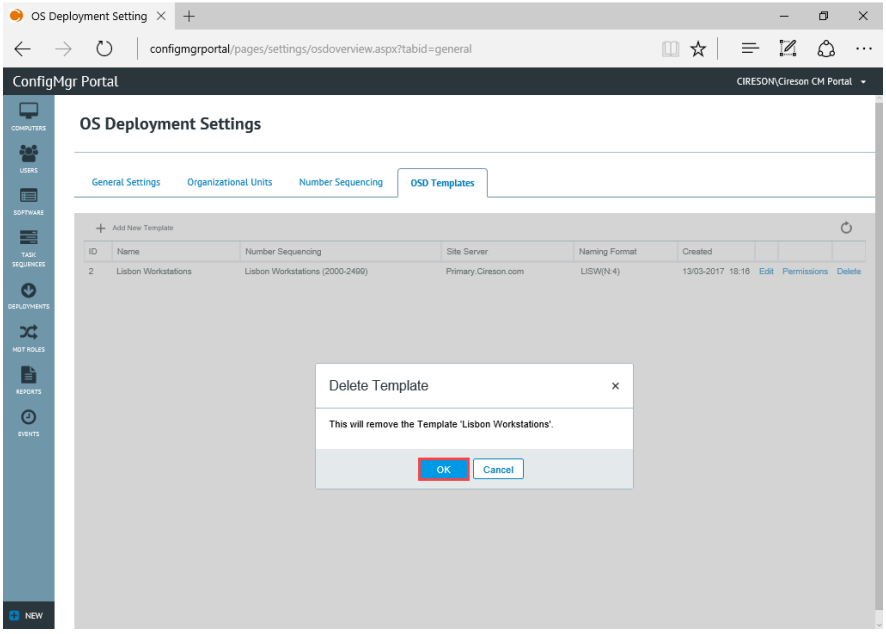
NOTE: The Portal does not ship with any default OSD Templates.



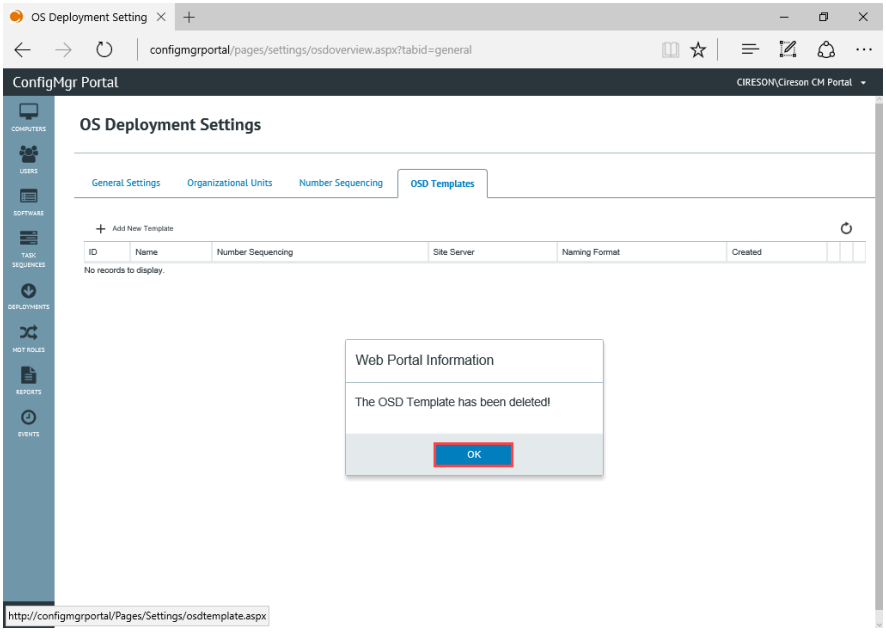
3. Click **Delete** beside the OSD Template you want to delete.



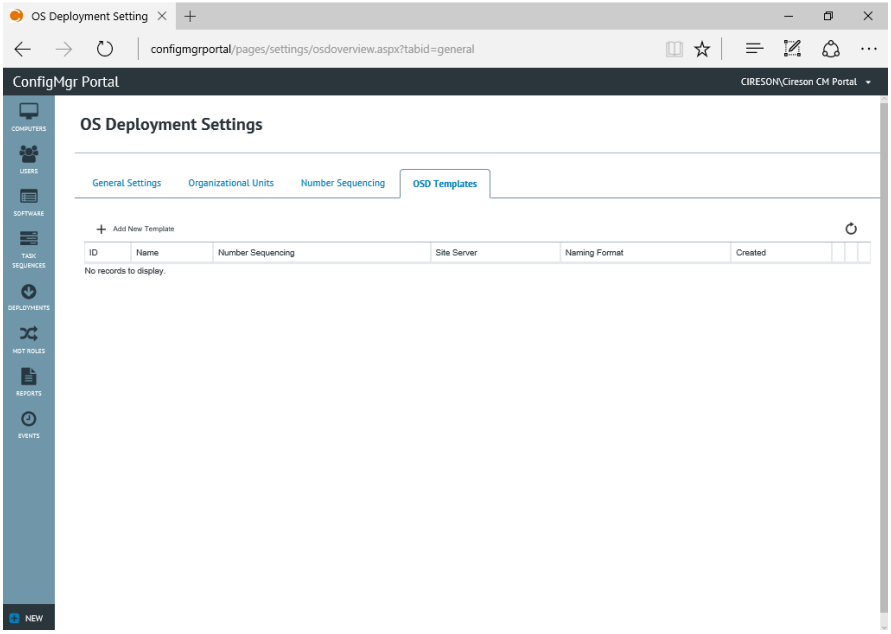
4. Click **OK** on the **Delete Template** dialog box stating **This will remove the Template '*<osd_template_name>*'**.



5. Click **OK** on the **Web Portal Information** dialog box stating **The OSD Template has been deleted!**



The **OSD Templates** tab automatically refreshes showing the template has been successfully deleted.



Registered Services

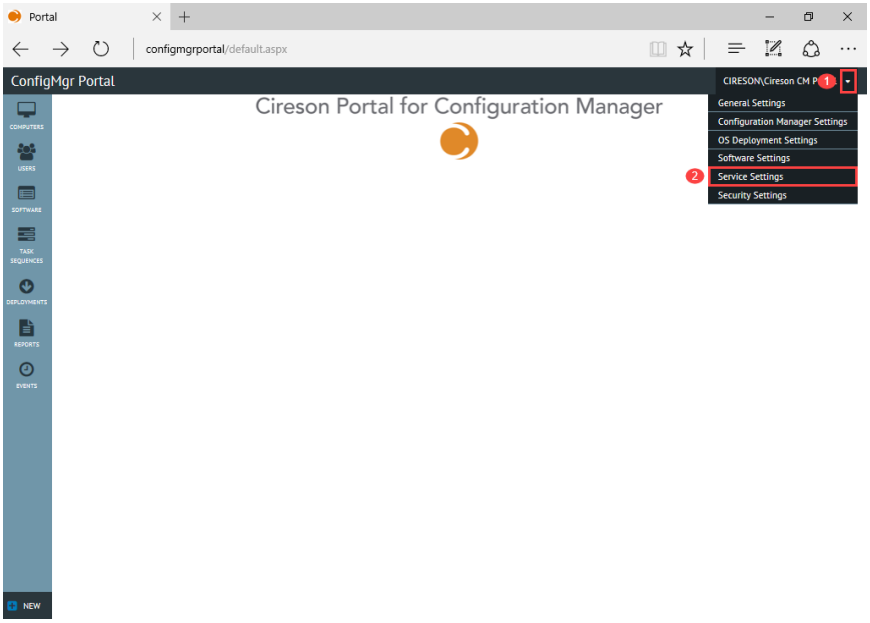
The Registered Services tab allows you to see the various services used by the Portal. This section details the tasks related to Registered Services that you can perform using the Portal.

- How do I view the Registered Services?

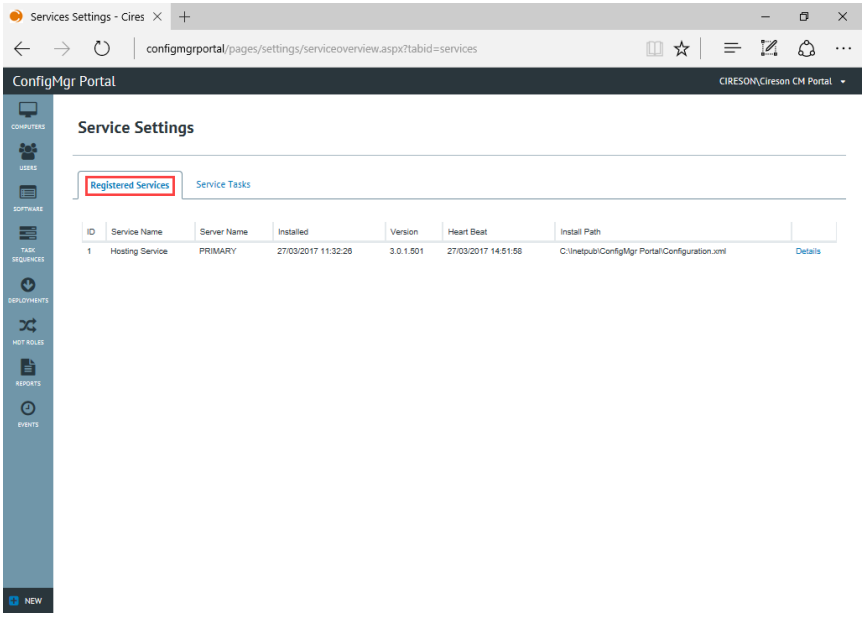
How do I view the Registered Services?

To view the Registered Services:

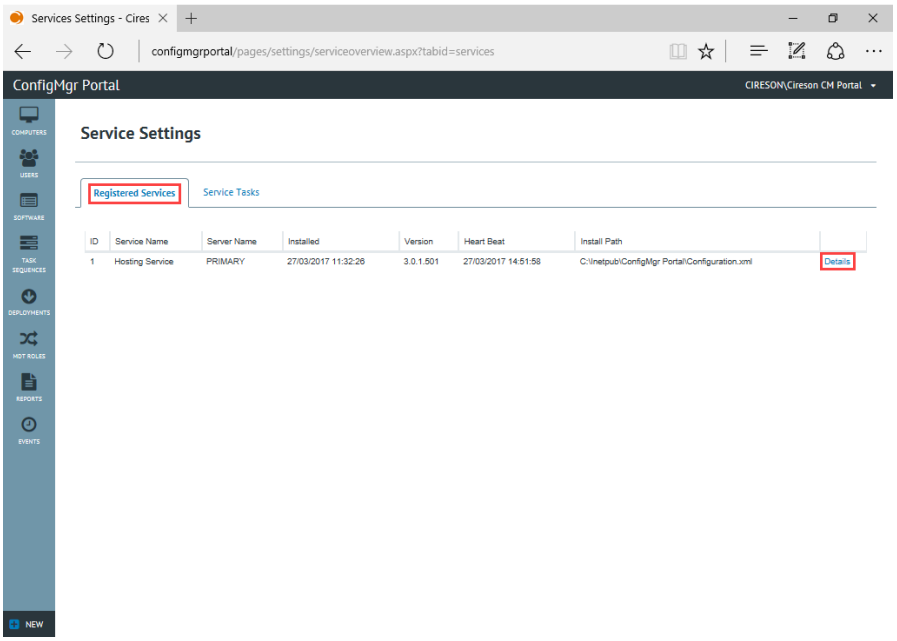
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Service Settings**



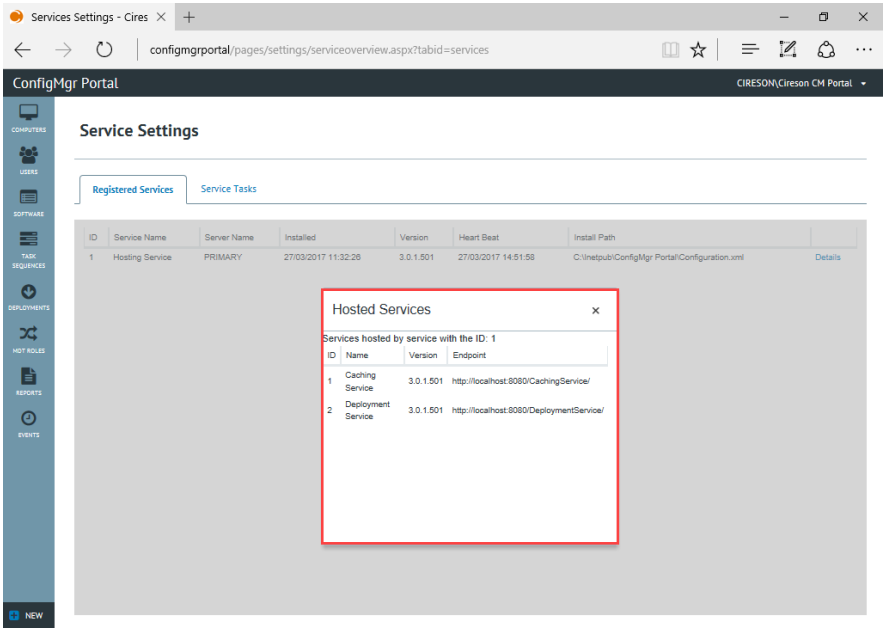
2. Make sure the **Registered Services** tab is selected.



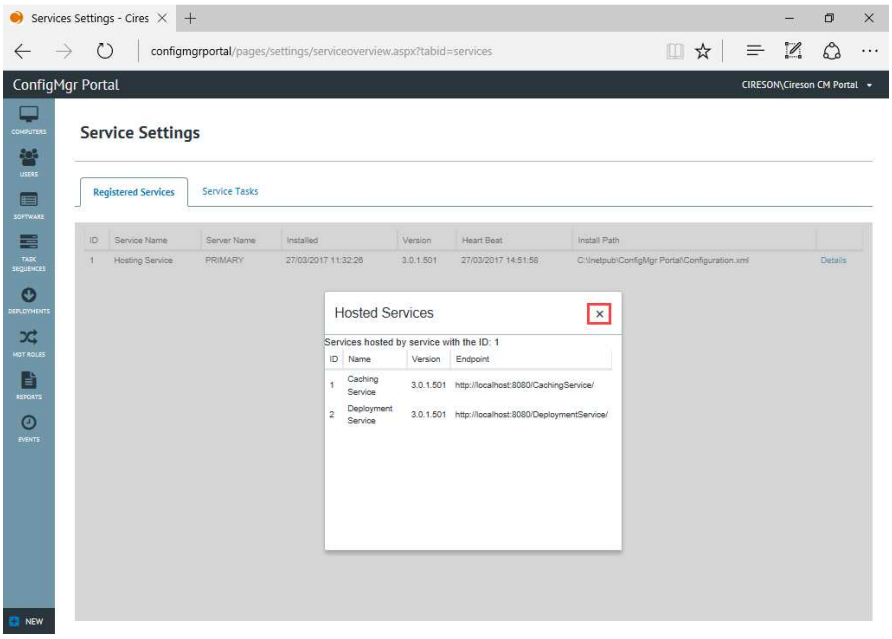
3. Click **Details**



The **Hosted Services** dialog is displayed showing all of the services that are part of the selected service.



4. Click the **X** in the top right-hand corner of the **Hosted Services** dialog box to close it.



Reporting

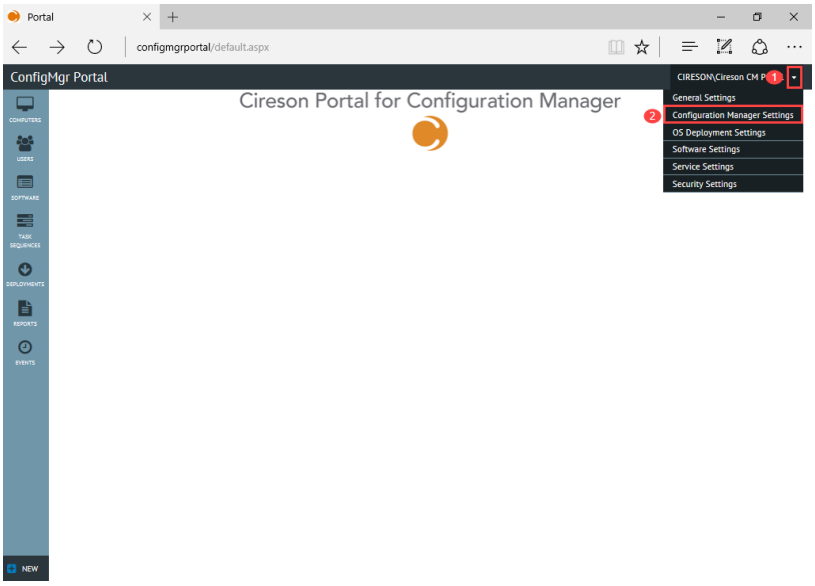
The Portal provides integration with the standard ConfigMgr Reporting through SQL Server Reporting Services. This section details the tasks related to reporting that you can perform using the Portal.

- How do I configure Reporting Services?

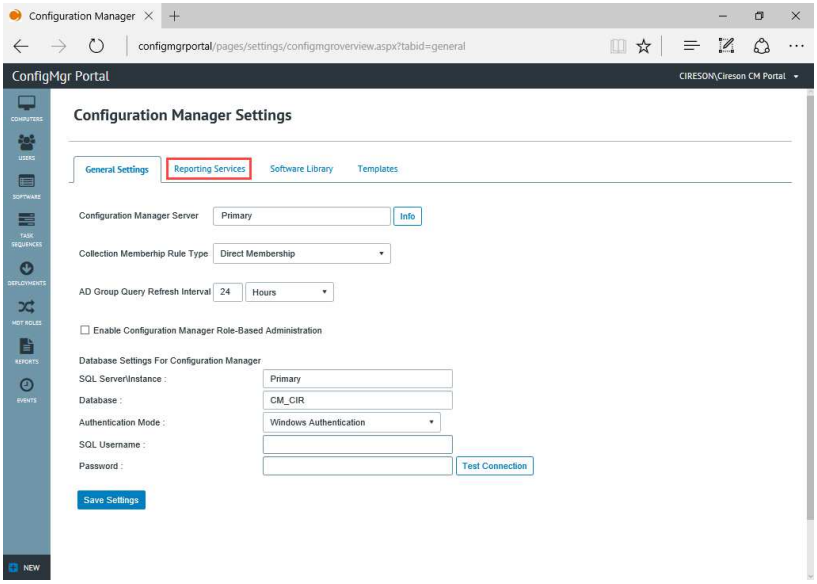
How do I configure Reporting Services?

To configure Reporting Services in the Portal:

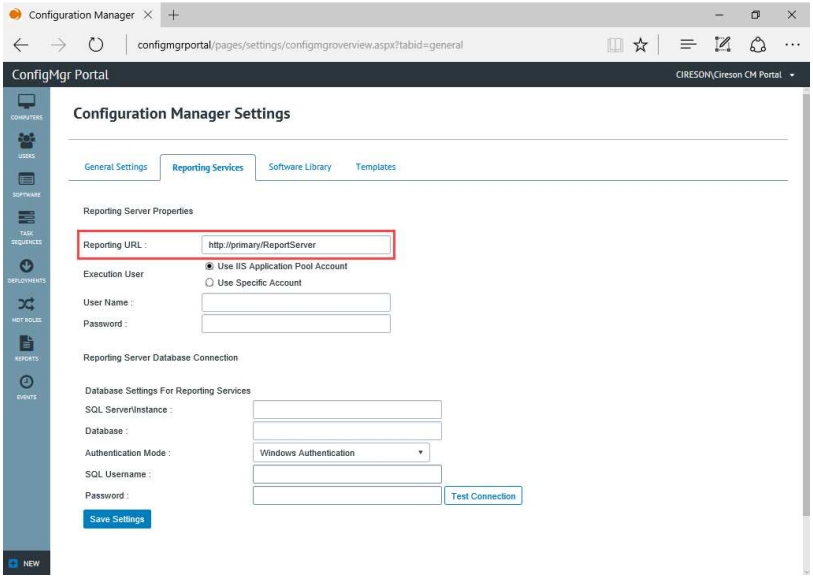
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Configuration Manager Settings**



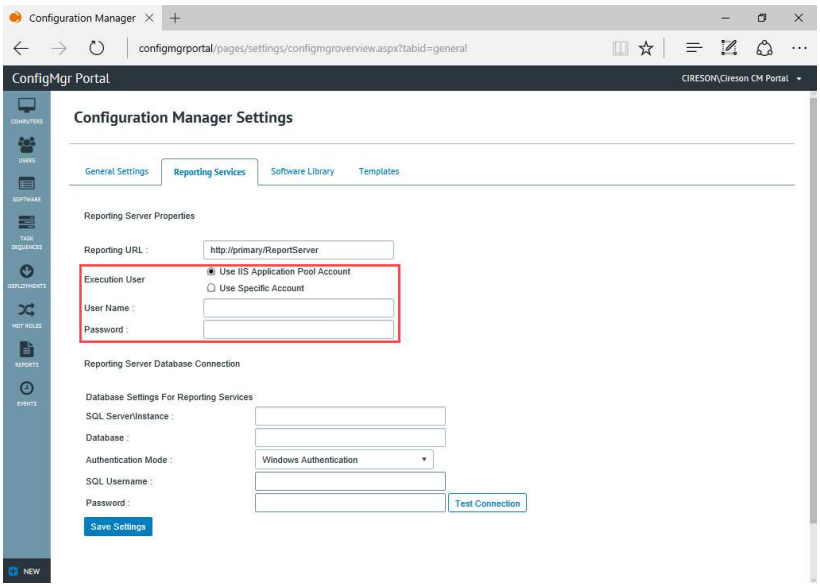
2. On the **Configuration Manager Settings** page, click the **Reporting Services** tab.



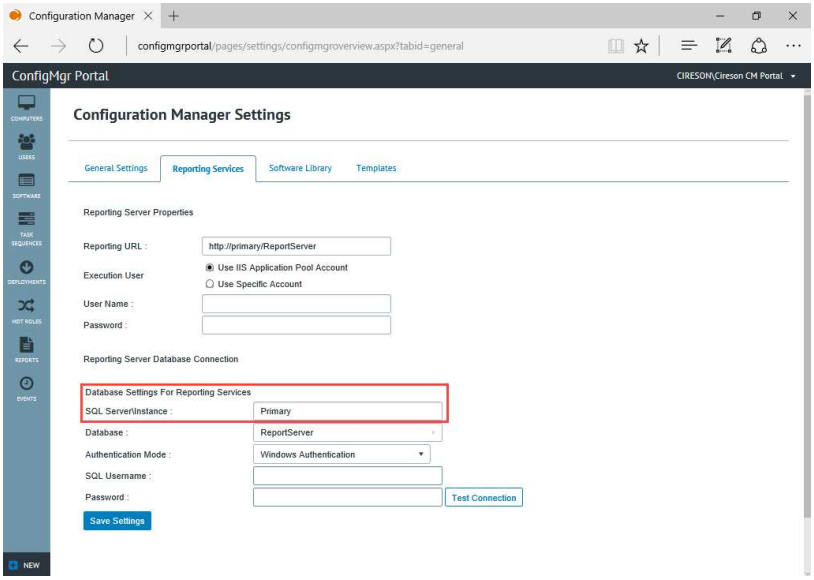
3. In the **Reporting URL** field, type the URL of the Reporting Services server (not the Report Manager URL). For example, **http://*<reporting_services_server_name>*/ReportServer**



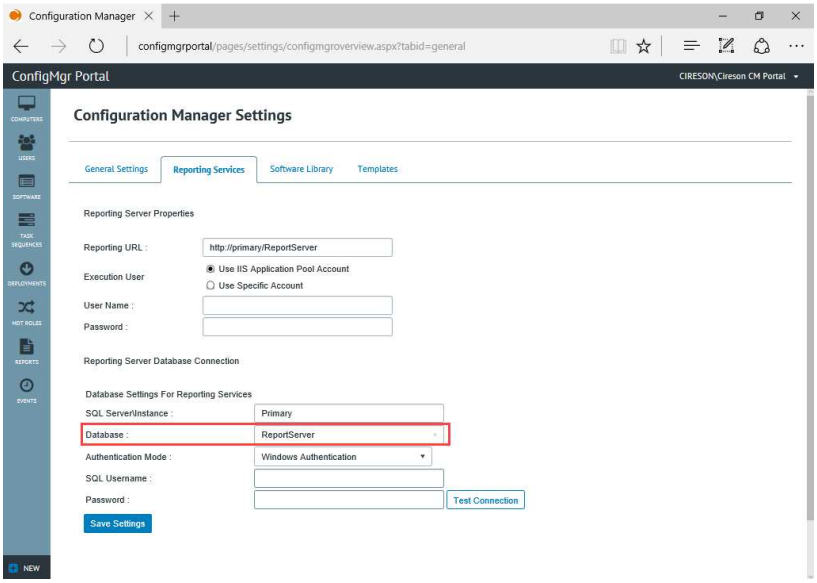
4. If required, under the **Execution User** section, select the **Use Specific Account** option and enter the relevant credentials in the **User Name** and **Password** fields.



5. Under the **Reporting Server Database Connection** section, enter the name of the SQL Server (and instance if necessary), in the **Database Settings For Reporting Services SQL Server\Instance** field.



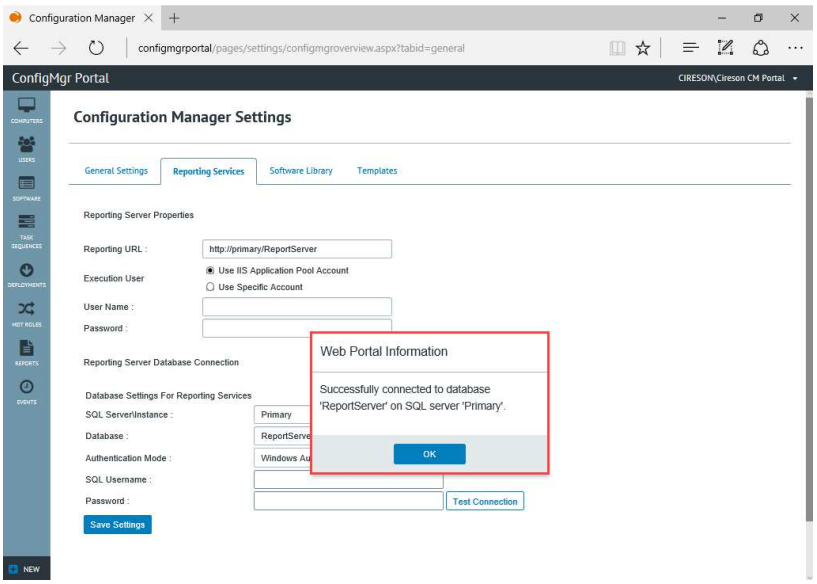
6. In the **Database** name field, enter the name of the SQL Server Reporting database. For example, **ReportServer**



7. If you are using **Windows Authentication**, click the **Test Connection** button. If you are using SQL Authentication, select this from the **Authentication Method** dropdown and enter the relevant details in the **SQL Username** and **Password** fields before clicking the **Test Connection** button.

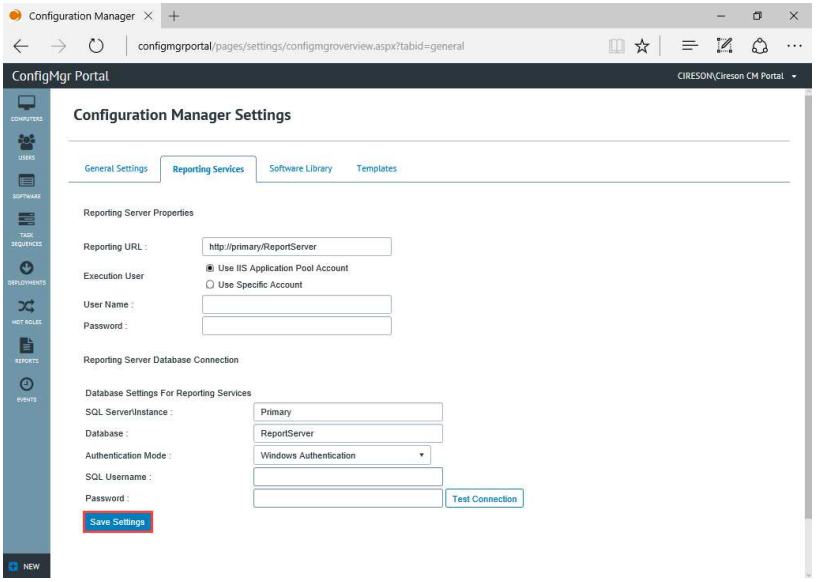
   If the connection is successful, the **Web Portal Information** dialog box will be displayed stating:

   Successfully connected to database '<*database_name*>' on SQL Server '<*server_name*>'

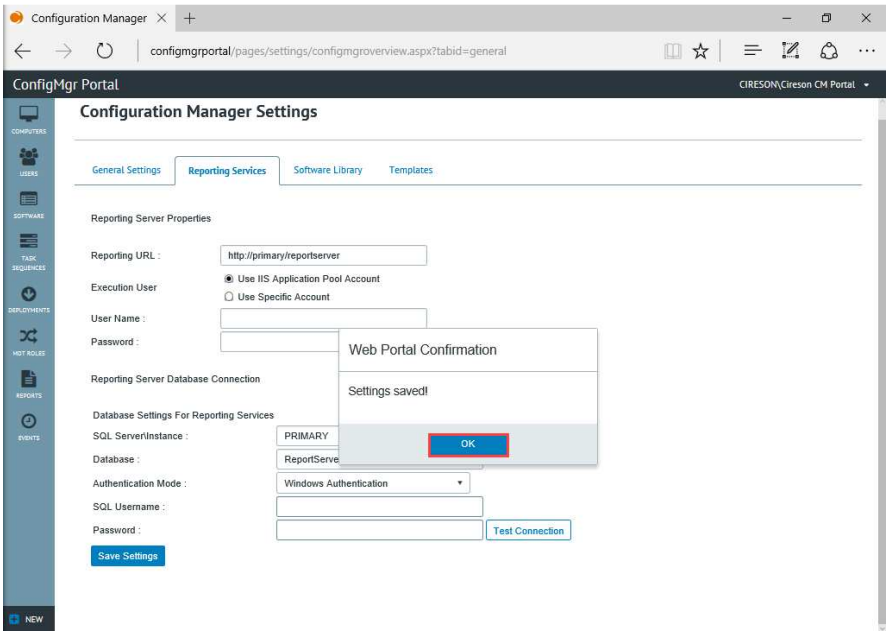


8. Click **OK** to close the **Web Portal Information** dialog box.

9. Click **Save Settings**



10. Click **OK** on the **Web Portal Confirmation** dialog box stating **Settings saved!**



Security Groups

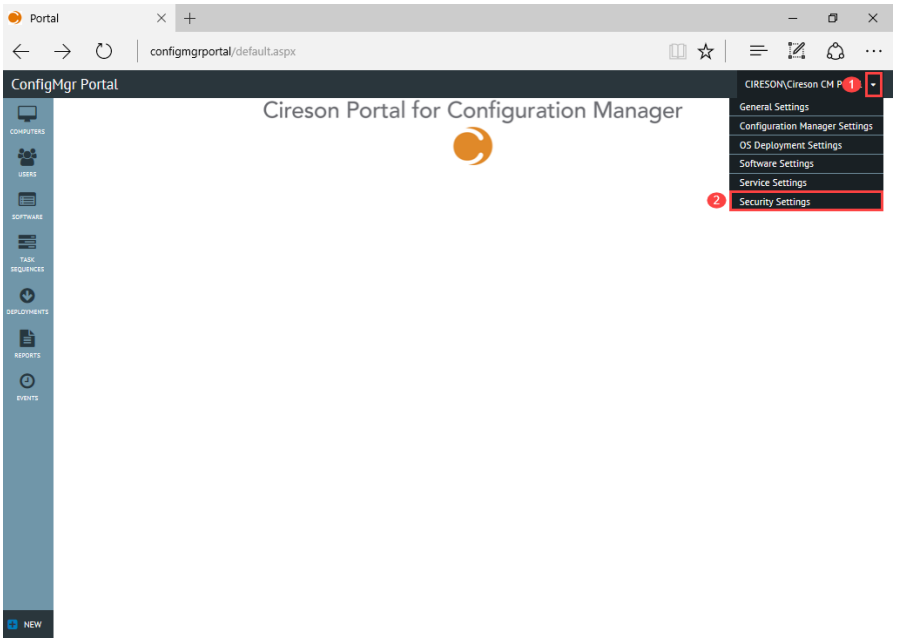
To simplify the administrative effort in controlling who has access to it, the Portal contains its own security group model. This section details the tasks related to Security Groups that you can perform using the Portal.

- How do I add a new Security Group?
- How do I edit a Security Group?
- How do I delete a Security Group?

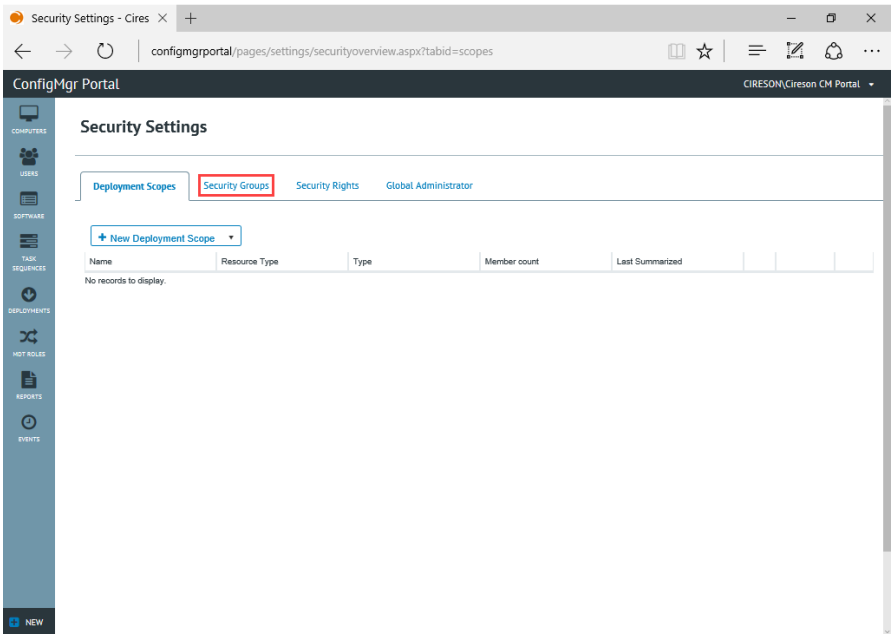
How do I add a new Security Group?

To add a new Security Group:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**

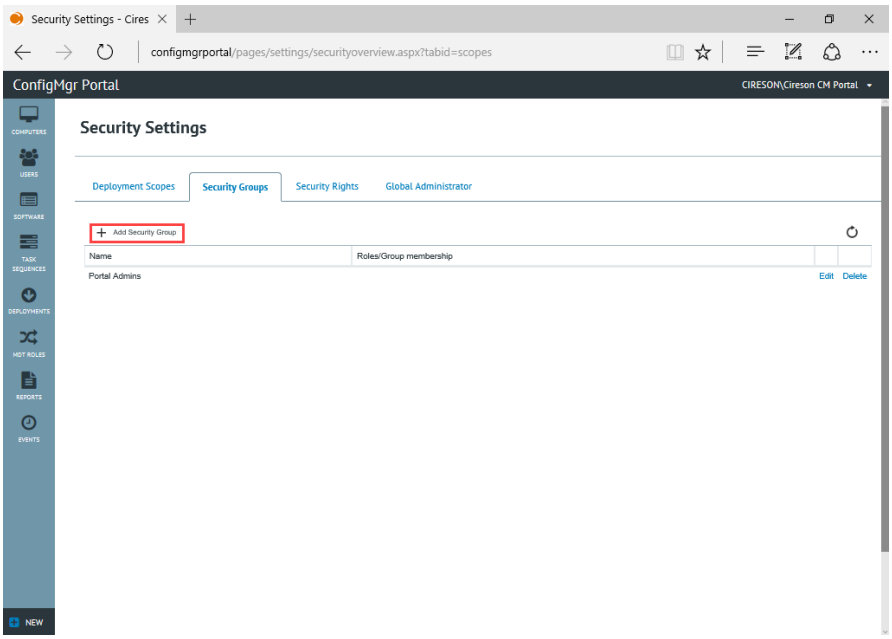


2. Click the **Security Groups** tab.

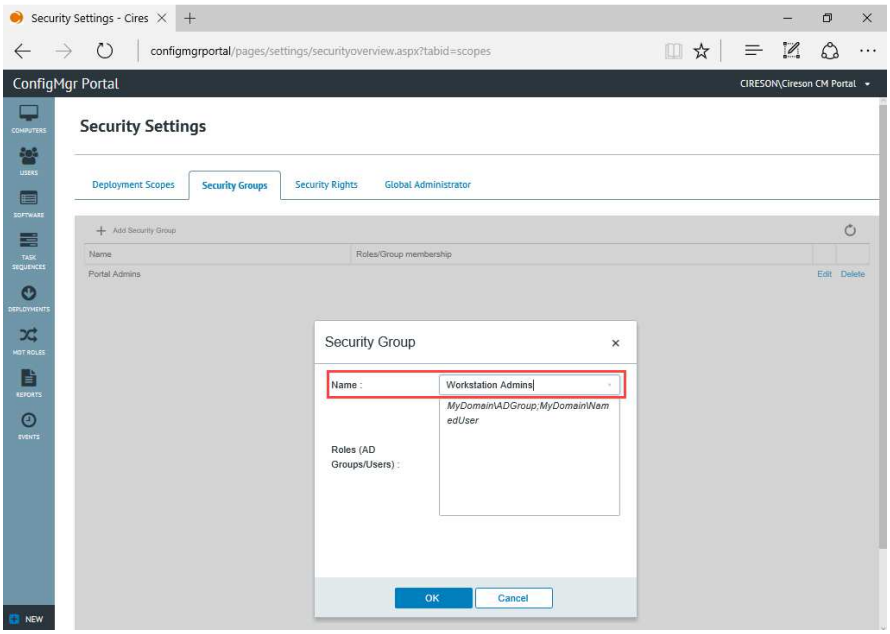


A list of the current Security Groups is displayed.

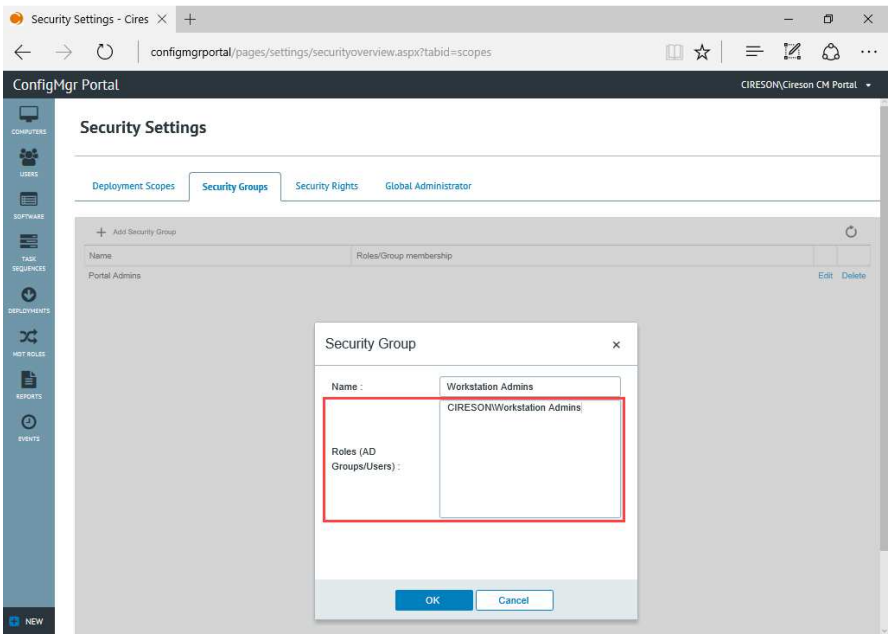
3. Click **Add Security Group**



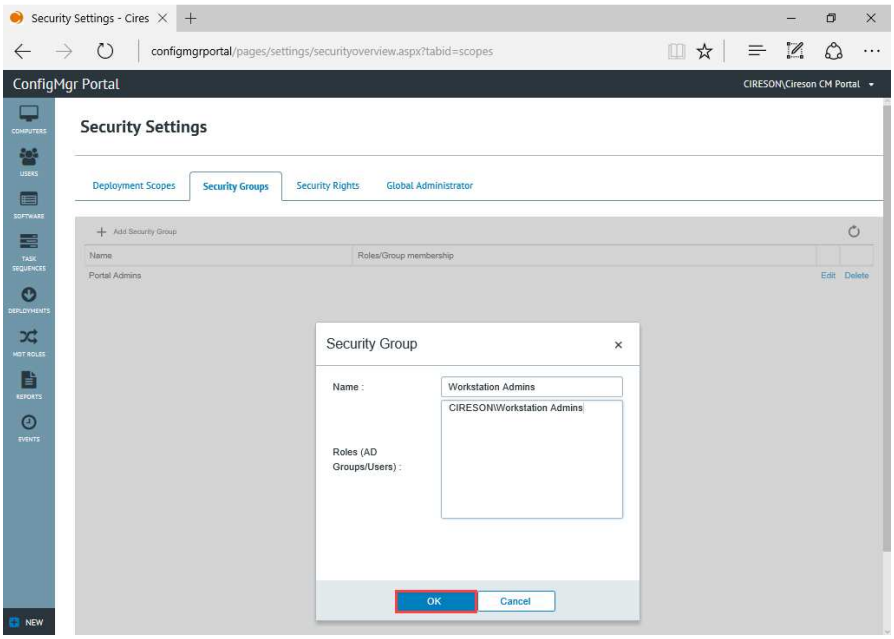
4. On the **Security Group** page, enter the name of the new group in the **Name** field.



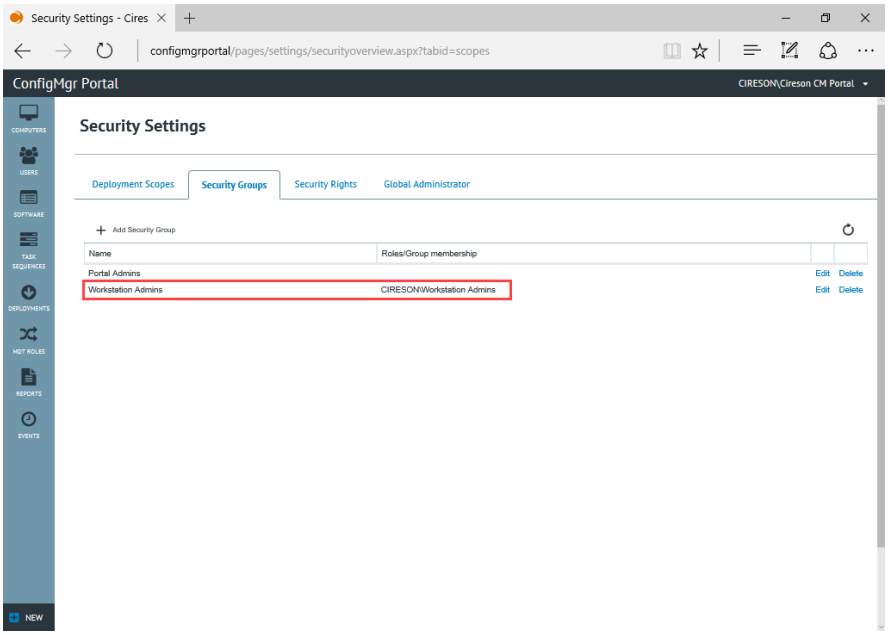
5. In the **Roles (AD groups/users)** field, enter the name(s) of the Active Directory users/groups that are to be added as members of this Group in the format ***<domain_name>\<group_name>*** or ***<domain_name>\<user_name>***



6. Click **OK** to save the group.



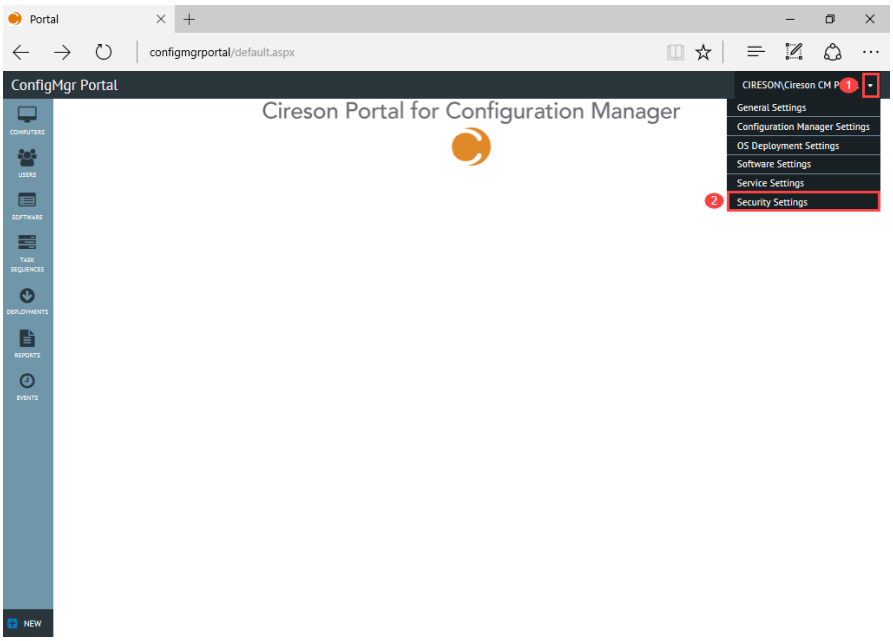
The newly created group will appear on the **Security Settings** page.



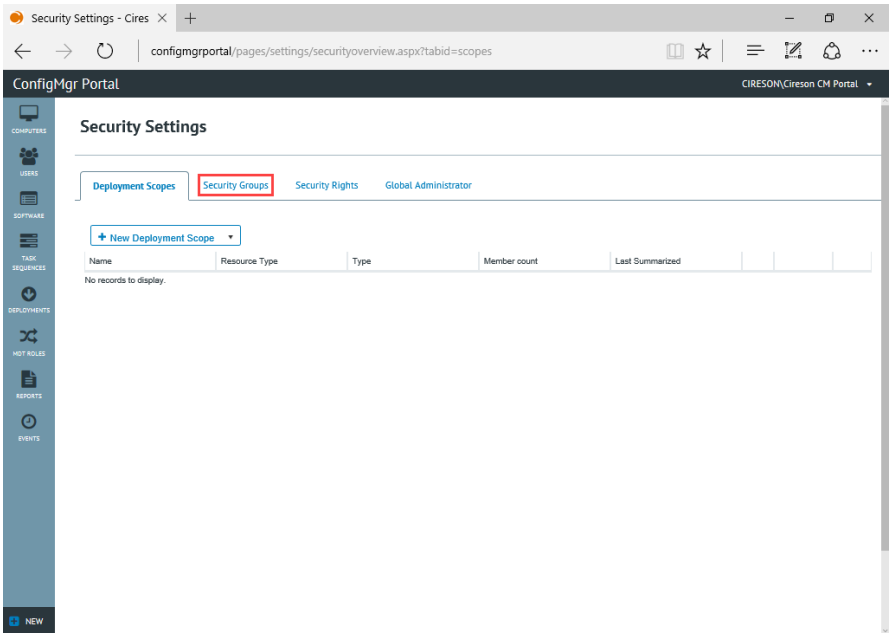
How do I edit a Security Group?

To edit a Security Group:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**

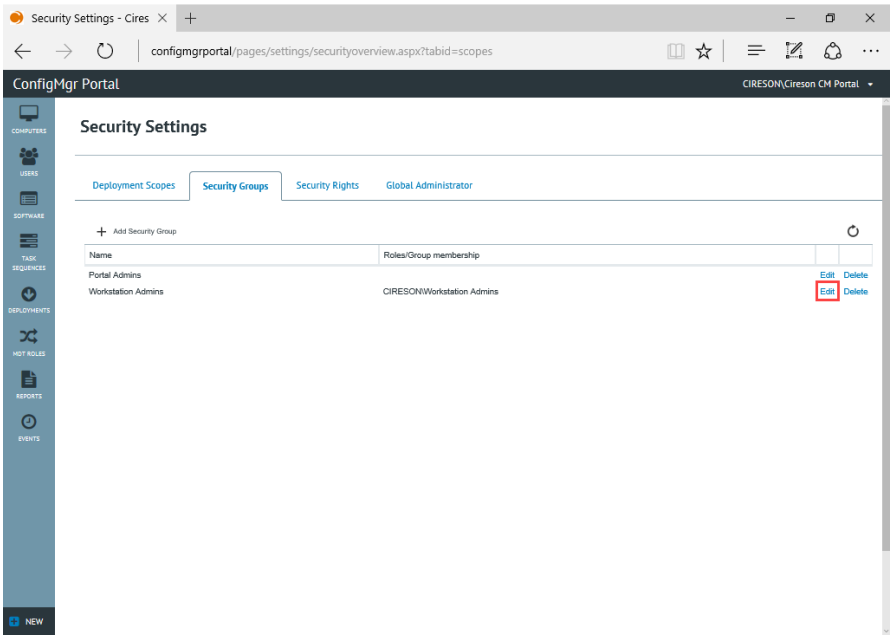


2. Click the **Security Groups** tab.

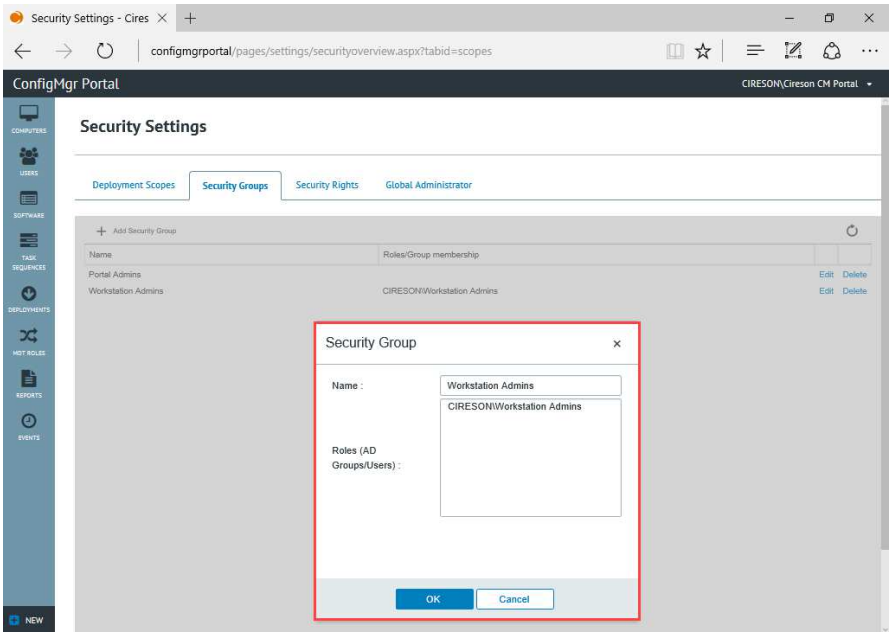


A list of the current Security Groups is displayed.

3. Click **Edit** beside the group you wish to edit.



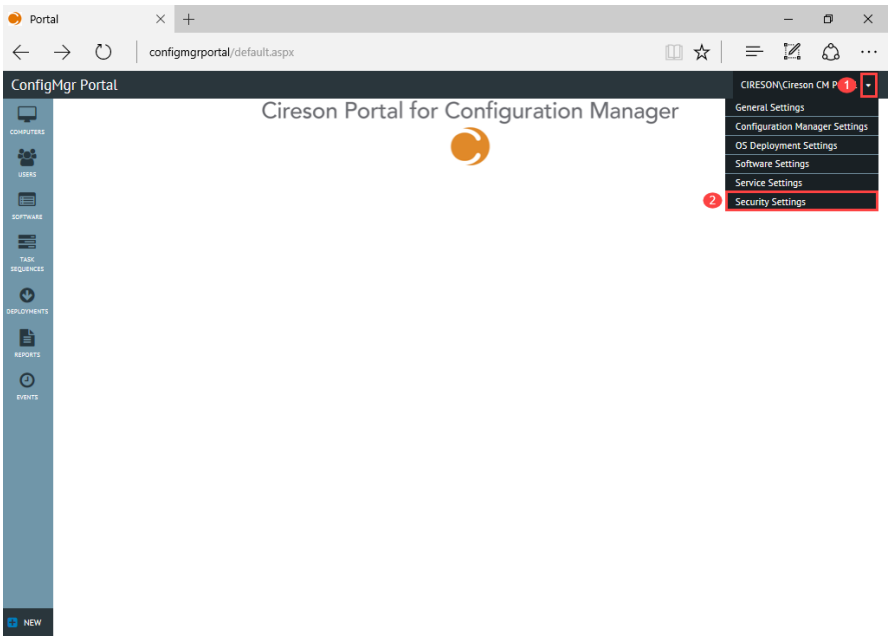
4. On the **Security Group** dialog box, make the required changes then click **OK** to save them.



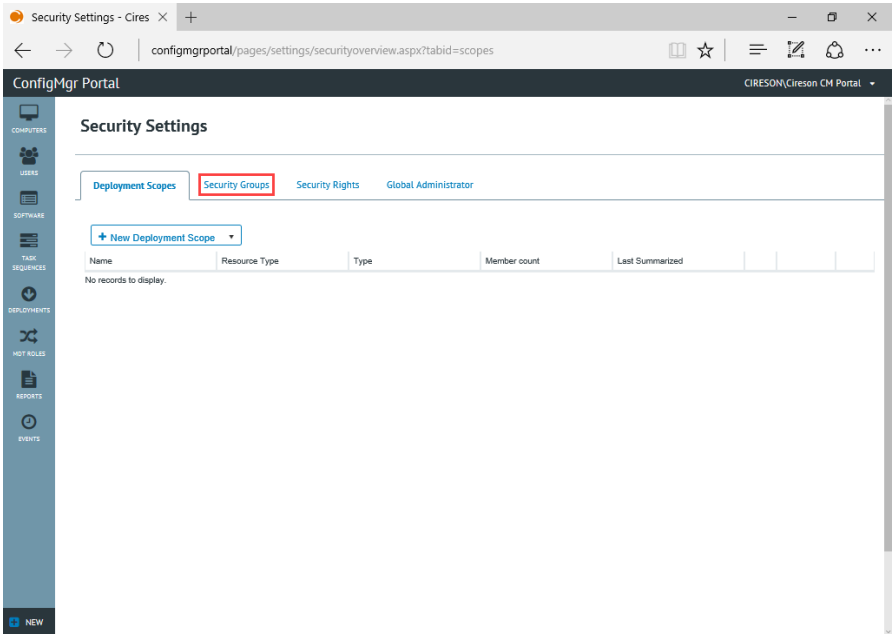
How do I delete a Security Group?

To delete a Security Group:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**

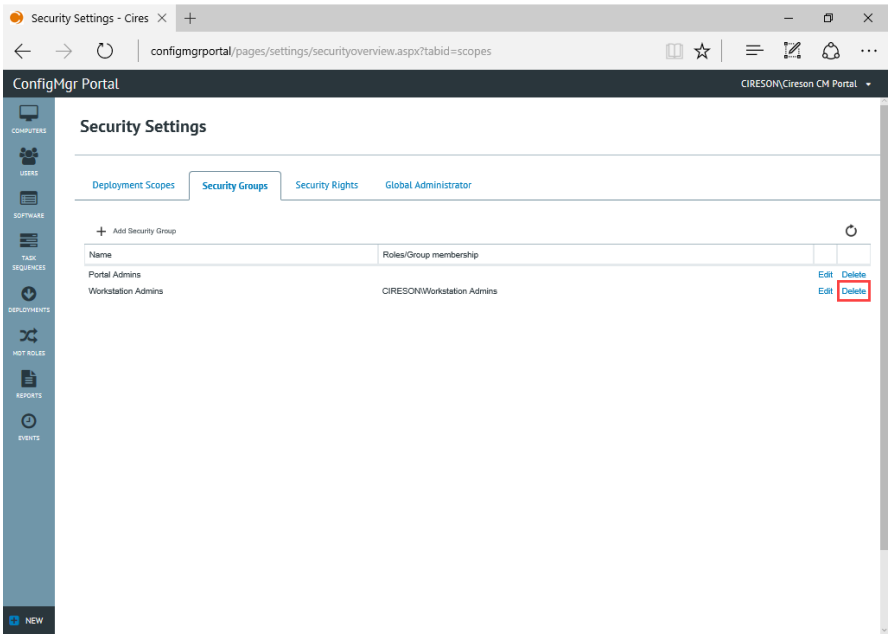


2. Click the **Security Groups** tab.

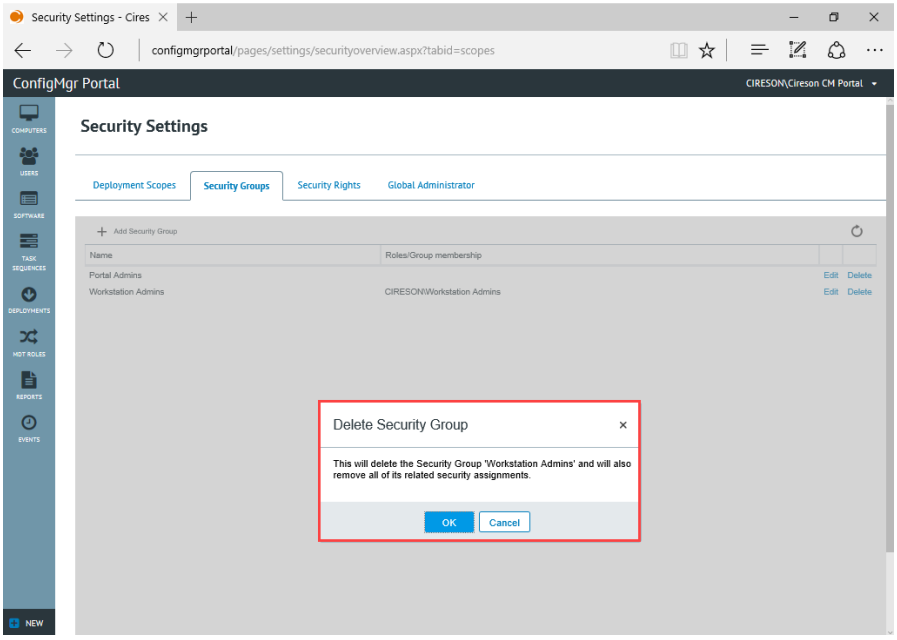


A list of the current Security Groups is displayed.

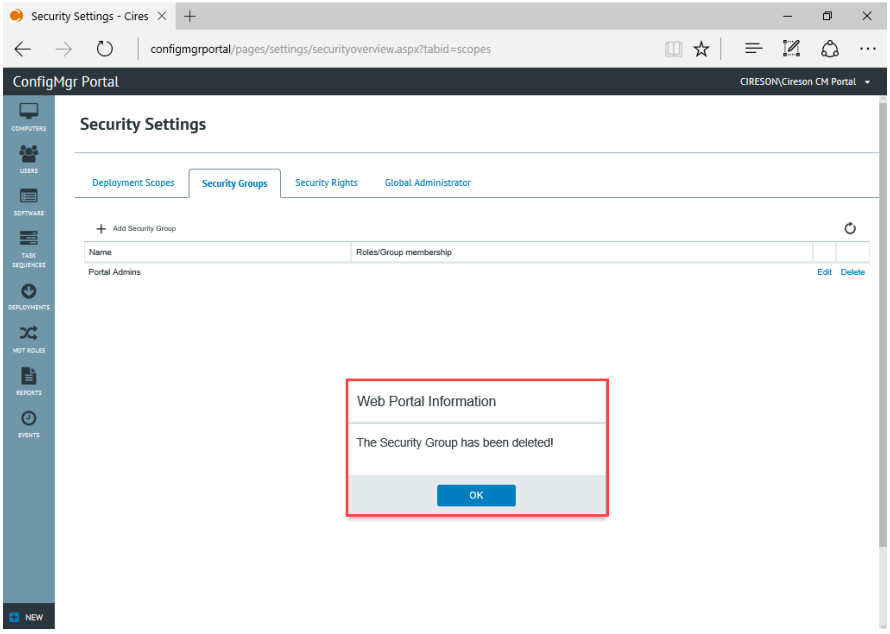
3. Click **Delete** beside the group you wish to delete.



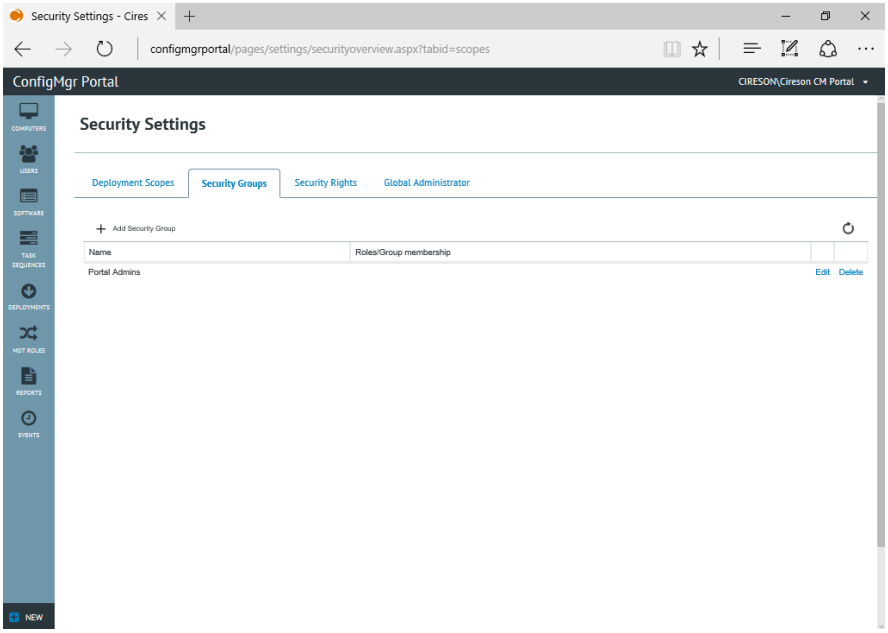
4. Click **OK** on the **Delete Security Group** dialog box when prompted **This will delete the Security Group '<*group_name*>' and will also remove all of its related security assignments**.



5. Click **OK** on the **Web Portal Information** dialog box stating **The Security Group has been deleted!**



The **Security Groups** page automatically refreshes to show the group has been deleted.



Security Rights

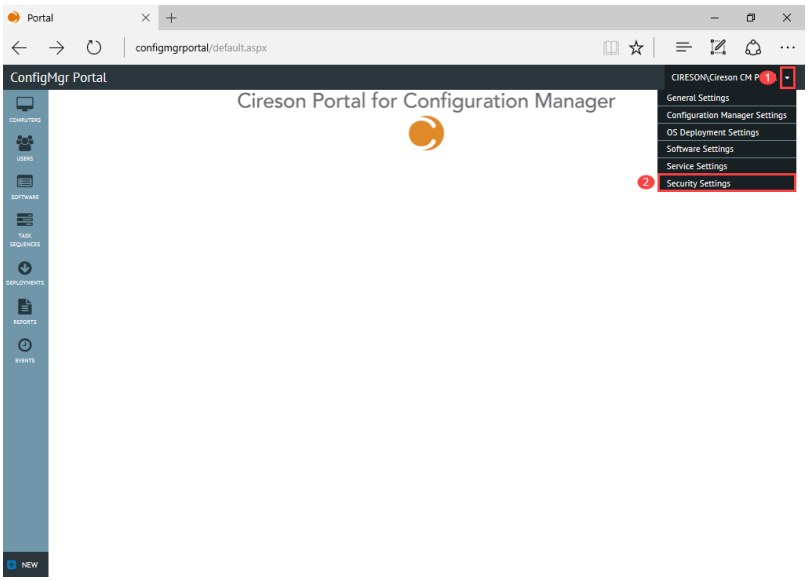
Security Rights can be used to control who has access to each of the objects in the Portal and what actions they can perform on those objects. This section details the tasks related to Security Groups that you can perform using the Portal.

- How do I manage the security rights of a Security Group?

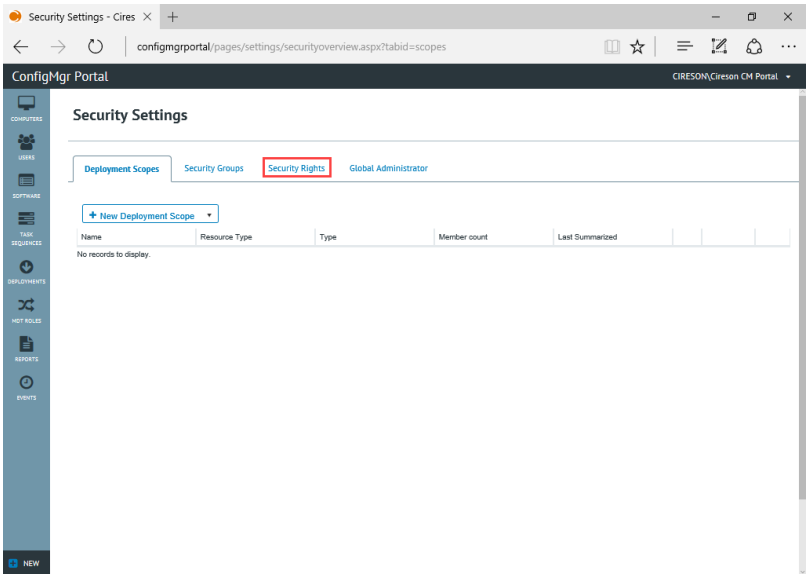
How do I manage the security rights of a Security Group?

To manage the security rights of a security group:

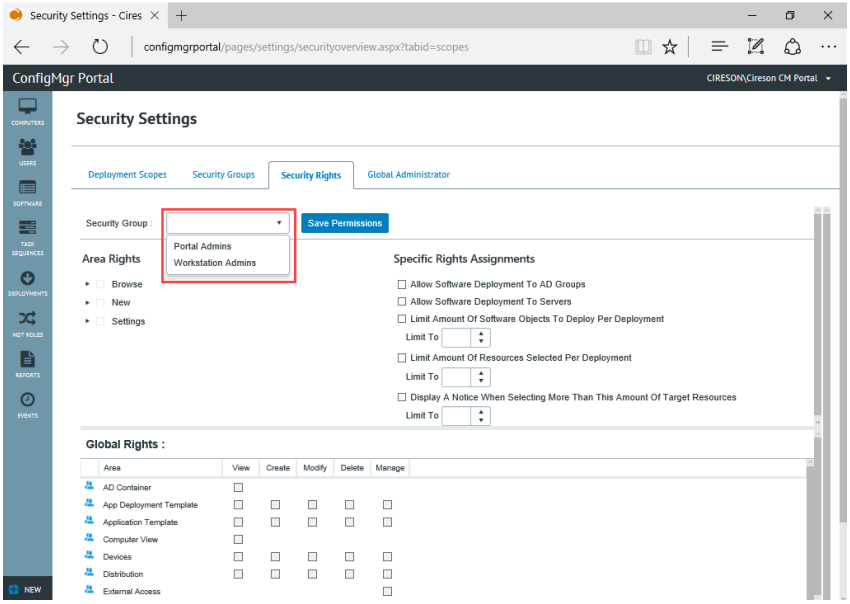
1. Create the Security Group as detailed in How do I add a new Security Group?
2. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Security Settings**



3. Click the **Security Rights** tab.



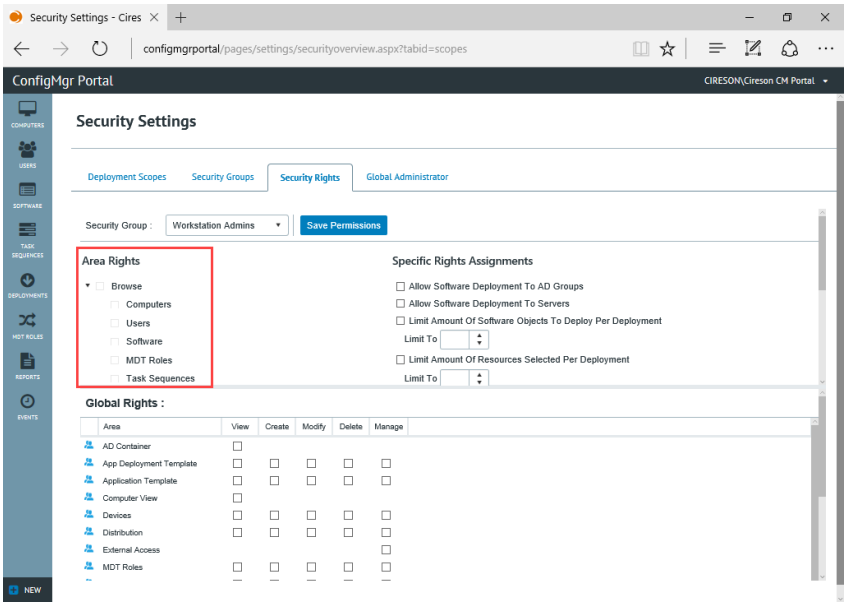
4. From the **Security Group** dropdown, select the relevant security group whose rights you wish to manage.



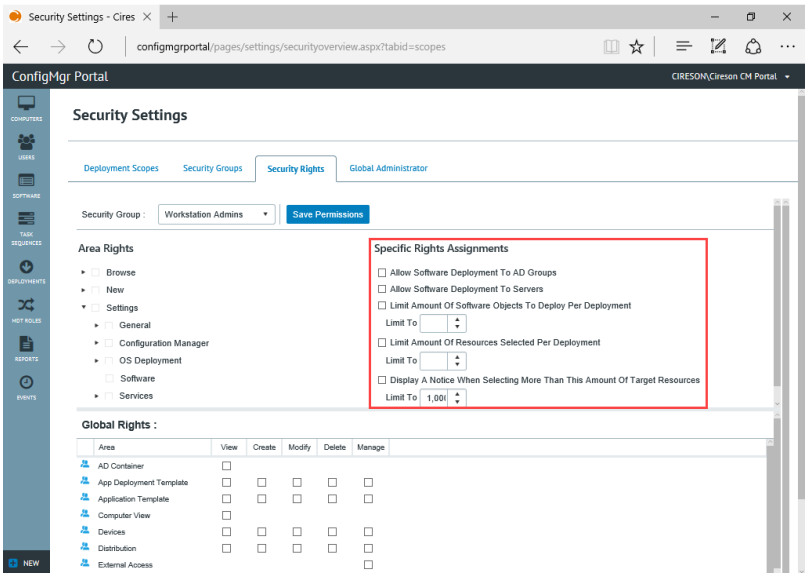
5. To manage rights to items and settings within the Portal, check the relevant checkboxes in the **Area Rights** section.

NOTE: The three different areas you can control rights to are:

- **Browse –** The ability control who has access to each of the items on the **Navigation** menu
- **New –** The ability control who has access to each of the items on the **New** menu
- **Settings -** The ability control who has access to each of the items on the **Settings** menu

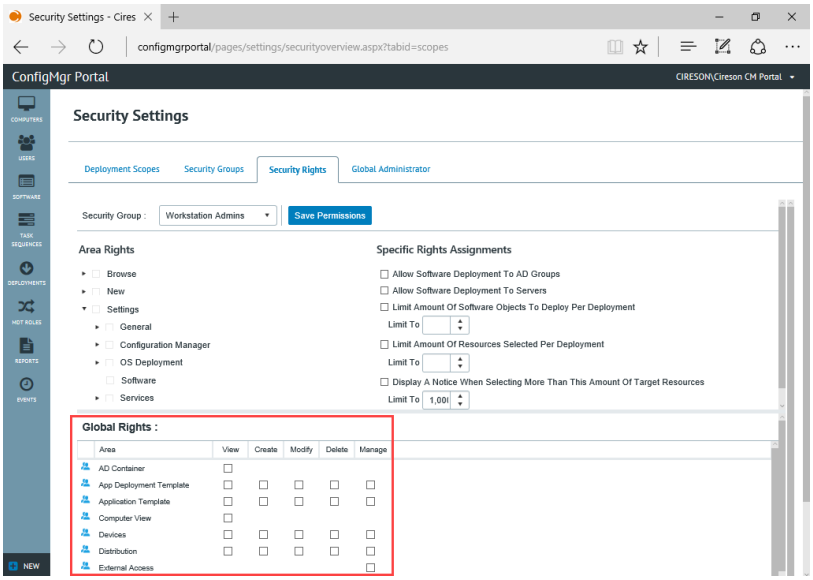


6. Configure the settings in the **Specific Rights Assignments** section for your requirements.

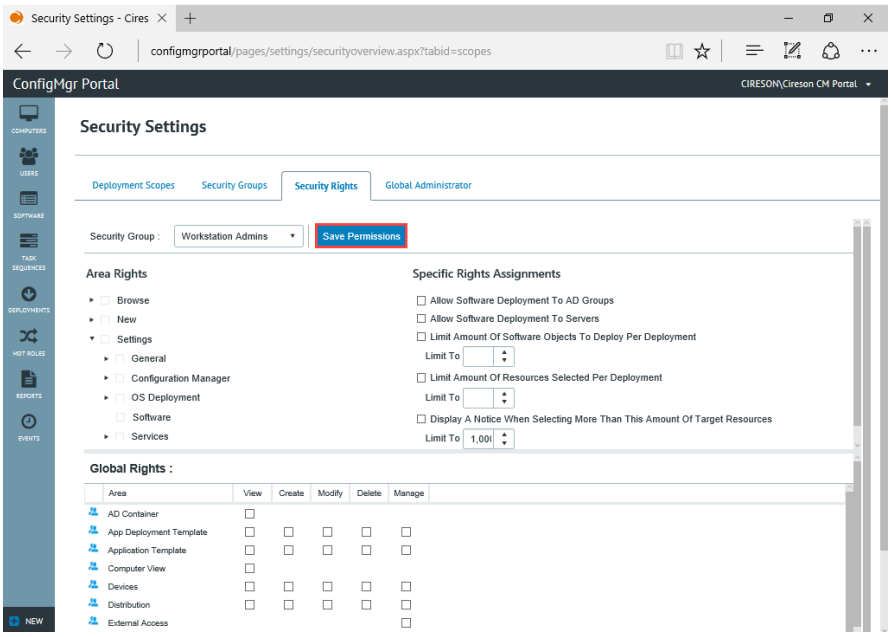


7. To manage rights of a group to all the items managed by the Portal, check the relevant checkboxes in the **Global Rights** section.

   NOTE: The Portal does provide the ability to limit access to individual instances of objects as detailed in the respective section of this guide.



8. Click **Save Permissions** to save your changes.



Service Tasks

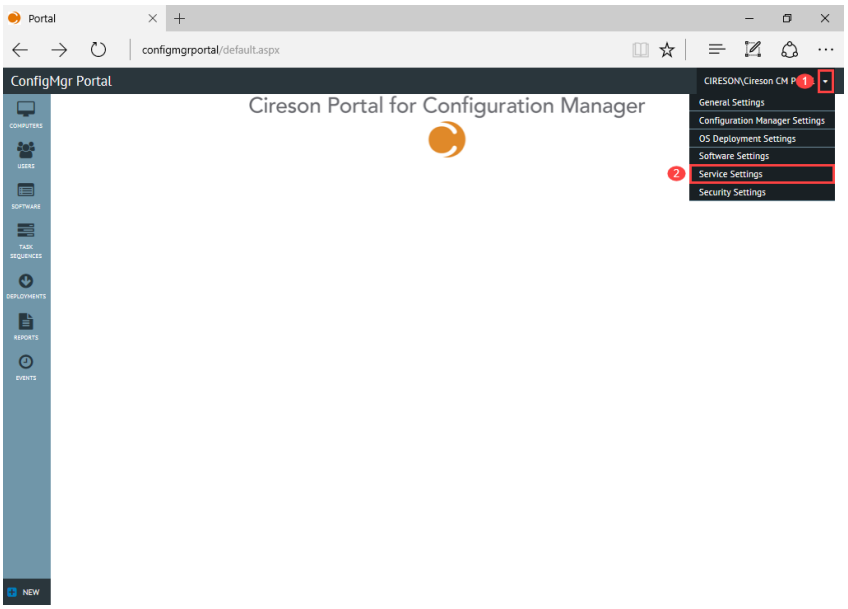
Service Tasks are used to control how often data is retrieved by the Portal from the ConfigMgr site database. This section details the tasks related to Service Tasks that you can perform using the Portal.

- How do I see how often the Portal is querying the ConfigMgr database for objects?
- How do I change how often the Portal queries the ConfigMgr database for an object?

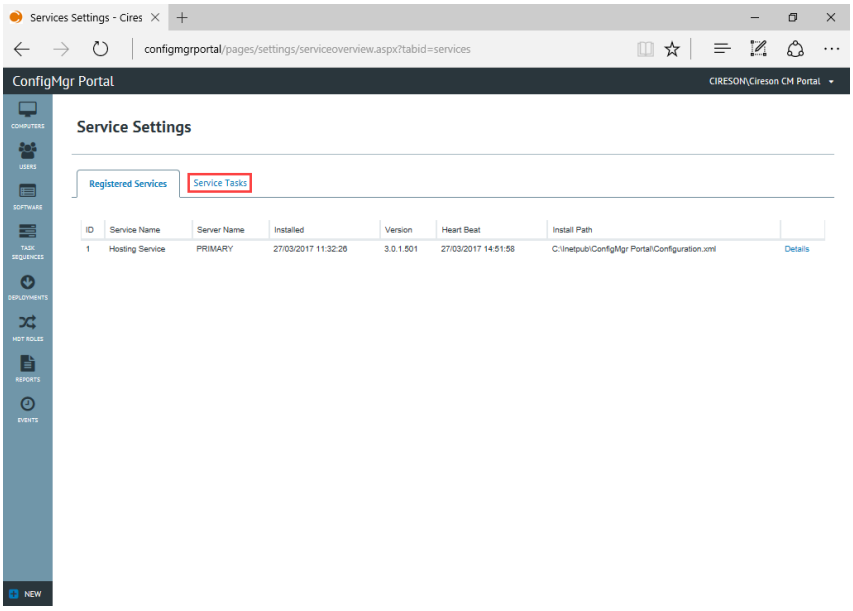
How do I see how often the Portal is querying the ConfigMgr database for objects?

To see how often the Portal is querying the ConfigMgr database for objects:

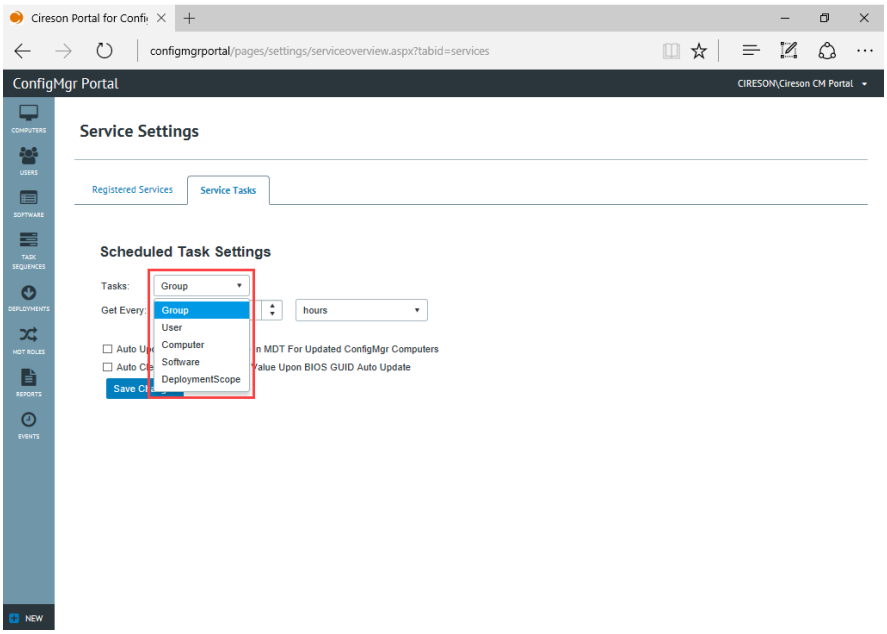
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Service Settings**



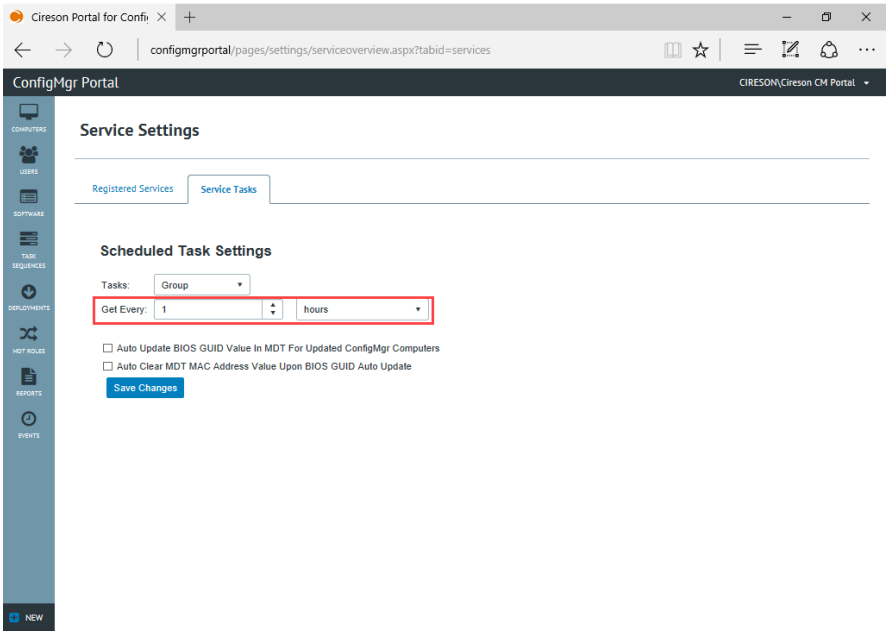
2. Click the **Service Tasks** tab.



3. From the **Tasks** dropdown list, select the option whose settings you want to check.



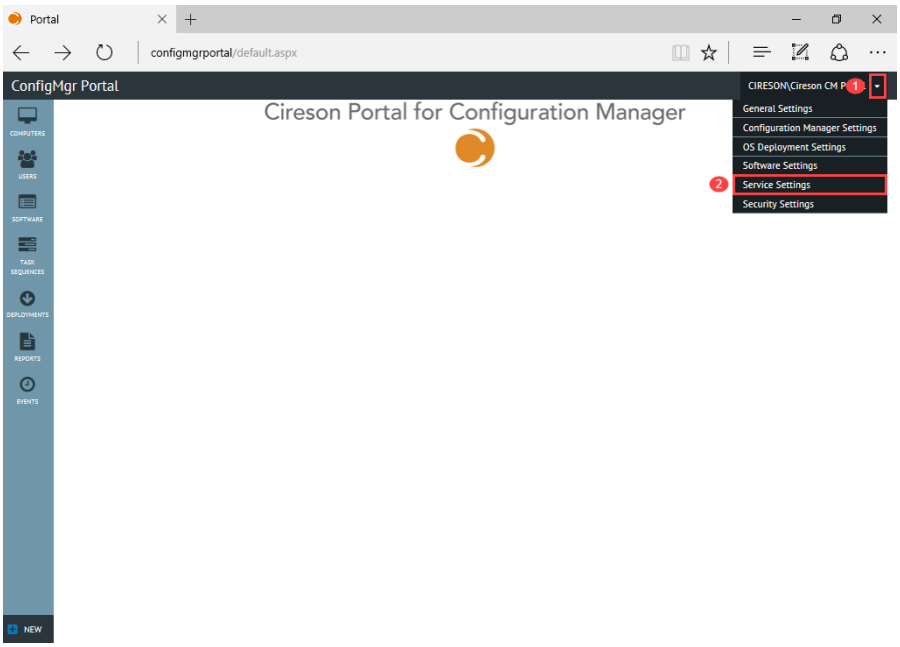
4. The configured frequency is shown in the **Get Every** field.



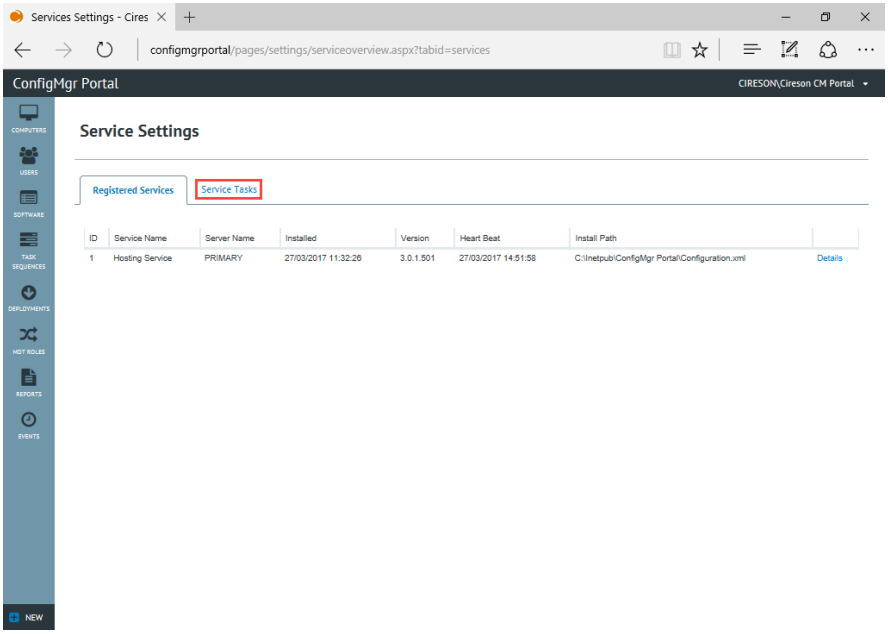
How do I change how often the Portal queries the ConfigMgr database for an object?

To change how often the Portal queries the ConfigMgr database for an object:

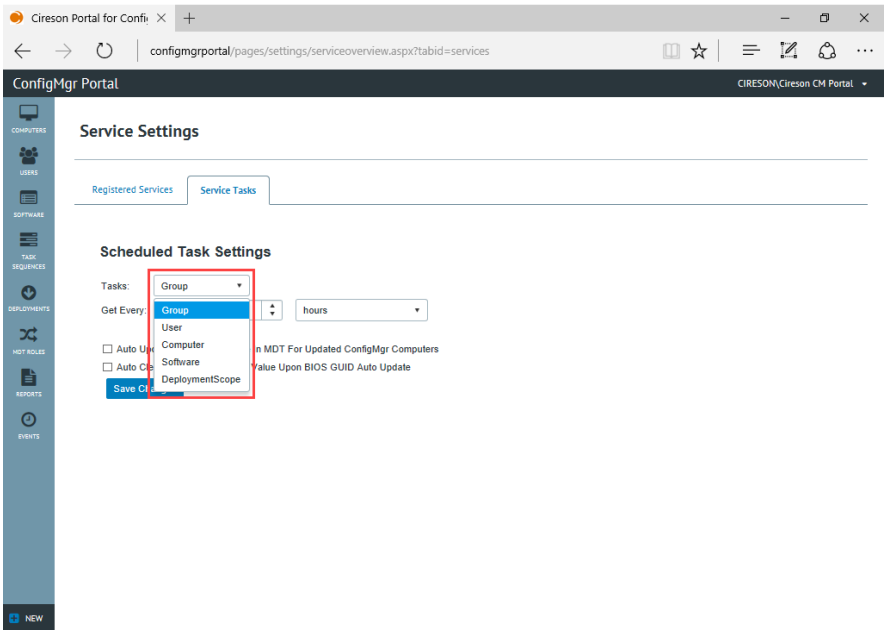
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Service Settings**



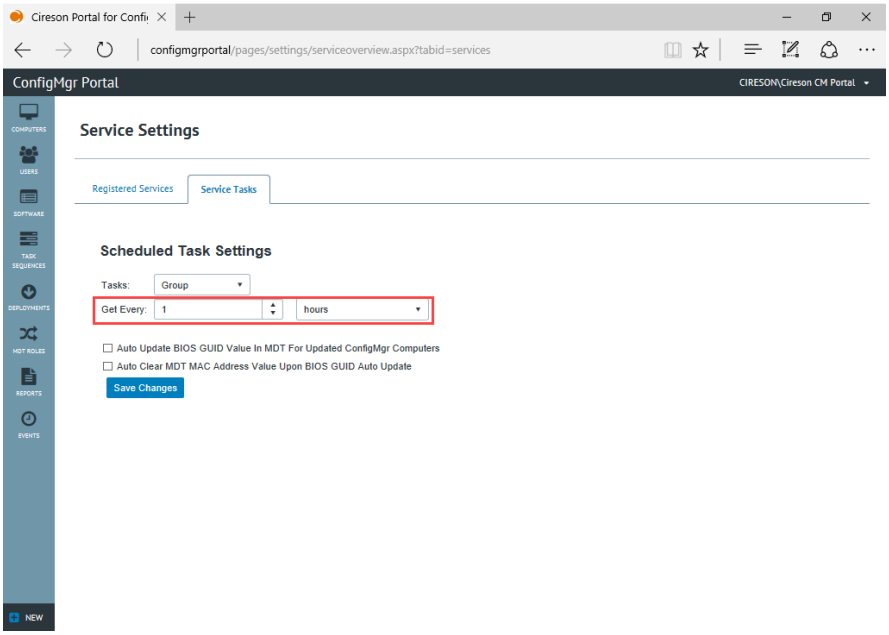
2. Click the **Service Tasks** tab.



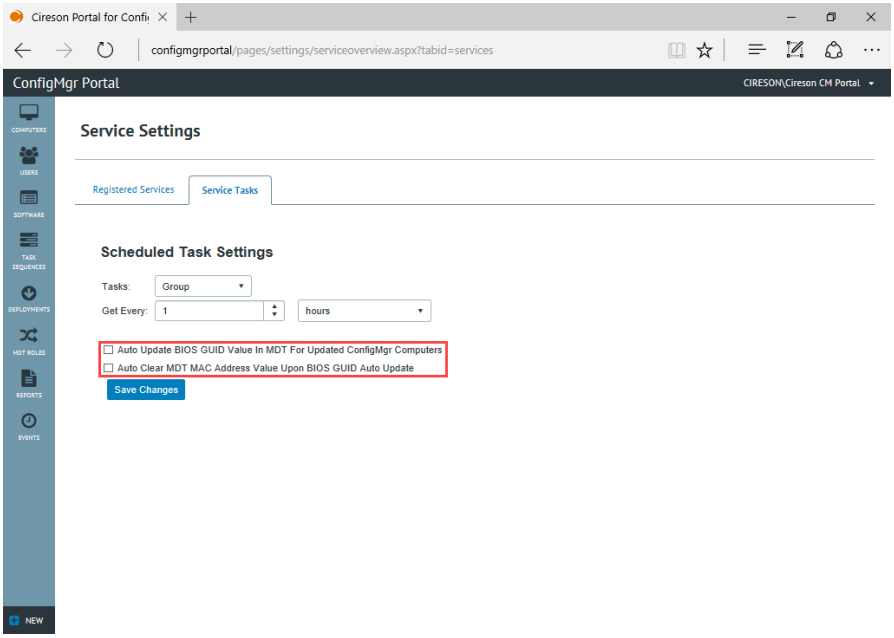
3. From the **Tasks** dropdown list, select the option whose settings you want to change.



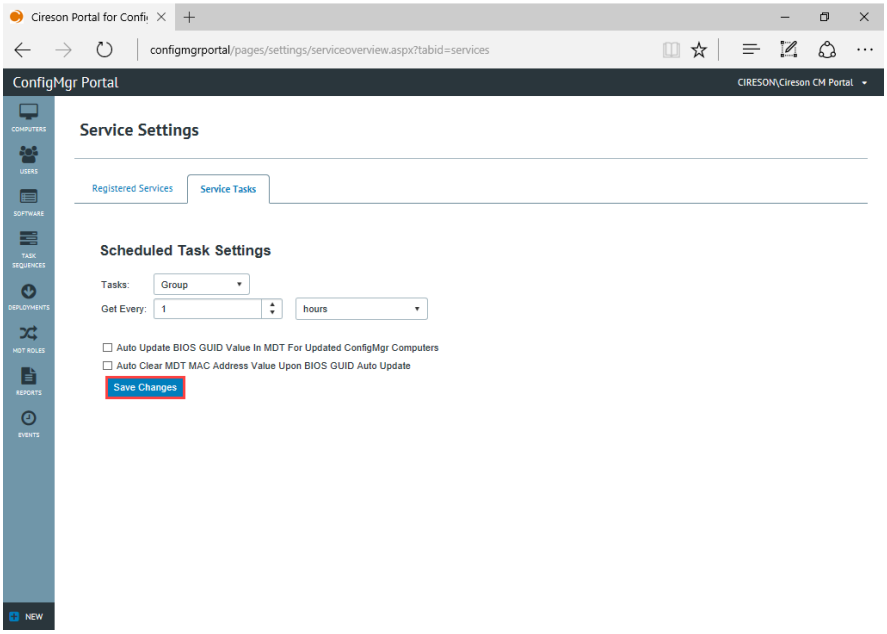
4. Make the required change in the **Get Every** field.



5. If MDT has been integrated with the Portal, check the **Auto Update BIOS GUID Value in MDT For Updated ConfigMgr Computers** and **Auto Clear MDT MAC Address Value Upon BIOS GUID Auto Update** checkboxes as required.



6. Click **Save Changes** to save your changes.



Software Source

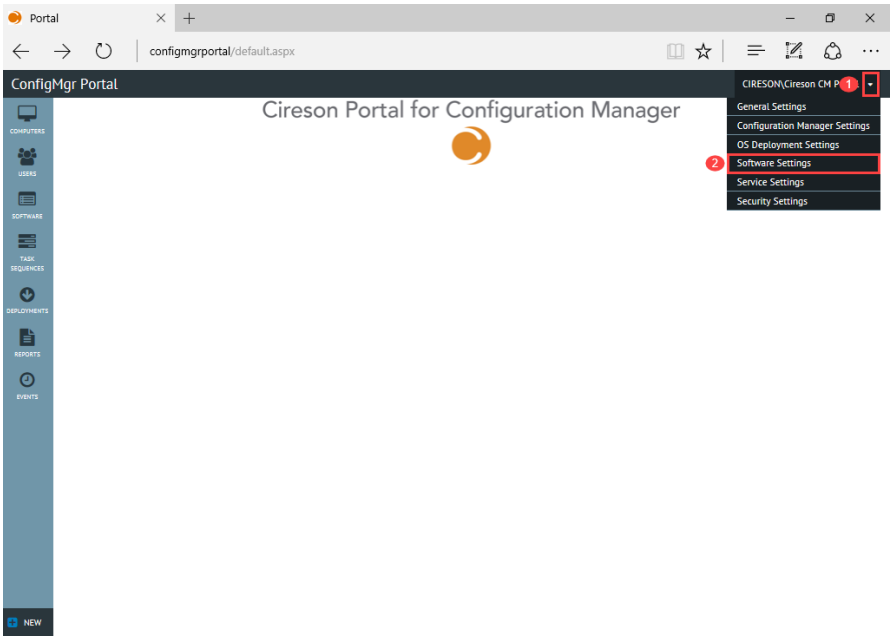
To create and deploy content using the Portal that requires source files, the Portal needs to be able to access the location containing those source files. A Software Source allows you to configure the Portal with the relevant UNC path to a network share to be used to store software source files that are to be used to create software in ConfigMgr. This section details the tasks related to the Software Source that you can perform using the Portal.

- How do I create a new Software Source?
- How do I edit a Software Source?
- How do I delete a Software Source?

How do I create a new Software Source?

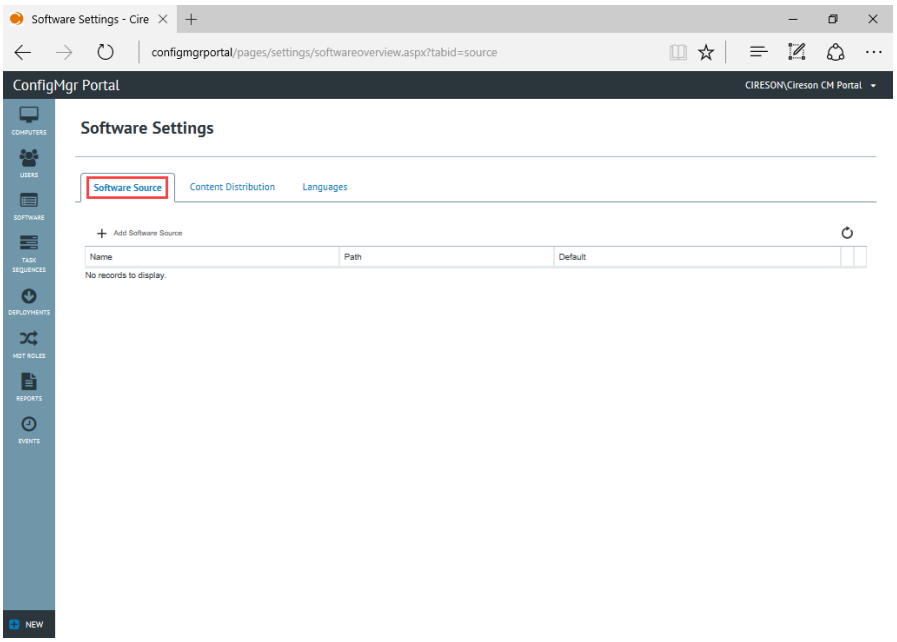
To create a new Software Source:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

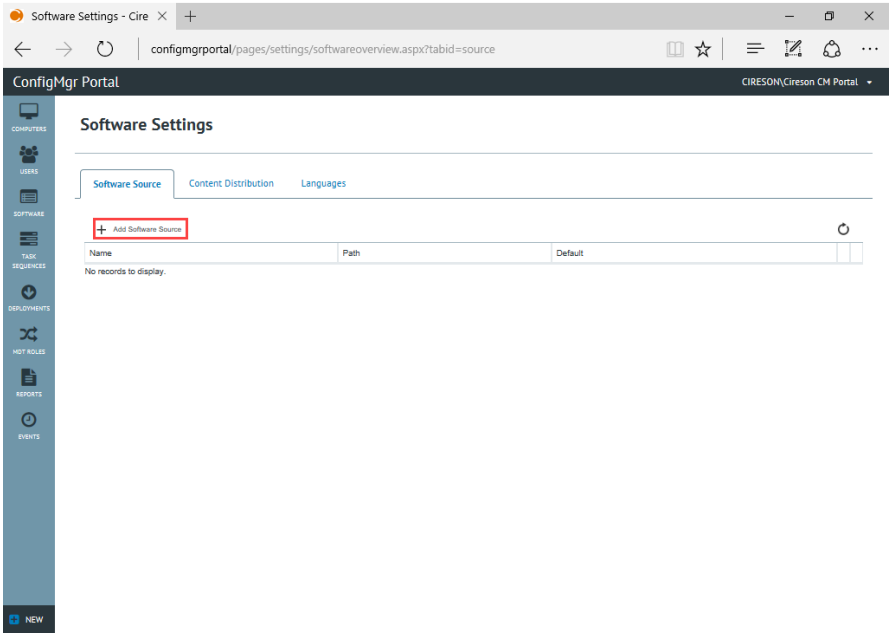


2. Make sure the **Software Source** tab is selected which will show a list of the current Software Sources.

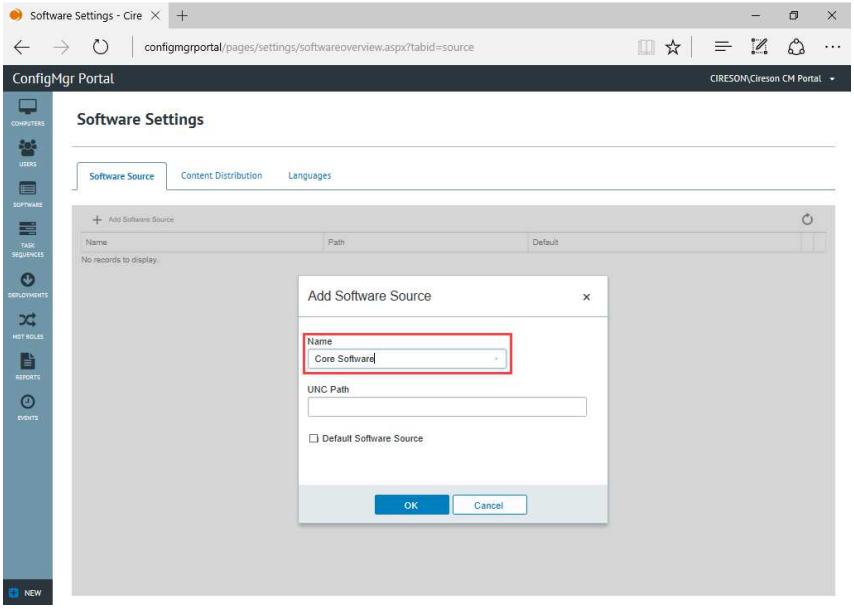
   NOTE: No Software Sources are configured by default.



3. Click **Add Software Source**



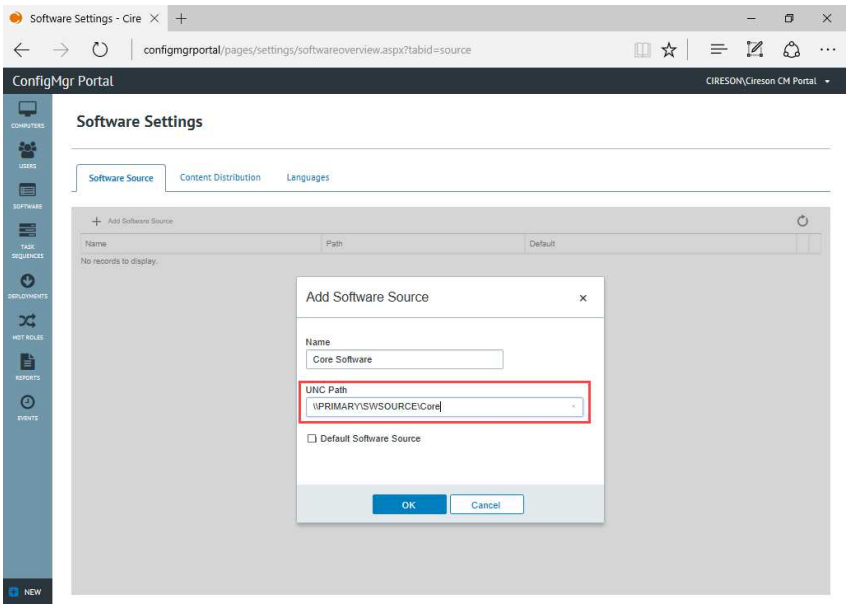
4. On the **Add Software Source** page, in the **Name** field enter the name of the new Software Source.



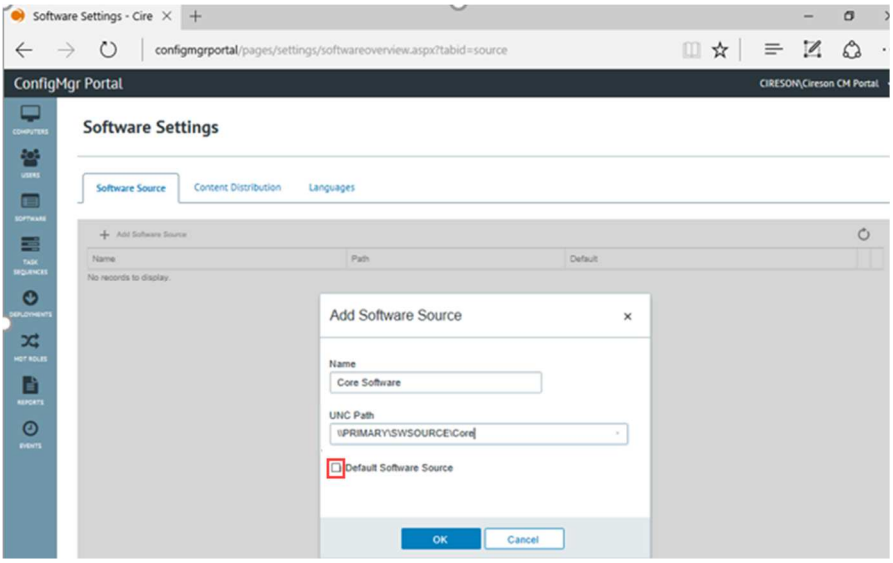
5. In the **UNC Path** field, enter the path to the Software Source which should be the UNC path to a network share to be used to store the software source files used to create software in ConfigMgr.

   NOTE: The IIS Application Pool account needs full control rights to the share as well as the NTFS path.

   ConfigMgr also must have access to the share as it needs to pull the software from the source to be able to push it out to your Distribution Points (you don't need to worry if the Software Source is on your site server as the local computer account will automatically have rights).

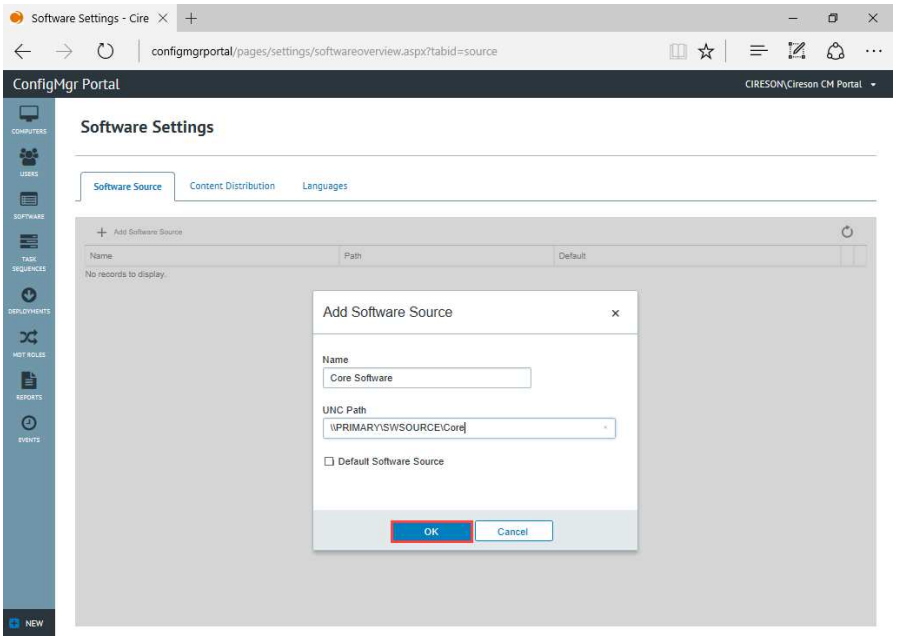


6. Check the **Default Software Source** checkbox to make this the default if desired.

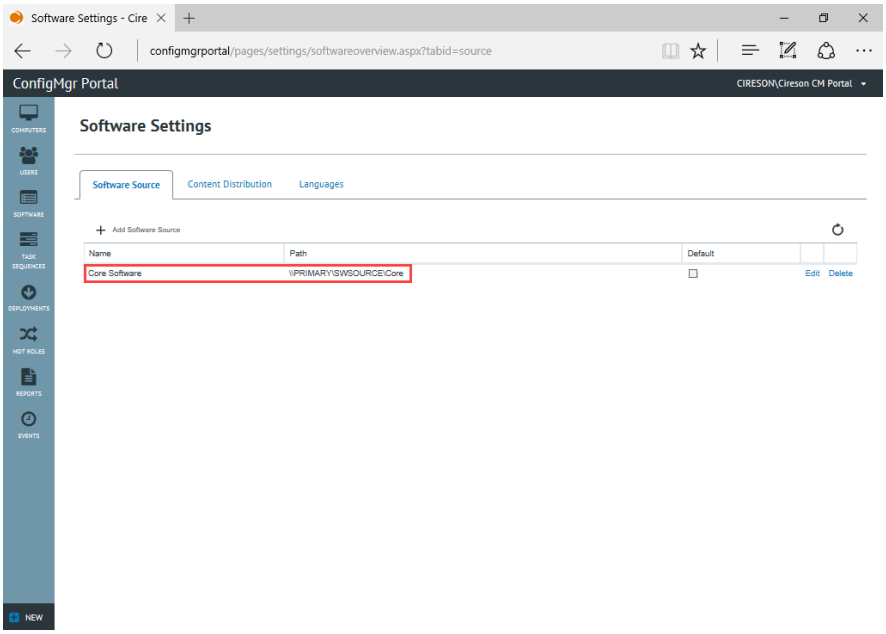


NOTE: The first software source created is automatically configured as the default. The default software source can be changed as detailed on How do I edit a Software Source?

7. Click **OK**



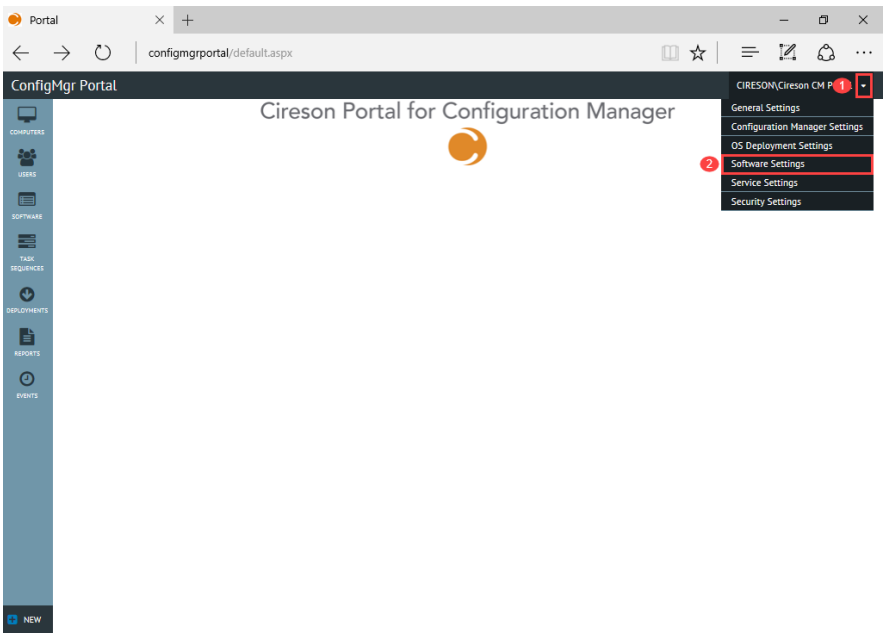
8. Refresh the Portal to see newly added Software Source.



How do I edit a Software Source?

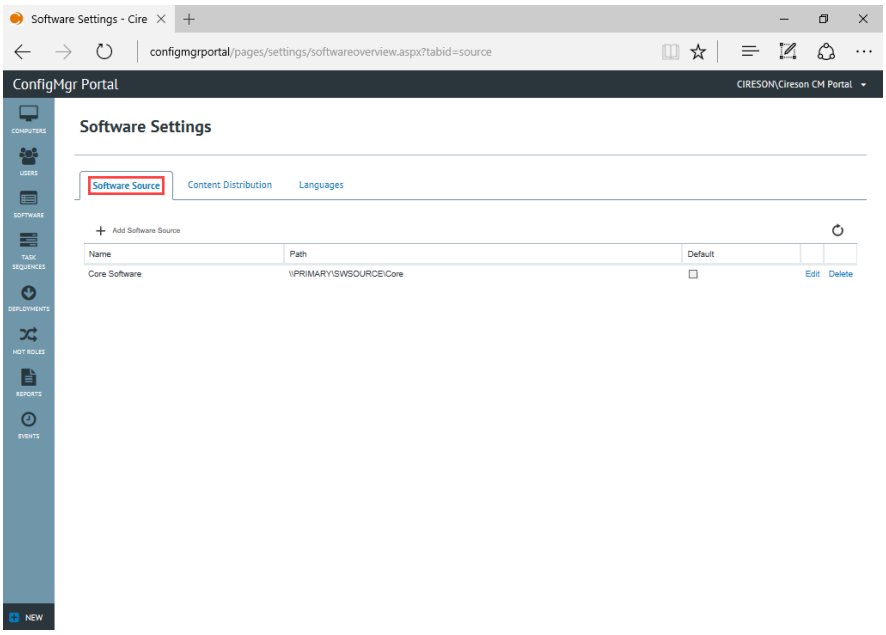
To edit the name, path or whether a Software Source is the default:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

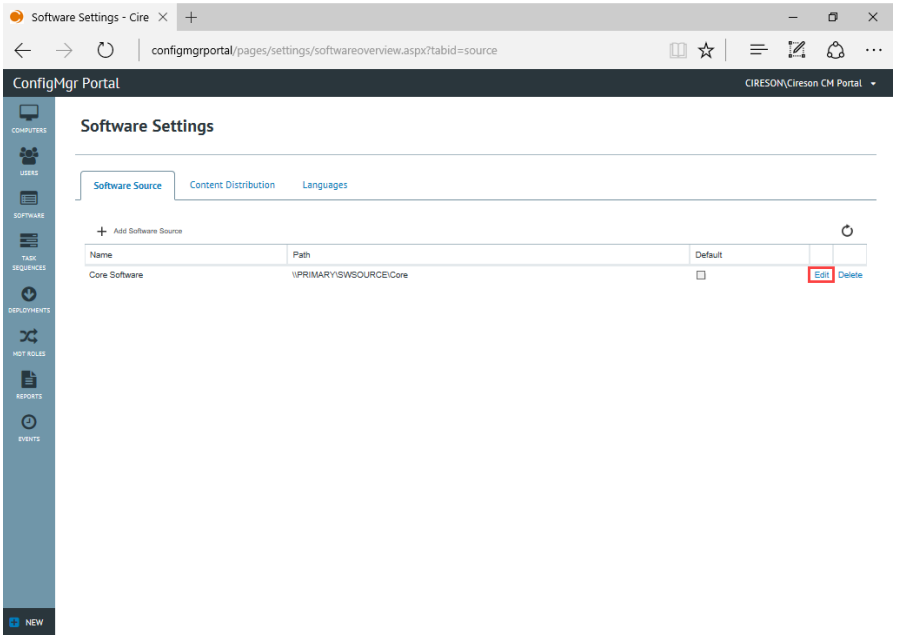


2. Make sure the **Software Source** tab is selected which will show a list of the current Software Sources.

   NOTE: No Software Sources are configured by default.

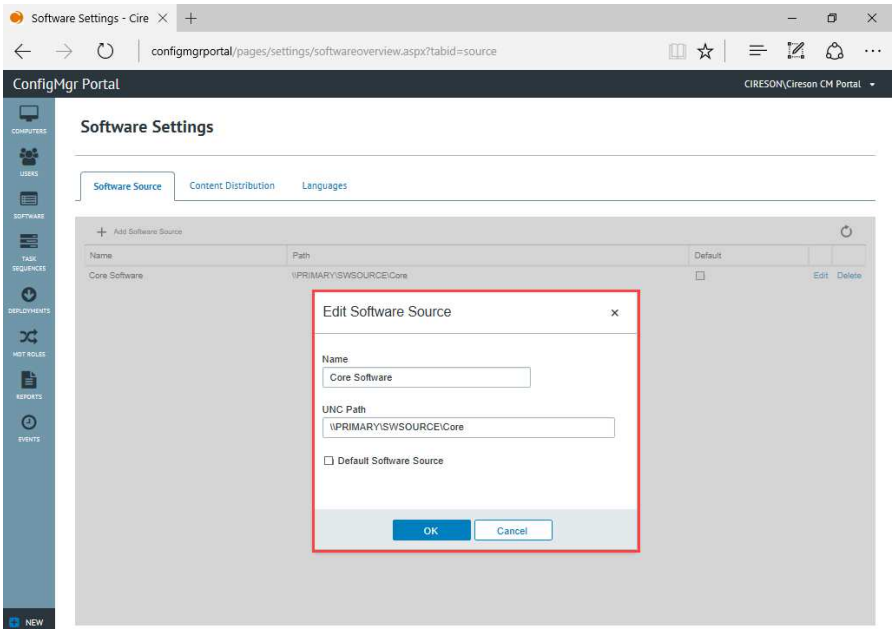


3. Click **Edit** beside the Software Source you want to edit.

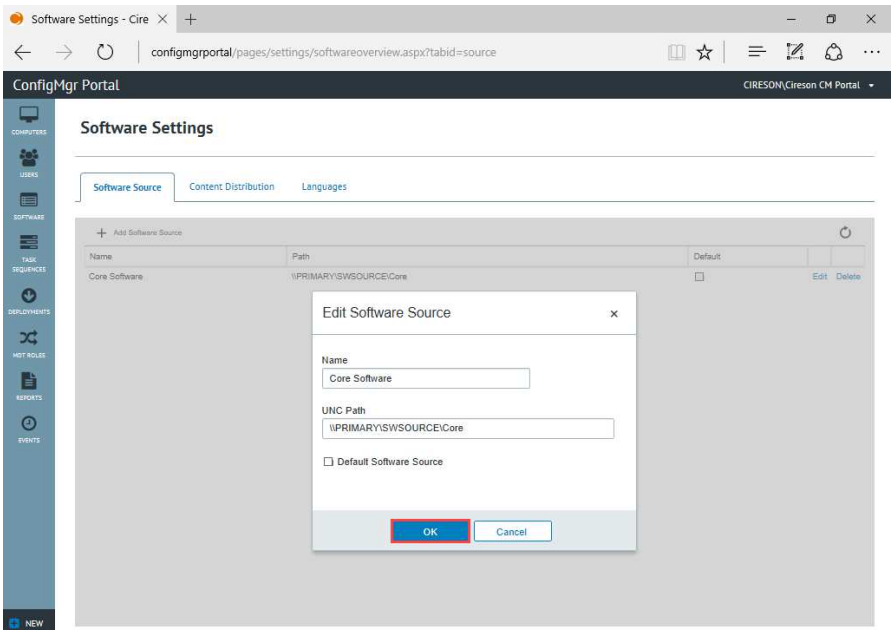


4. On the **Edit Software Source** page, make the required changes to the Software Source.

   NOTE: If you want to configure this Software Source as the default, check the **Default Software Source** checkbox.



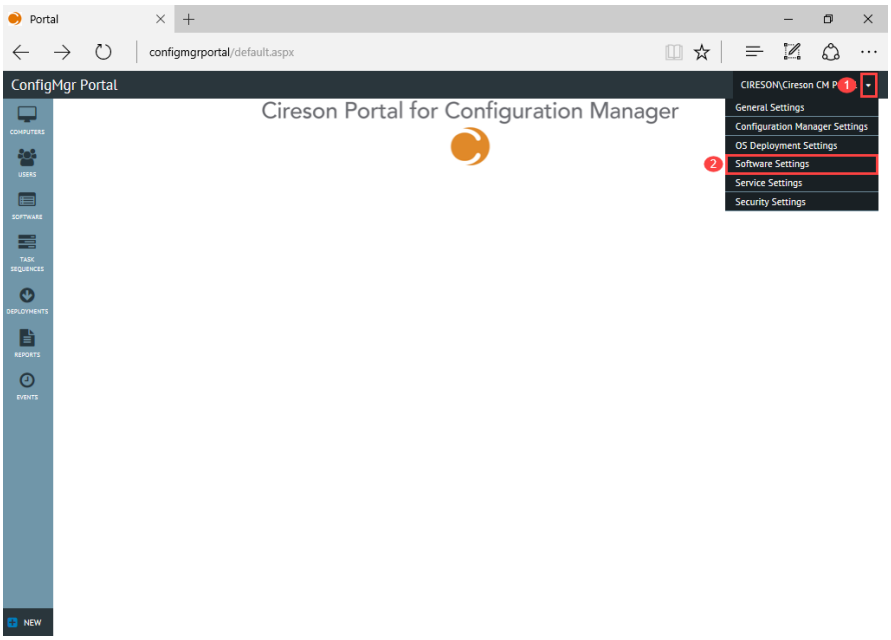
5. Click **OK** to save your changes.



How do I delete a Software Source?

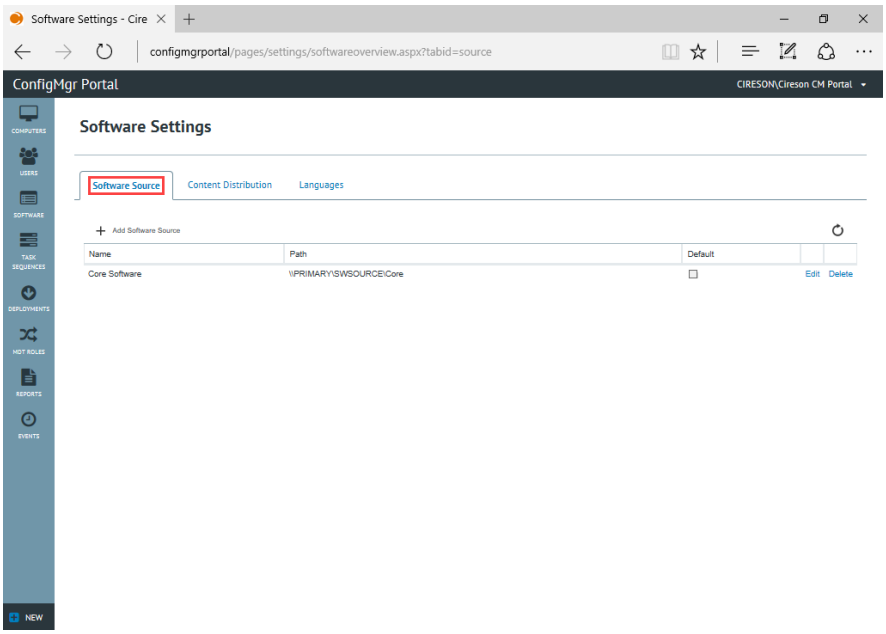
To delete a Software Source:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Software Settings**

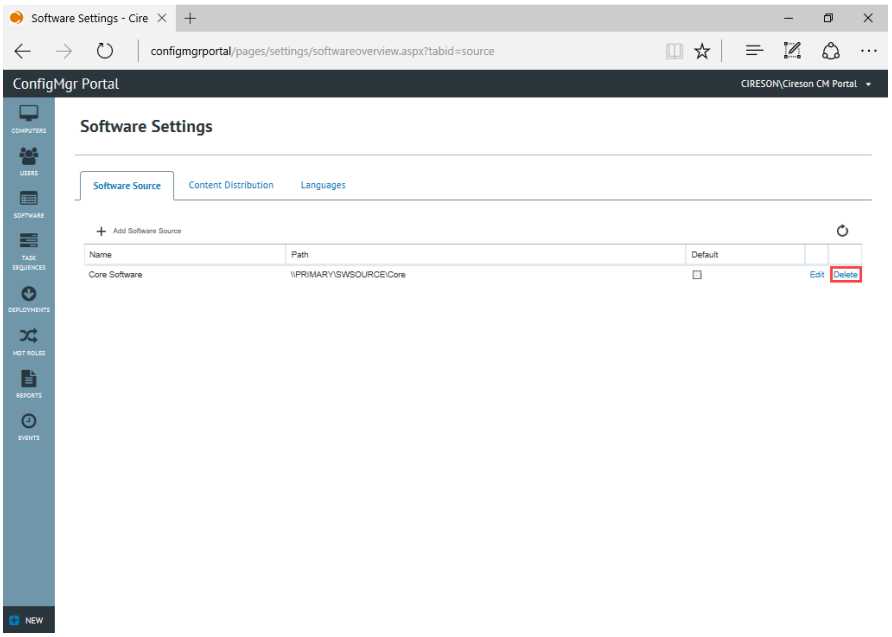


2. Make sure the **Software Source** tab is selected which will show a list of the current Software Sources.

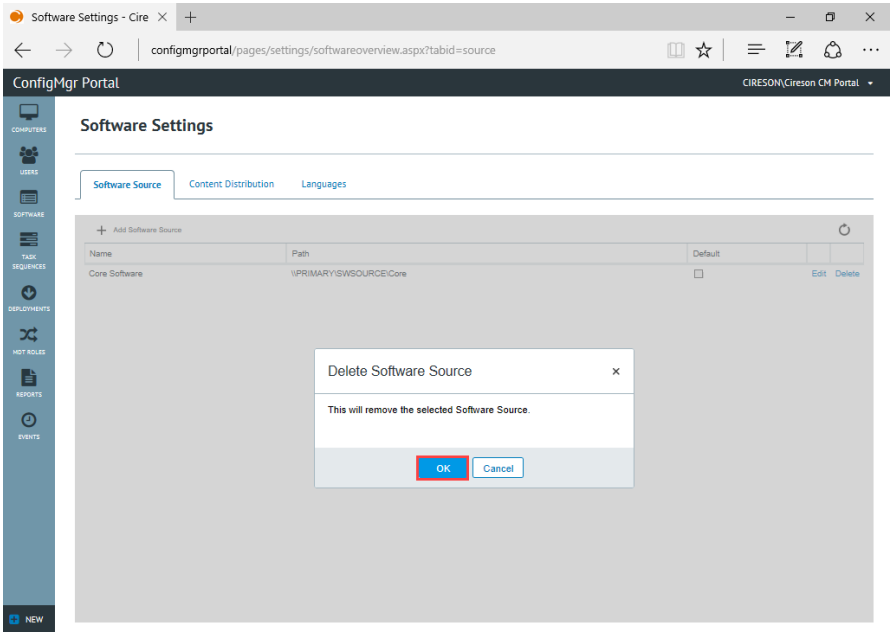
   NOTE: No Software Sources are configured by default.



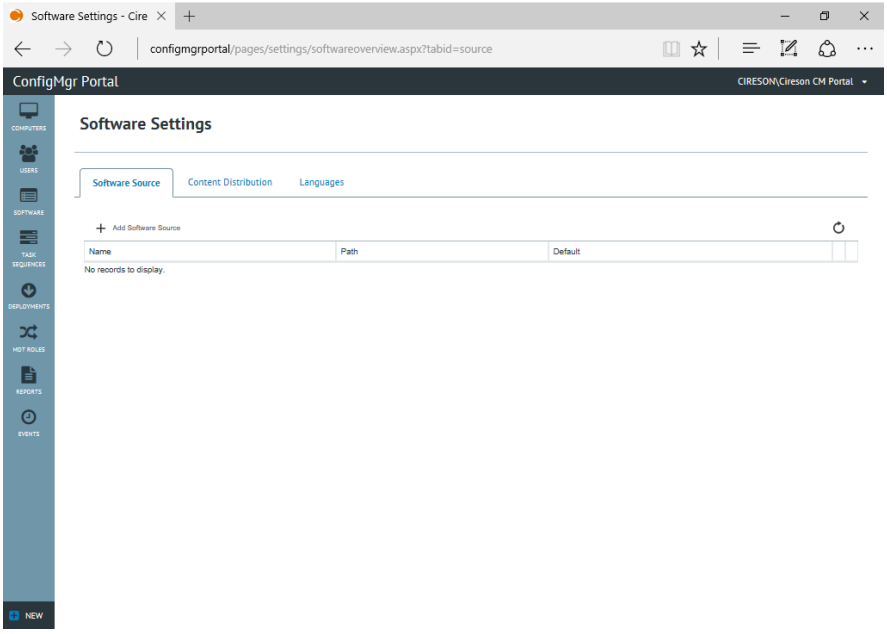
3. Click **Delete** beside the Software Source you want to delete.



4. Click **OK** on the **Delete Software Source** dialog box stating **This will remove the selected Software Source**



The Portal will automatically refresh and the selected Software Source will no longer be shown on the **Software Source** tab.



Templates

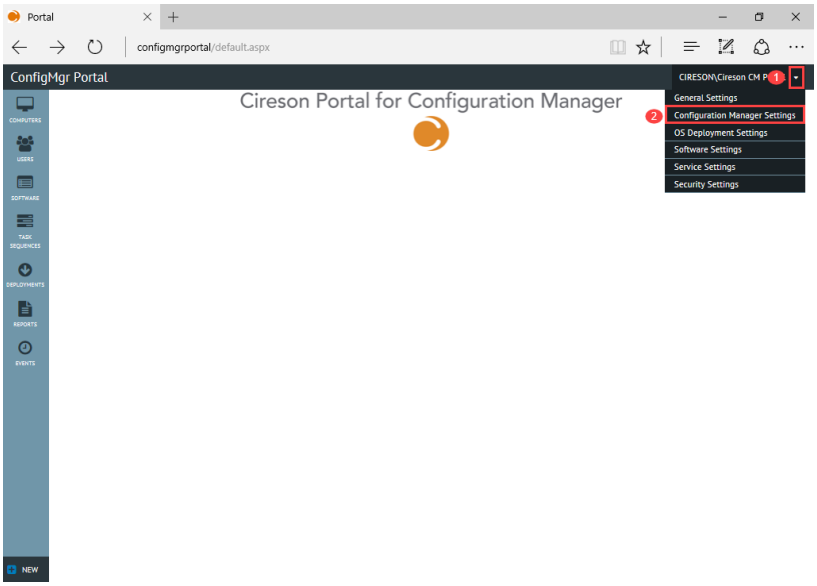
The Portal allows you to create different templates containing appropriate settings for the various objects you can create using the Portal such as Packages, Task Sequences, Deployments, etc. Then the next time you create an object, you can select the relevant Template from a list which will then automatically configure the new object with the settings defined in the Template. This section details the tasks related to Templates that you can perform using the Portal.

- How do I create a new Template?
- How do I edit a Template?
- How do I manage the permissions on a Template?
- How do I delete a Template?

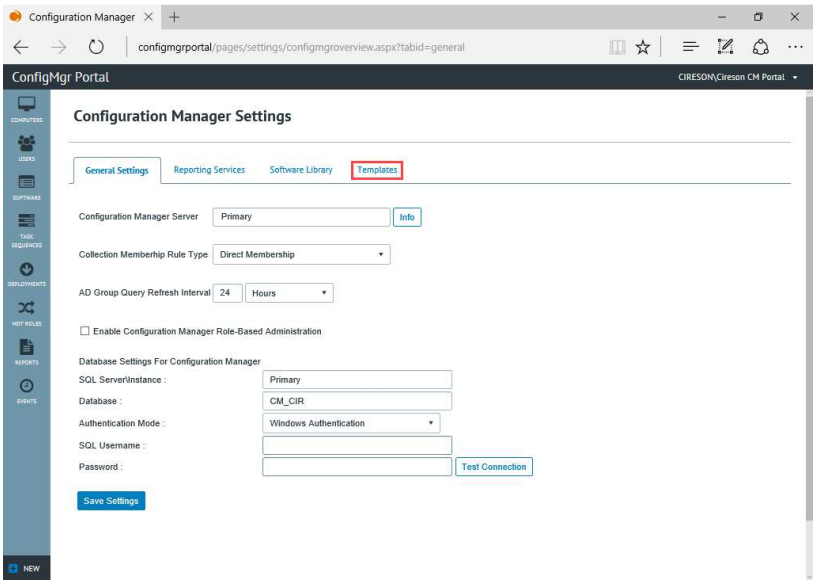
How do I create a new Template?

To create a new Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Configuration Manager Settings**

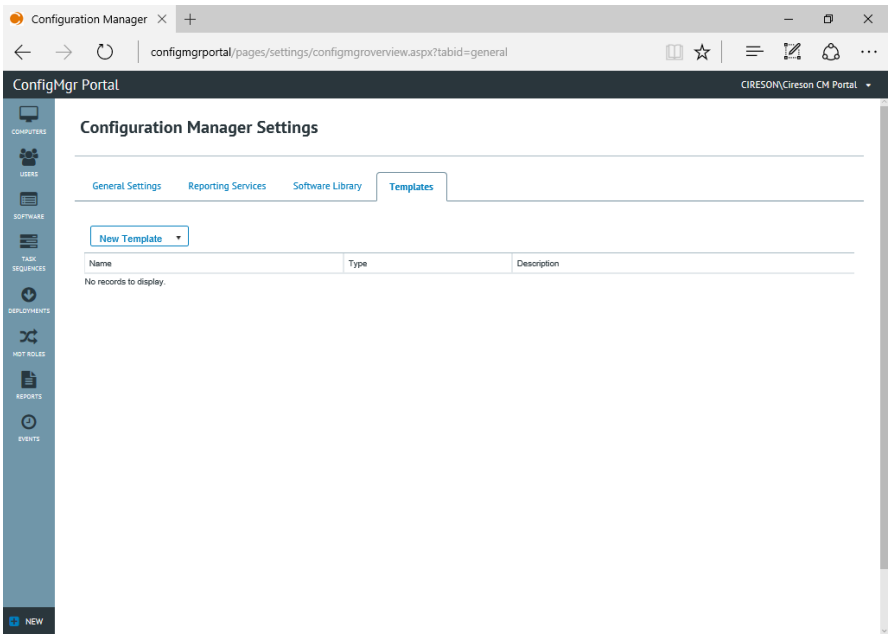


2. Click the **Templates** tab.



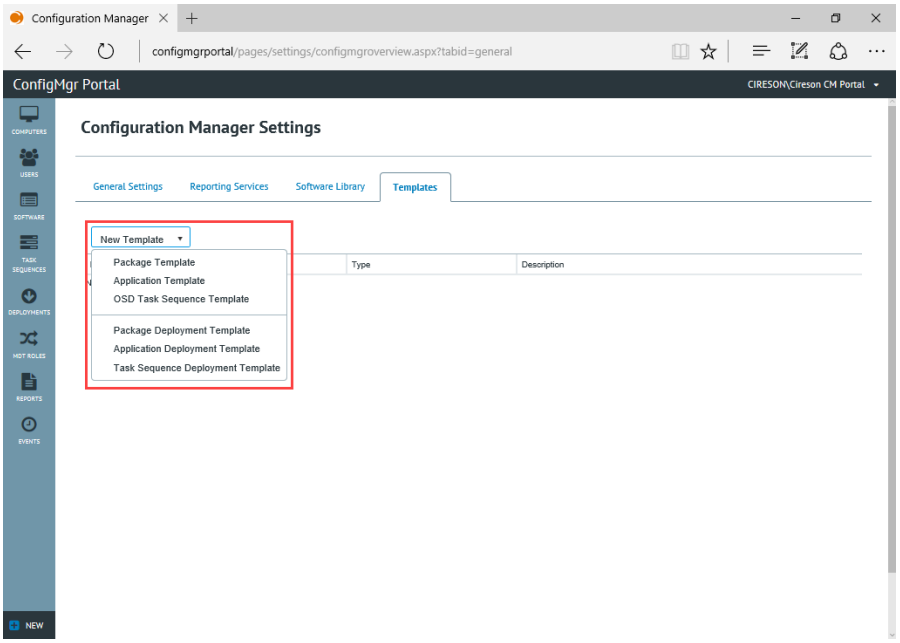
A list of the current Templates is displayed.

NOTE: The Portal does not ship with any default Templates.

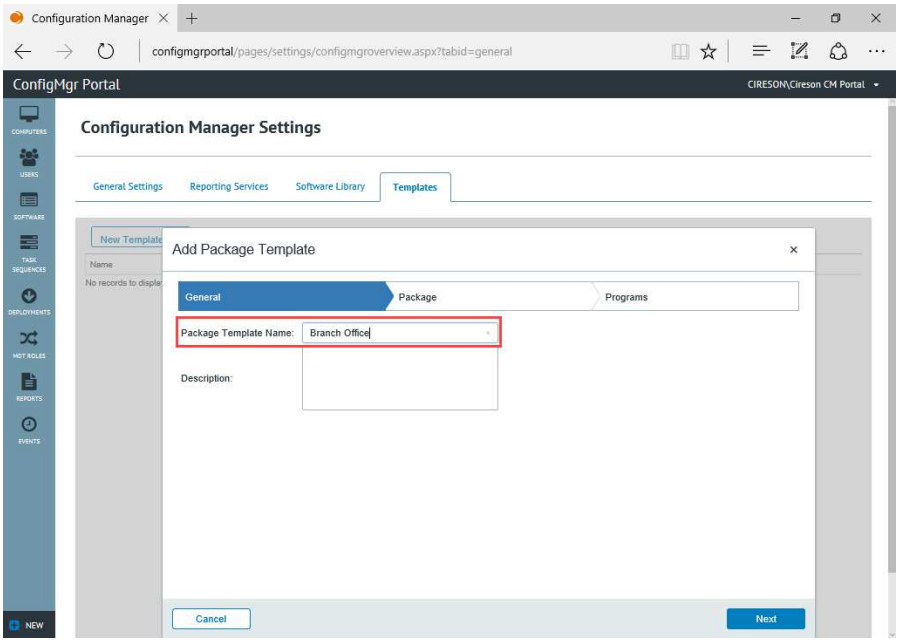


3. Click **New Template** and select the type of Template that you want to create (**Package, Application, OSD Task Sequence, Package Deployment, Application Deployment, Task Sequence Deployment**). In this example, we will create a new **Package Template**

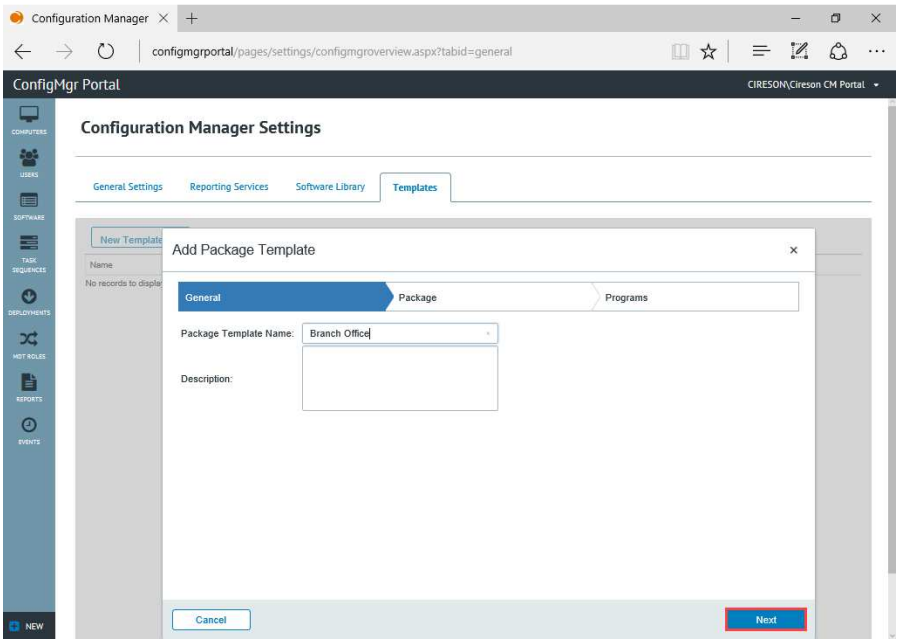
   NOTE: The process for creating a different type of Template is essentially the same as creating a **Package Template**, simply select the relevant options for the type of Template you are creating.



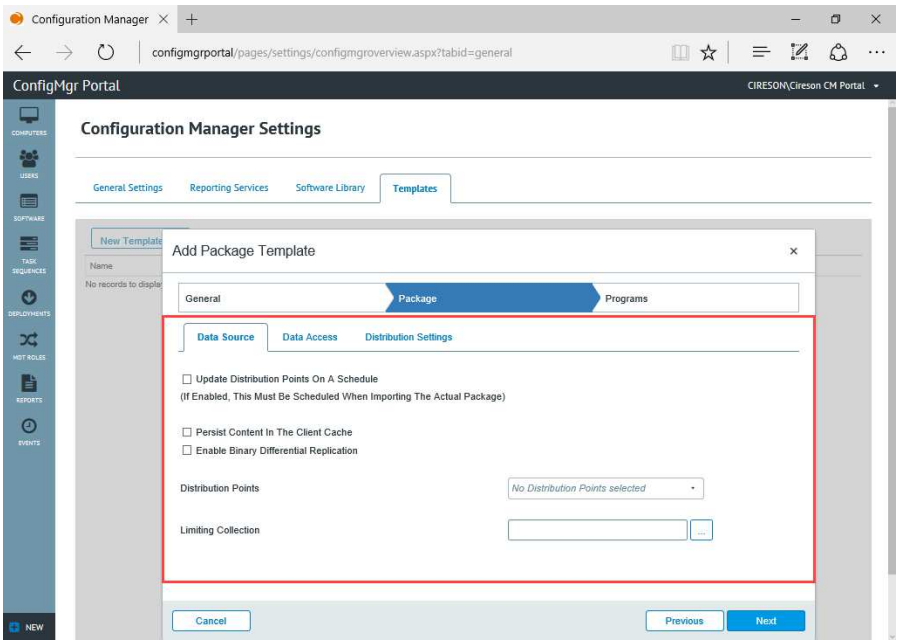
4. On the **Add Package Template** page, enter the name of the new Template in the **Package Template Name** field and optionally, add a description.



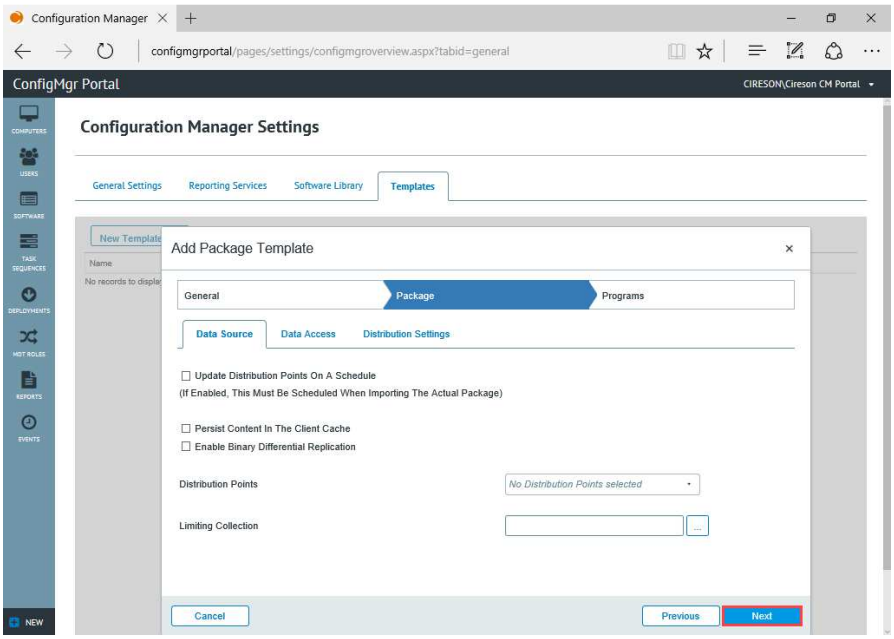
5. Click **Next**



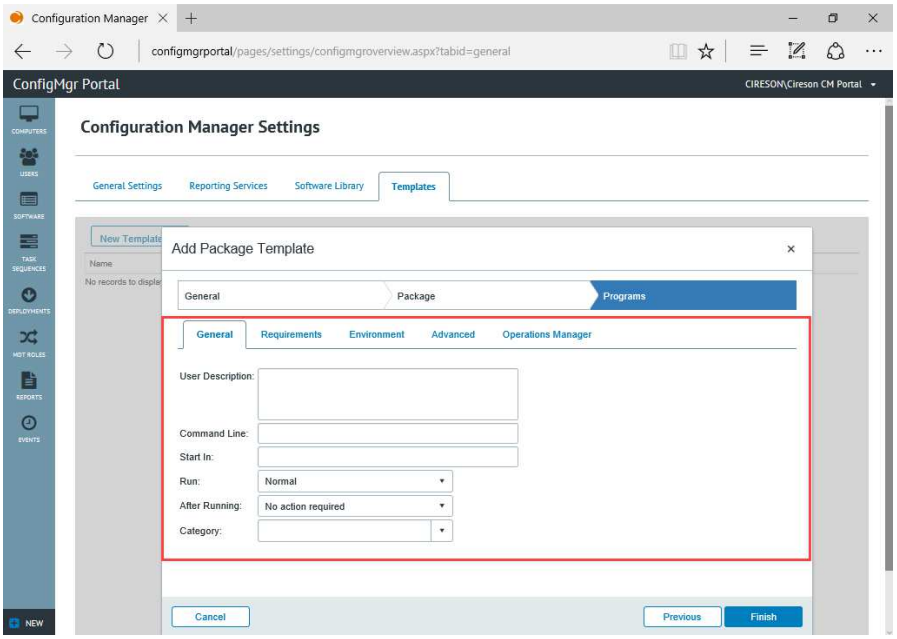
6. Select the relevant settings you require from the various tabs on the **Package** page.



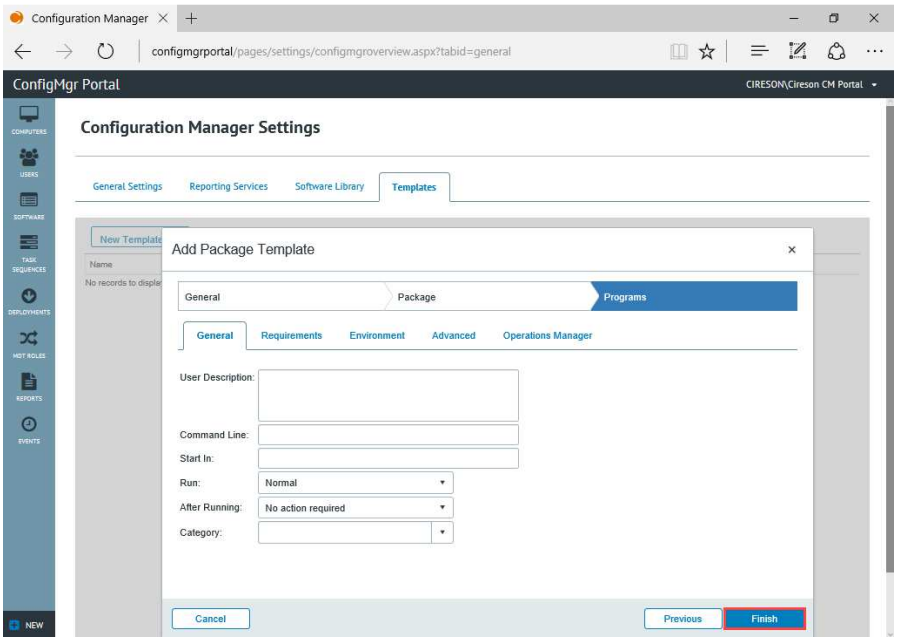
7. Click **Next**



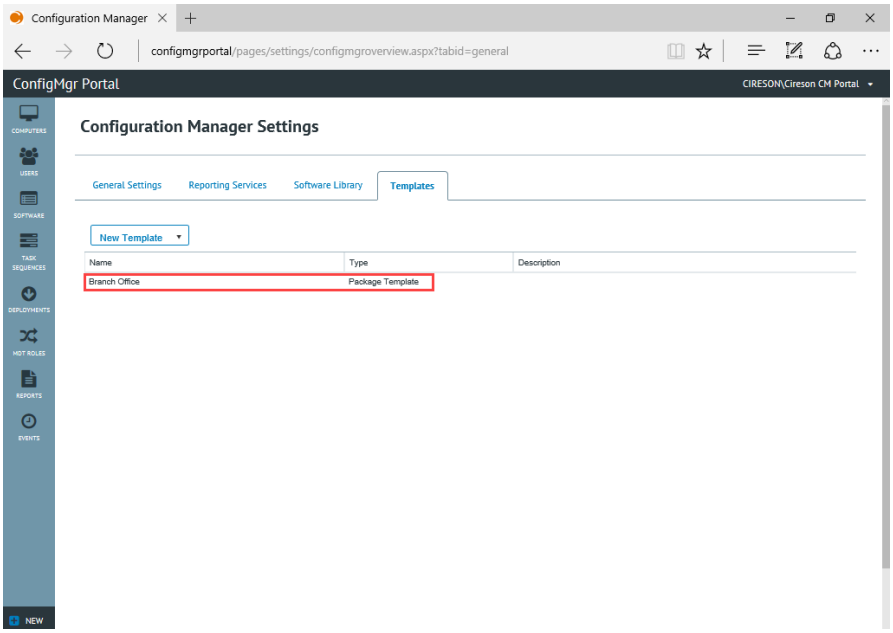
8. Select the relevant settings you require from the various tabs on the **Programs** page.



9. Click **Finish** to save the Template.



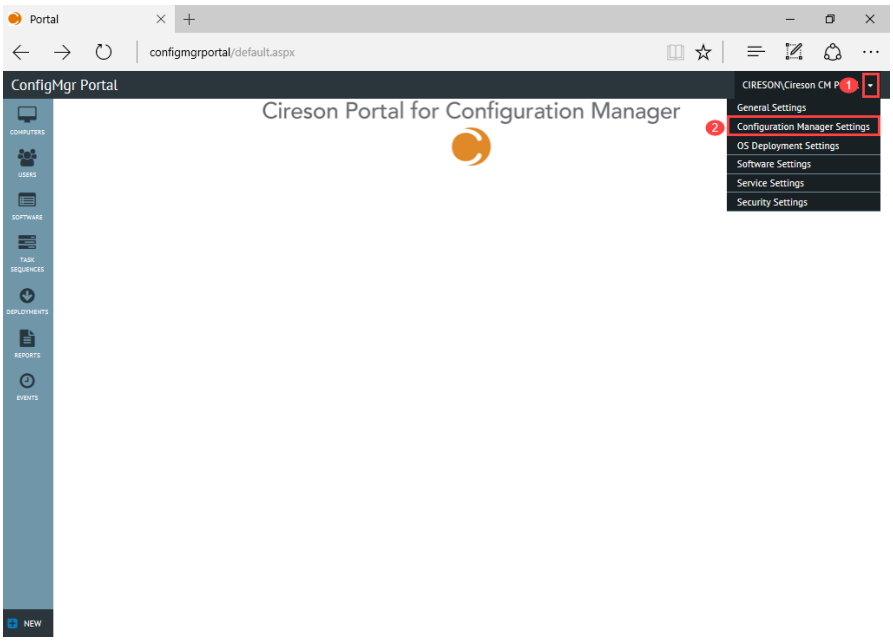
The new Template is shown on the **Templates** tab.



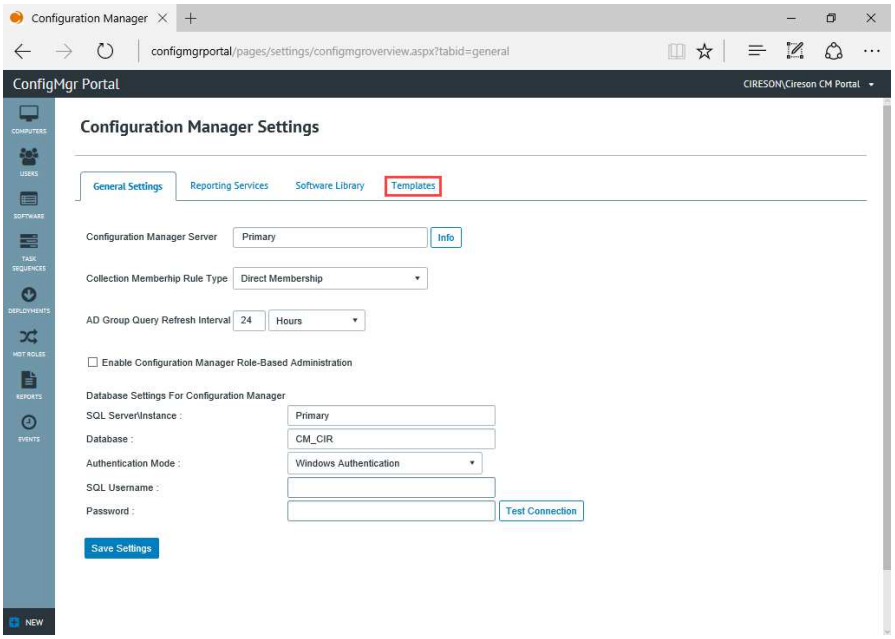
How do I edit a Template?

To edit a Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Configuration Manager Settings**

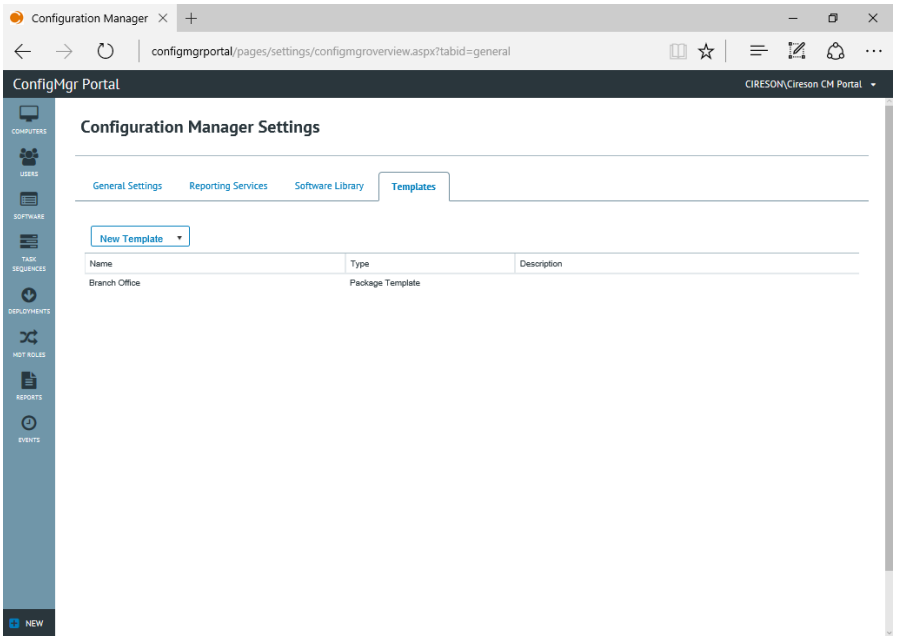


2. Click the **Templates** tab.

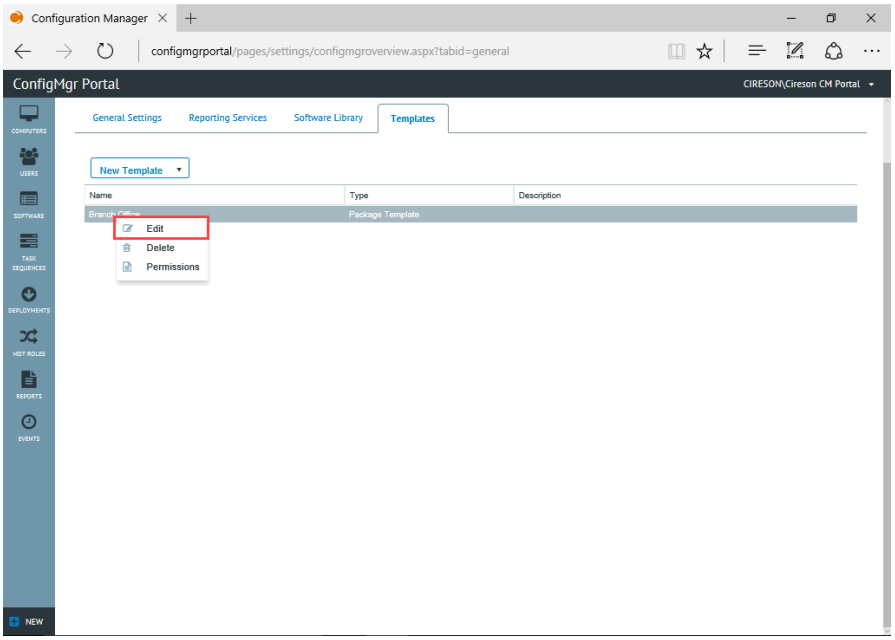


A list of the current Templates is displayed.

NOTE: The Portal does not ship with any default Templates.



3. Right-click the Template you want to edit and select **Edit** from the context menu.

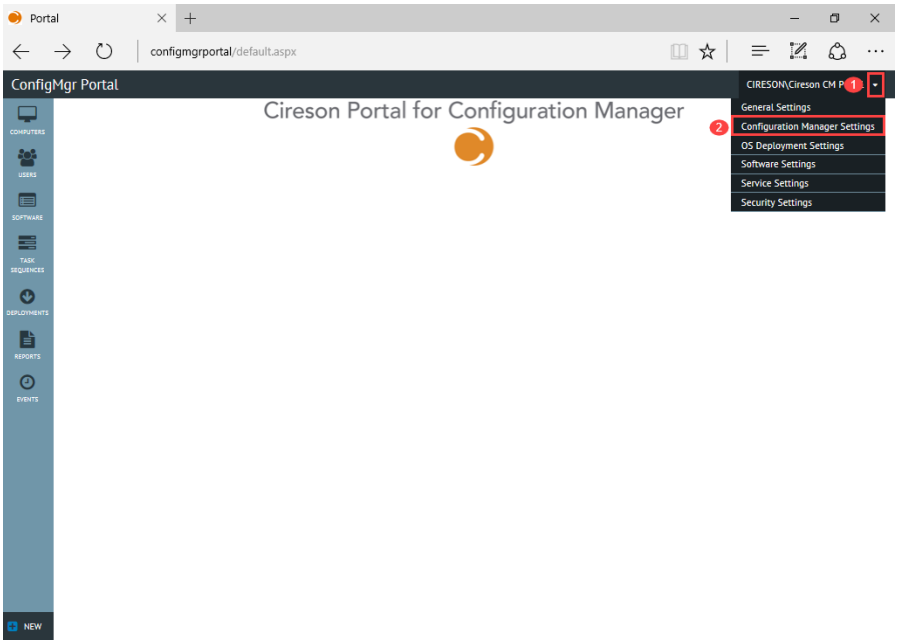


4. Make the required changes to the Template.
5. Keep clicking **Next** until you get to the final page then click **Finish** to save your changes.

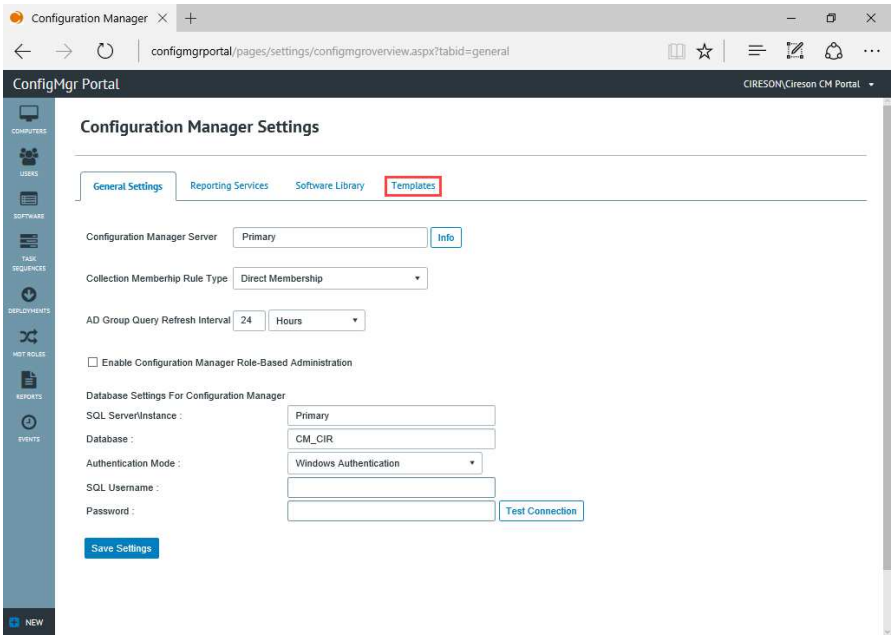
How do I manage the permissions on a Template?

To manage the permissions on a Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Configuration Manager Settings**

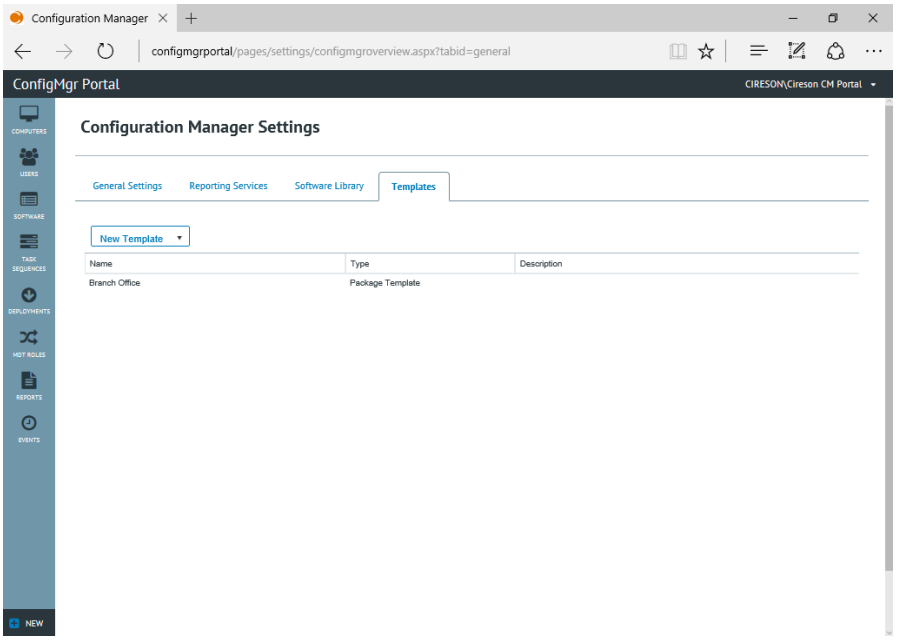


2. Click the **Templates** tab.

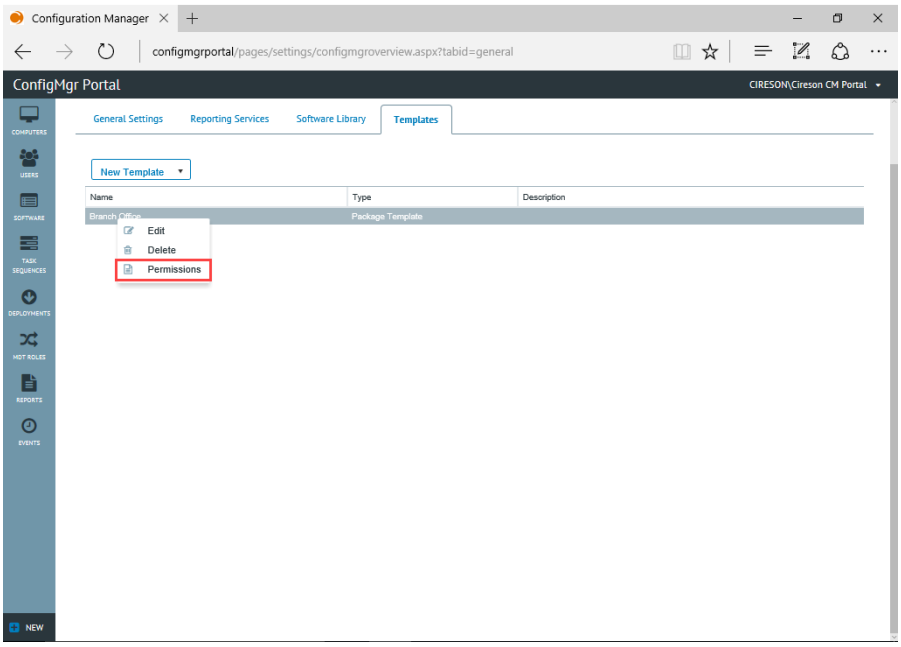


A list of the current Templates is displayed.

NOTE: The Portal does not ship with any default Templates.

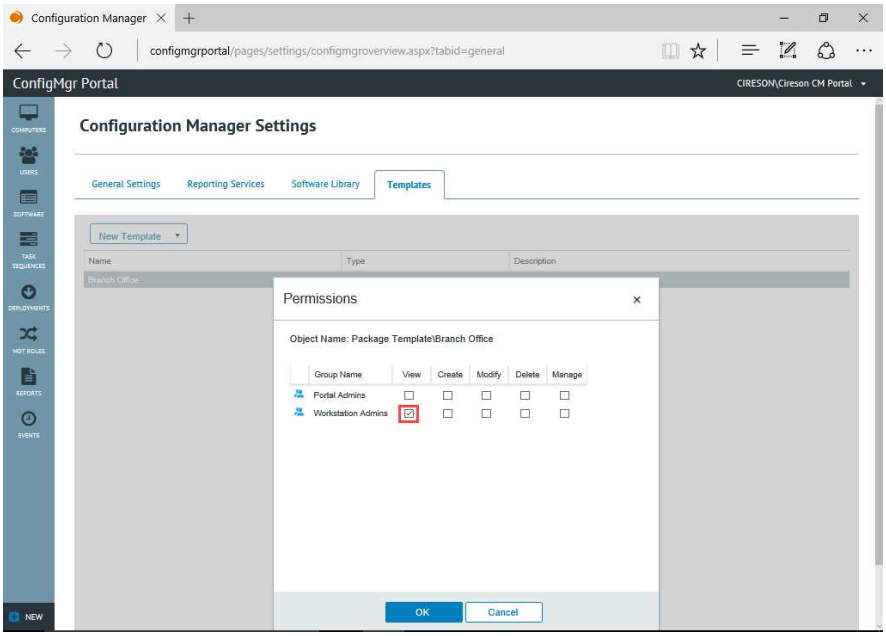


3. Right-click the Template whose permissions you want to manage and select **Permissions** from the context menu.

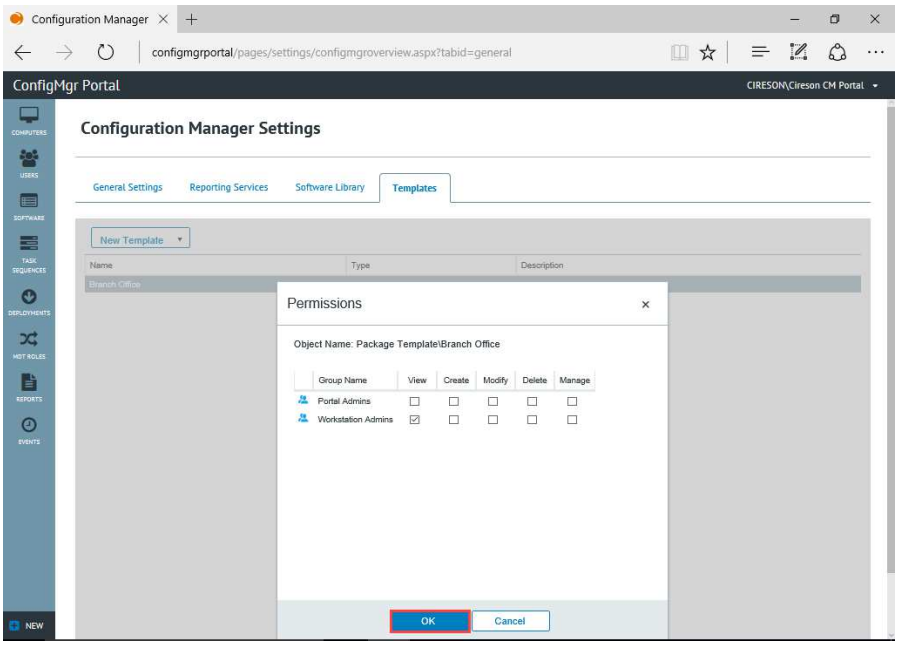


4. On the **Permissions** dialog box select the relevant checkboxes to define the relevant level of permissions for each Portal group.

   NOTE: A Portal Group needs a minimum of the **View** permission in order to be able to see and therefore use the Template.



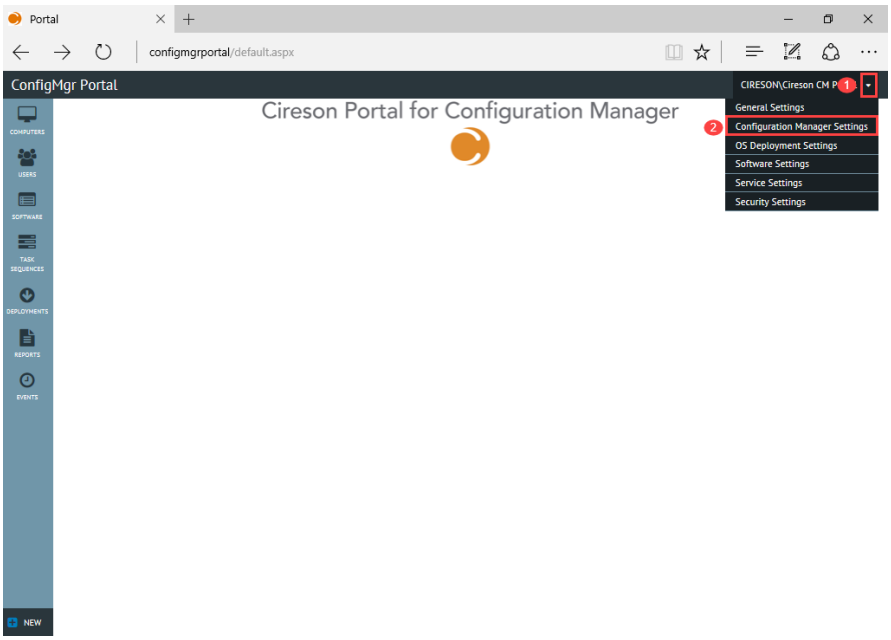
5. Click **OK** to save the changes.



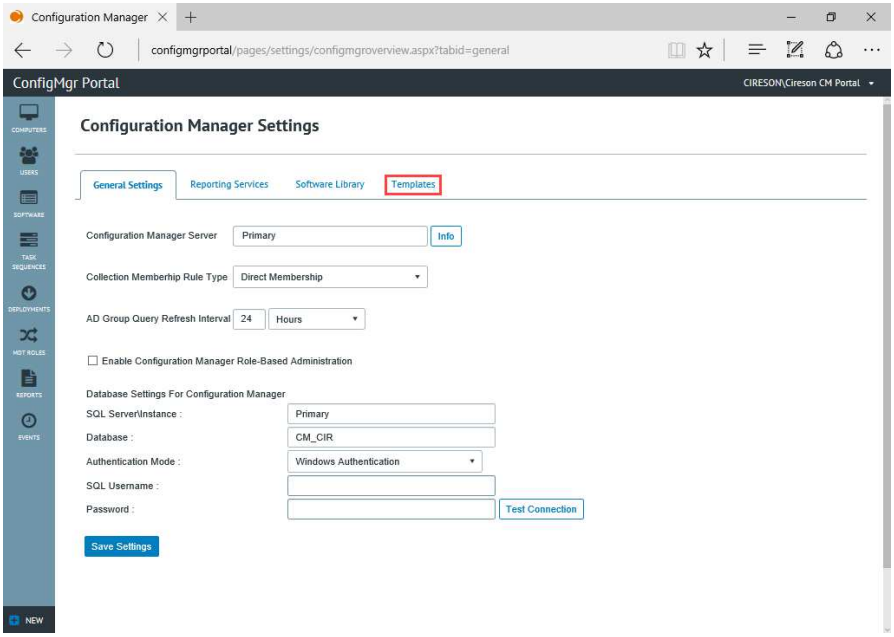
How do I delete a Template?

To delete a Template:

1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **Configuration Manager Settings**

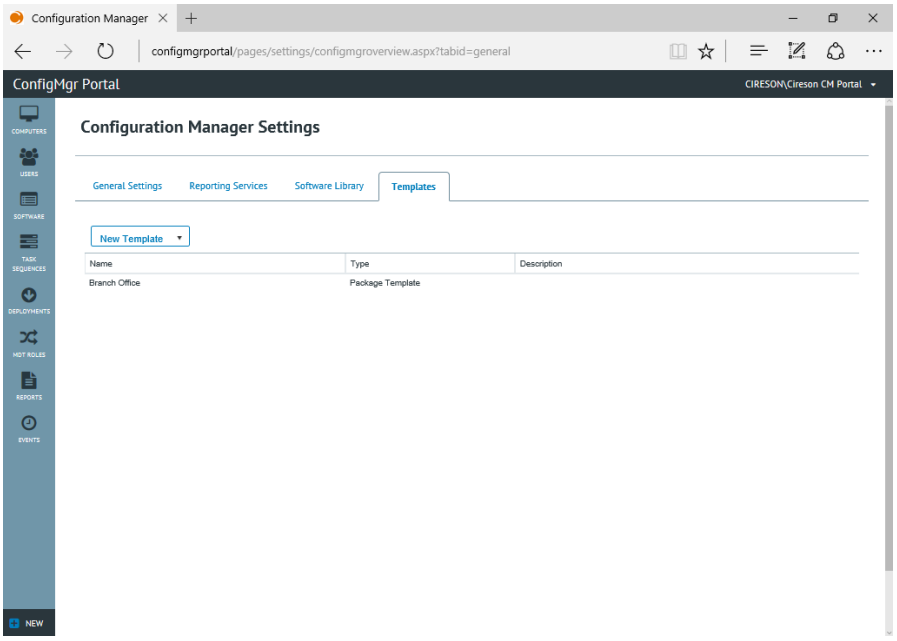


2. Click the **Templates** tab.

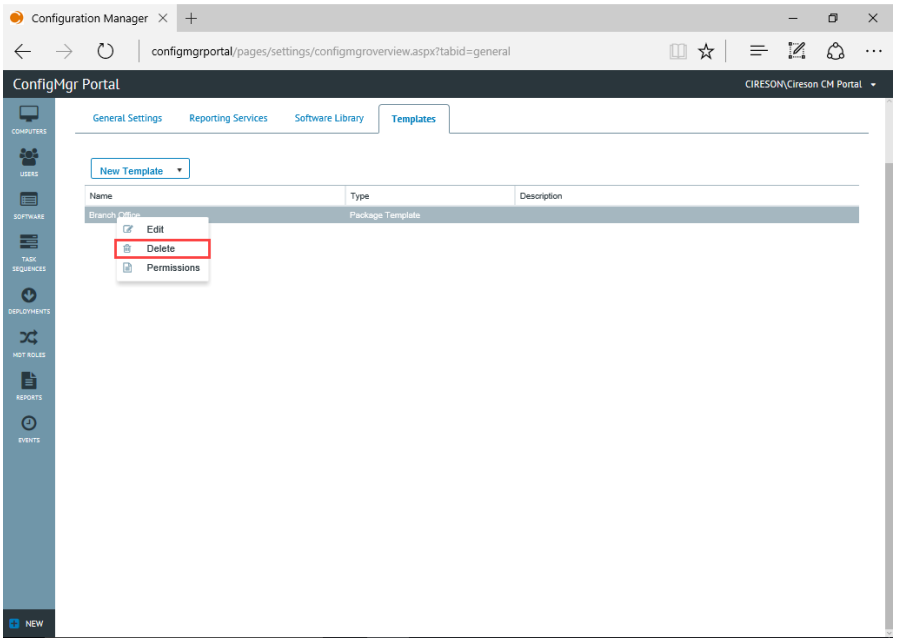


A list of the current Templates is displayed.

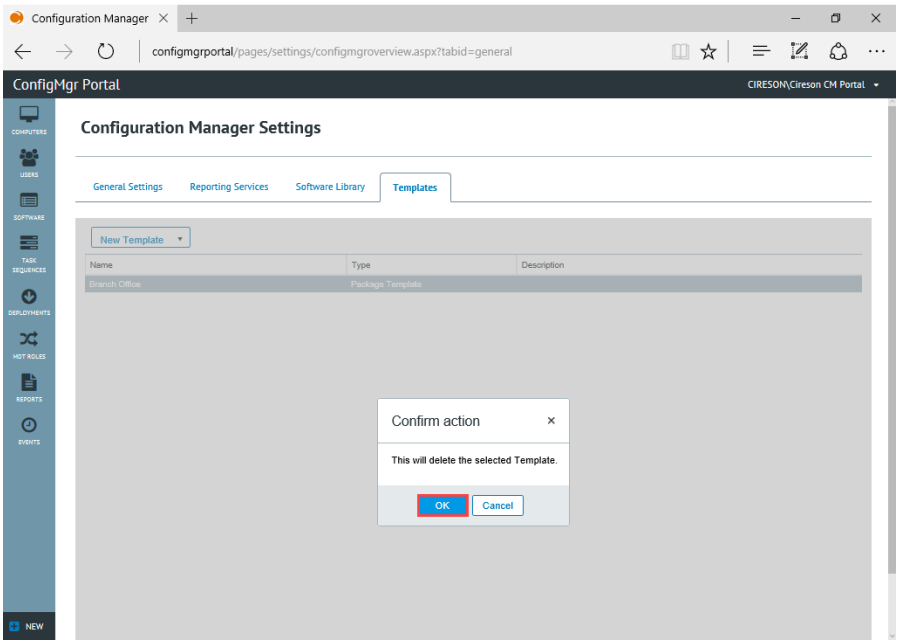
NOTE: The Portal does not ship with any default Templates.



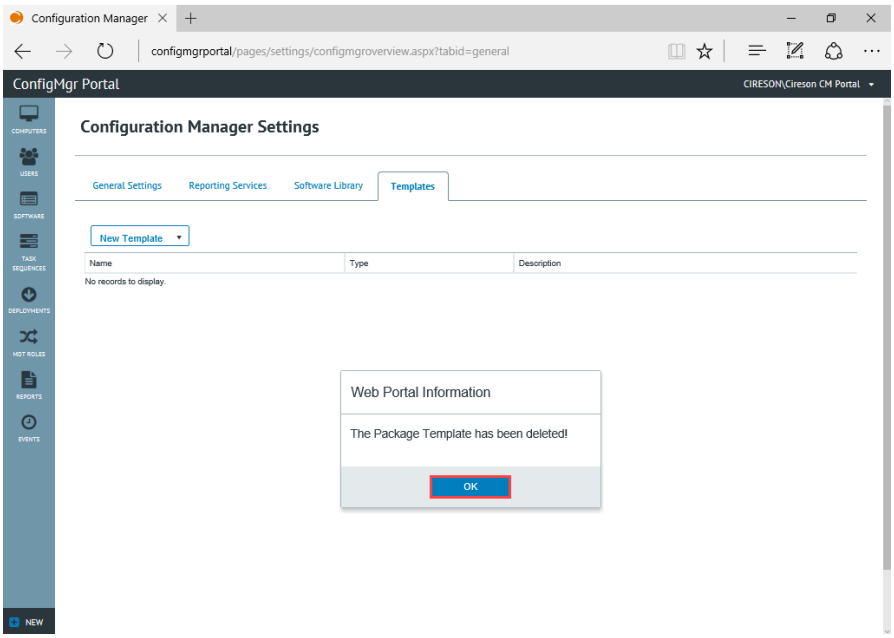
3. Right-click the Template you want to delete, and select **Delete** from the context menu.



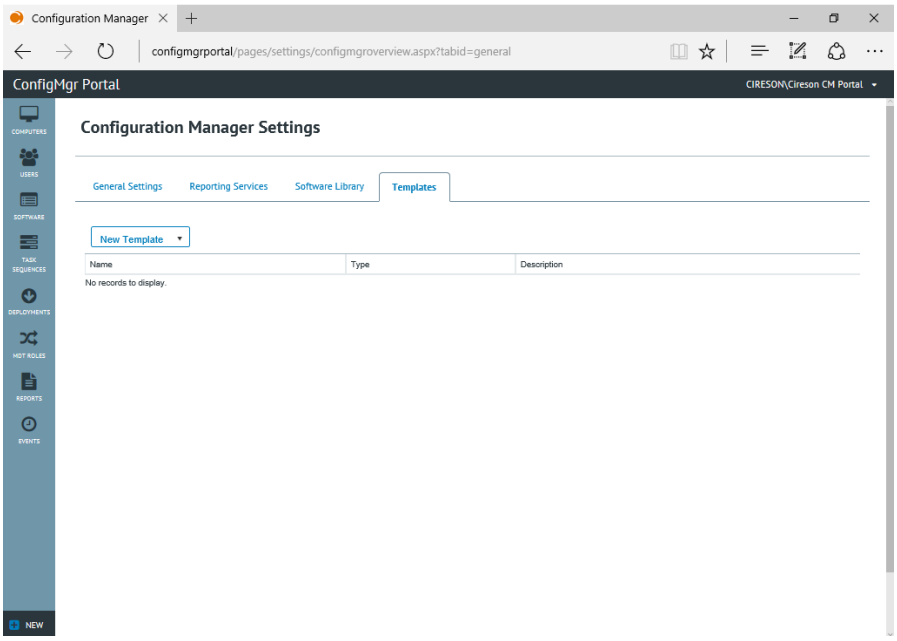
4. Click **OK** on the **Confirm action** dialog box stating **This will delete the selected Template.**



5. Click **OK** on the **Web Portal Information** dialog box stating **The <*template_type*> Template has been deleted!**



The deleted Template no longer appears on the **Templates** tab.



Views

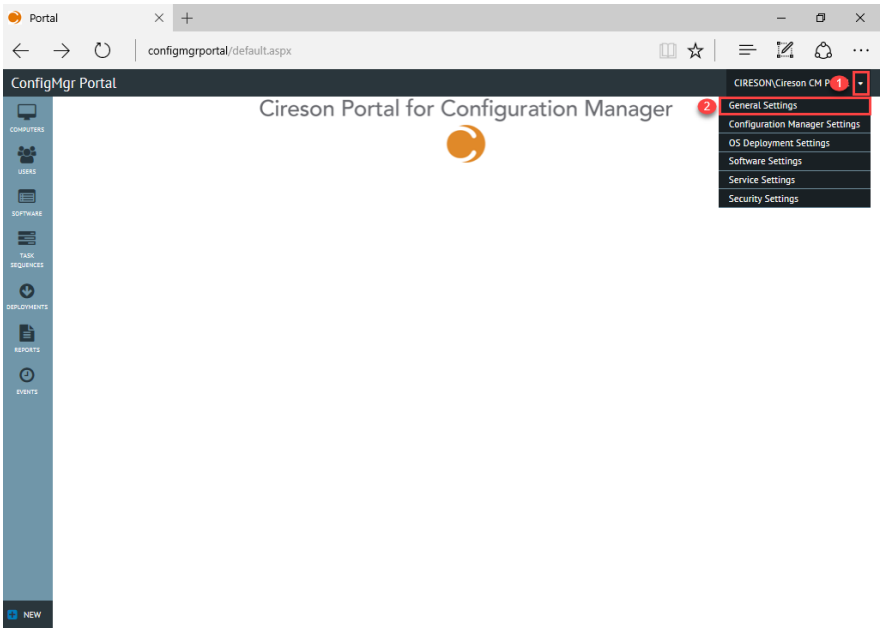
Views allow you to control what resources are shown in the Portal based on configured criteria (like a ConfigMgr query). The Portal ships with standard views for Computers, Users, and Software. Custom views can be created as required as detailed in this section. This section details the tasks related to Views that you can perform using the Portal.

- How do I create a new View?
- How do I edit a View?
- How do I manage the permissions on a View?
- How do I delete a View?

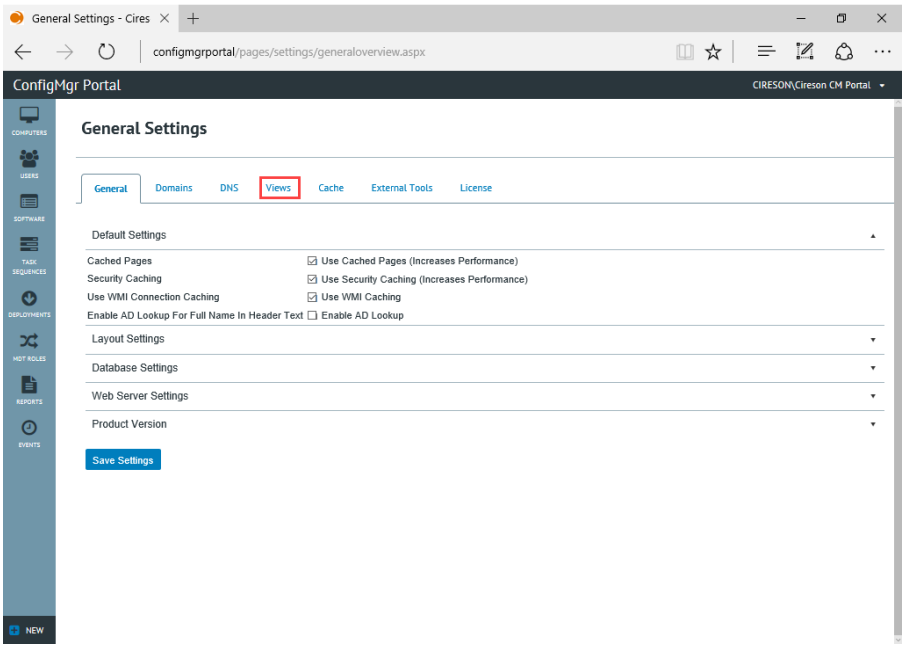
How do I create a new View?

To create a new View:

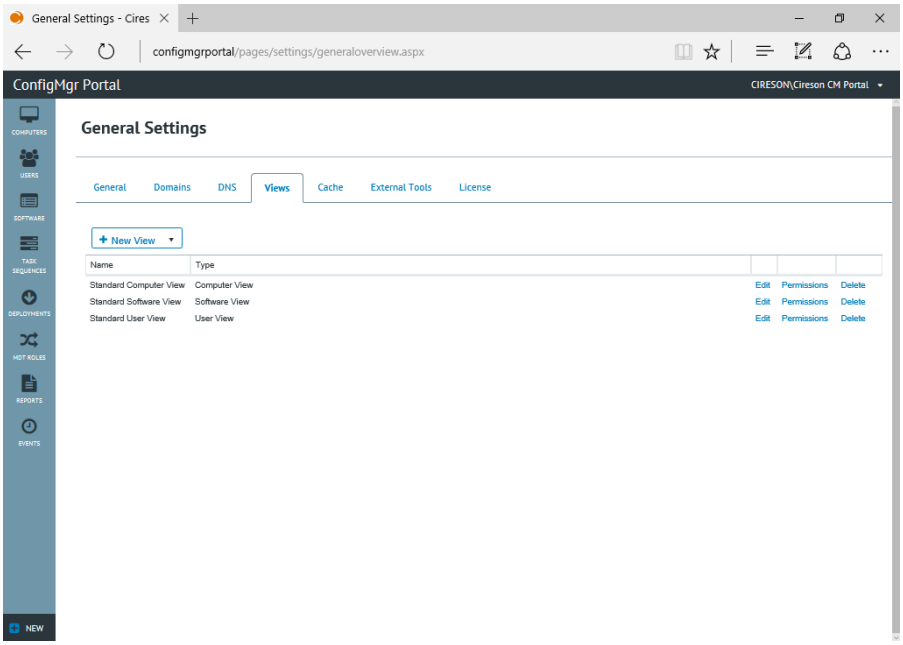
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**



2. Click the **Views** tab.

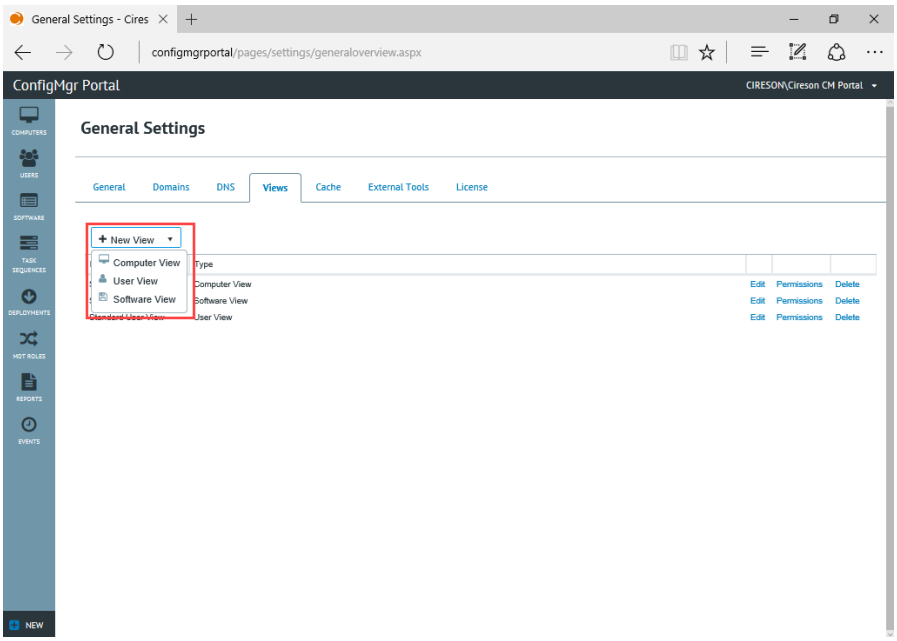


A list of existing views is displayed.

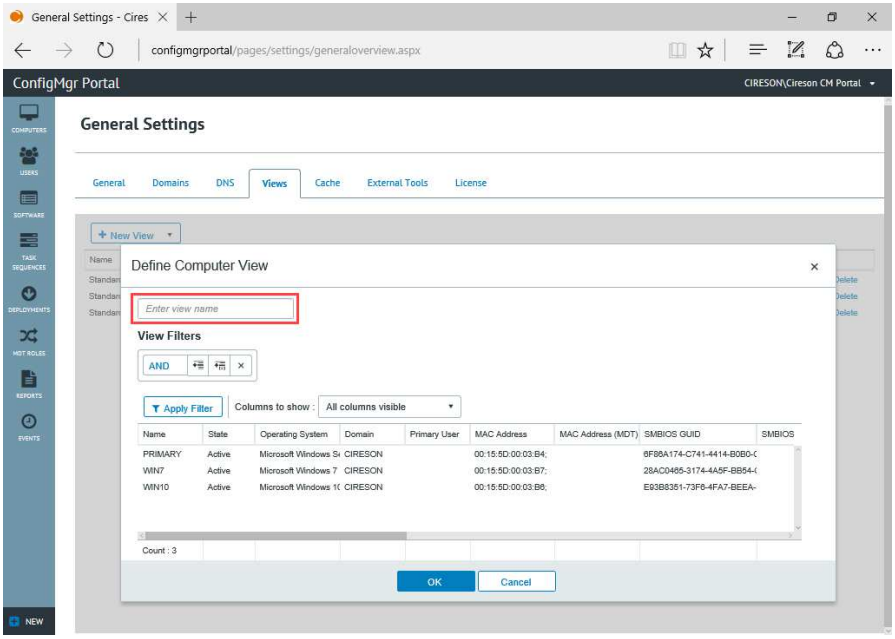


3. Click **New View** and then select the type of View you want to create (**Computer, User** or **Software**). In this example, we will create a new **Computer View** that only displays servers.

   NOTE: The process for creating a different type of View is essentially the same as creating a **Computer View**, simply select the relevant options for the type of View you are creating.

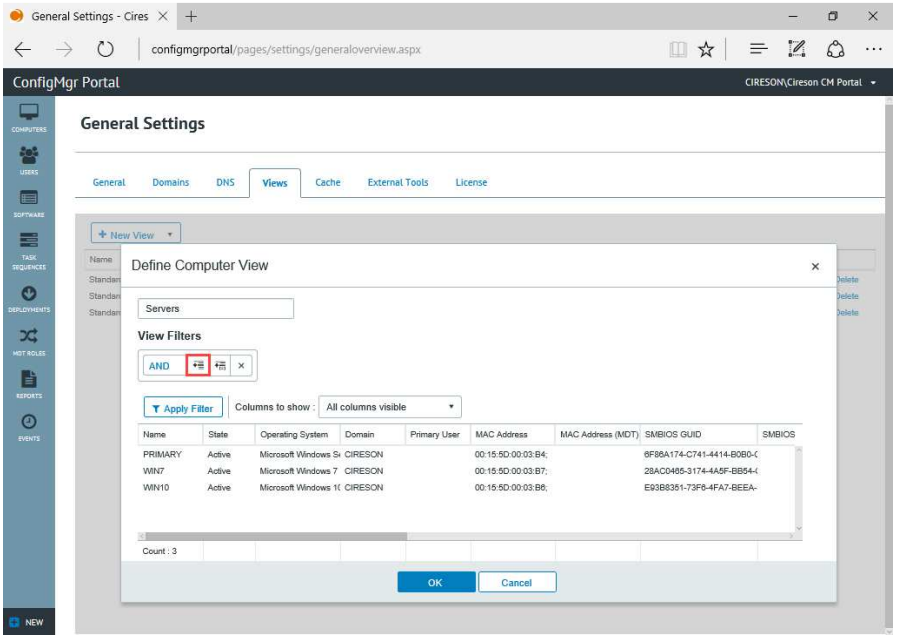


4. On the **Define Computer View** page, enter the name of the new View in the **Enter view name** field.

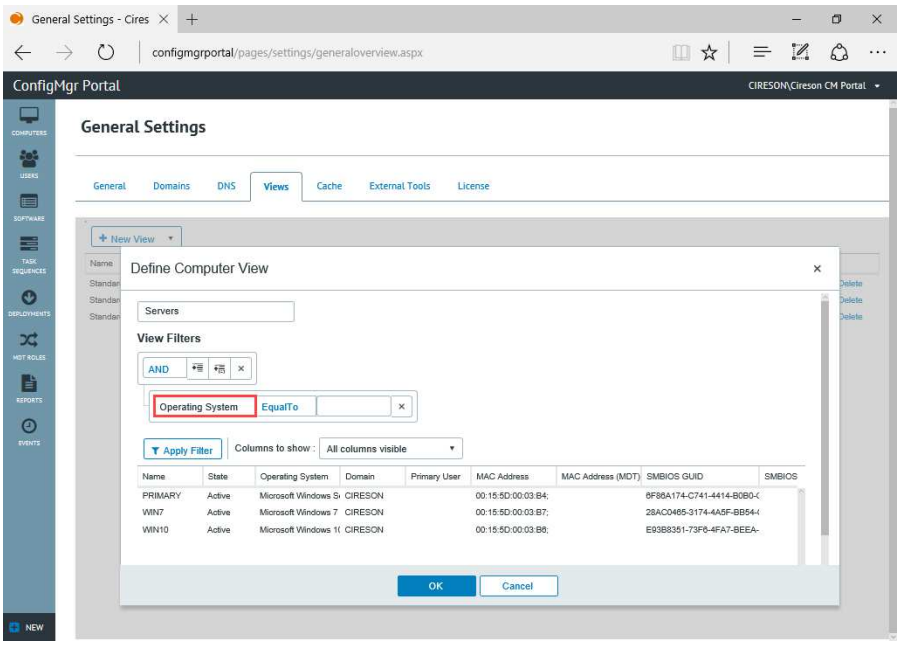


5. Select the type of operator you want to define for the View from the criterion dropdown.

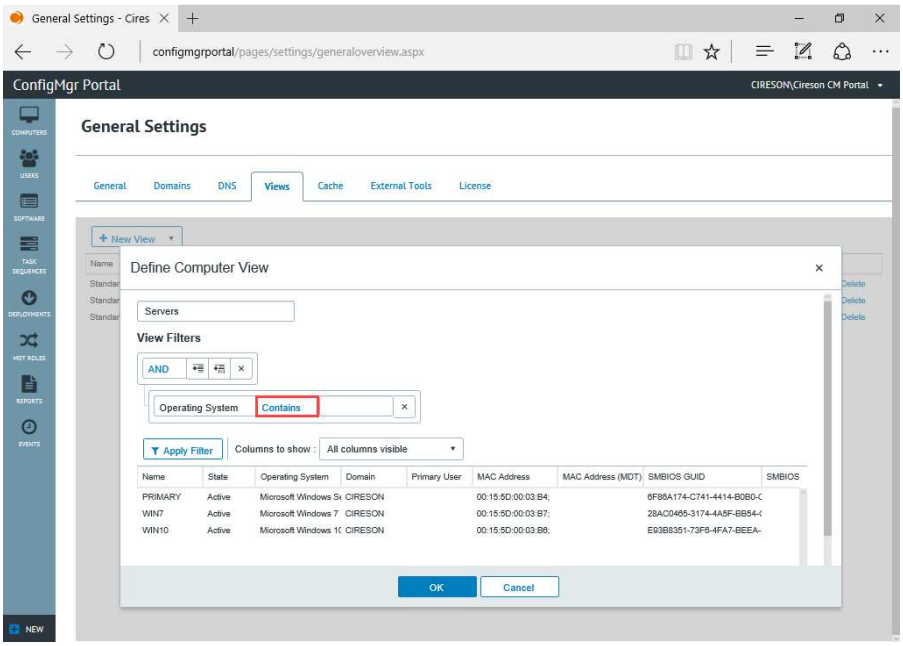
6. Either click **Add Expression** or **Add Group** depending on your requirements (in this case click **Add Expression**).



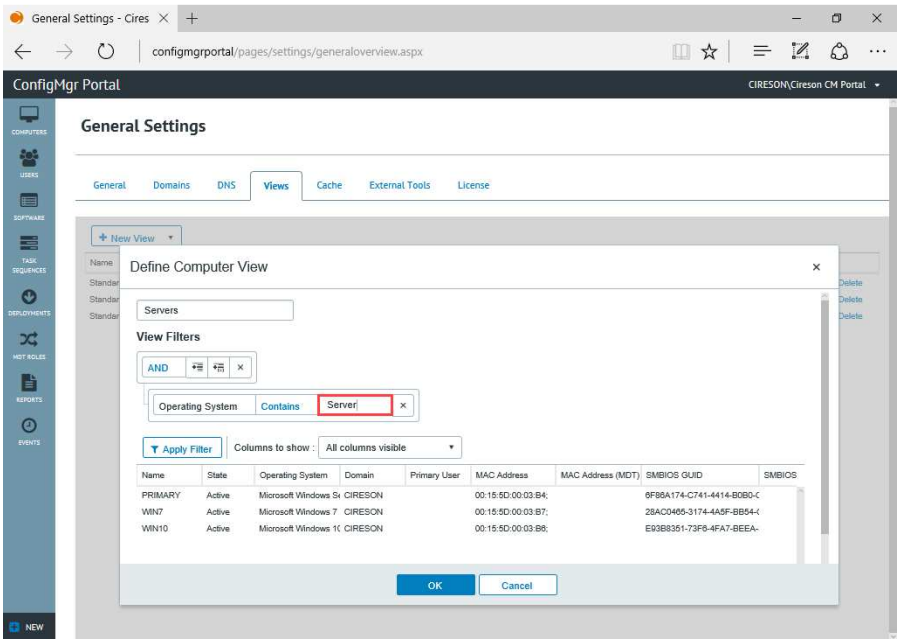
7. Select the attribute you want to filter by from the dropdown (for example **Operating System**).



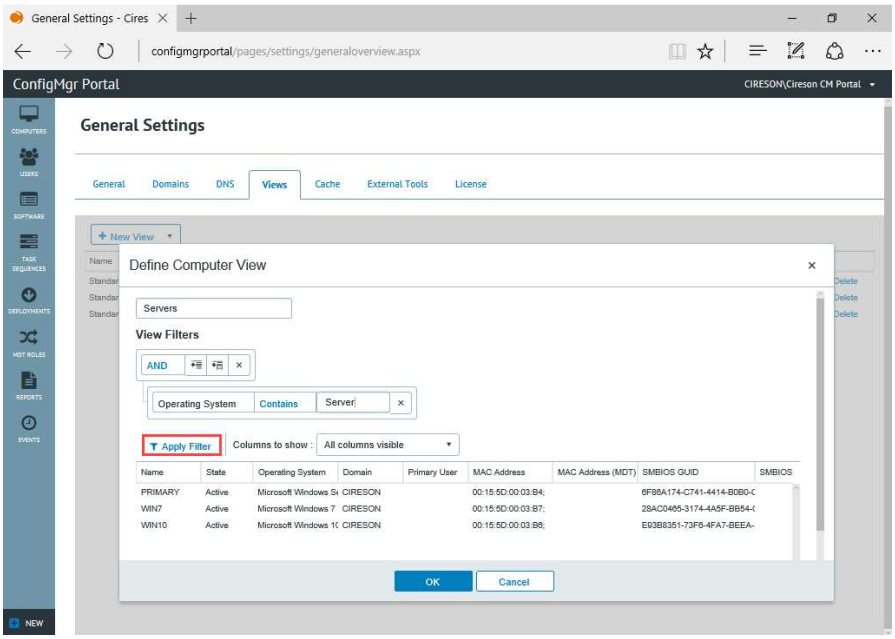
8. Select the operator from the dropdown (for example **Contains**).



9. Enter the required value (for example **Servers**).

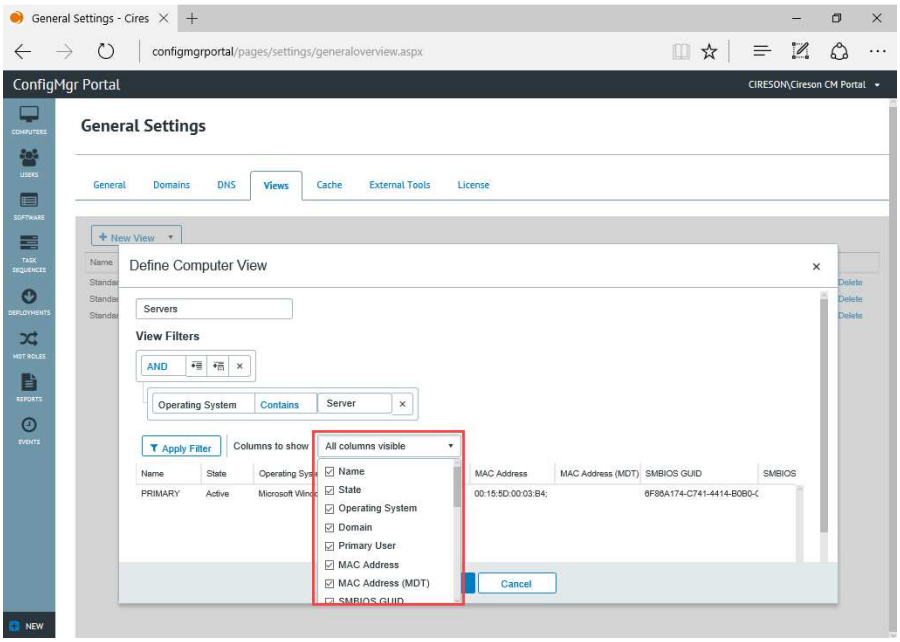


10. Click **Apply Filter** to verify the View is working as expected.

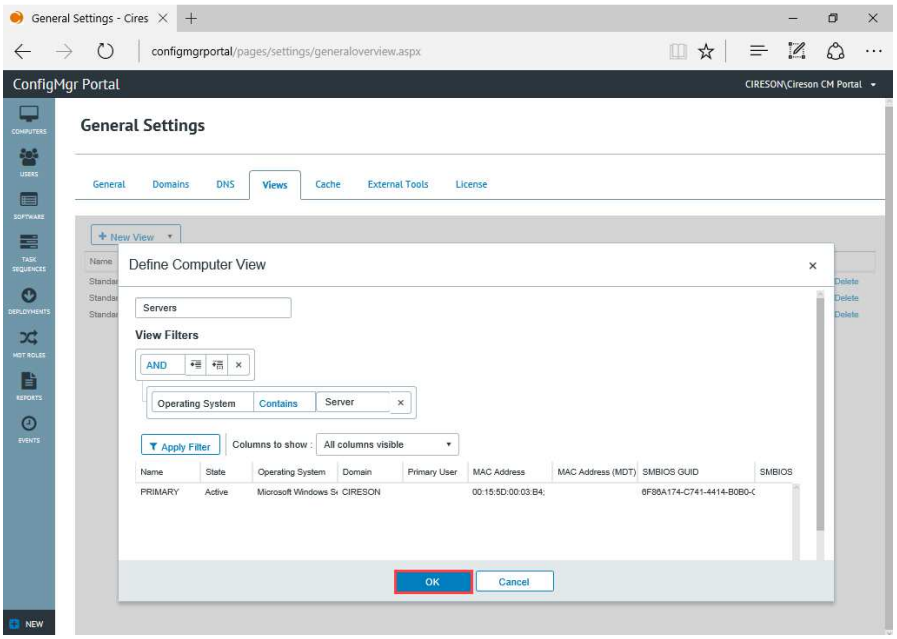


NOTE: You can add multiple expressions to a view.

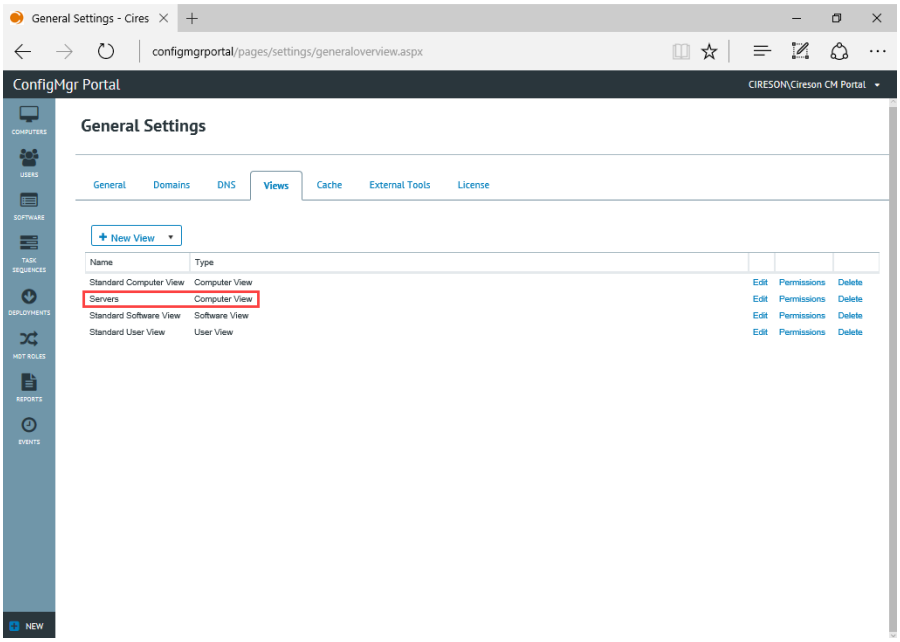
11. Select the columns you want to be displayed in the View by selecting them from the **Columns to show** dropdown.



12. Click **OK** to save the view.



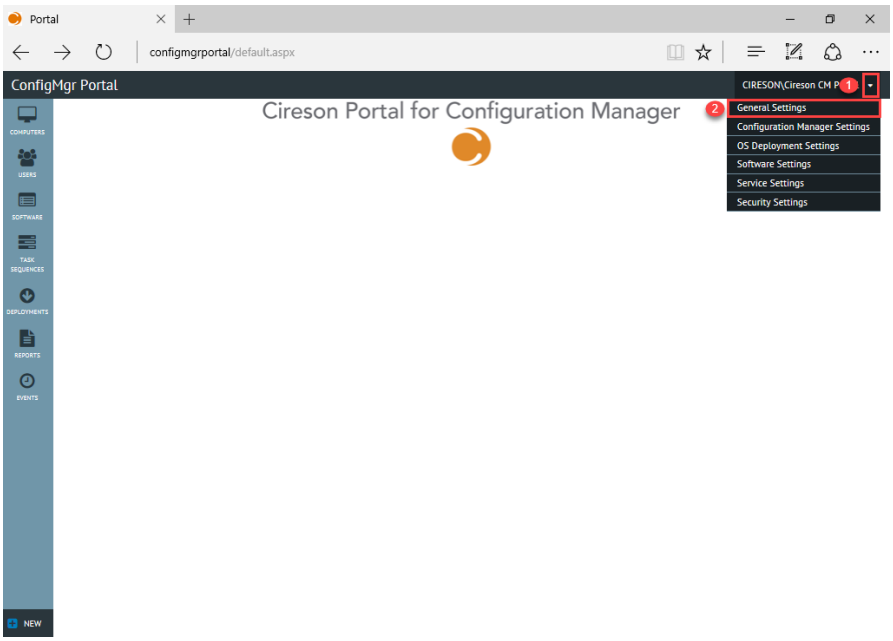
The new view is shown on the **Views** tab.



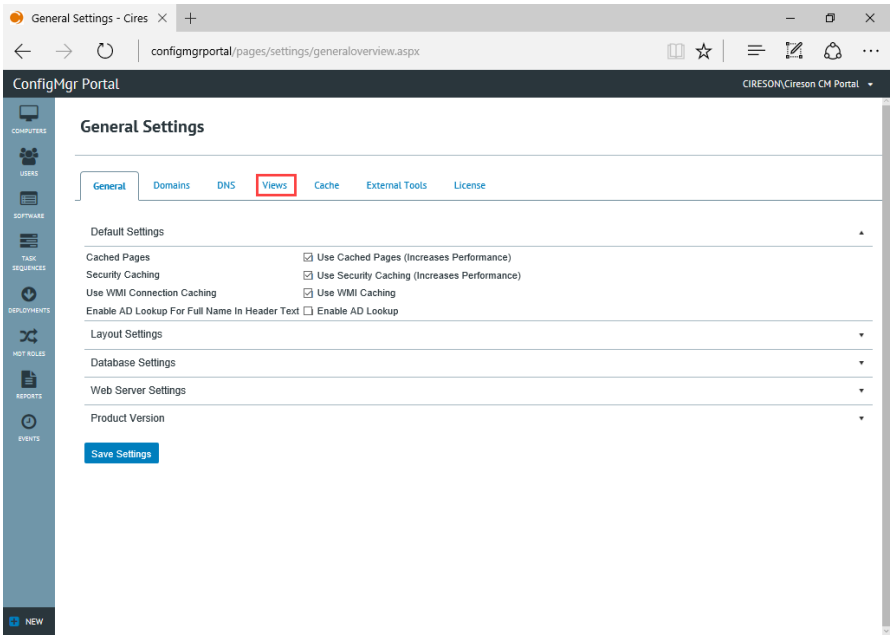
How do I edit a View?

To edit a View:

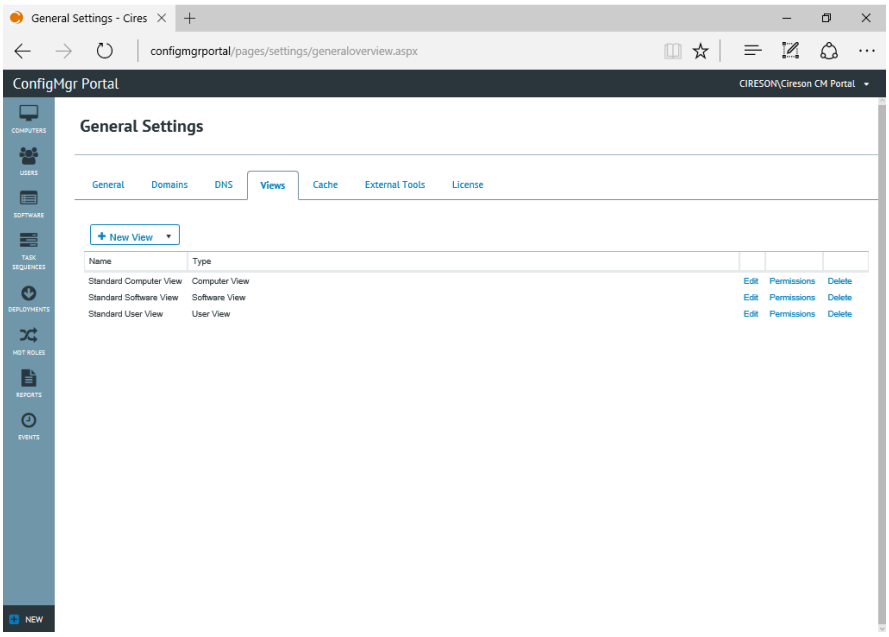
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**



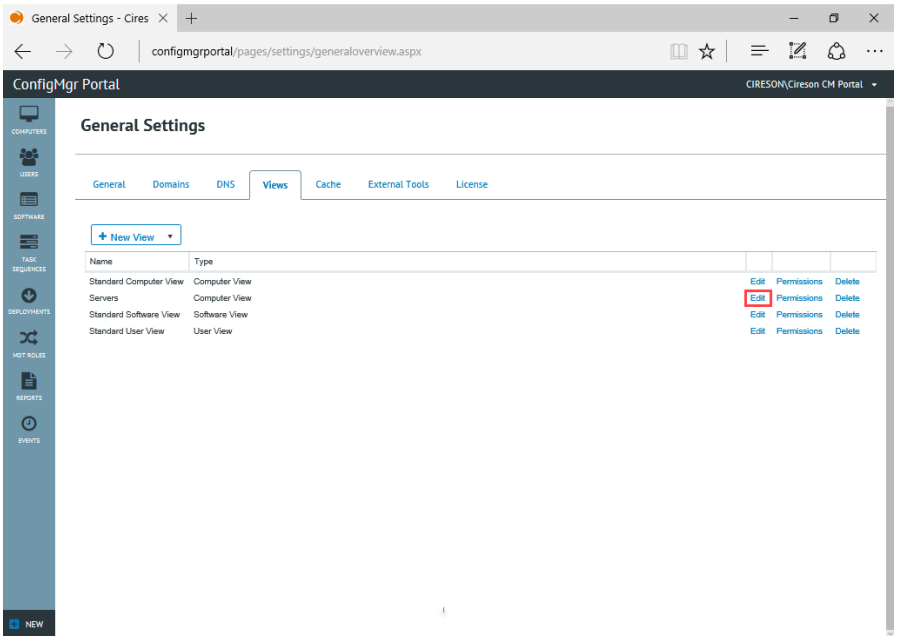
2. Click the **Views** tab.



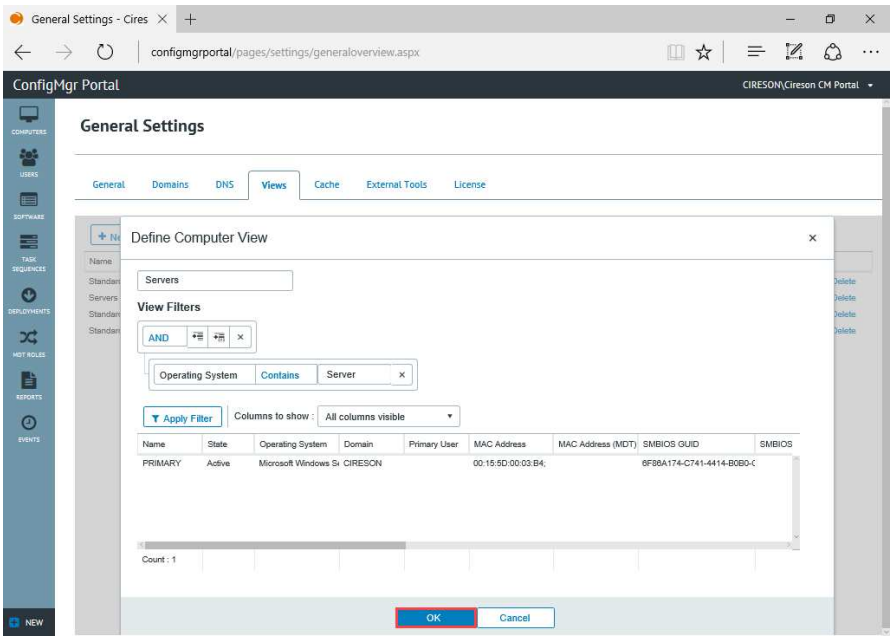
A list of the current Views is displayed.



3. Click **Edit** beside the View you want to edit.



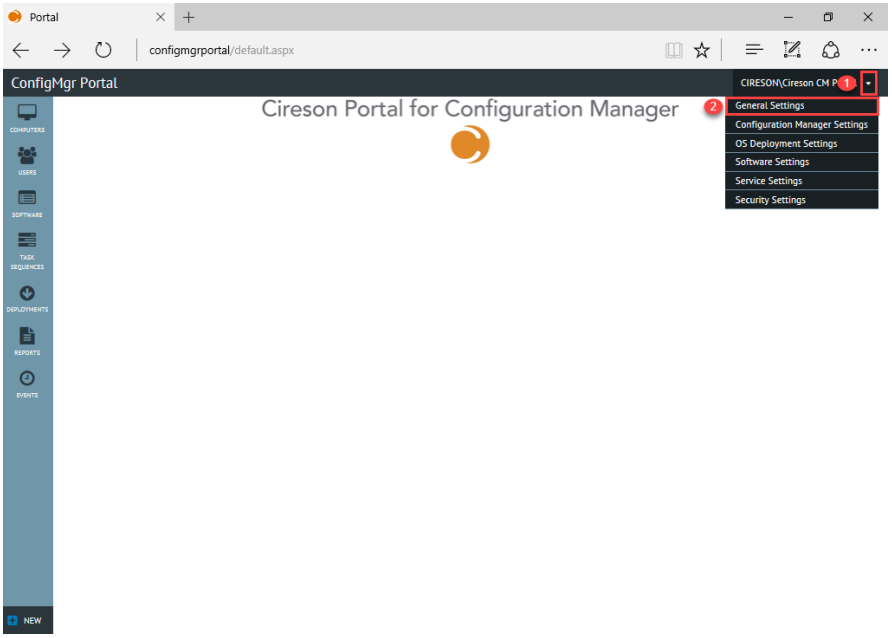
4. On the **Define Computer View** page, make the required changes to the View then click **OK** to save them.



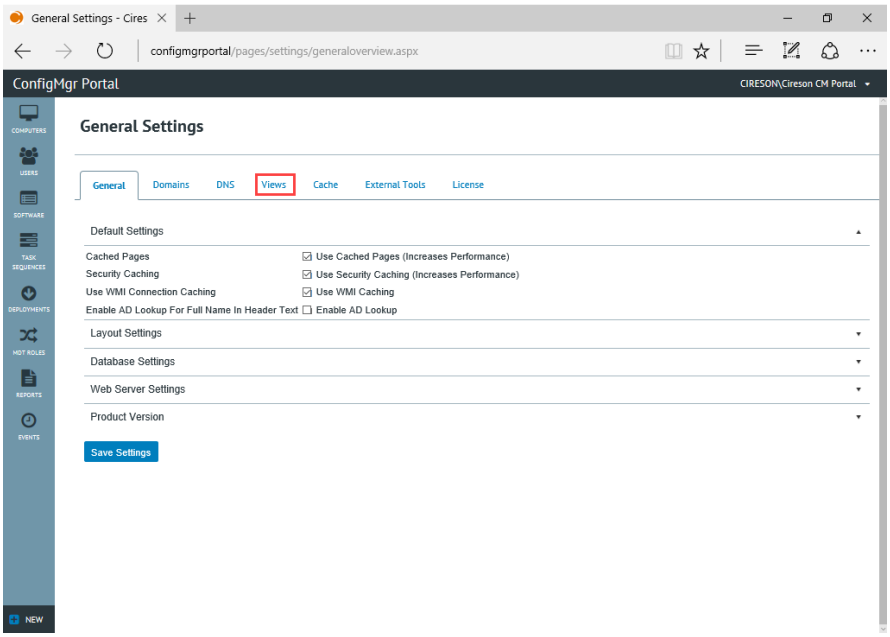
How do I manage the permissions on a View?

To manage the permissions on a View:

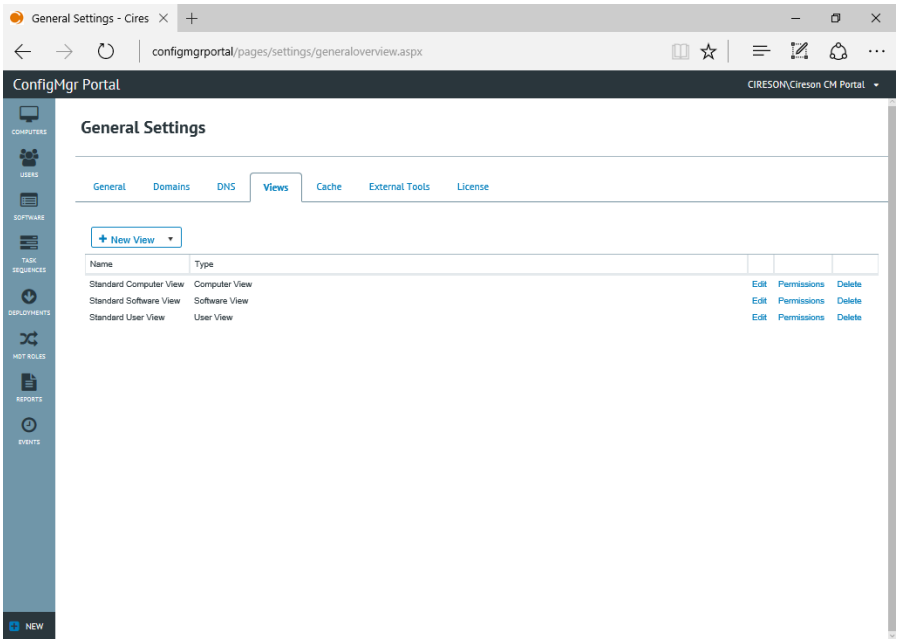
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**



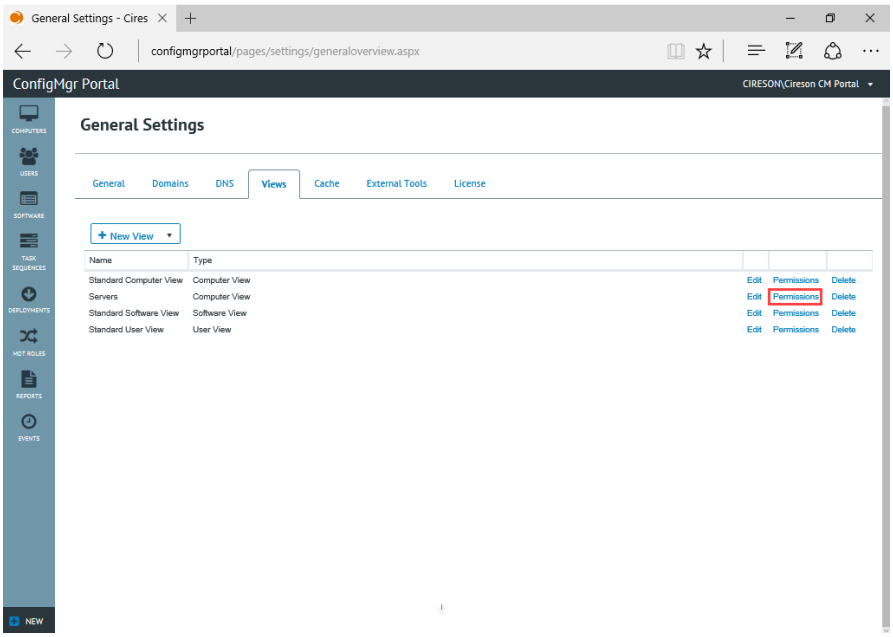
2. Click the **Views** tab.



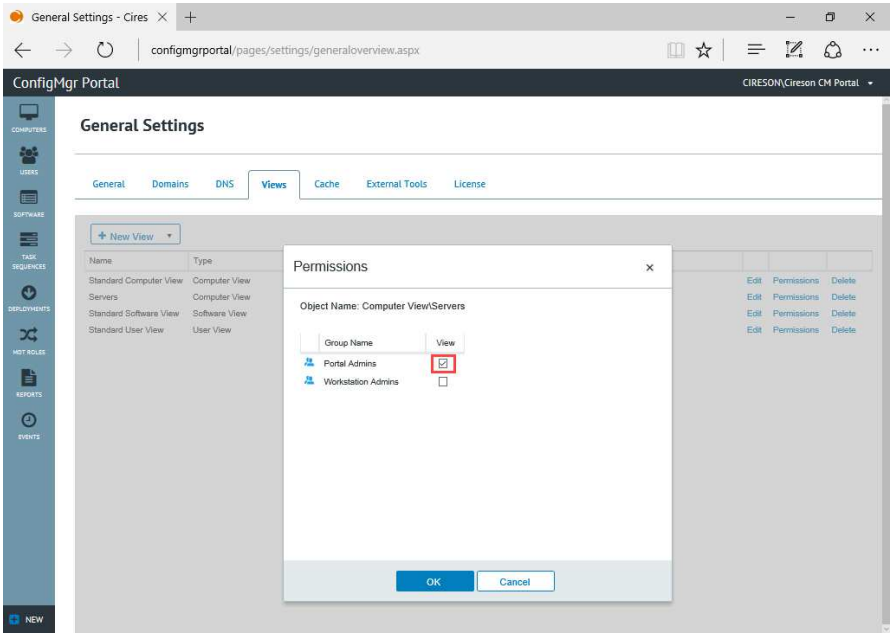
A list of the current Views is displayed.



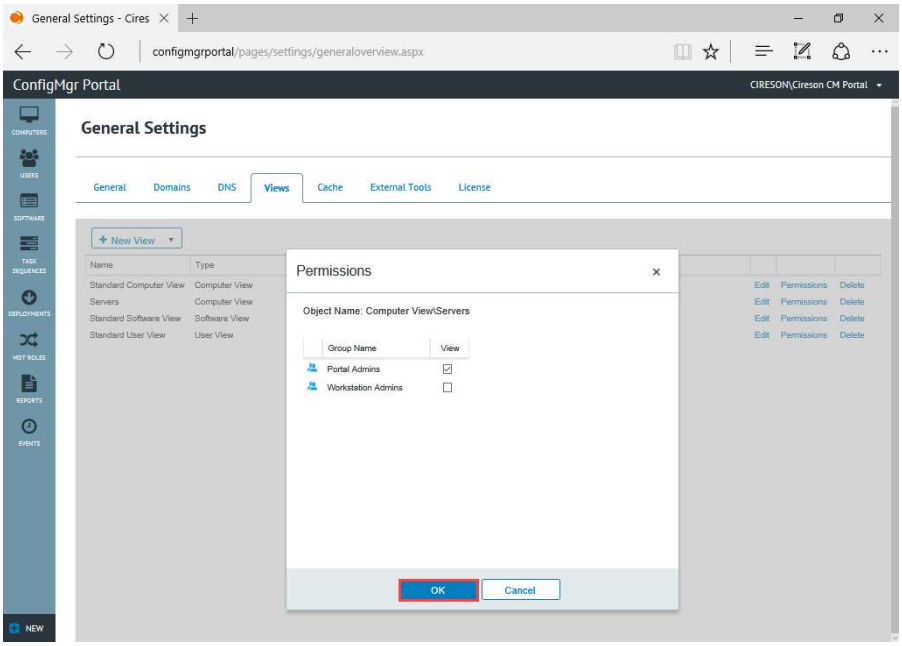
3. Click **Permissions** beside the View whose permissions you want to manage.



4. On the **Permissions** dialog box select the **View** checkbox beside any Portal groups that you want to be able to use the View.



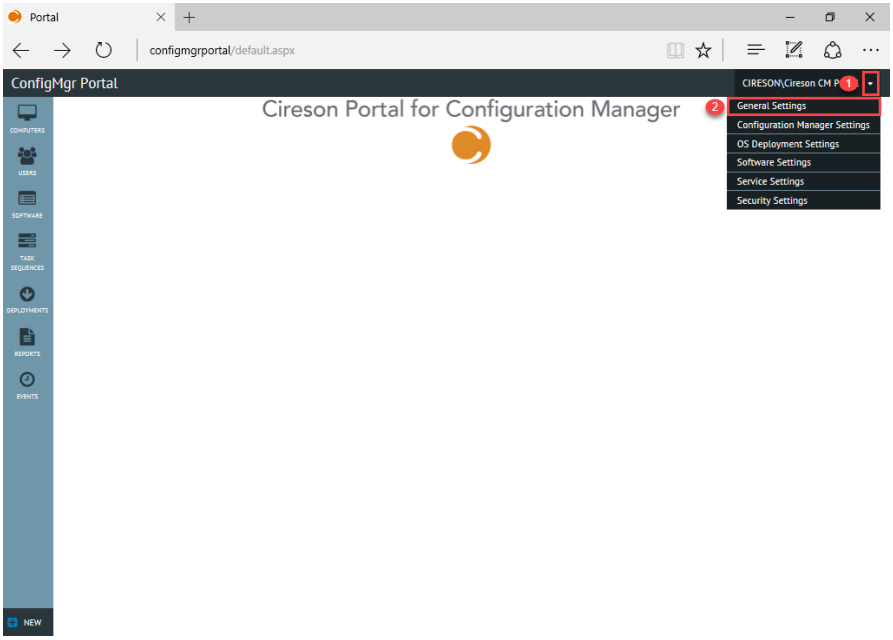
5. Click **OK** to save the changes.



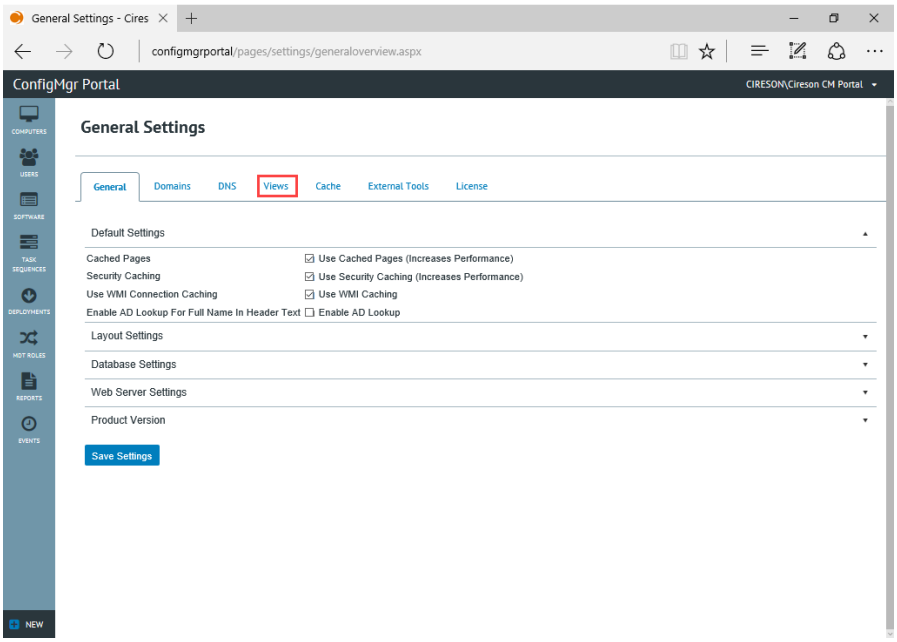
How do I delete a View?

To delete a view:

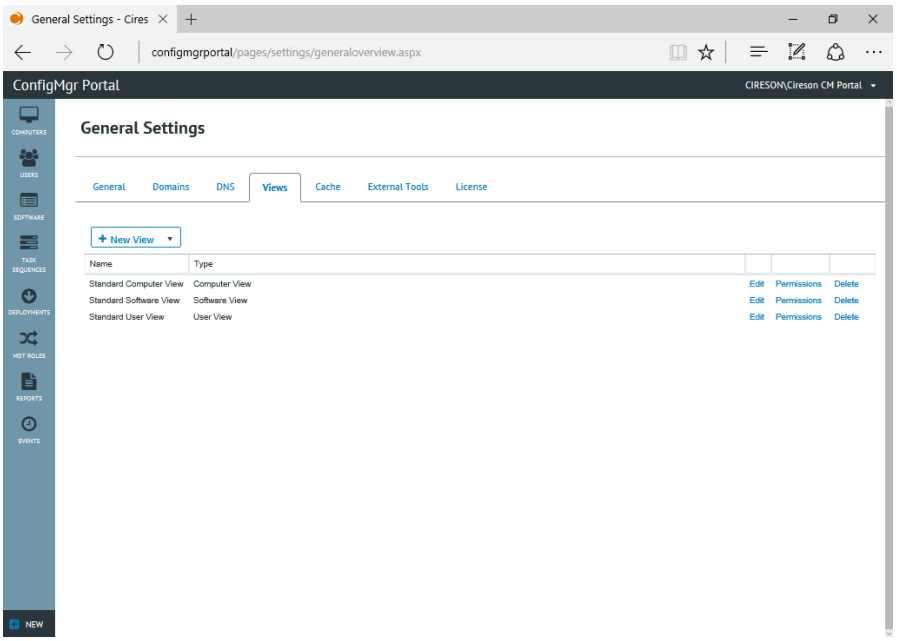
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**



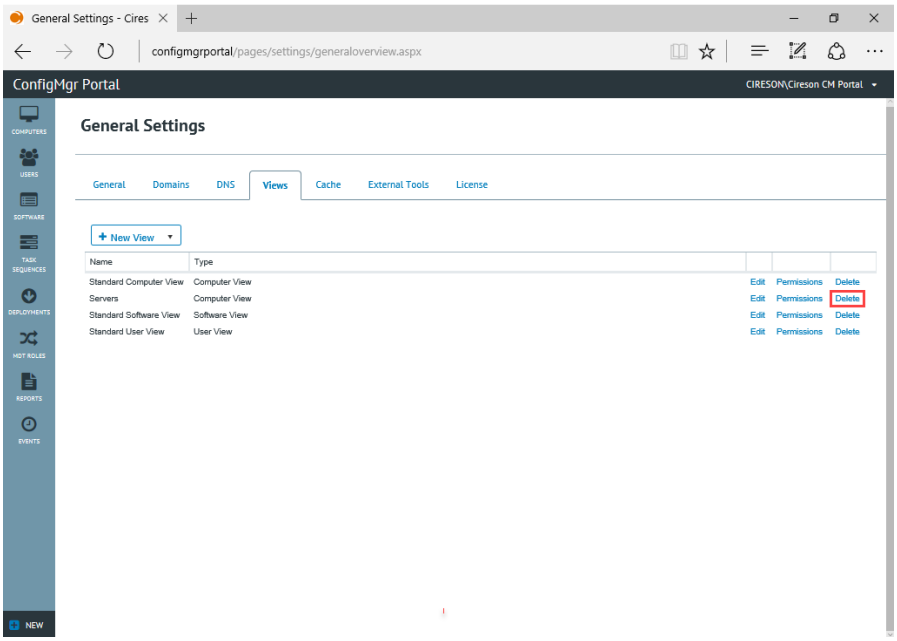
2. Click the **Views** tab.



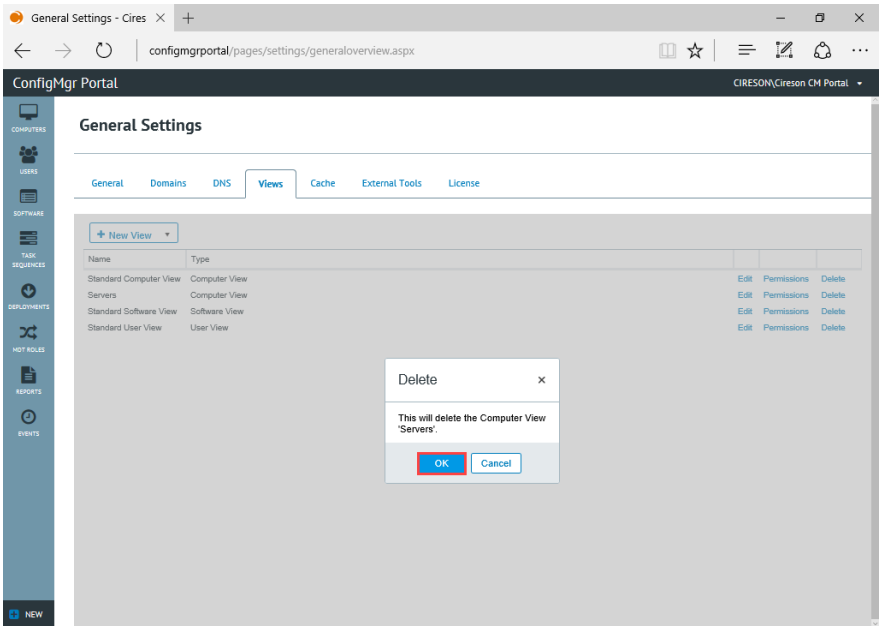
A list of the current Views is displayed.



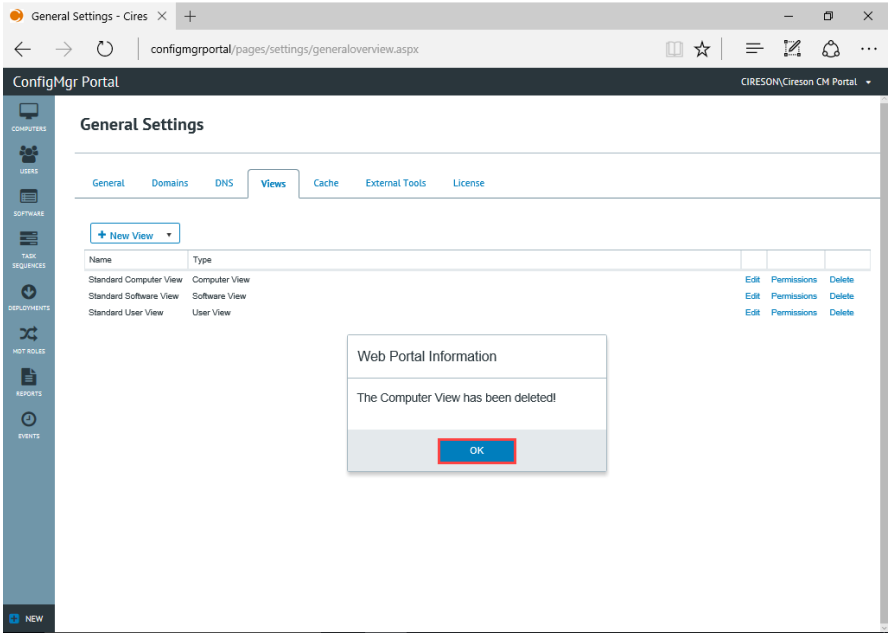
3. Click **Delete** beside the View you want to delete.



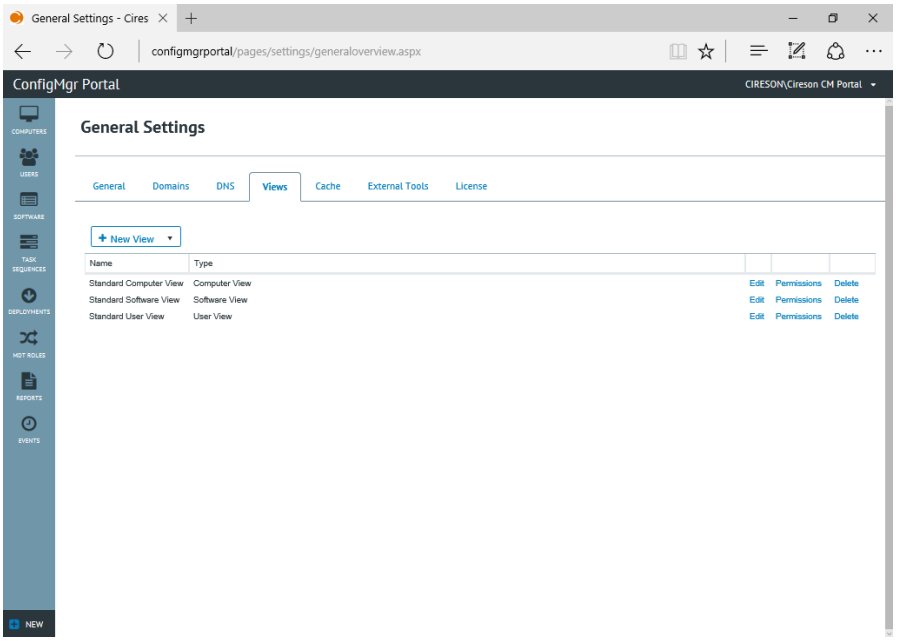
4. Click **OK** on the **Delete** dialog box stating **This will delete the <*view_type*> View '<*view_name*>'**.



5. Click **OK** on the **Web Portal Information** dialog box stating **The <*view_type*> View has been deleted!**



The deleted View no longer appears on the **Views** tab.



Creating New Objects

This section contains details of the tasks available to you when you click **New** on the **Navigation Menu** listed in the order they appear on the **New** menu:

- Computer
- Deployments
- Software
- Task Sequences
- MDT Roles

Computer

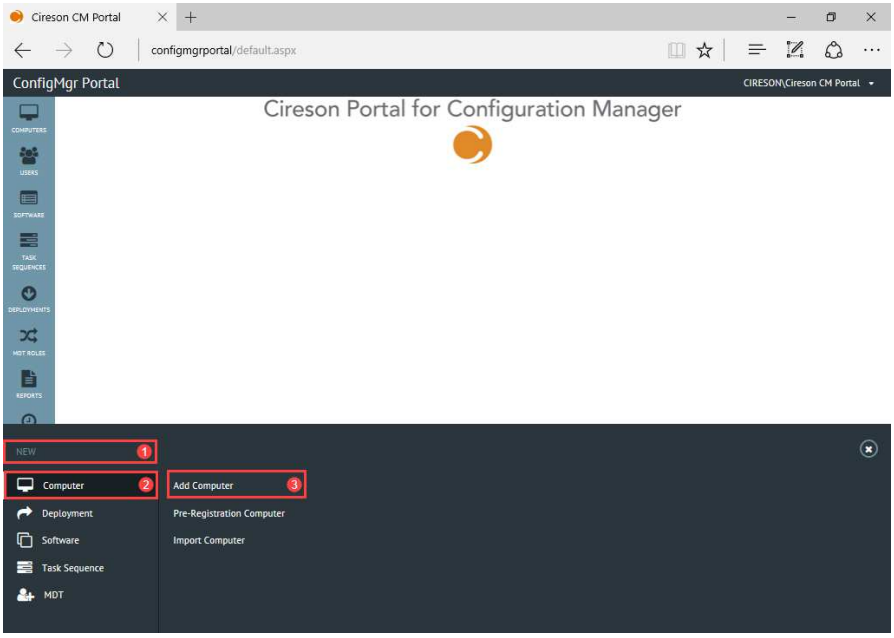
This section contains details of the tasks available to you when you select the **Computers** option from the **New** menu on the **Navigation Menu**.

- How do I Add a new computer?
- How do I Pre-Register a computer?
- How do I Import a computer?

How do I Add a new computer?

To add a new computer:

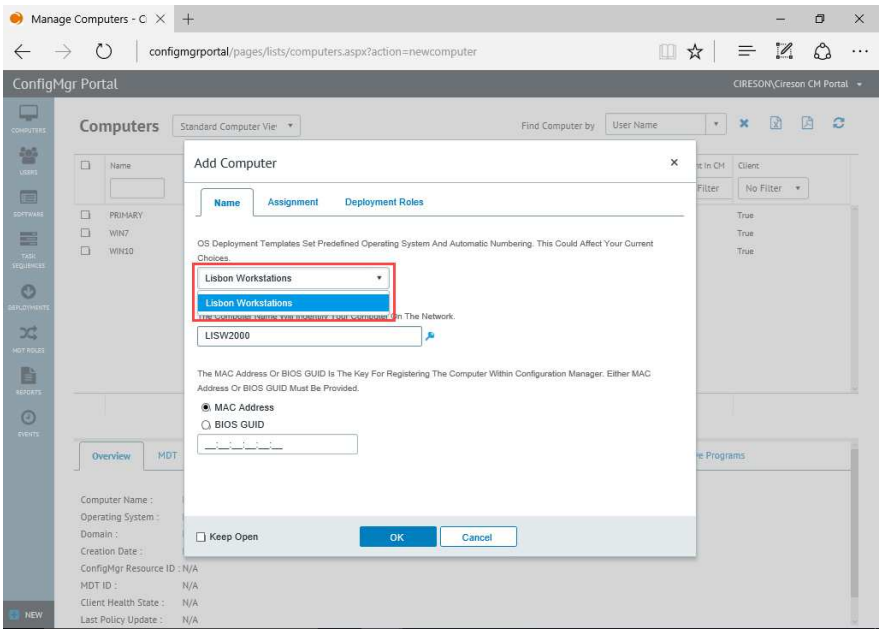
1. From the **Navigation Menu** select **New | Computer | Add Computer**



The **Add Computer** page is displayed.

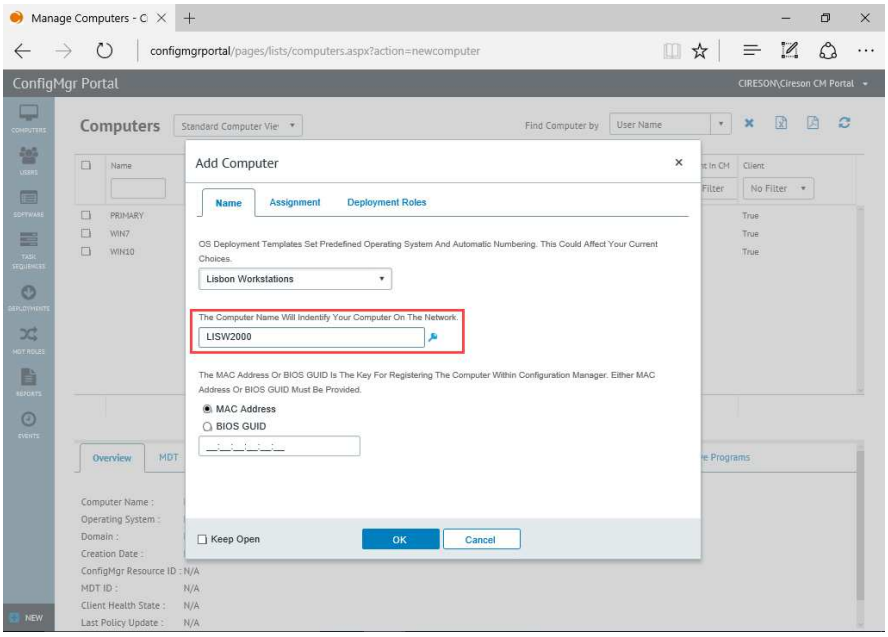
2. Select the relevant **OS Deployment Template** from the dropdown list on the **Name** tab.

NOTE: The relevant **OS Deployment Template** should have already been created before adding the computer, as the goal here is to create the computer and get it deployed ready for the end user to start using it. For details of how to create an OS Deployment Template see How do I create a new OSD Template?

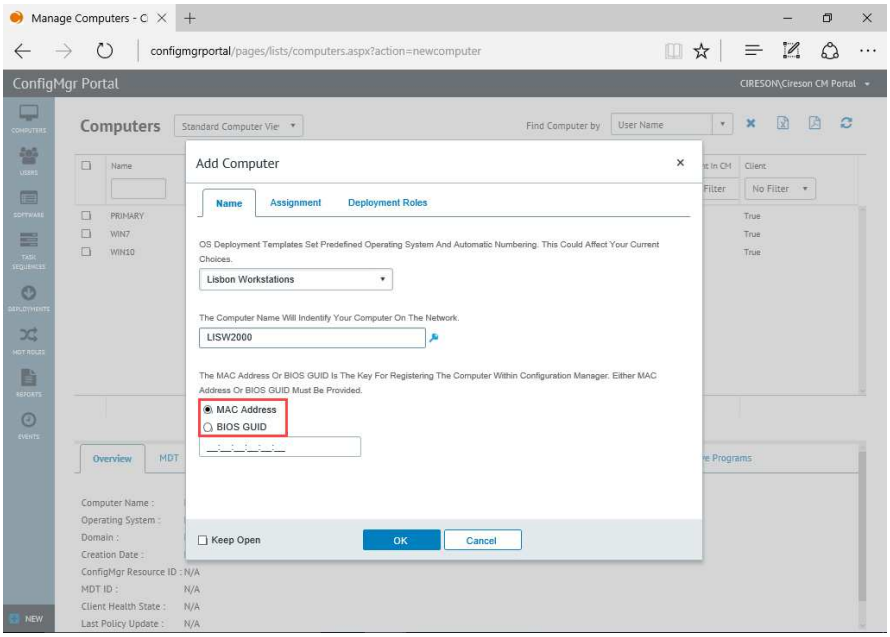


3. Verify that the value in **The Computer Name Will Identify Your Computer On the Network** field is set correctly, amending it as necessary.

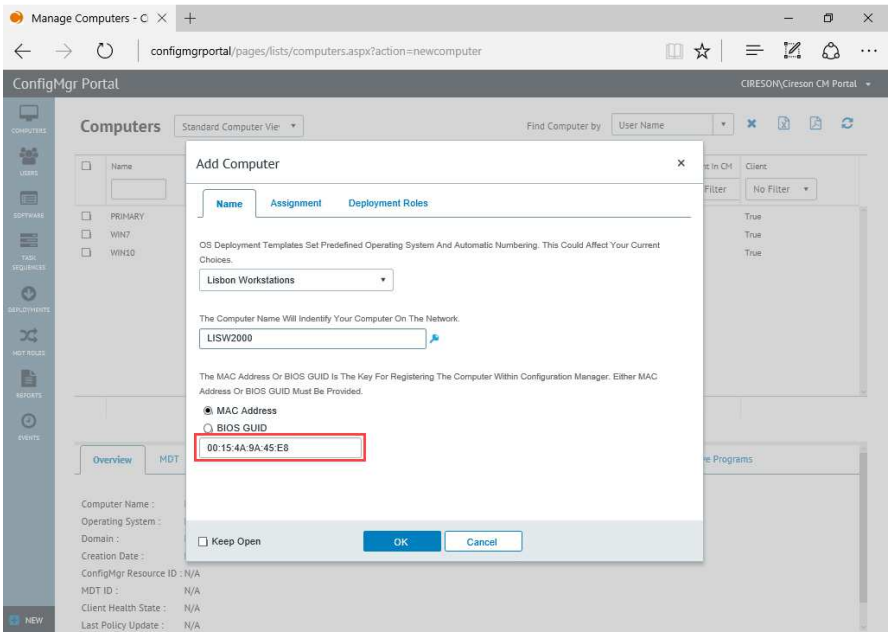
   NOTE: The value in this field is based on the Number Sequencing sequence configured in the selected **OS Deployment Template**. If this field is empty, see How do I create a new Number Sequencing Series? Then configure the relevant OS Deployment Template to use it as detailed in How do I create a new OSD Template?



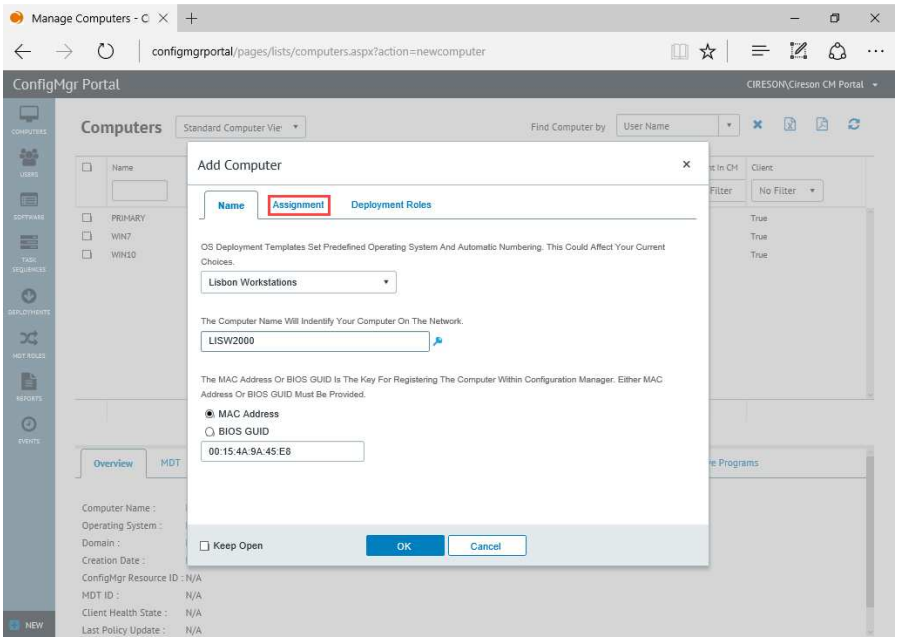
4. Select either the **Mac Address** or **BIOS GUID** option.



5. Enter the relevant data for the option chosen in Step 4.

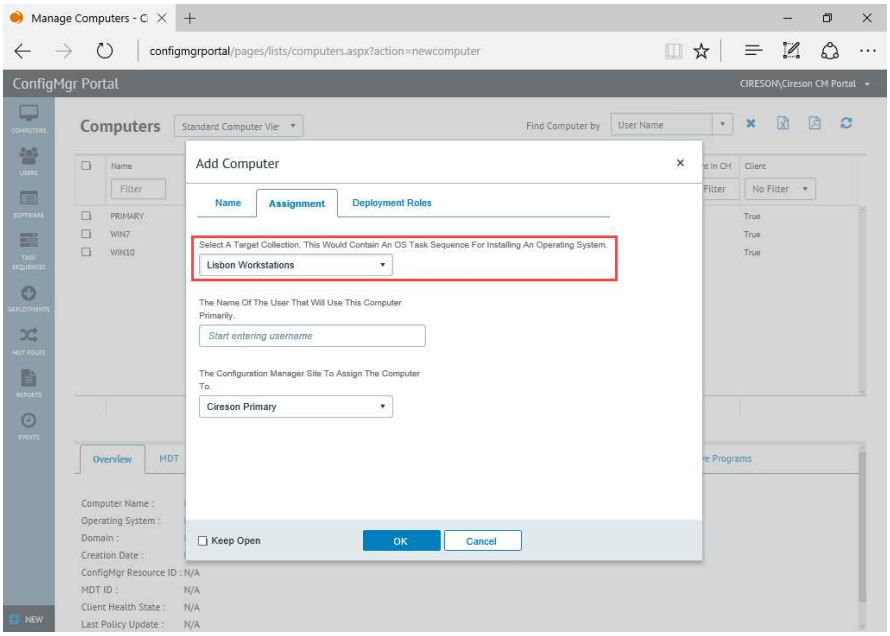


6. Click the **Assignment** tab.

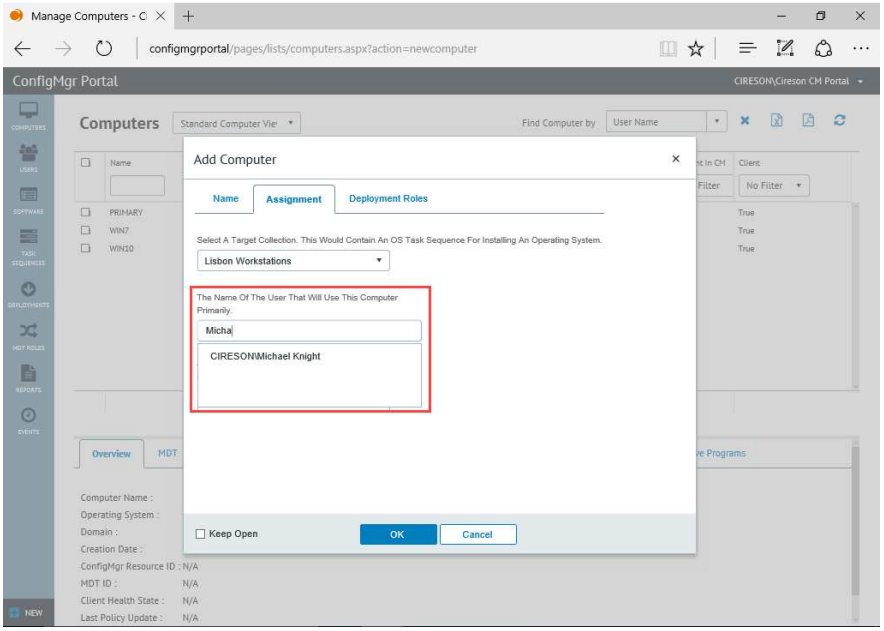


7. From the **Select A Target Collection** dropdown, select the collection this new computer is to be added to.

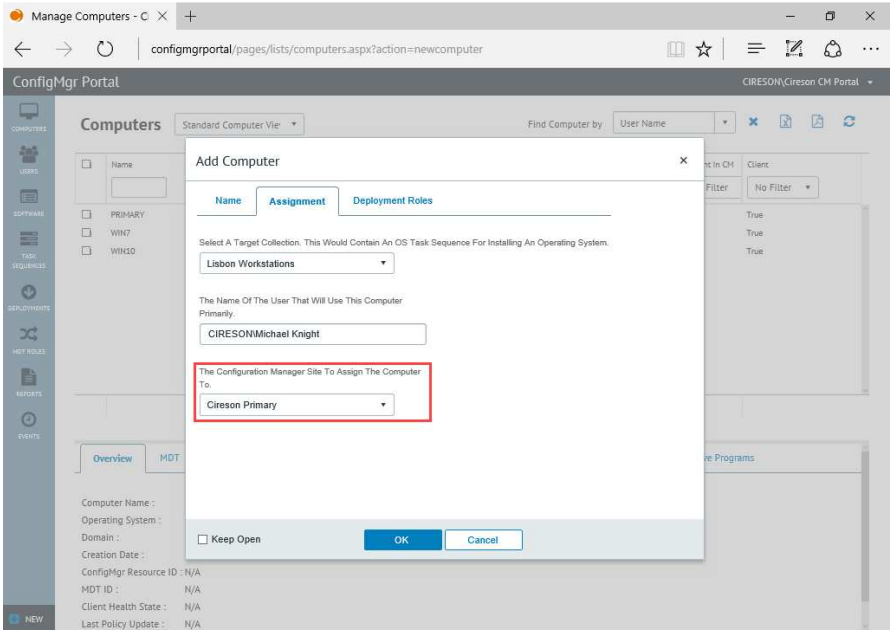
   NOTE: The collections listed in the **Select A Target Collection** dropdown are those that have OSD task sequences deployed to them.



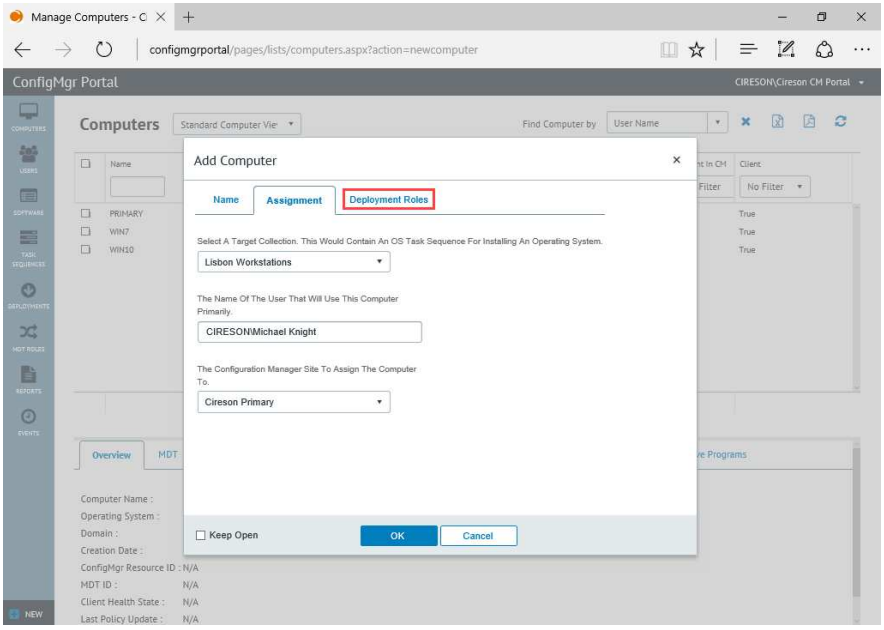
8. In **The Name Of The User That Will Use This Computer Primarily** field, start typing the name of the user who will primarily use this computer. Once you seeing the matching user select them.



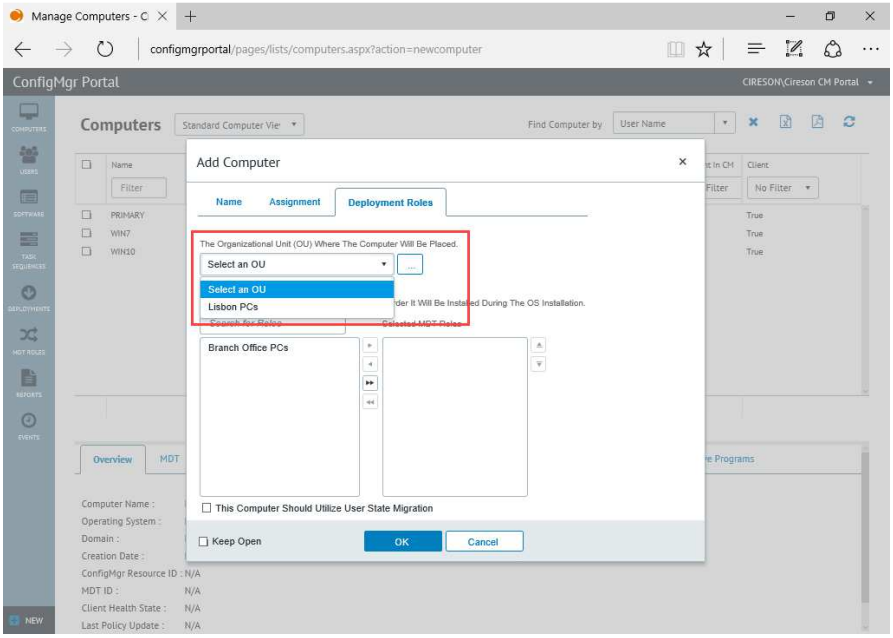
9. If you have more than one ConfigMgr site, from **The Configuration Manager Site To Assign The Computer To** dropdown select the relevant site.



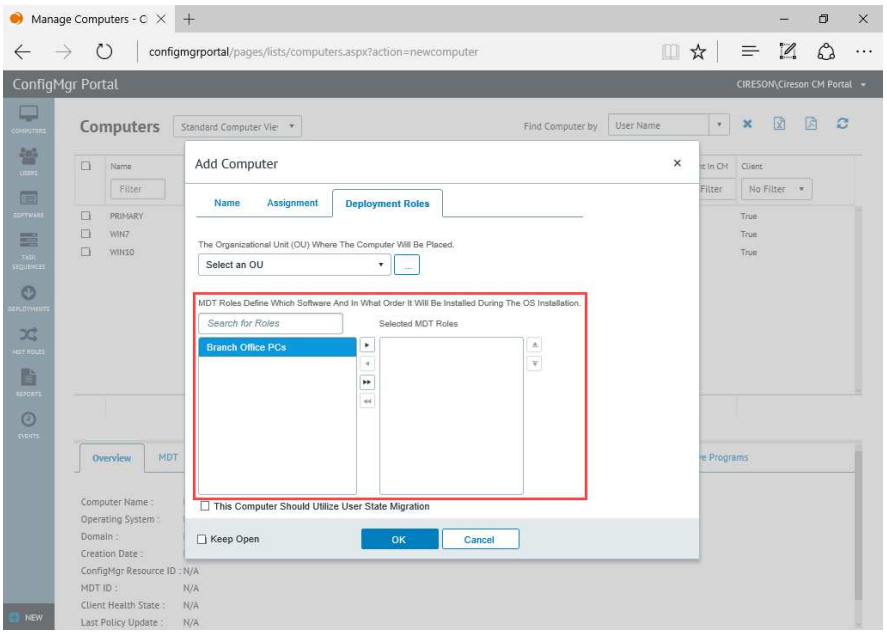
10. If you have not integrated the Portal with MDT, click **OK** otherwise click the **Deployment Roles** tab.



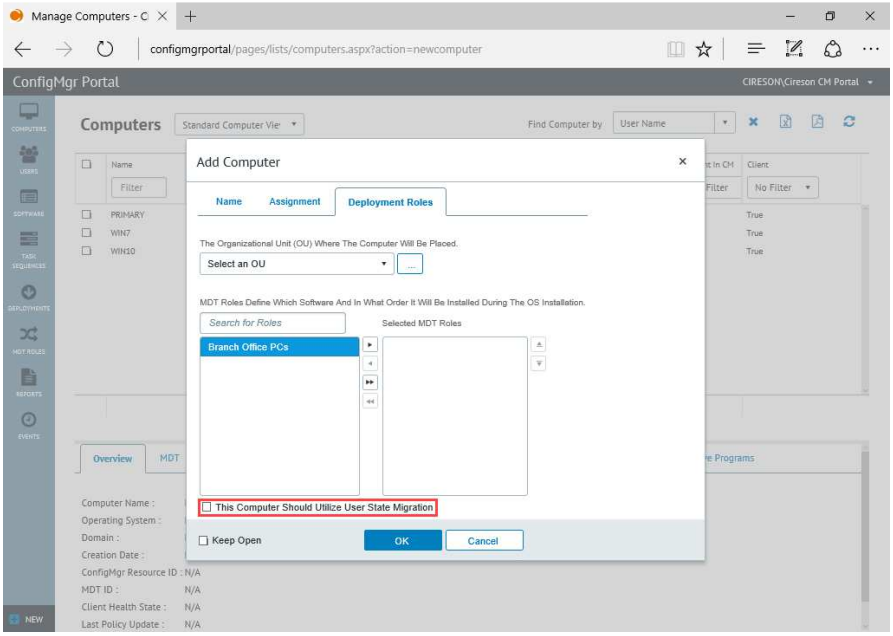
11. From **The Organizational Unit (OU) Where The Computer Will Be Placed** dropdown either:
    a. Select the relevant OU if it has been previously registered with the Portal (see How do I register a new Organizational Unit?)
    b. Clicking the browse button (...), then browsing and selecting the relevant OU.



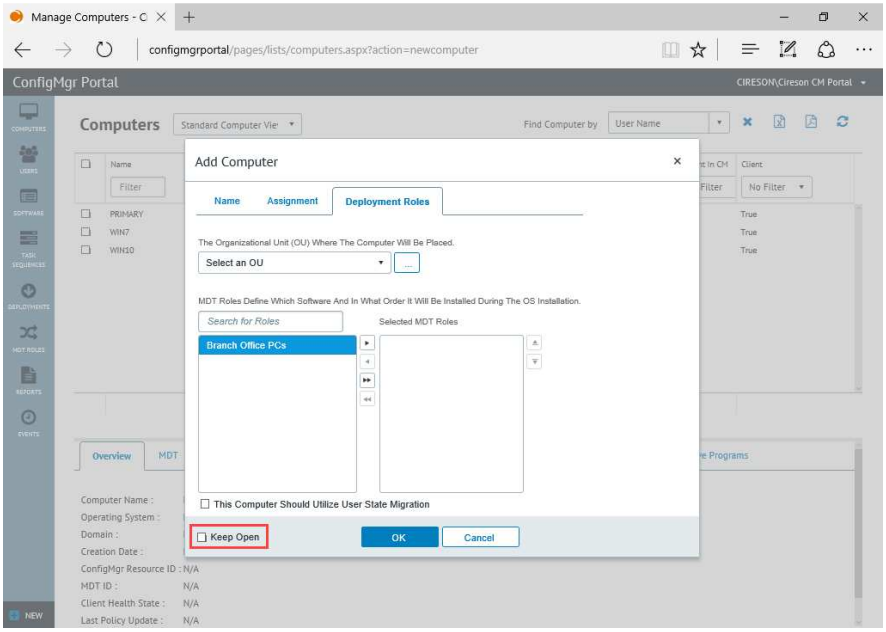
12. If any MDT Roles need to be added, add them from the list of roles.



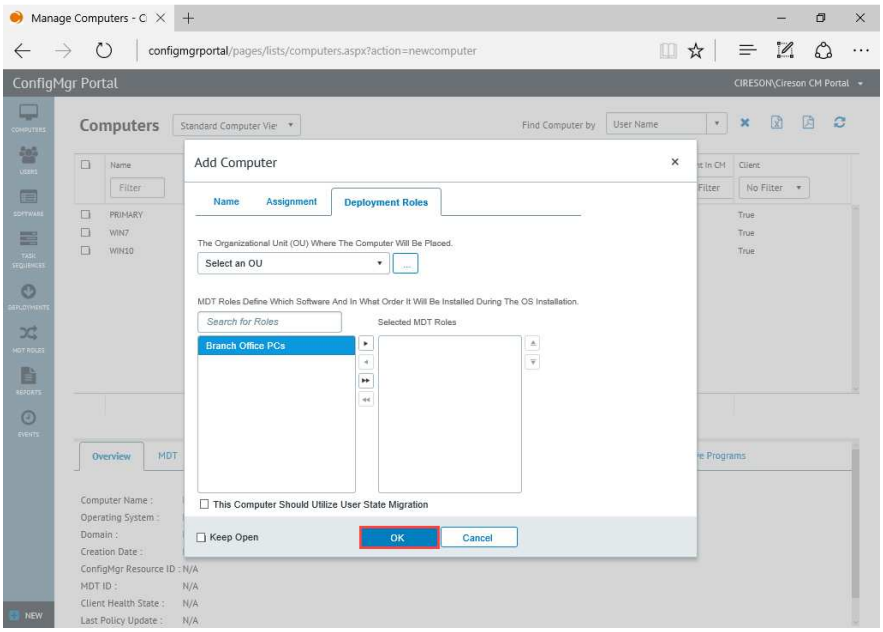
13. Check the **This Computer Should Utilize User State Migration** checkbox if appropriate for your environment.



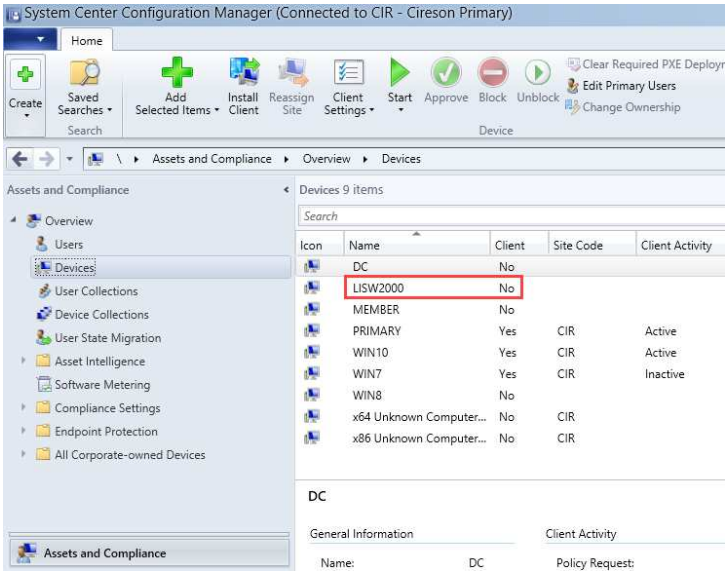
14. Check the **Keep Open** checkbox if you have more than one computer to add to save you having to go back through the menu (**New | Computer | Add Computer**) to re-open the **Add Computer** page to add the next computer.



15. Click **OK**



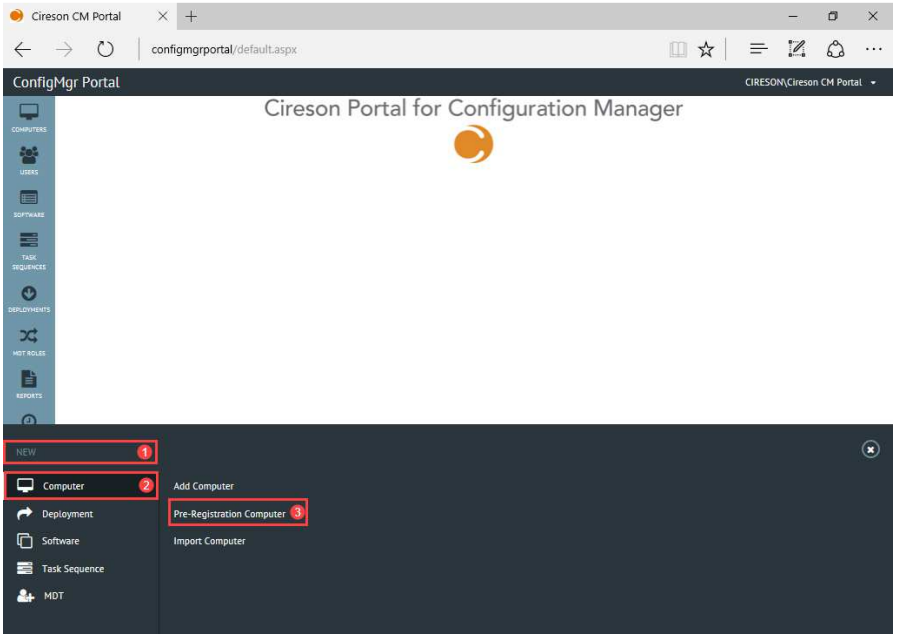
NOTE: You will not see the newly added computer in the Portal using the **Standard View** as the ConfigMgr client has not been installed on this computer. However, if you look in the ConfigMgr Console you will see the new computer listed under **Assets and Compliance | Overview | Devices**



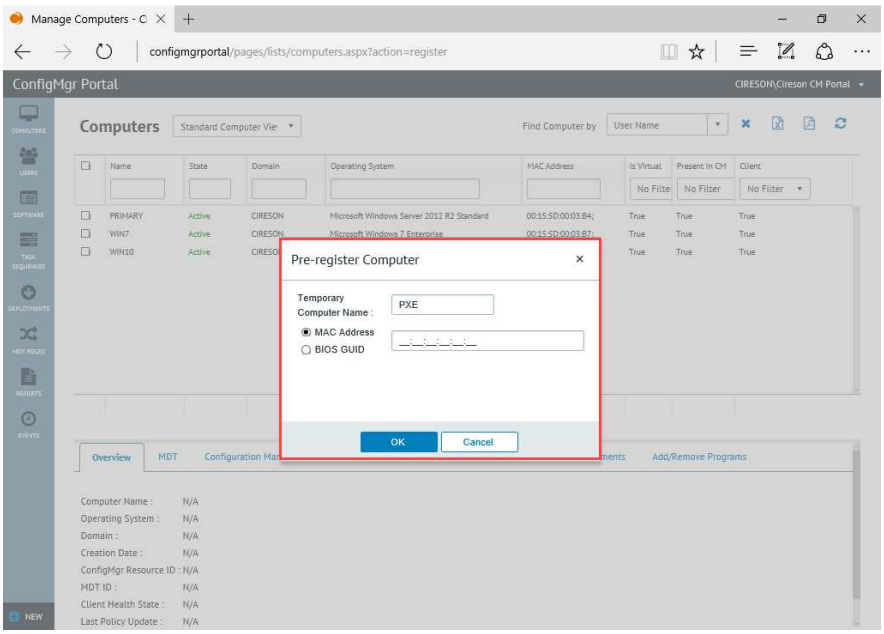
How do I Pre-Register a computer?

To Pre-Register a computer:

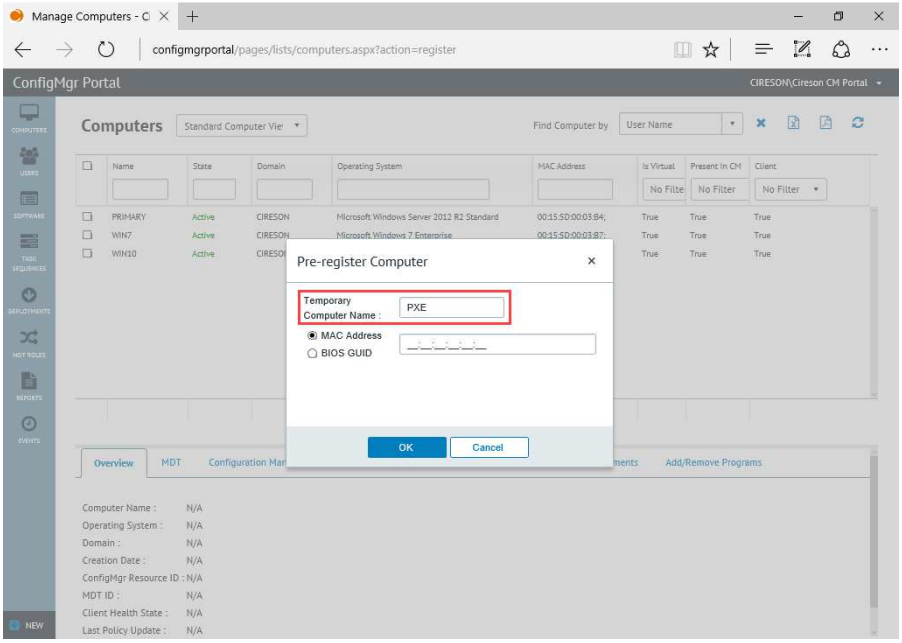
1. At the bottom of the **Navigation Menu**, select **New | Computer | Pre-Registration Computer**



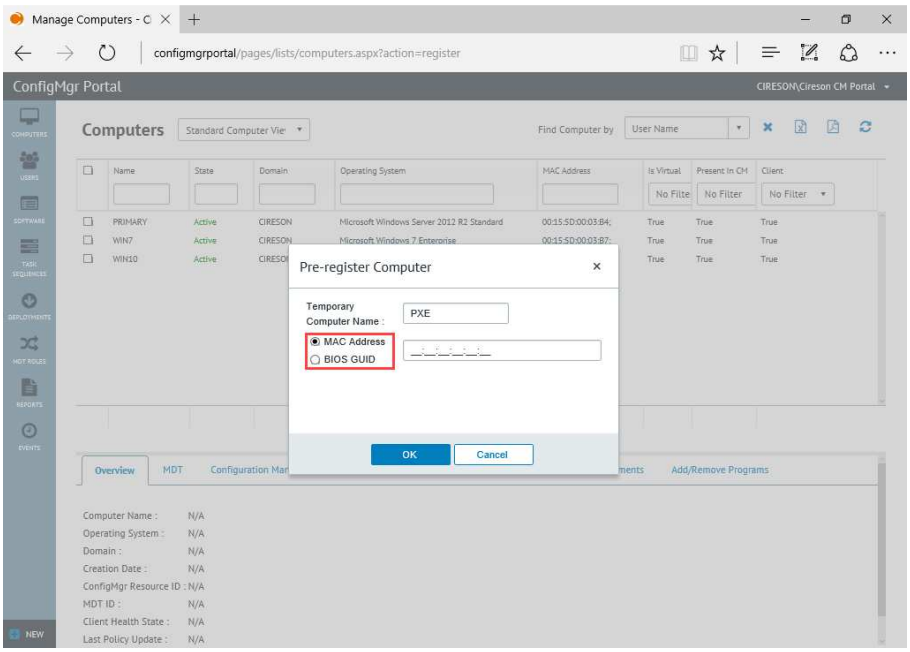
The **Pre-register Computer** page is displayed.



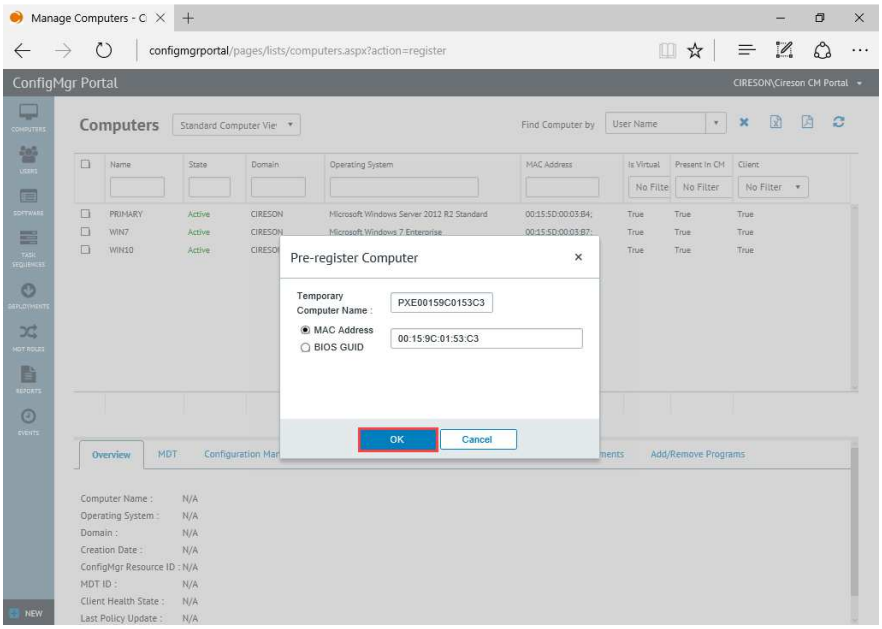
2. Update the **Temporary Computer Name** field with the custom prefix you want to use if you do not want to use the default of **PXE** as the prefix for the computer name.



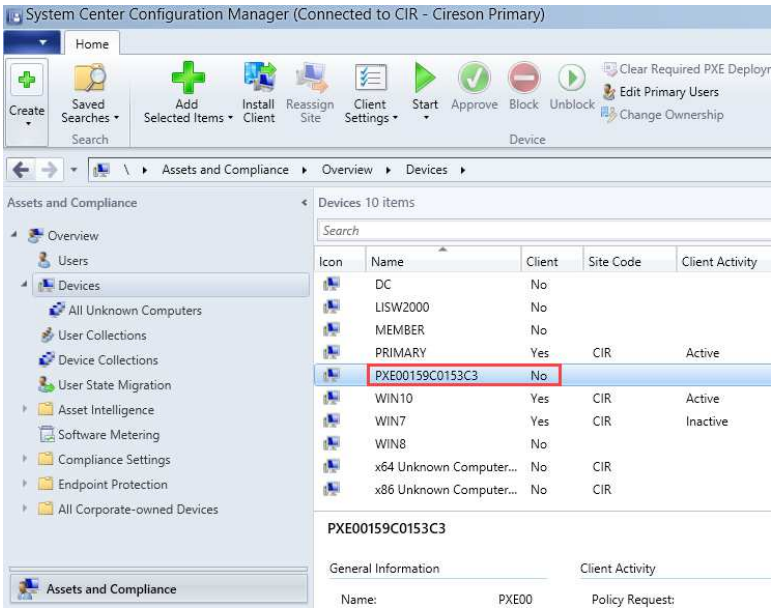
3. Select either the **Mac Address** or **BIOS GUID** option.



4. Enter the relevant data for the option chosen in Step 3.
5. Click **OK**



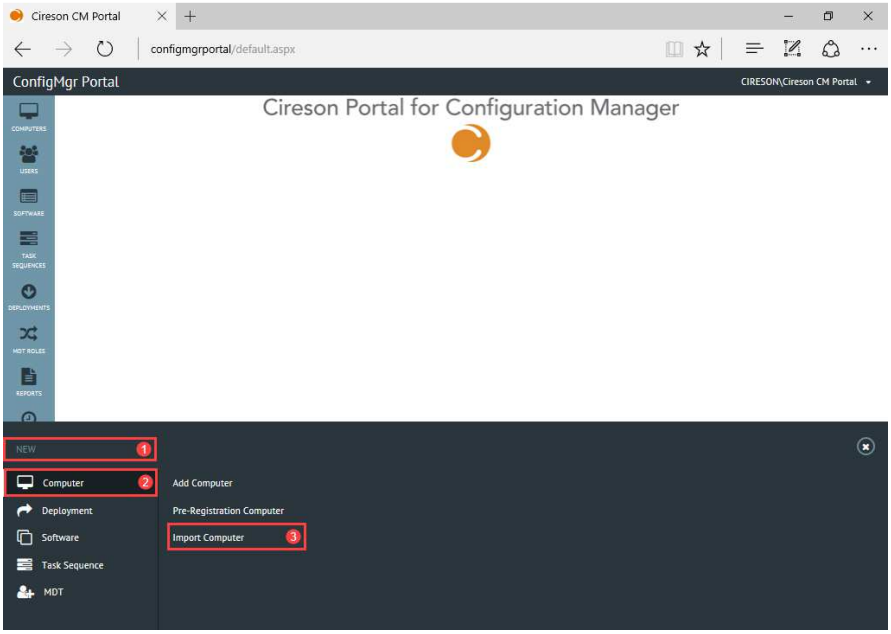
NOTE: You will not see the newly added computer in the Portal using the **Standard View** as the ConfigMgr client has not been installed on this computer. However, if you look in the ConfigMgr Console you will see the new computer listed under **Assets and Compliance | Overview | Devices**



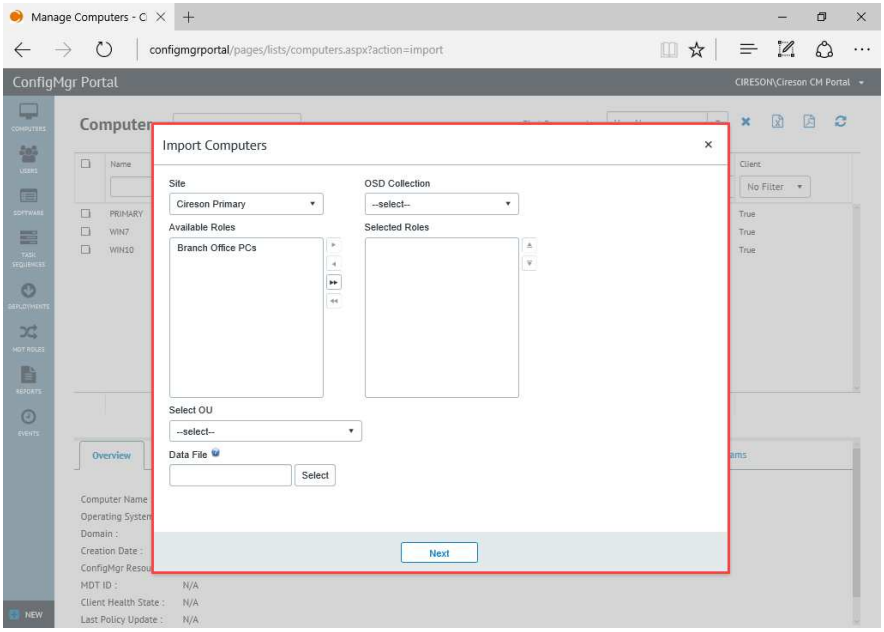
How do I Import a computer?

To Import a computer:

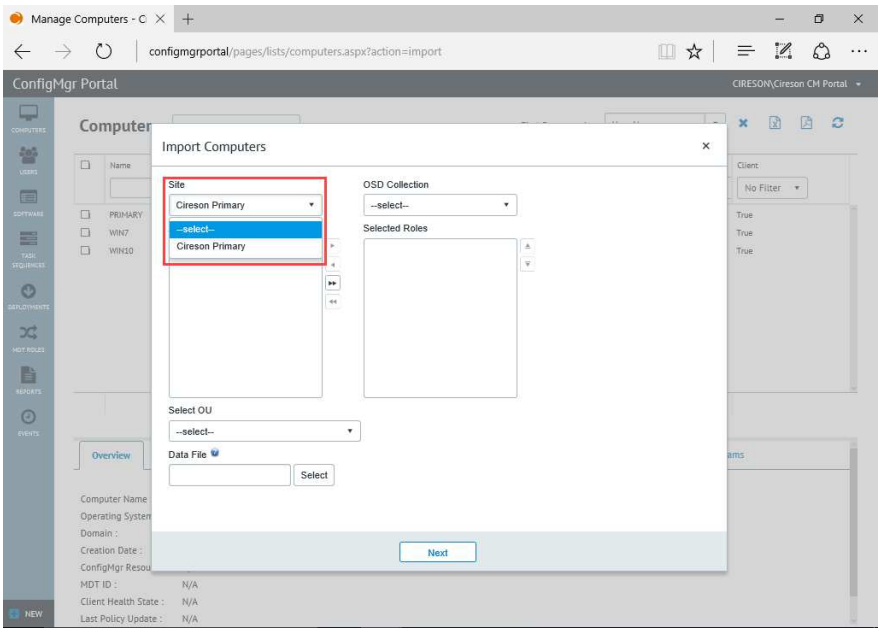
1. From the **Navigation Menu**, select **New | Computer | Import Computer**



The **Import Computers** page is displayed.

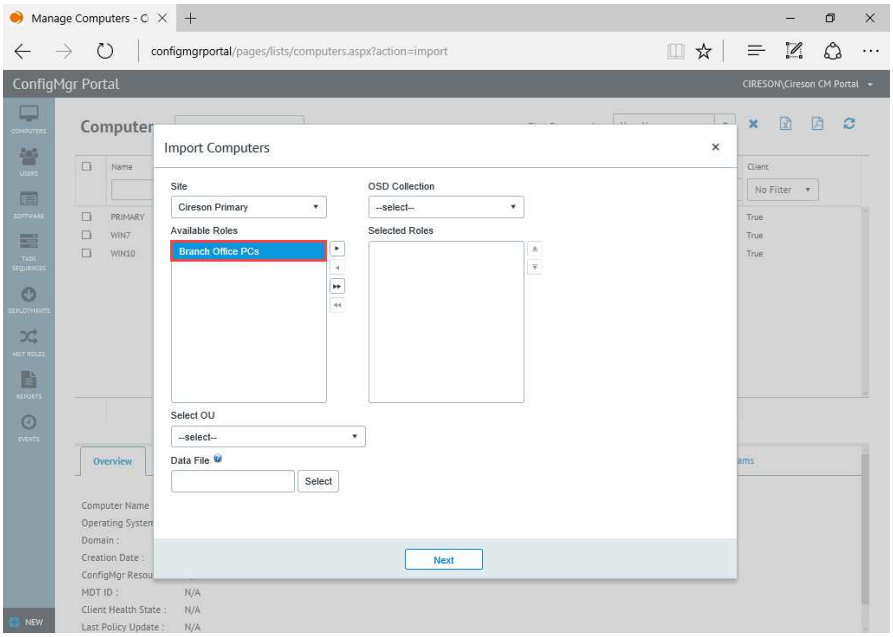


2. From the **Site** dropdown list, select the relevant ConfigMgr site the computers are to be imported to.

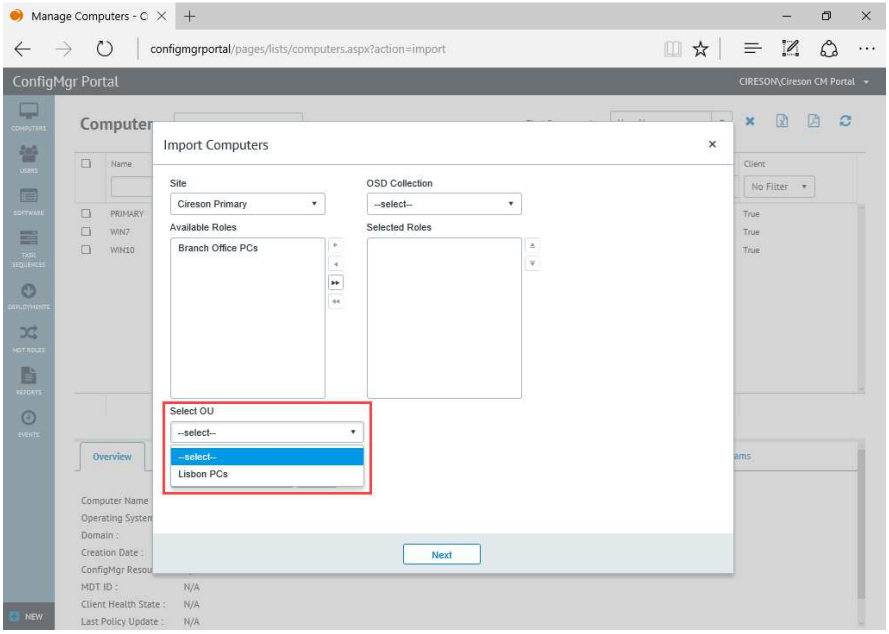


NOTE: Please ignore the **OSD Collection** dropdown list which serves no purpose and will be removed in a later version.

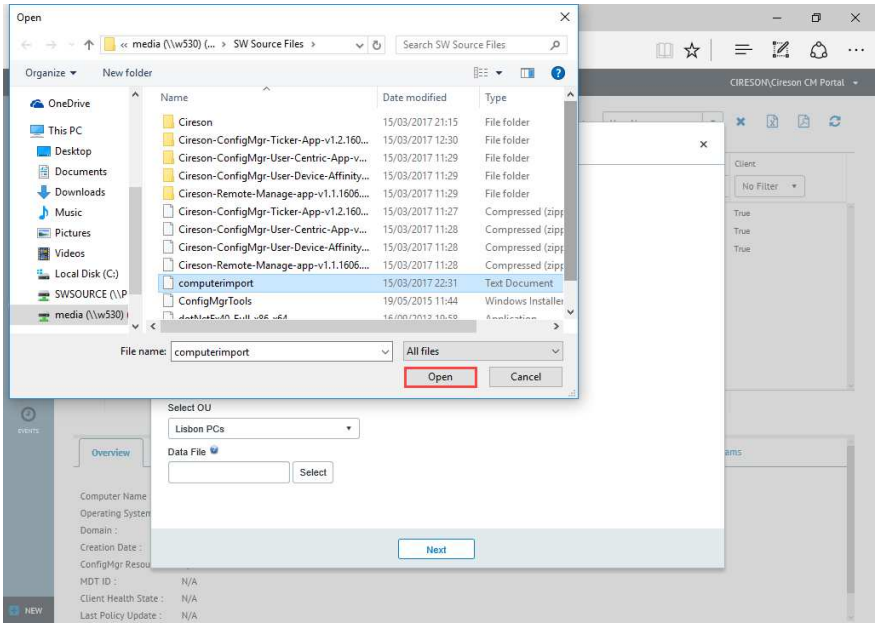
3. Add any existing MDT Roles that are required from the **Available Roles** list to the **Selected Roles** list by selecting one and pressing the right arrow ( ) or if you want to add multiple/ all of the MDT Roles click the double right-facing arrow ( ).



4. From the **Select OU** dropdown list, select the relevant Organizational Unit (OU) the computer should be imported to.



5. In the **Data File** field, enter the path and filename of the file containing the list of computers to be imported. Alternatively, press **Select** which to browse for the relevant file, select the file then click **Open**



The format for the data file is shown in the following table:

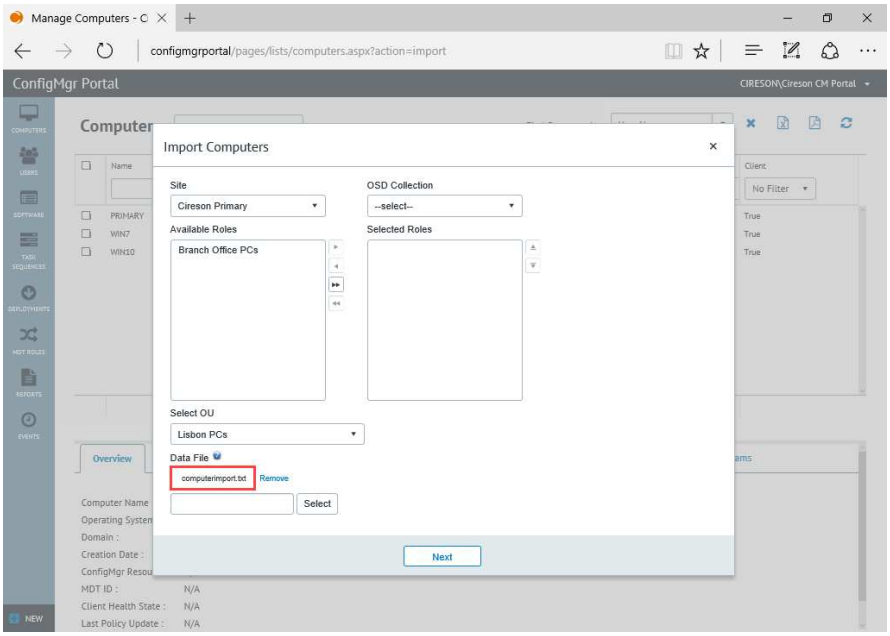
Column	Description	Mandatory?
Computer Name	Name of the computer	Yes
MAC Address	Hex values of the MAC Address must be separated either by '-' or ':'	Yes
Organizational Unit	Must be a name of a Portal OU entry	No
Site Code	Must be specified in data file or drop down list in order to create computers in ConfigMgr	No
Collection ID	If empty and not selected in the list, the OSD Collection membership will not be created	No
MDT Roles	If specified, the selections in the list will be merged. Roles must be separated with colon (,)	No
Primary User	Primary user in form of ***<domain>\<username>***	No

Examples:

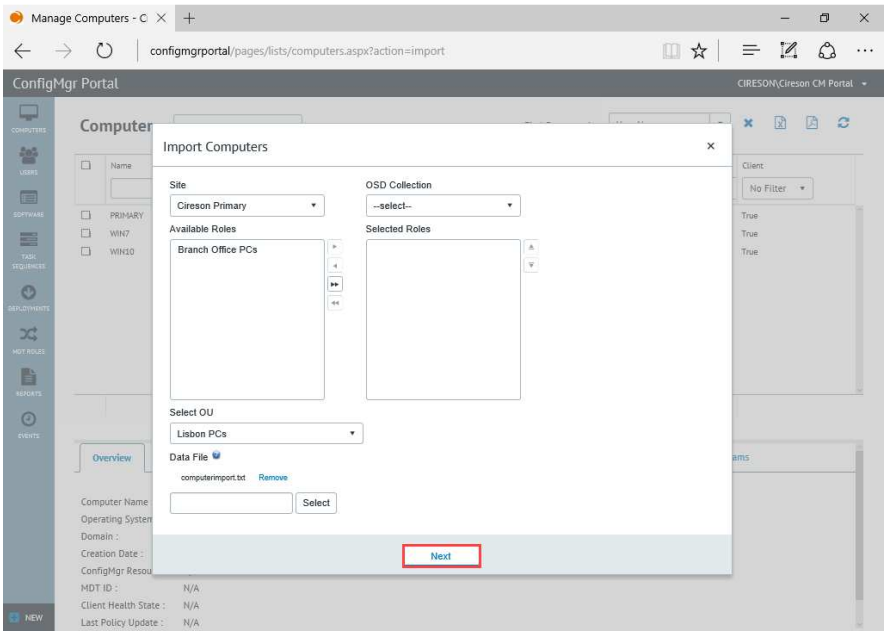
WSTST0303;AC:34:55:27:6A:E6;ComputerOU;S01;S0100011;SQL Server 2012 base,Visual Studio 2013 Core;mydomain\myuser

WSTST0303;AC:34:55:27:6A:E6;ComputersOU;;;SQL Server 2012 base,Visual Studio 2013 Core;

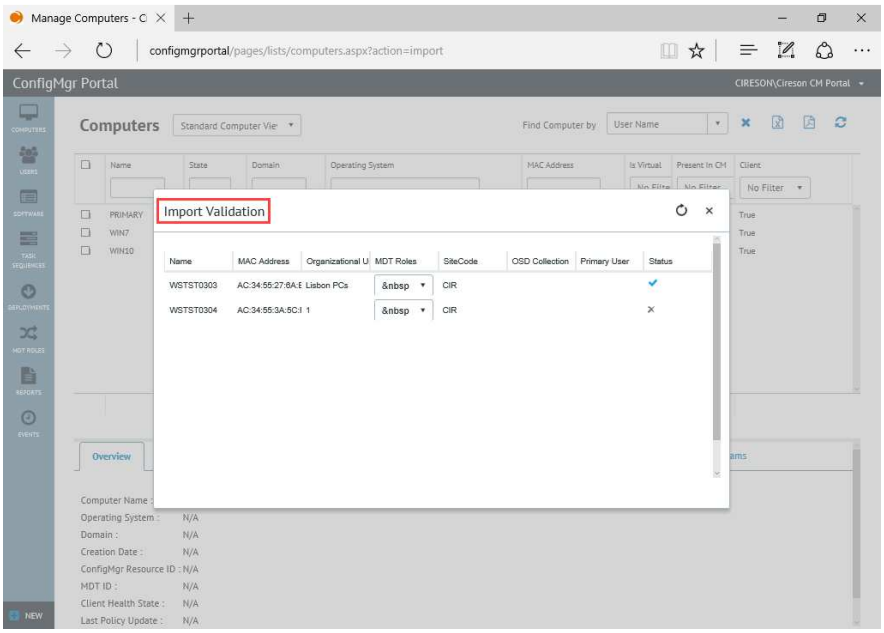
The file(s) to be imported appears under the **Data File** heading.



6. Click **Next**

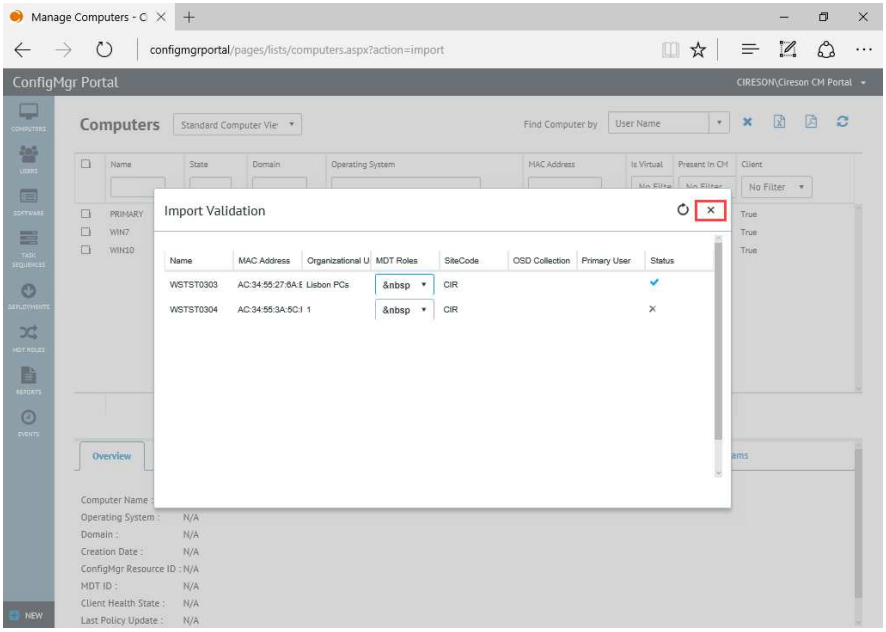


The **Import Validation** page is then displayed showing the records to be imported.

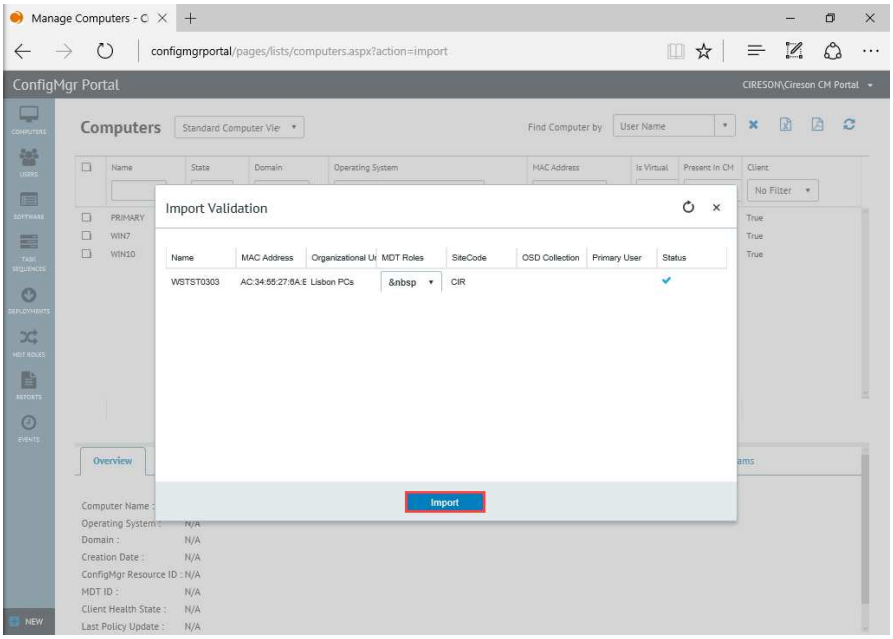


Records with a checkmark (✔) in the **Status** column are ready to be imported. Records with a cross (✕) in the **Status** column cannot be imported.

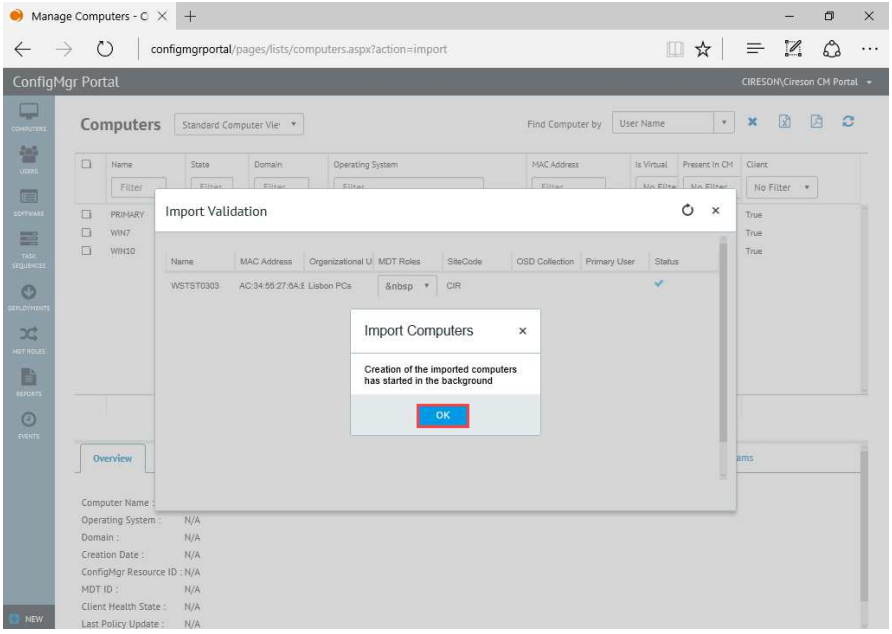
7. If you have any records with a **Status** of **x** you need to close the **Import Validation** page by clicking the **x** in the top right-hand corner. Then correct the relevant entries in the data file and then retry the import.



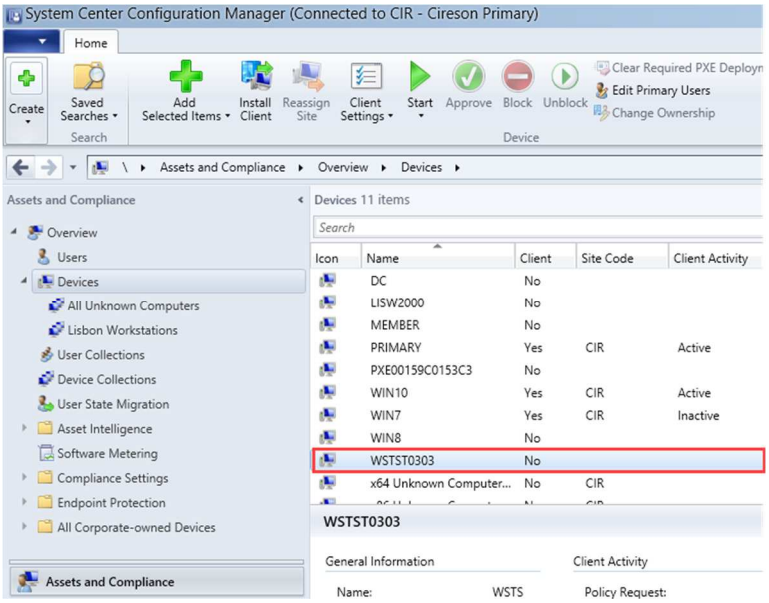
Click **Import** if you don't have any records with a **Status** of **x**



8. Click **OK** on the **Import Computers** dialog box stating **Creation of the imported computers has started in the background**



NOTE: You will not see the newly imported computers in the Portal using the **Standard View** as the ConfigMgr client has not been installed on them. However, if you look in the ConfigMgr Console you will see the new computers listed under **Assets and Compliance | Overview | Devices**



Deployments

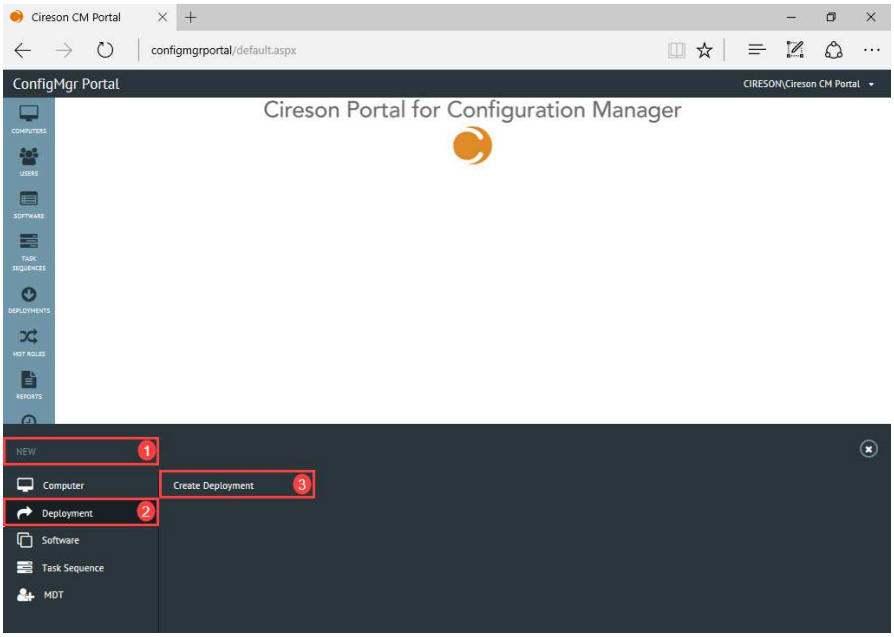
This section contains details of the tasks available to you when you select the **Deployment** option from the **New** menu on the **Navigation Menu**.

- How do I create a new Deployment to a new collection?
- How do I deploy software to an existing collection?

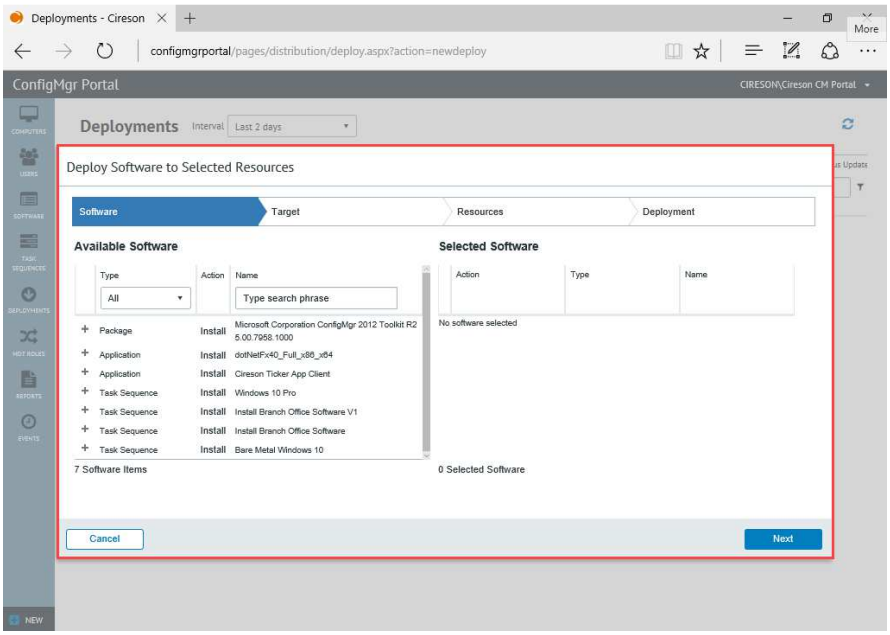
How do I create a new Deployment to a new collection?

To a create a new deployment to a new collection:

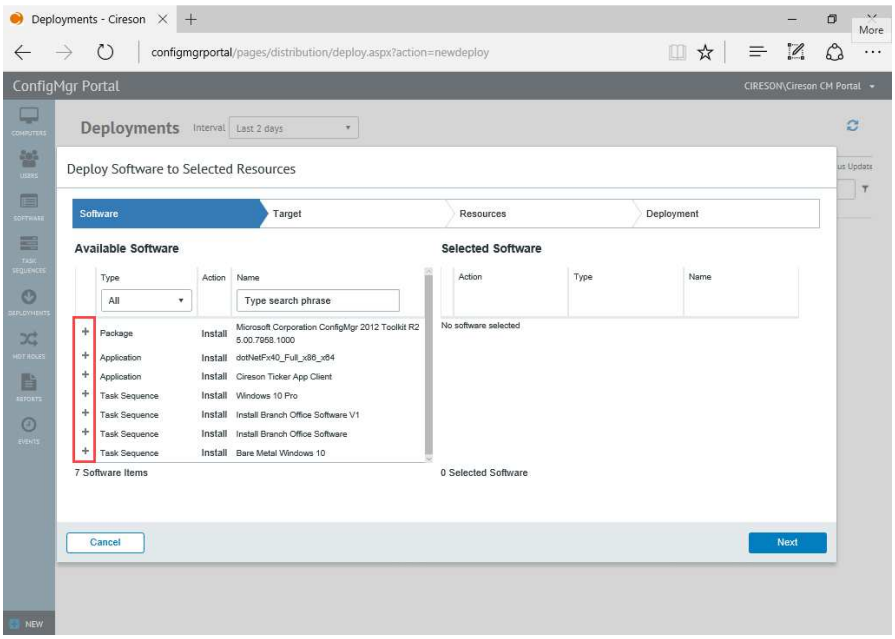
1. At the bottom of the **Navigation Menu**, select **New | Deployment | Create Deployment**



The **Deploy Software to Selected Resources** wizard is started.



On the **Deploy Software to Selected Resources** page, click **+** beside the software you wish to deploy.

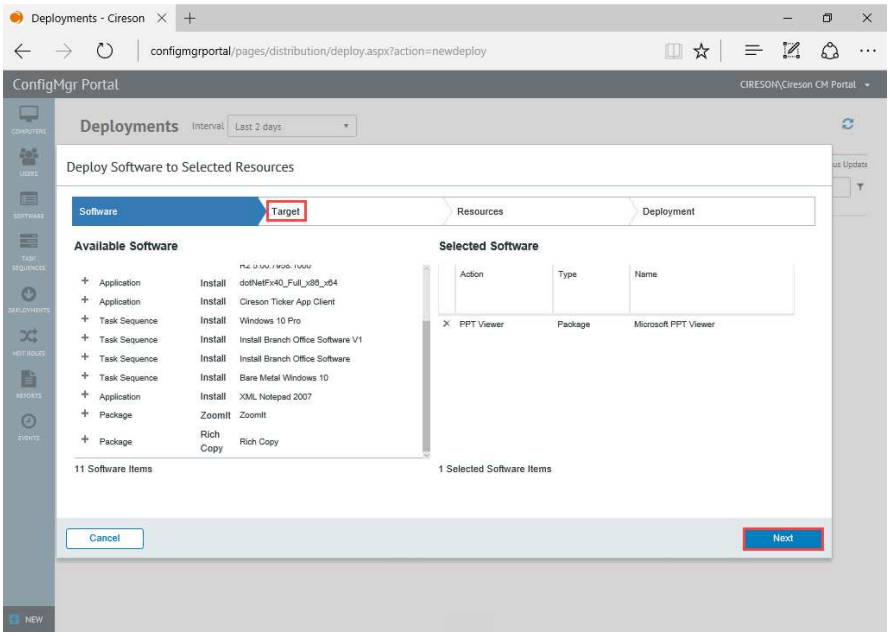


TIP: If you have a lot of software that can be deployed, use the **Type** dropdown list to help you filter your software by type (available options being **All**, **Application**, **Package**, and **Task Sequence**).

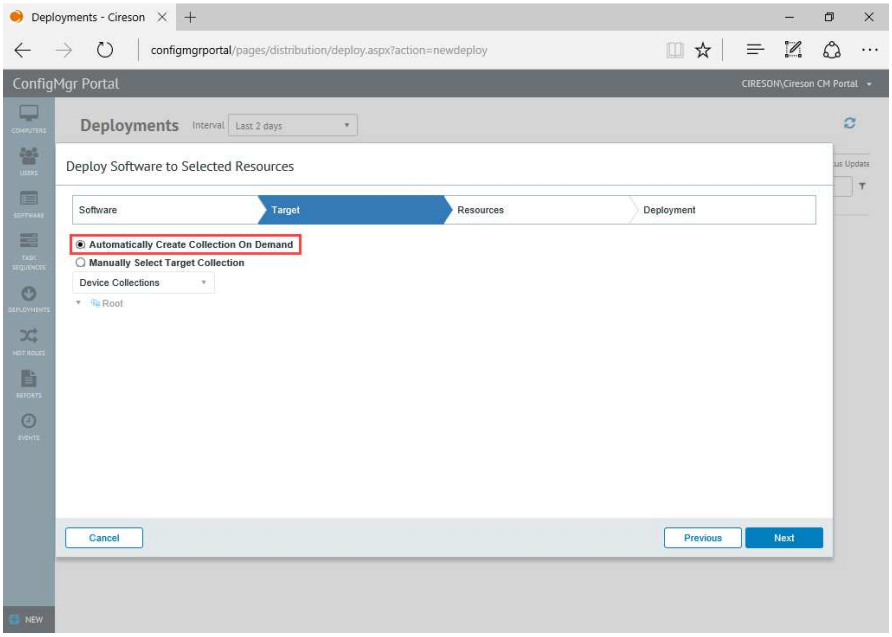
Also, consider utilizing the filtering capabilities of the **Name** field to help you locate the required software if you have a lot of results.

NOTE: Assuming you have the appropriate security rights, you can add multiple software objects of the same type (such as packages), in a single deployment. However, you cannot mix software types in a single deployment. For example, an application and a package.

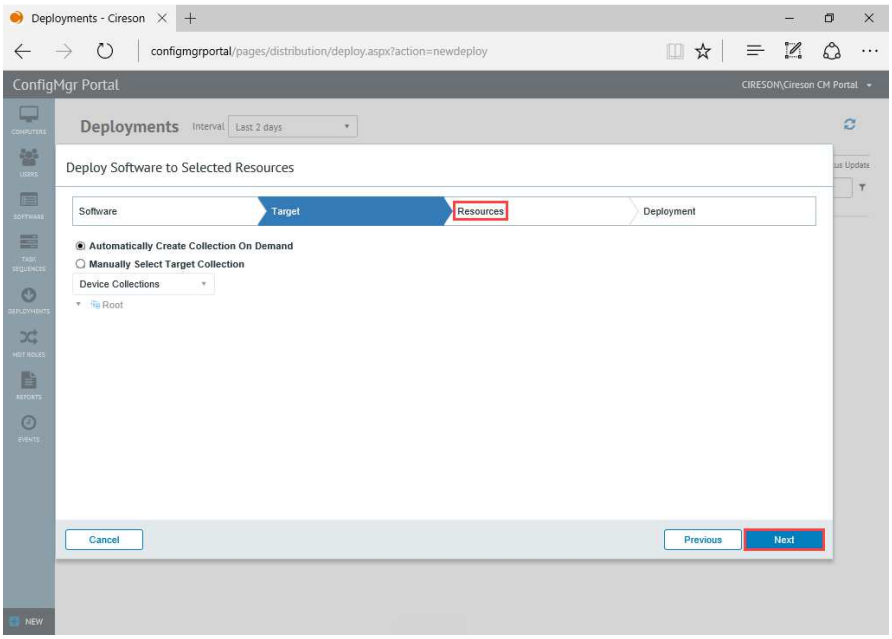
2. Either click the **Target** tab or click **Next**



3. On the **Target** page, select the **Automatically Create Collection On Demand** option which will create a new collection if one does not already exist with the appropriate name.

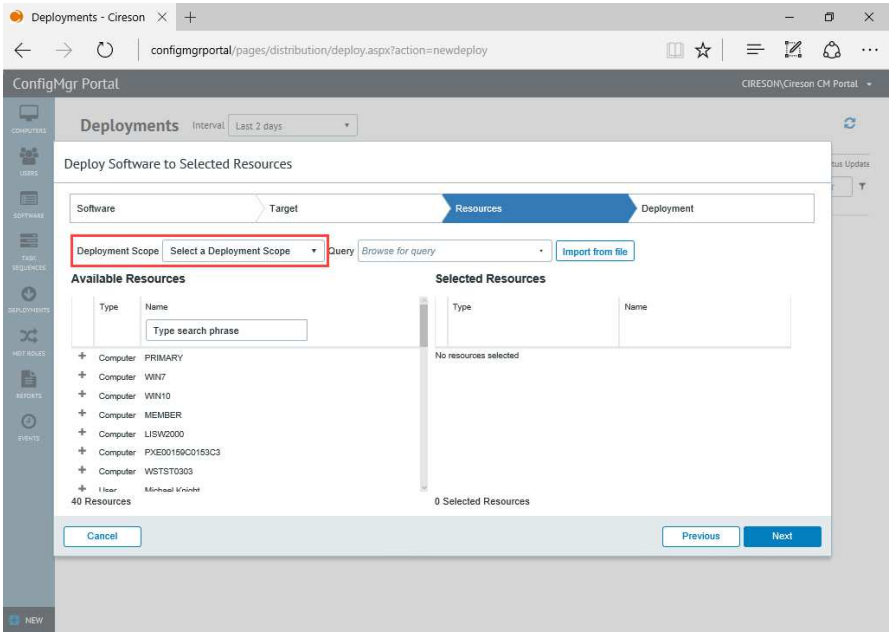


4. Either click the **Resources** tab or click **Next**



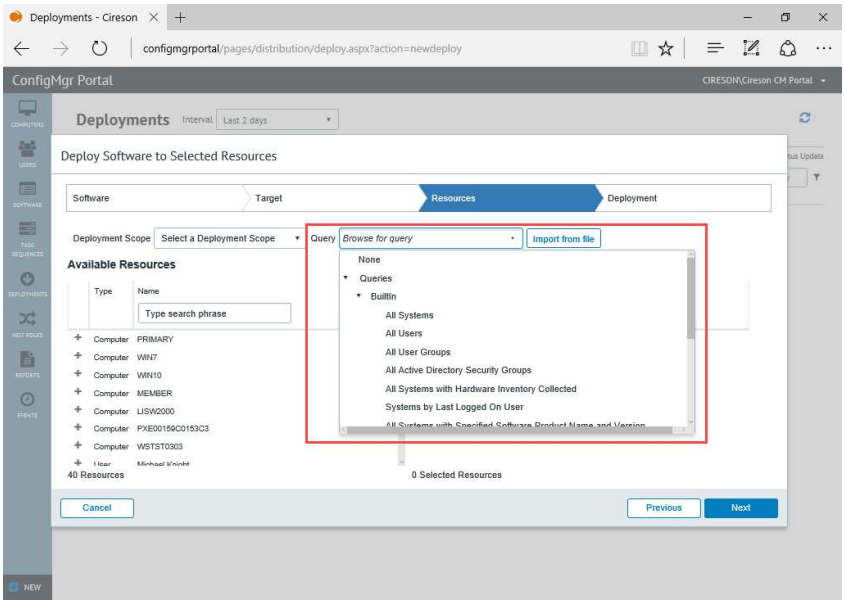
5. On the **Resources** page, optionally select the relevant deployment scope from the **Deployment Scope** dropdown list.

   NOTE: Selecting a deployment scope will limit the list of **Available Resources** to only those that meet the conditions defined by the relevant deployment scope.



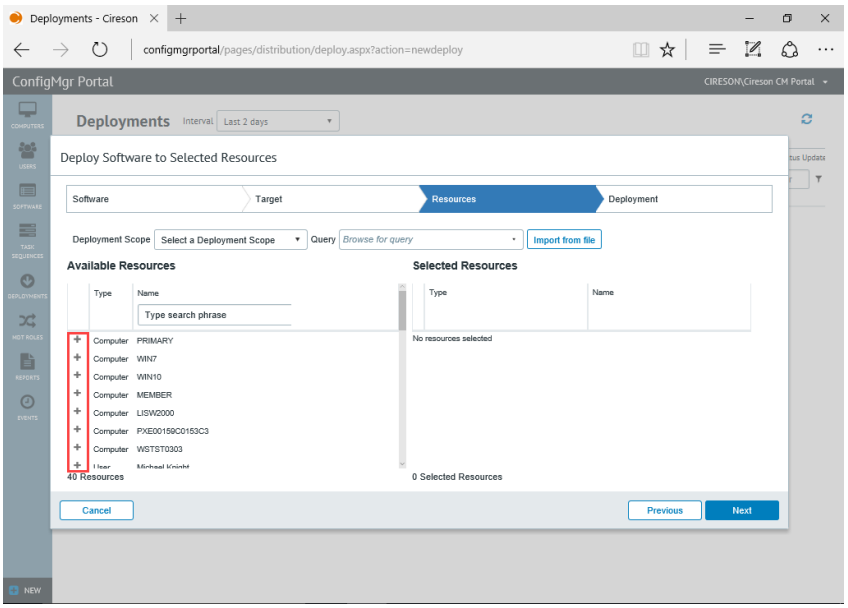
6. Optionally, select the relevant query from the **Query** dropdown list or click the **Import from file** button to import a file containing just the resources you want to deploy to.

   NOTE: Selecting a query or importing resources from a file will only reduce the list of **Available Resources** down to those in the query or import file. You will need to manually click **+** beside the relevant resources to move them over to the **Selected Resources** list.

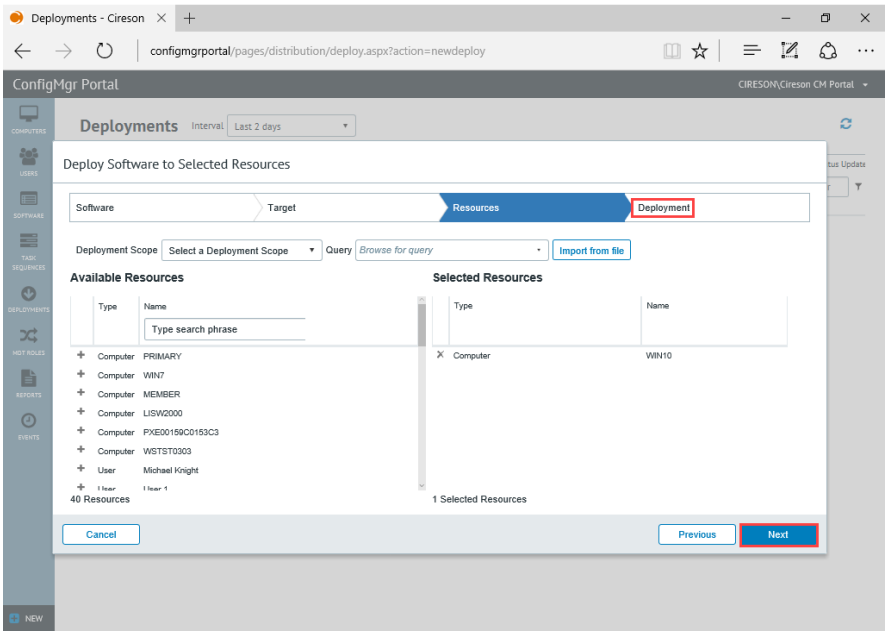


7. Click **+** beside the resources (computers, users, and/or user groups) you want to include in this deployment.

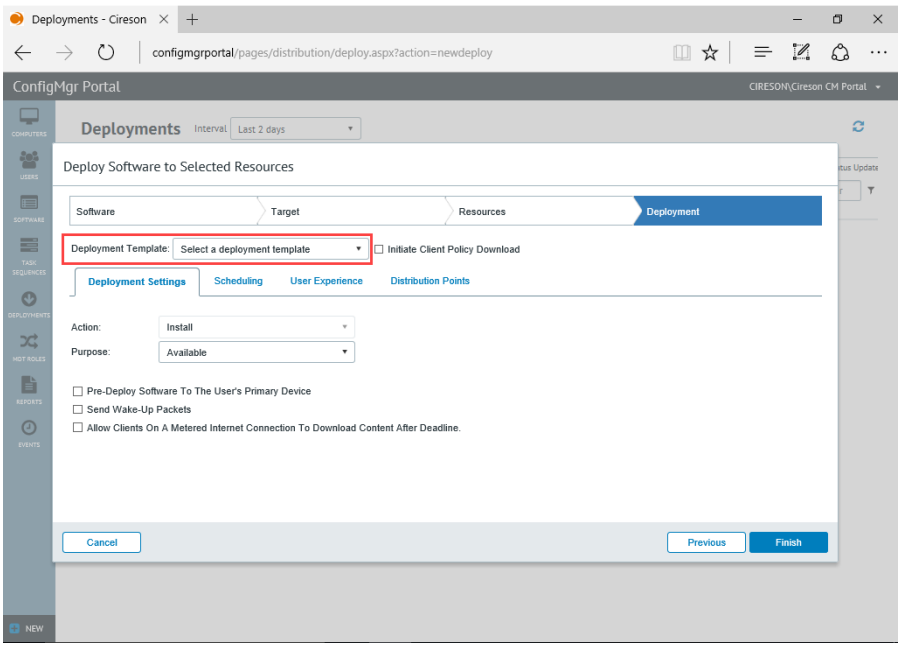
   NOTE: Only resources that have been discovered by ConfigMgr and retrieved by the Portal are listed on the **Resources** tab.



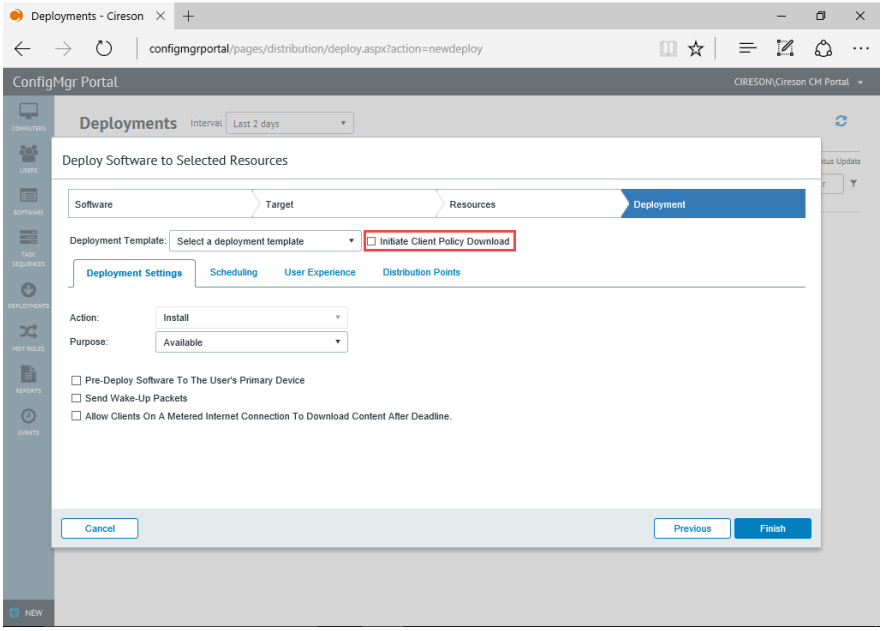
8. Either click the **Deployment** tab or click **Next**



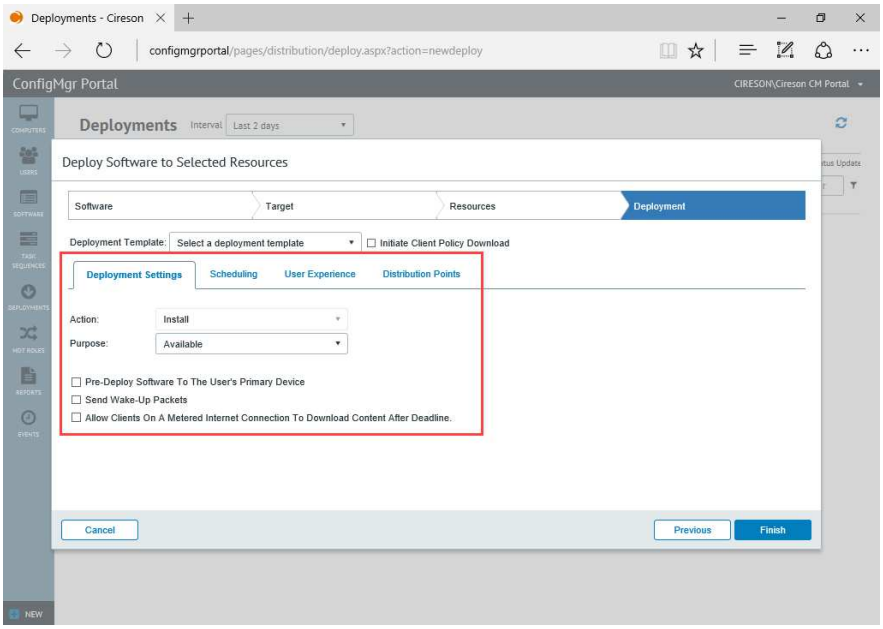
9. On the **Deployment** page, optionally select the relevant deployment template from the **Deployment Template** dropdown list.



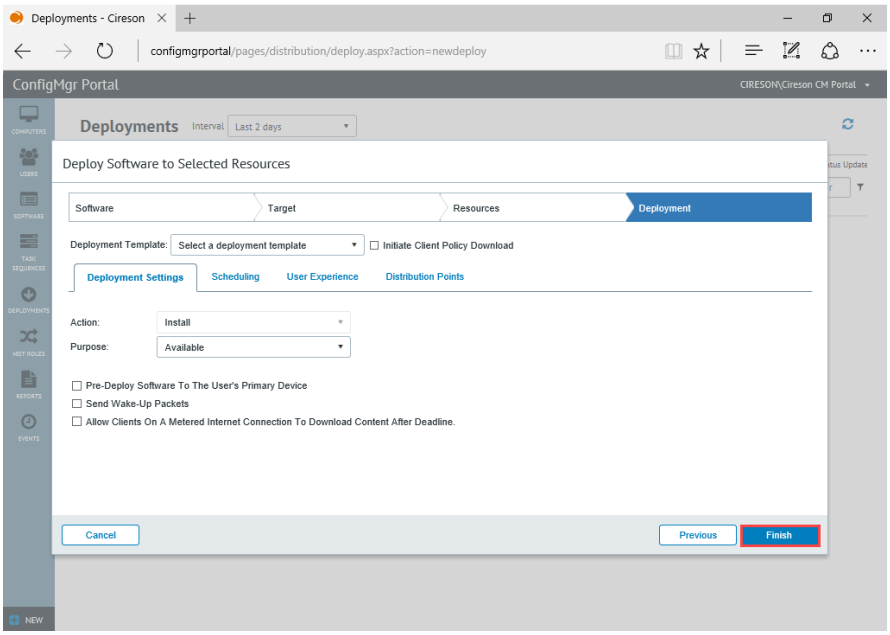
10. Check the **Initiate Client Policy Download** checkbox if required, to initiate the fast client notification channel to get the deployment out to the targeted clients as soon as possible.



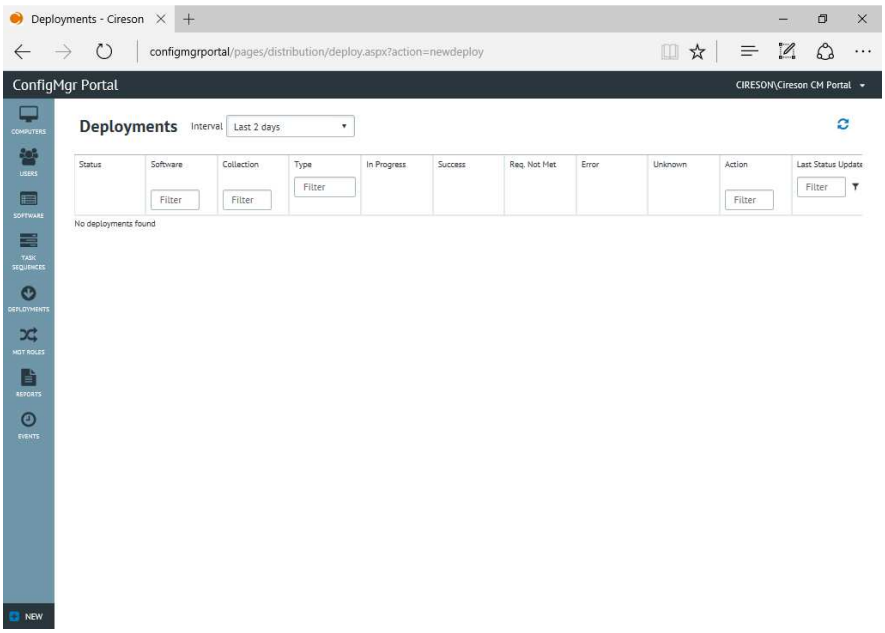
11. Configure the relevant settings on the relevant tabs as required.



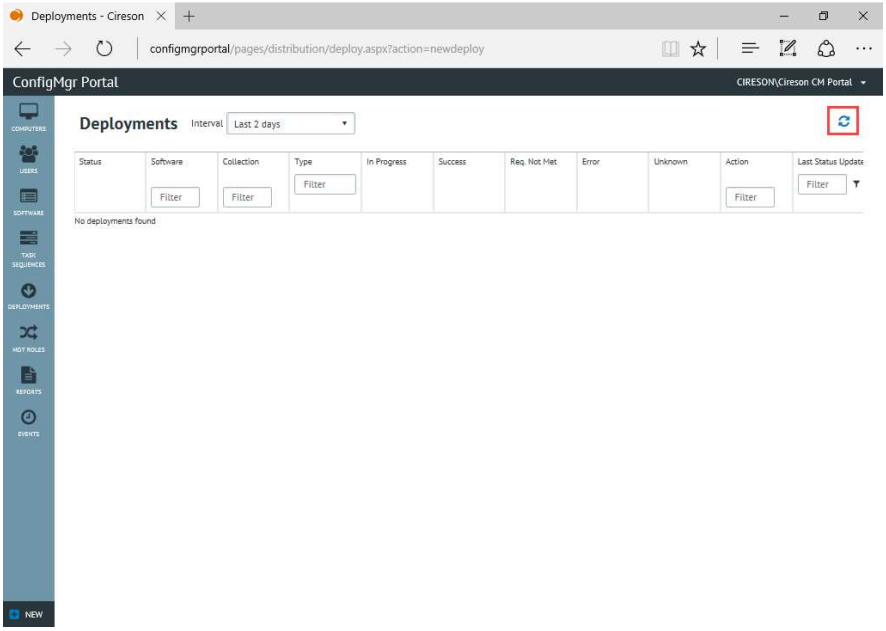
12. Click **Finish**



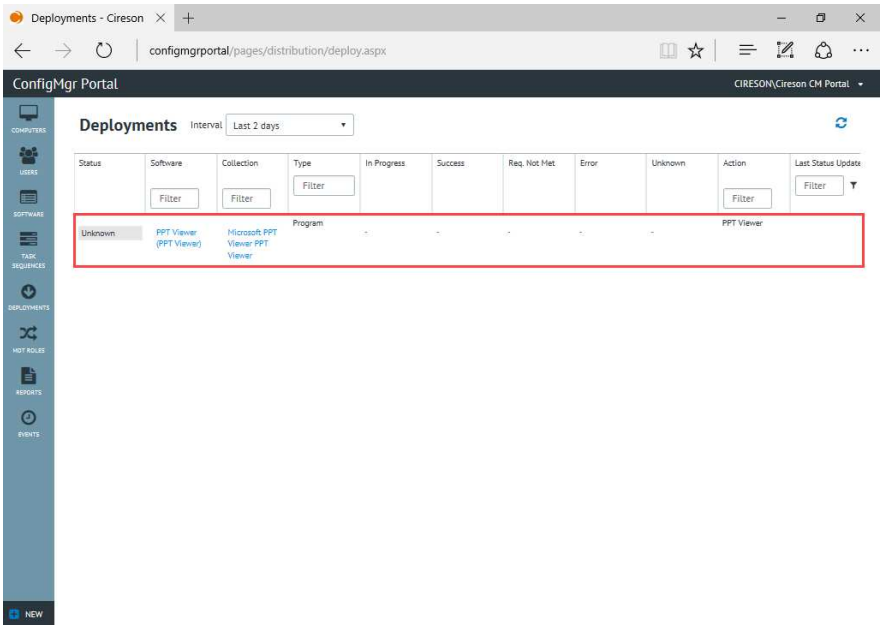
The **Deployments** page will then be displayed. The Portal will now create the new deployment as a background task.



13. Click the refresh button in the top right-hand corner of the **Deployments** page to refresh the list of deployments.



Once the background task has completed the newly created deployment will appear.

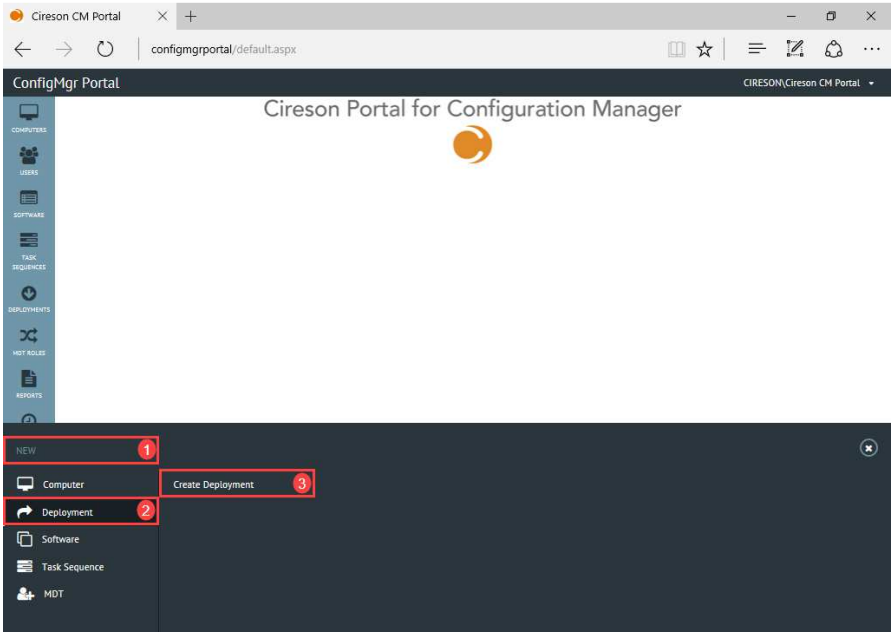


14. Periodically refresh the **Deployments** page to view updated status information.

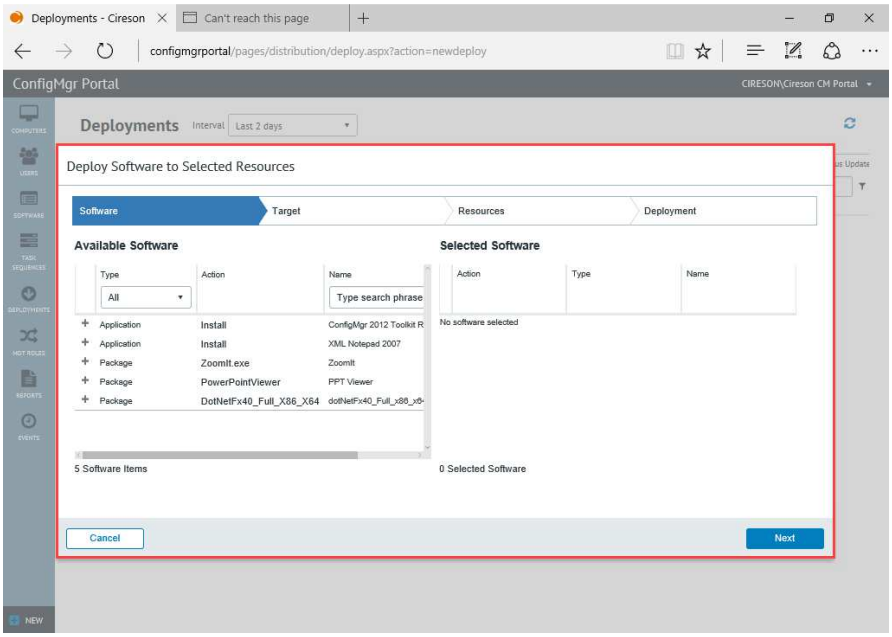
How do I deploy software to an existing collection?

To a create a new deployment to an existing collection:

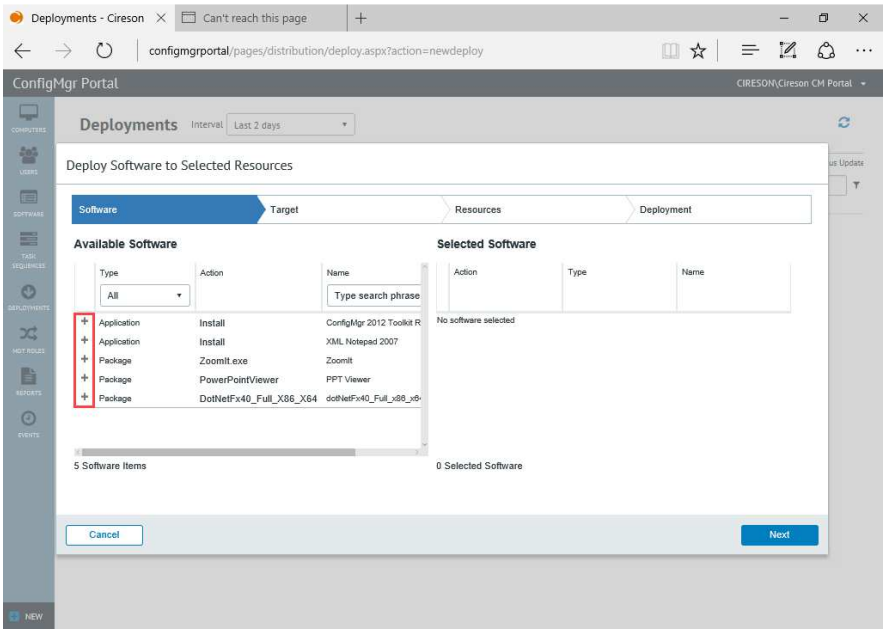
1. At the bottom of the **Navigation Menu**, select **New | Deployment | Create Deployment**



The **Deploy Software to Selected Resources** wizard is started.



2. On the **Deploy Software to Selected Resources** page, click **+** beside the software you wish to deploy.

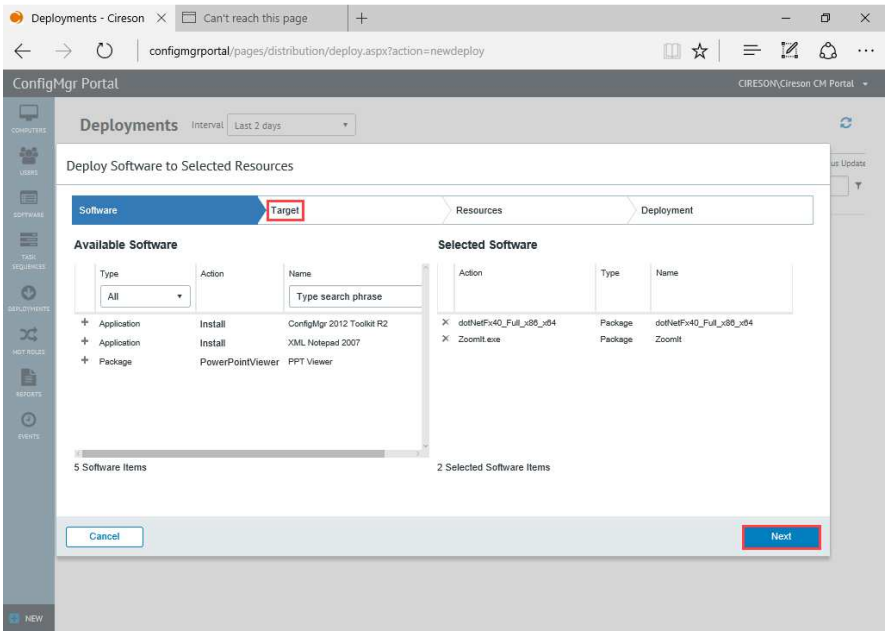


TIP: If you have a lot of software that can be deployed, use the **Type** dropdown list to help you filter your software by type (available options being **All**, **Application**, **Package**, and **Task Sequence**).

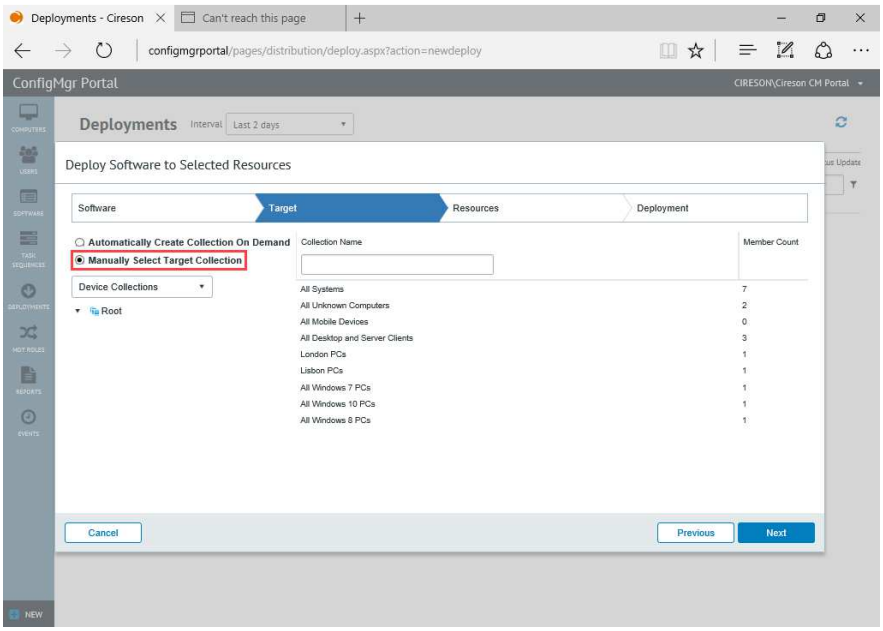
Also, consider utilizing the filtering capabilities of the **Name** field to help you locate the required software if you have a lot of results.

NOTE: Assuming you have the appropriate security rights, you can add multiple software objects of the same type (such as packages), in a single deployment. However, you cannot mix software types in a single deployment. For example, an application and a package.

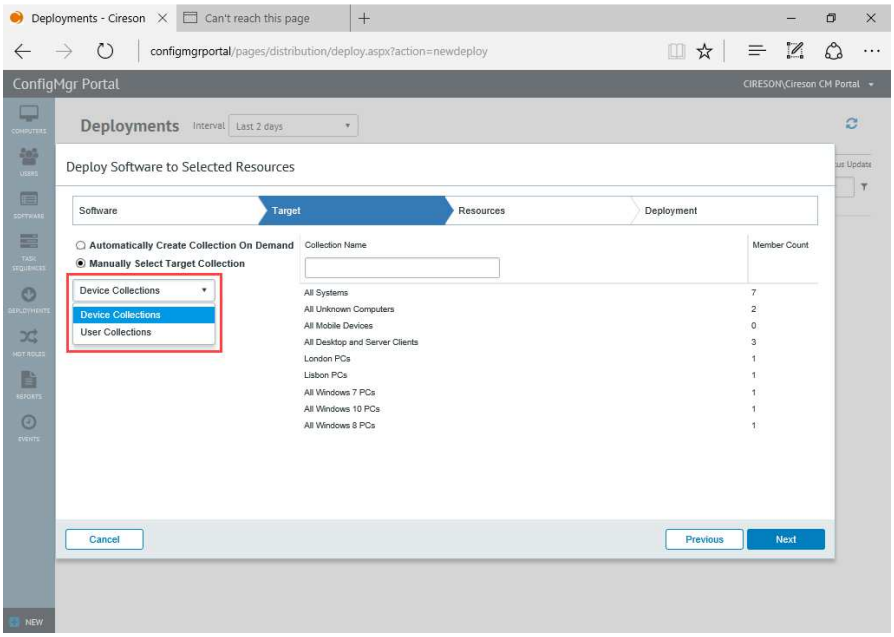
3. Either click the **Target** tab or click **Next**



4. On the **Target** page, ensure the **Manually Select Target Collection** option is selected.

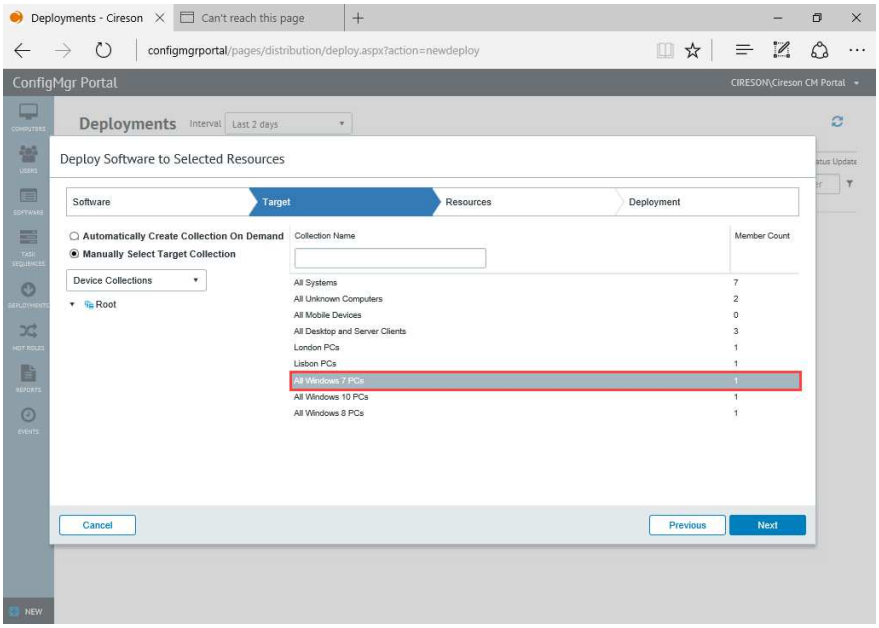


5. From the dropdown, choose the type of collection you want to deploy to i.e. **Device Collections** or **User Collections**.

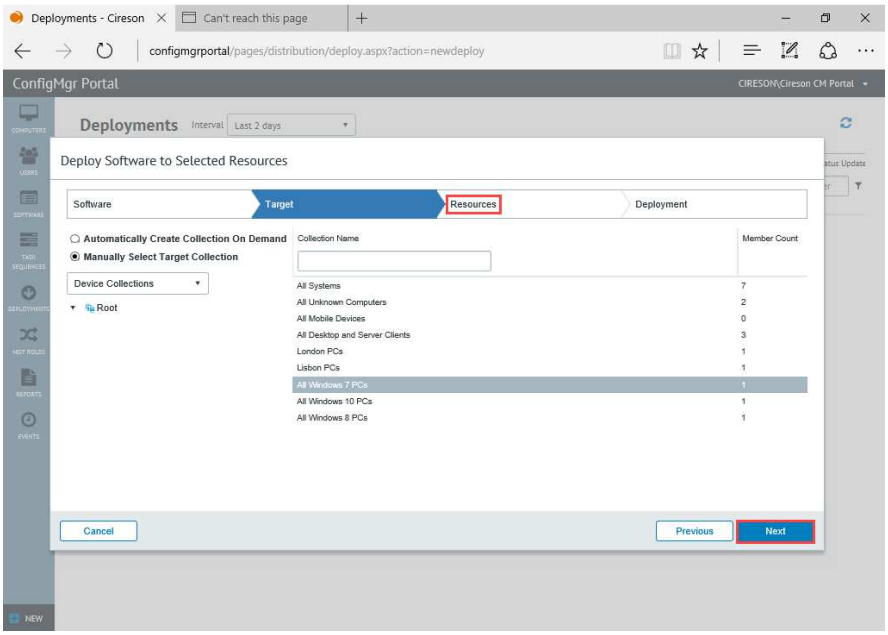


6. Select the relevant collection to be targeted.

TIP: If you have a lot of collections, use the filtering capabilities of the Portal by typing the name of the target collection in the **Collection Name** field and pressing **ENTER**

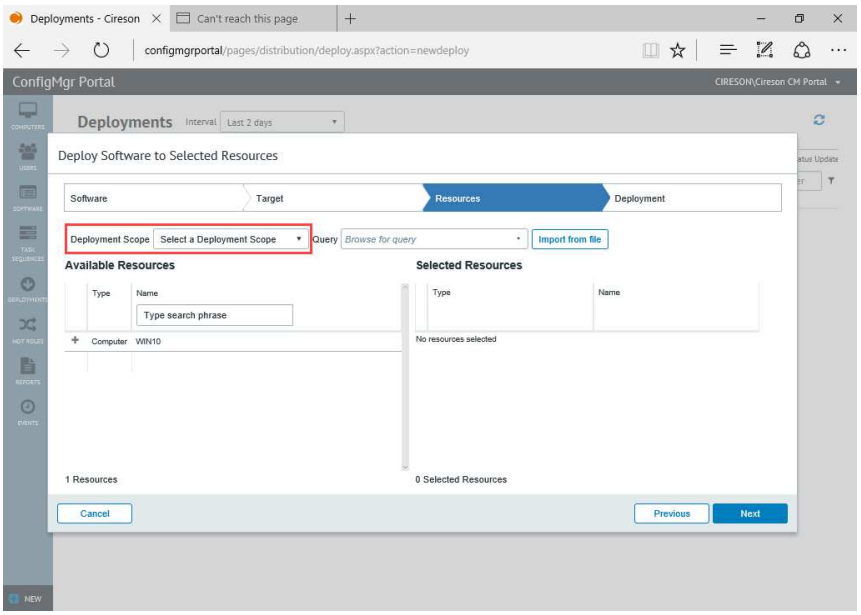


7. Either click the **Resources** tab or click **Next**



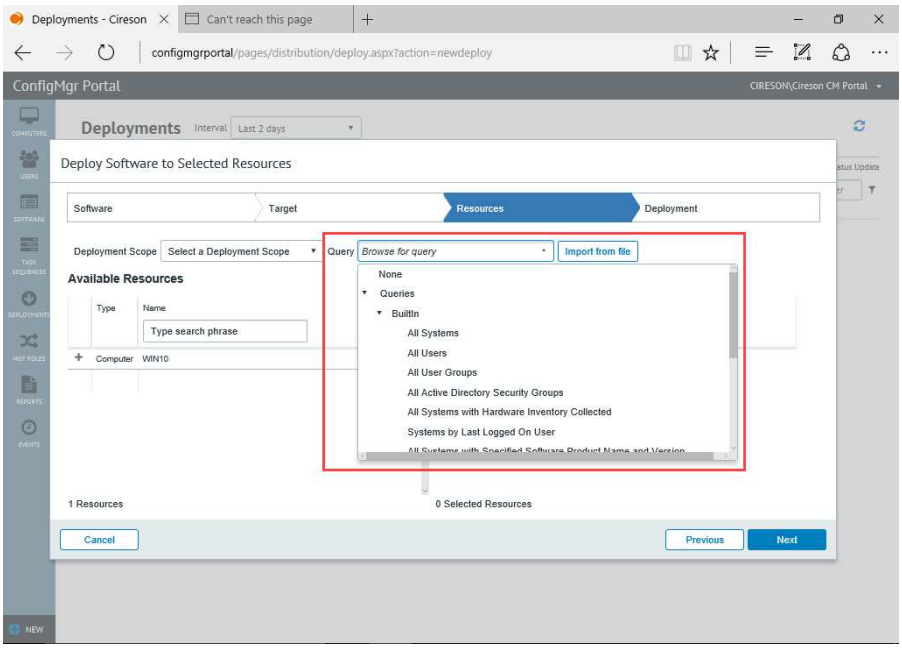
8. On the **Resources** page, optionally select the relevant deployment scope from the **Deployment Scope** dropdown list.

   NOTE: Selecting a deployment scope will limit the list of **Available Resources** to only those that meet the conditions defined by the relevant deployment scope.



9. Optionally select the relevant query from the **Query** dropdown list or click the **Import from file** button to import a file containing just the resources you want to deploy to.

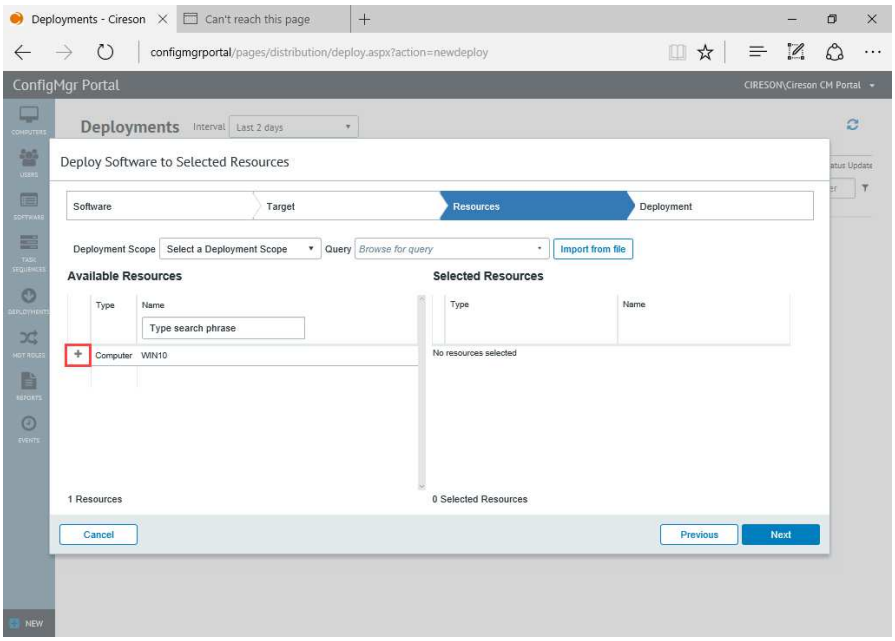
   NOTE: Selecting a query or importing resources from a file will only reduce the list of **Available Resources** down to those in the query or import file. You will need to manually click **+** beside the relevant resources to move them over to the **Selected Resources** list.



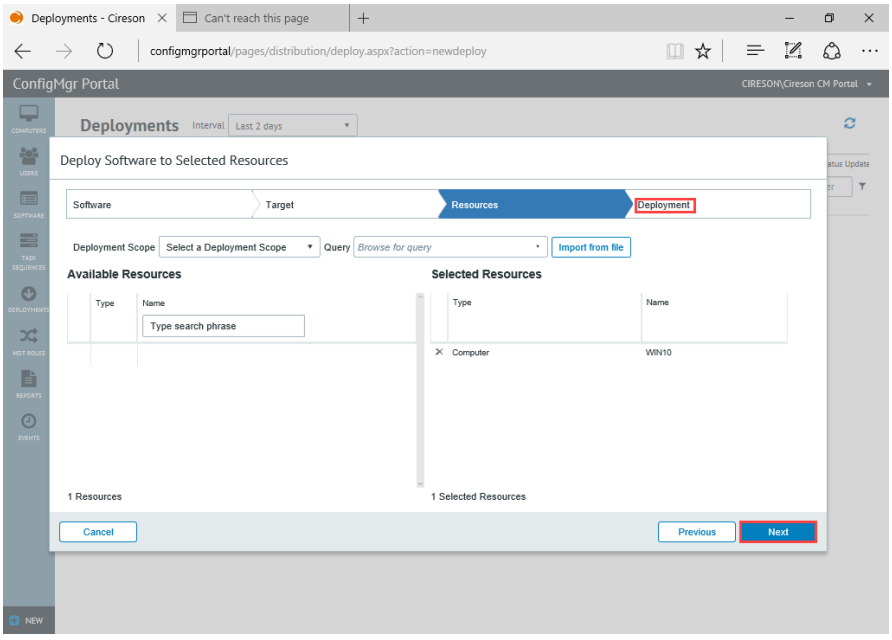
10. If required, click **+** beside the resources (computers, users, and/or user groups) you want to add to the selected collection.

    NOTE: You can only add resources based on the type of collection. For example, you cannot add computers to a user collection.

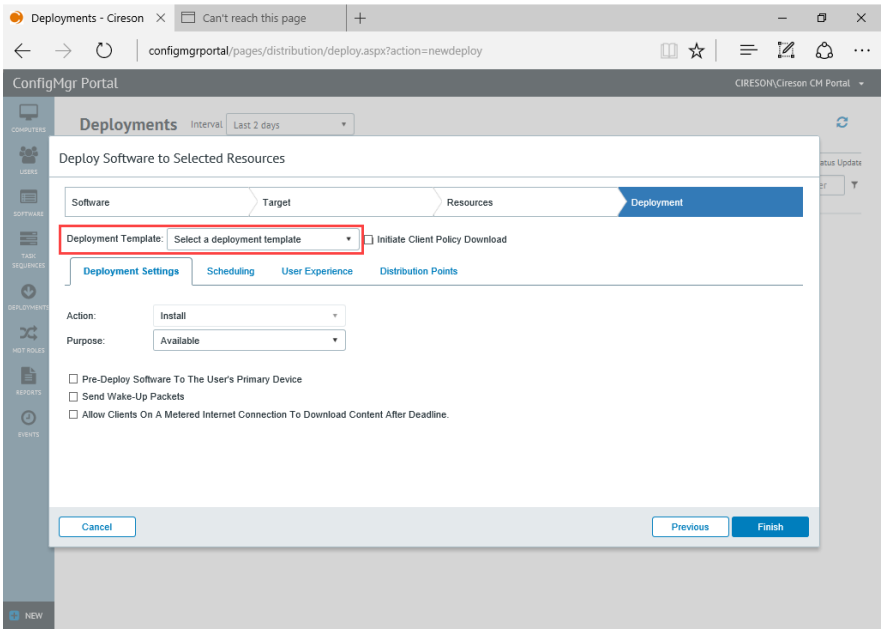
    Only resources contained within the existing ConfigMgr collection and retrieved by the Portal are listed on the **Resources** tab.



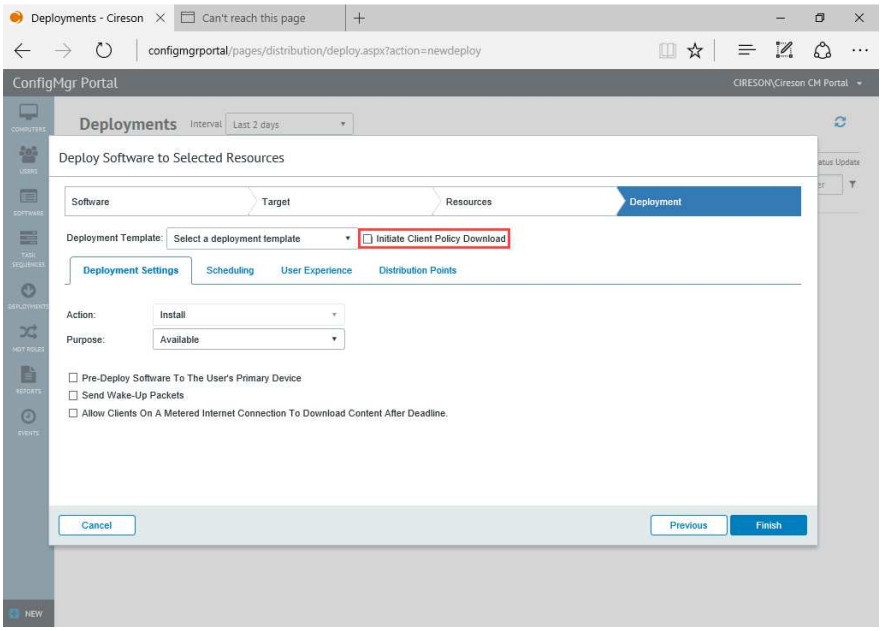
11. Either click the **Deployment** tab or click **Next**



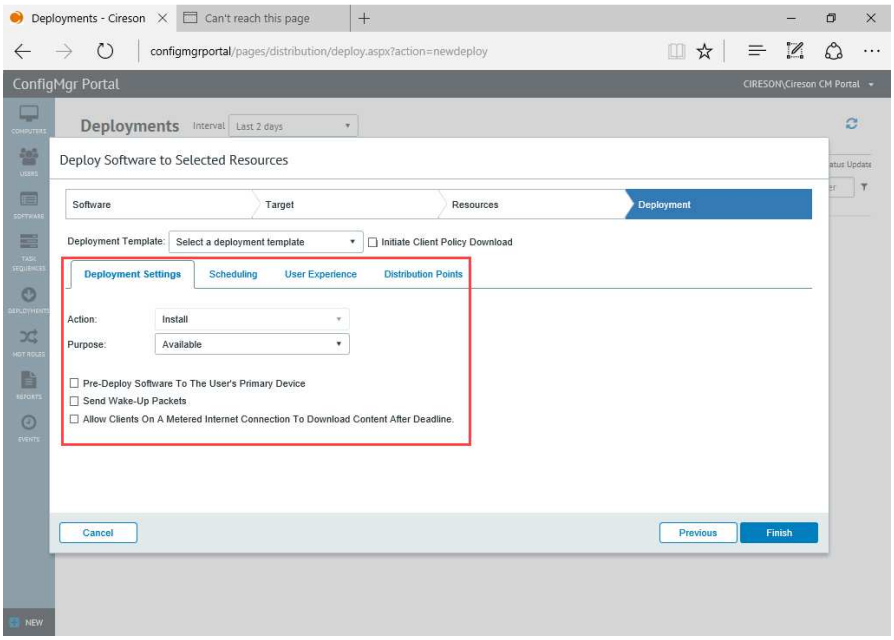
12. On the **Deployment** page, optionally select the relevant deployment template from the **Deployment Template** dropdown list.



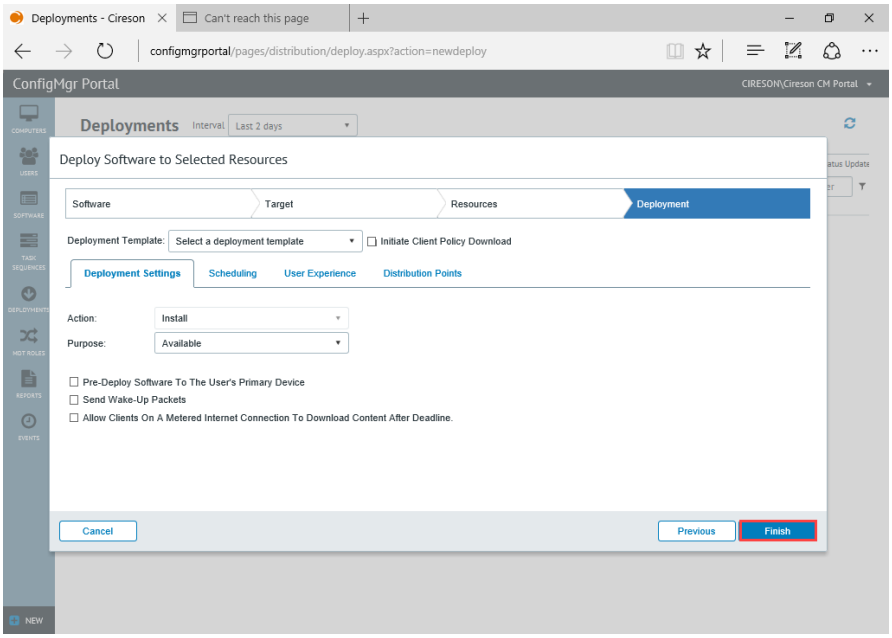
13. Check the **Initiate Client Policy Download** checkbox if required, to initiate the fast client notification channel to get the deployment out to the targeted clients as soon as possible.



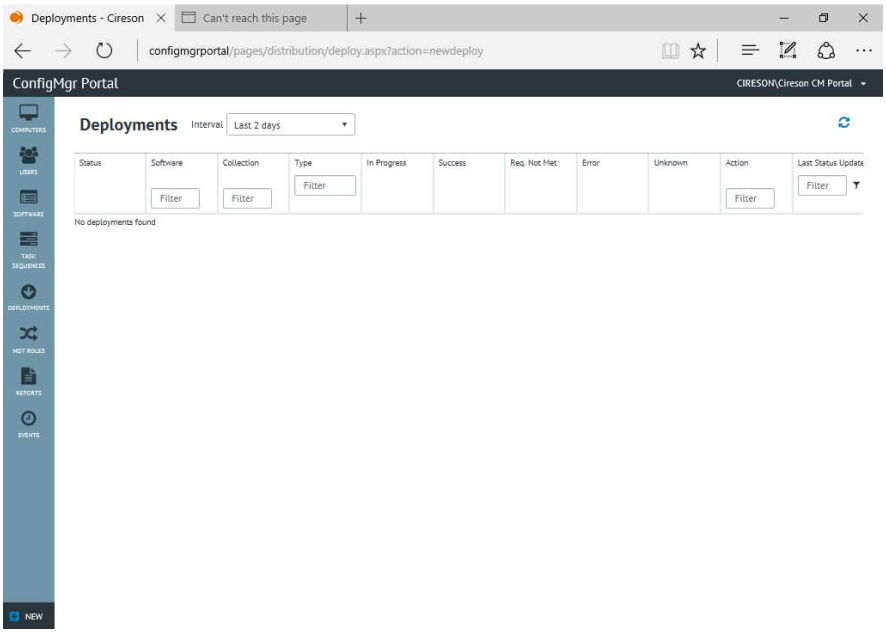
14. Configure the relevant settings on the relevant tabs as required.



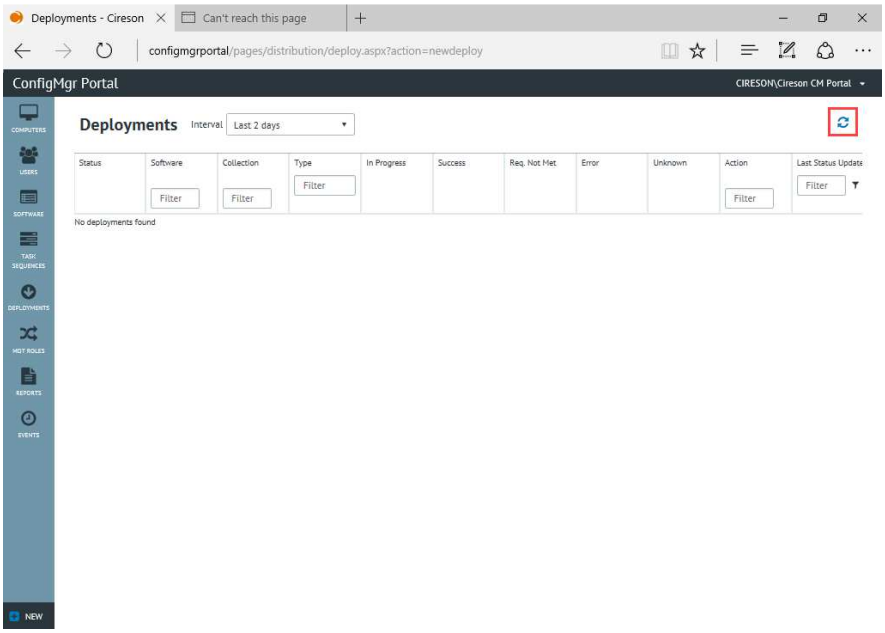
15. Click **Finish**



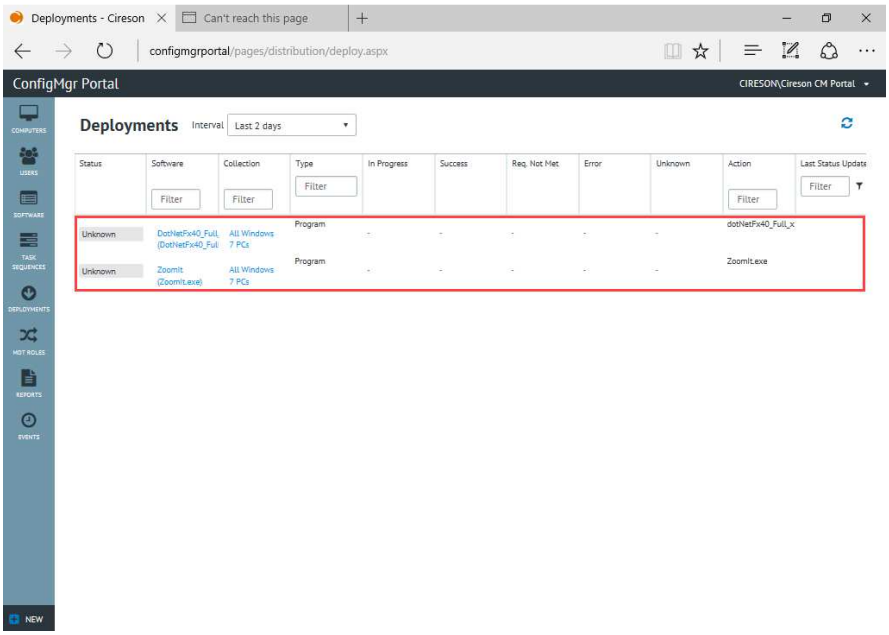
The **Deployments** page will then be displayed. The Portal will now create the new deployment as a background task.



16. Click the refresh button in the top right-hand corner of the **Deployments** page to refresh the list of deployments.



After the background task has completed, the newly created deployment will appear.



Periodically refresh the **Deployments** page to view updated status information.

Software

This section contains details of the tasks available to you when you select the **Software** option from the **New** menu on the **Navigation Menu**.

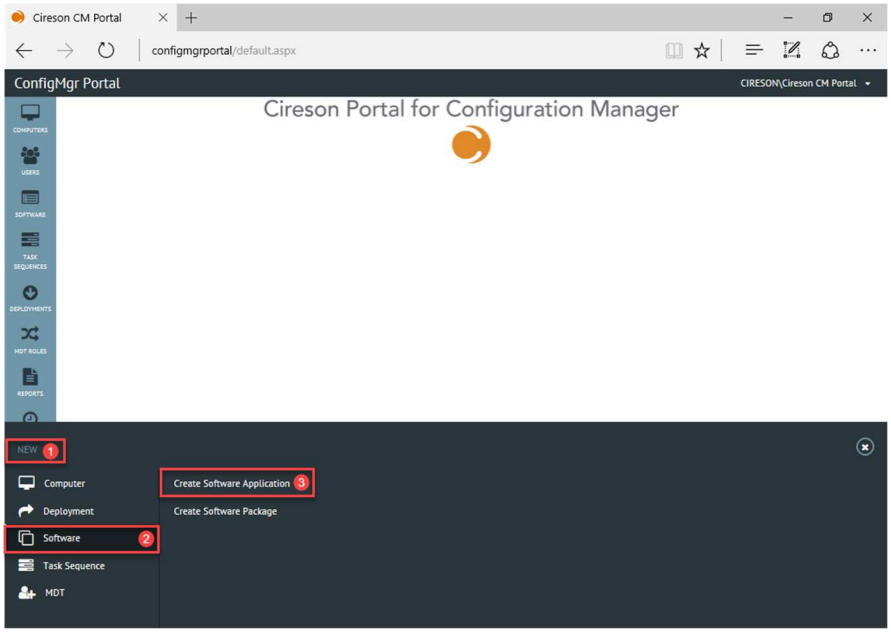
- How do I create a new Software Application?
- How do I create a new Software Package?

NOTE: Before you can add new software to the Portal (application or package), you need to create a Software Source as detailed in the How do I create a new Software Source?

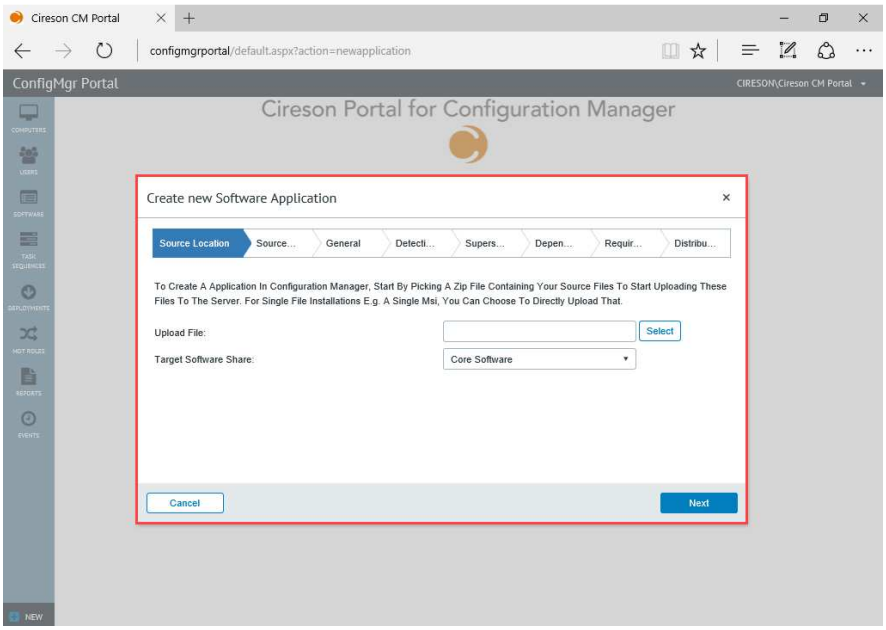
How do I create a new Software Application?

To create a new Software Application:

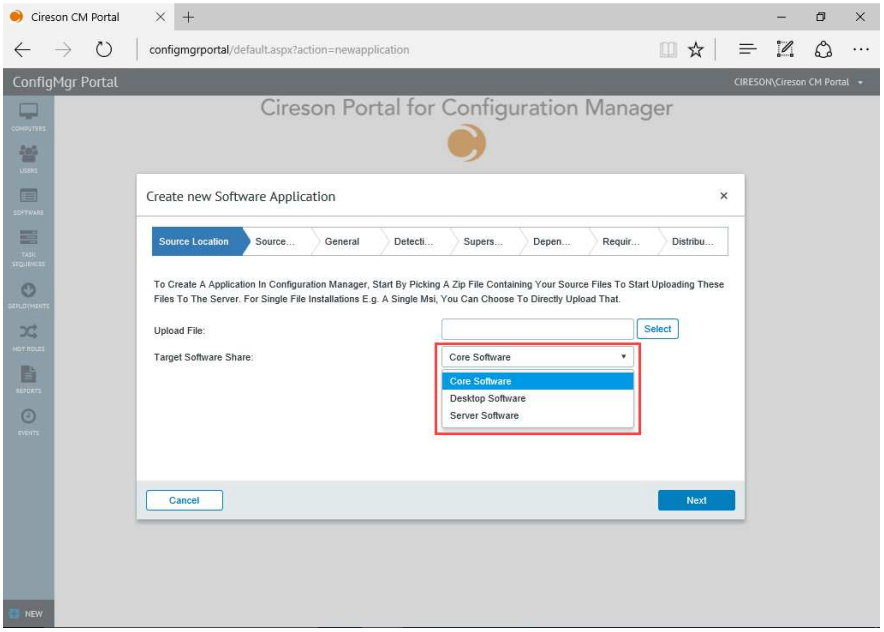
1. At the bottom of the **Navigation Menu**, select **New | Software | Create Software Application**



The **Create new Software Application** wizard appears.

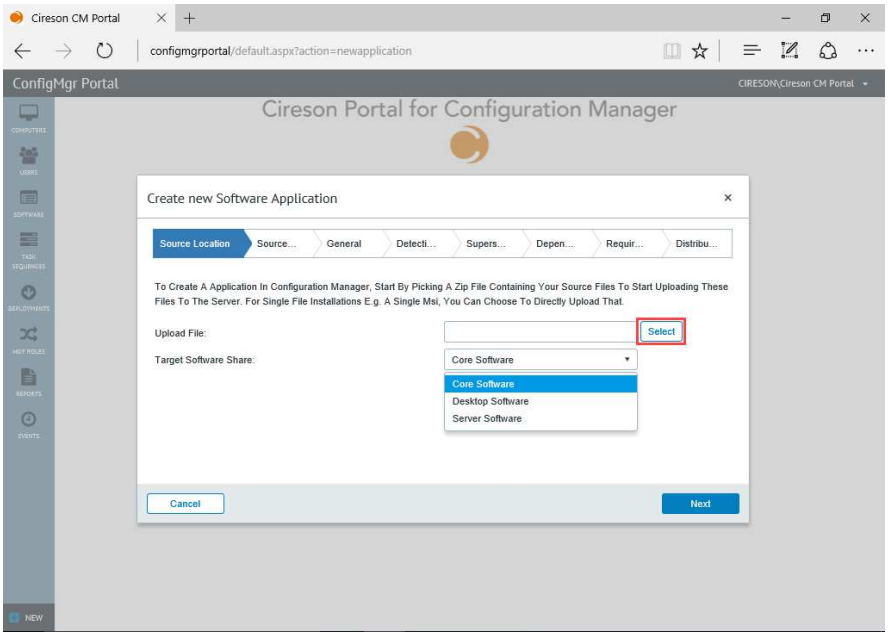


2. On the **Source Location** page of the **Create new Software Application** wizard, select the relevant target software share for the software from the **Target Software Share** dropdown, which defaults to the Software Source configured as the default.

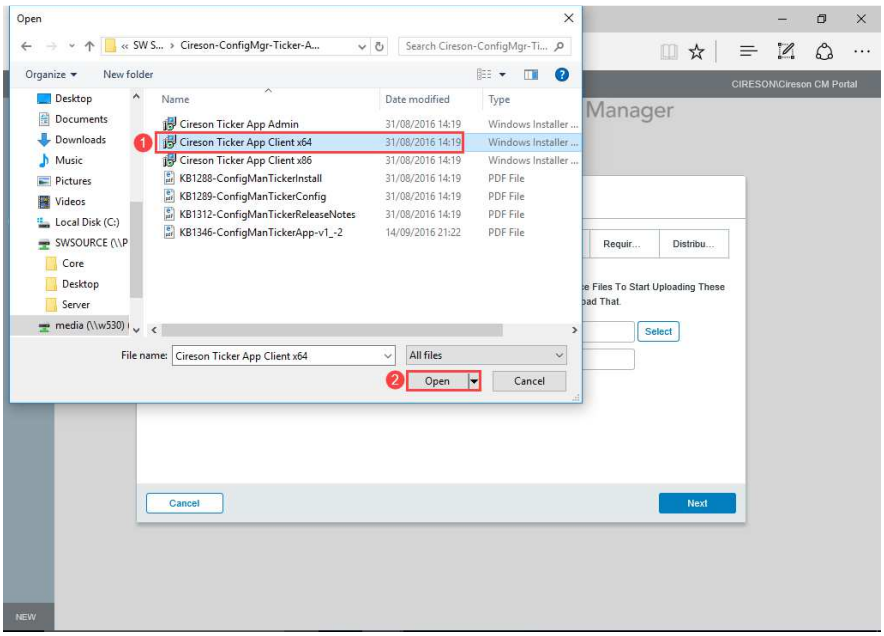


3. Click **Select** to browse to the location containing the source files for your application. The Portal supports ZIP, MSI or EXE files.

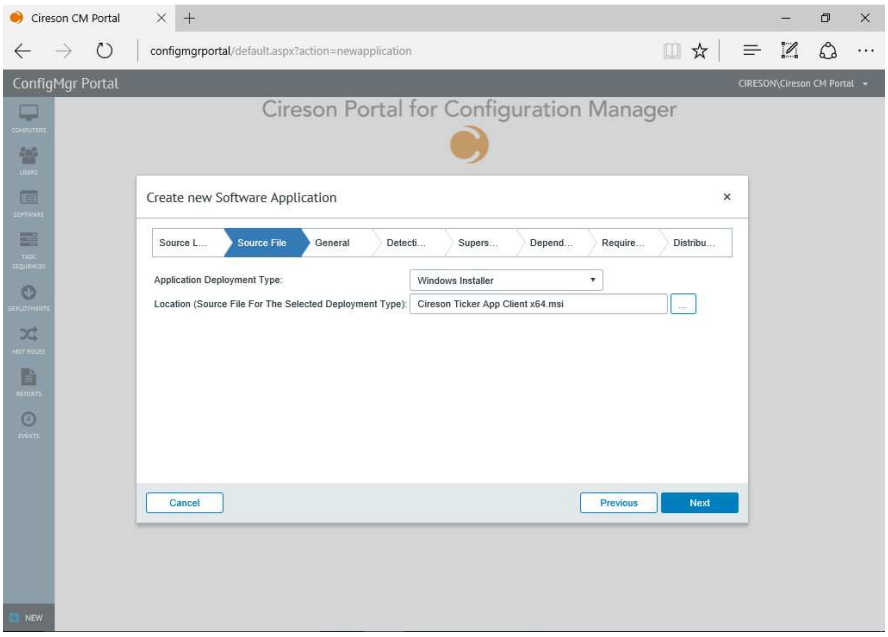
   NOTE: If you use ZIP files, these must contain either the MSI or EXE that can be used to create an application.



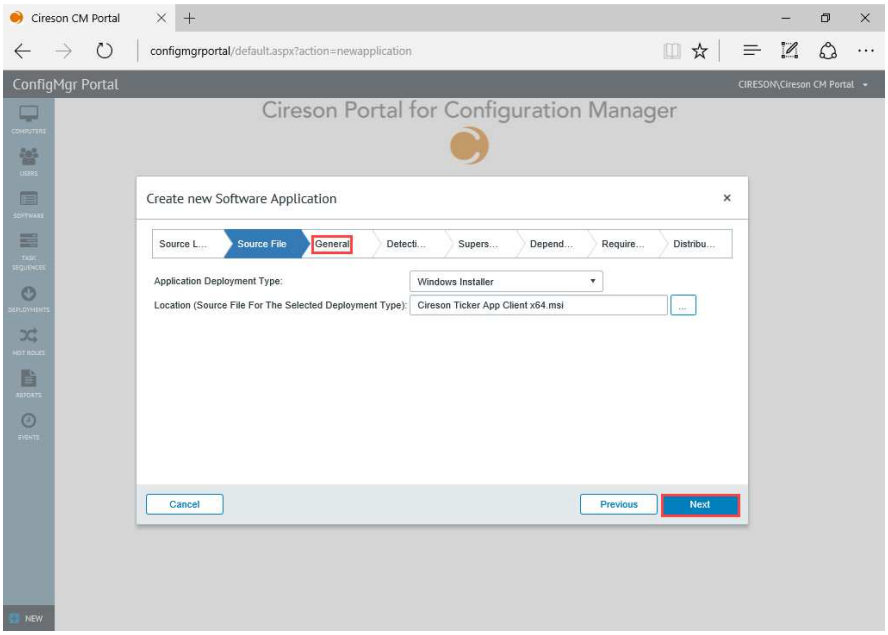
4. Browse to the location containing the source files for the software, select the software then click **Open**



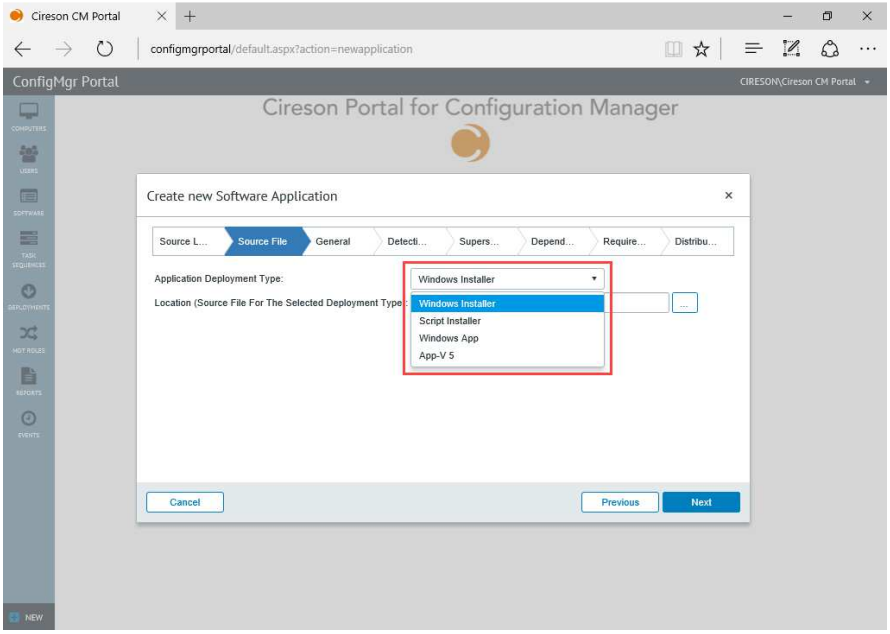
The fields on the **Source File** page are automatically populated.



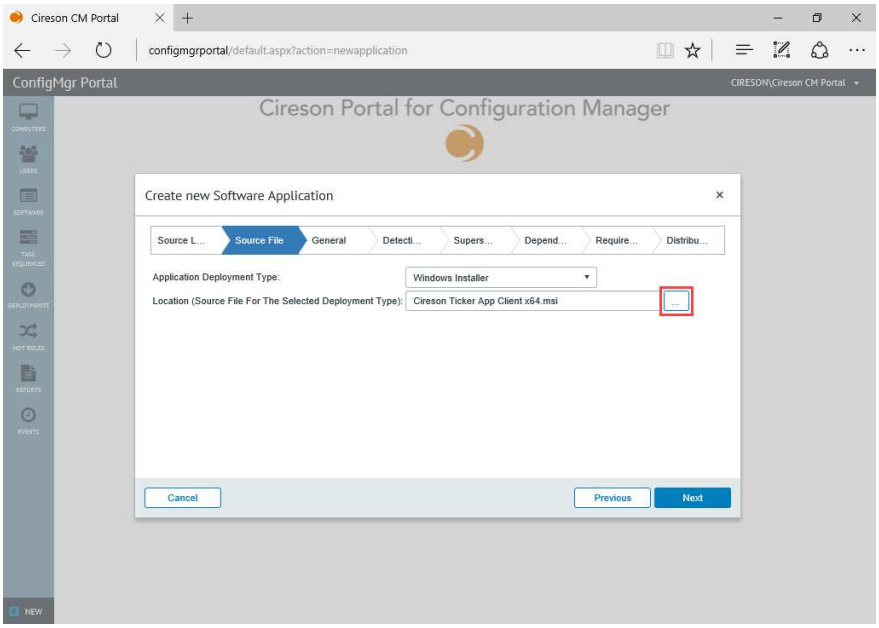
5. Either click the **General** tab or click **Next**



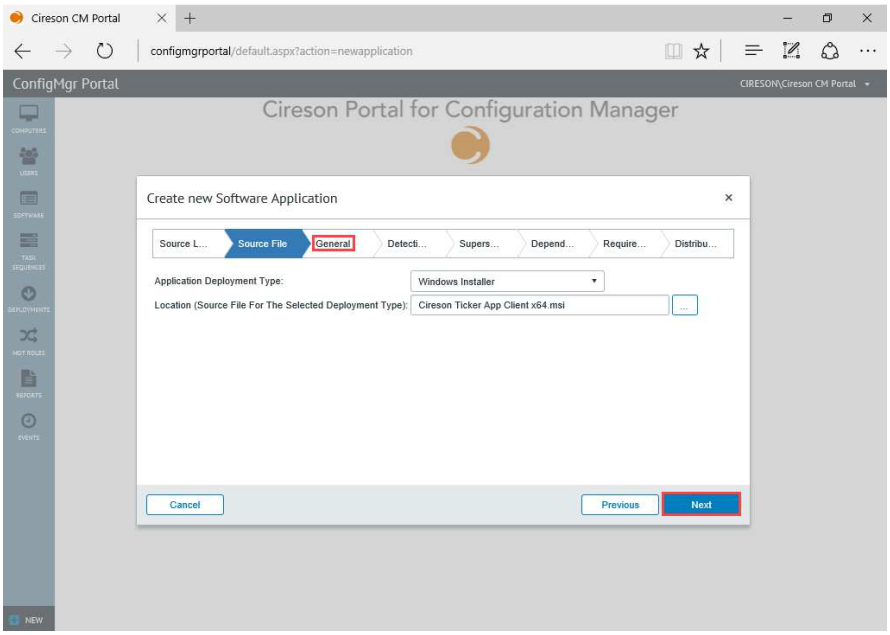
6. From the **Application Deployment Type** dropdown, select the deployment type for this application if it is not selected automatically.



7. Click the browse button (...) after the **Location** field if you need to select a different source file.

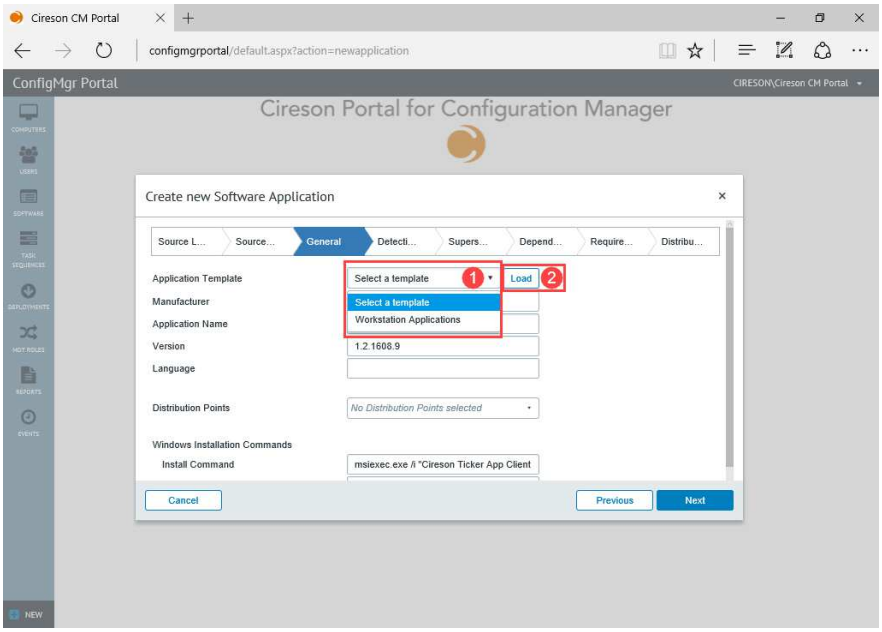


8. Either click the **General** tab or click **Next**



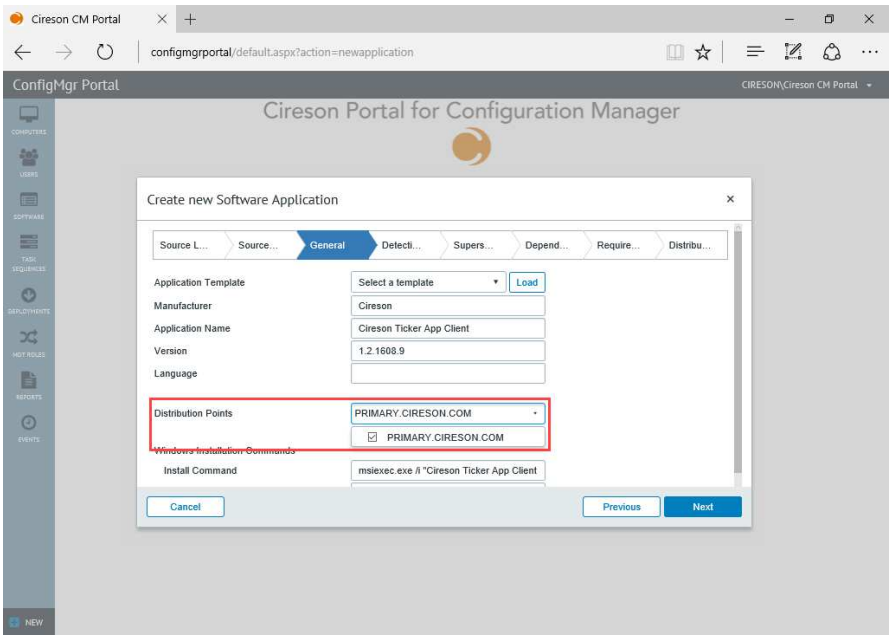
9. Optionally, if you want to use an existing application template, select the relevant template from the **Application Template** dropdown, then click **Load** to load it.

   NOTE: For details of how to create an Application Template see How do I create a new Template?

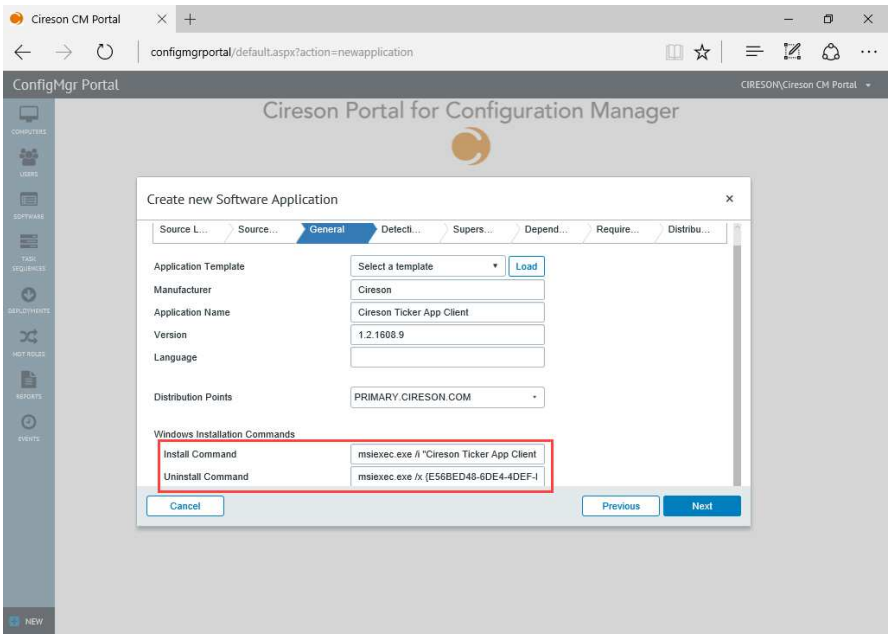


10. Complete the relevant fields on the **General** page which their respective values.
11. From the **Distribution Points** dropdown, select at least one Distribution Point (DP)/DP Group.

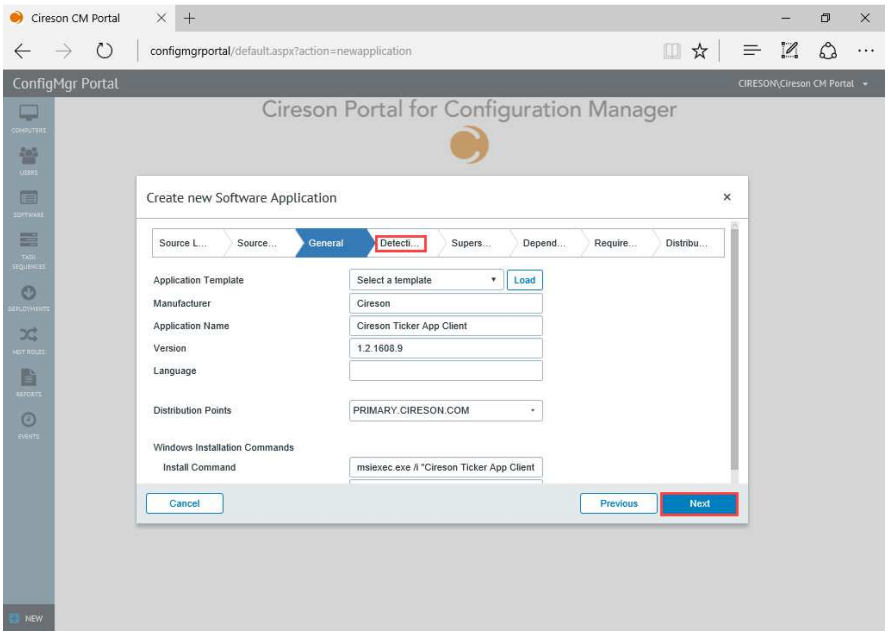
    NOTE: You need to select at least one DP/DP Group from the **Distribution Points** dropdown to be able to successfully create an application.



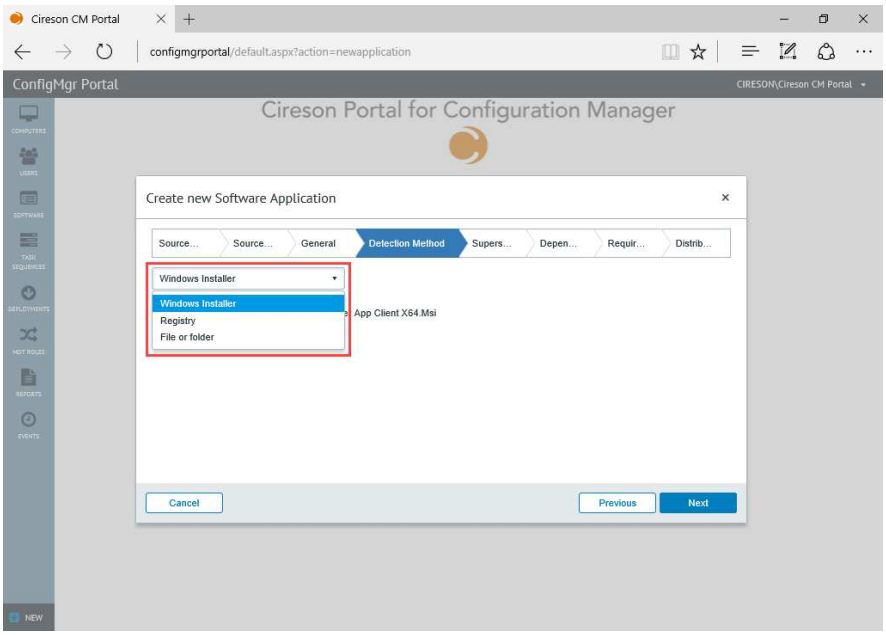
12. In the **Install Command** and **Uninstall Command** fields, enter the relevant commands if they are not automatically populated (the **Uninstall Command** field can be left empty if required).



13. Either click the **Detection Method** tab or click **Next**



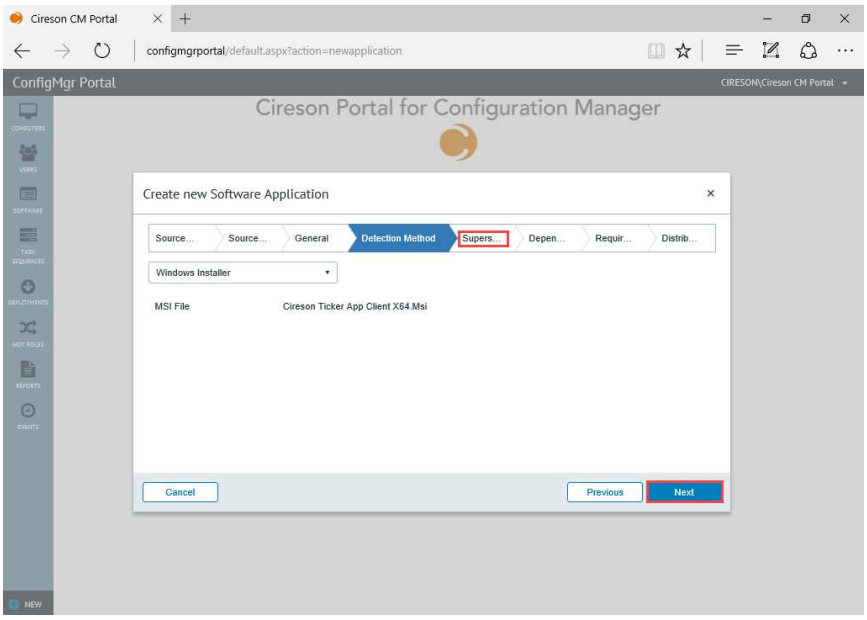
14. On the **Detection Method** page, select the relevant detection method from the dropdown menu.



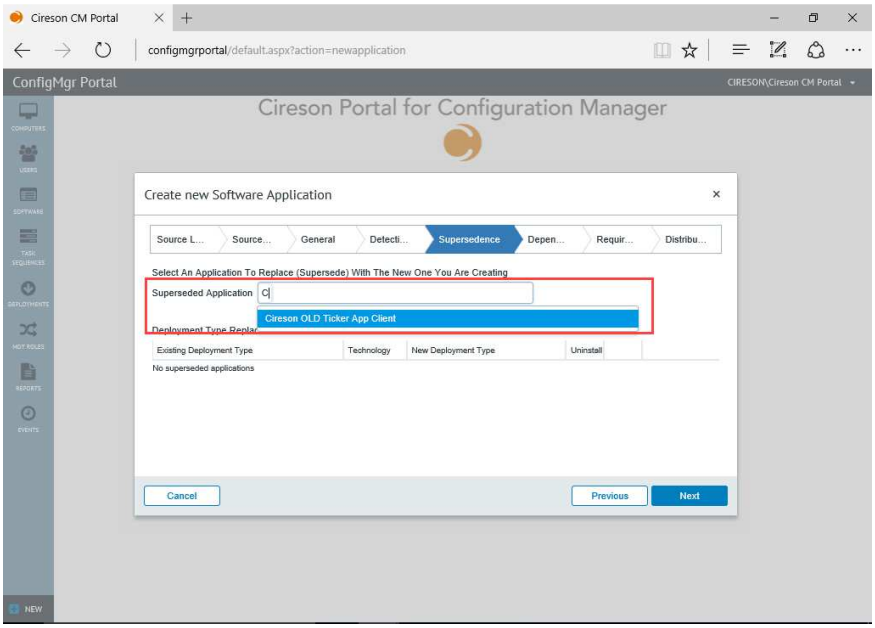
15. If you select a detection method other than **Windows Installer**, complete the fields with their respective values.

16. Optionally, either click the **Supersedence** tab or click **Next**

    NOTE: You do not need to visit each tab and specify settings on every tab of the **Create new Software Application** wizard. If some tabs are not relevant (such as **Supersedence**), simply skip to the next tab that is relevant to the application you are creating.

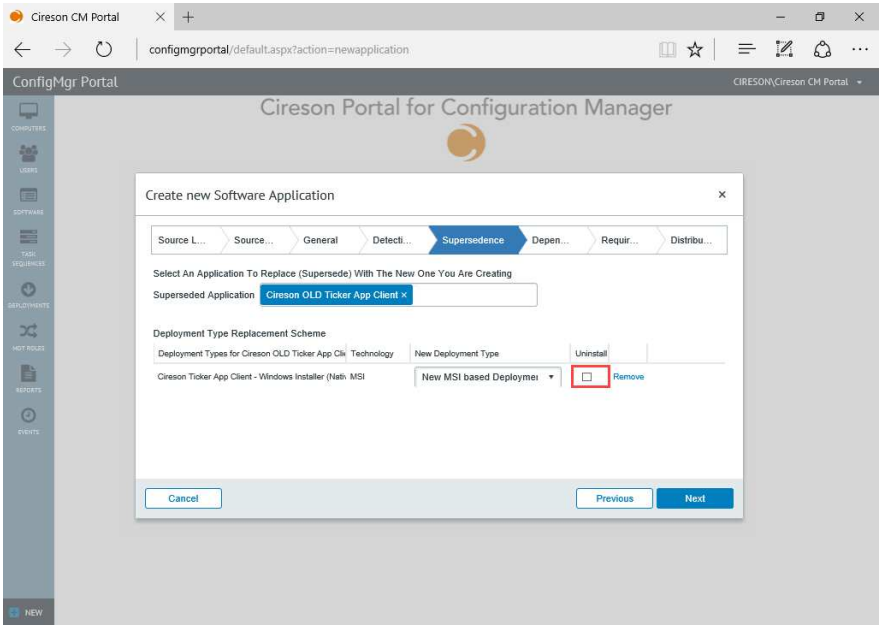


17. Optionally, if you want this application to supersede an existing one, start typing the name of the application to be superseded in the **Superseded Application** field which will autocomplete as you type.

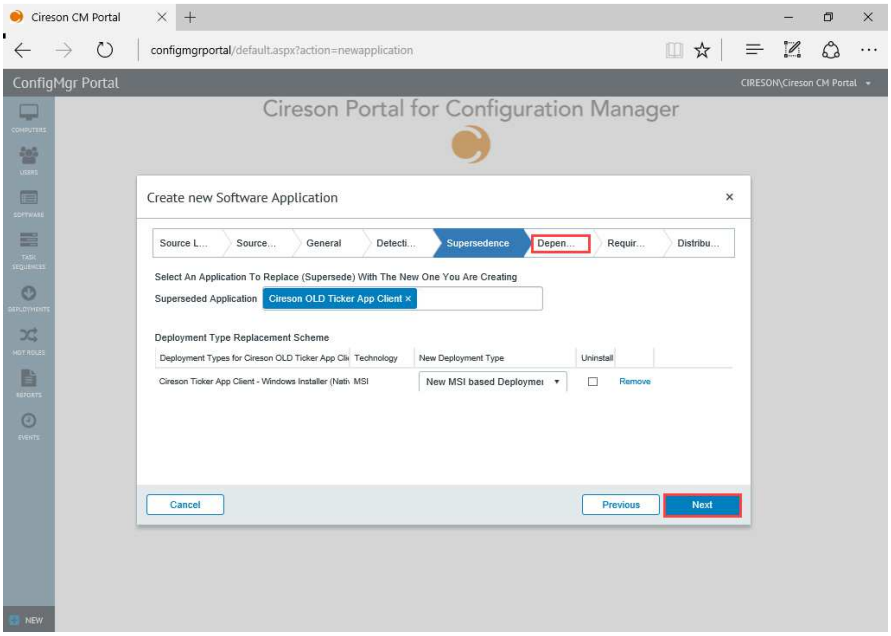


In the above example, we are going to supersede the existing application called **Cireson OLD Ticker App Client** with this new version.

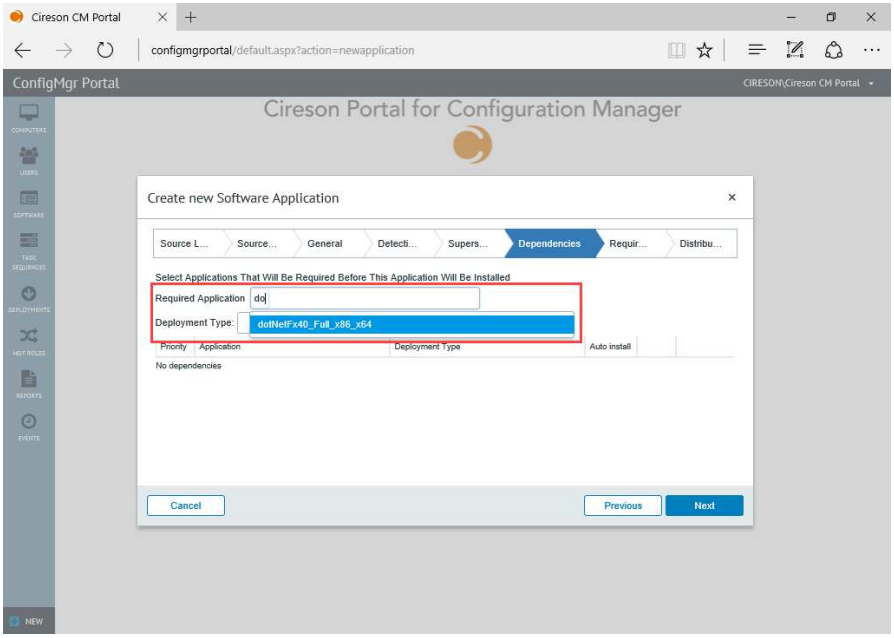
18. Select the **Uninstall** checkbox to have the old version automatically uninstalled. If you don't select this checkbox, the newer version of the application will attempt to do an in-place upgrade of the existing version which may not work.



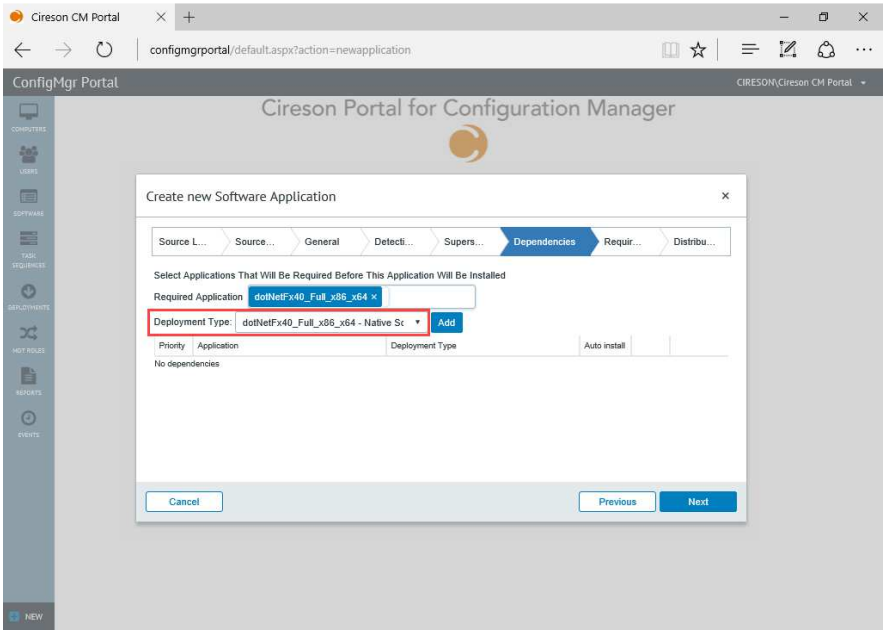
19. Either click the **Dependencies** tab or click **Next**



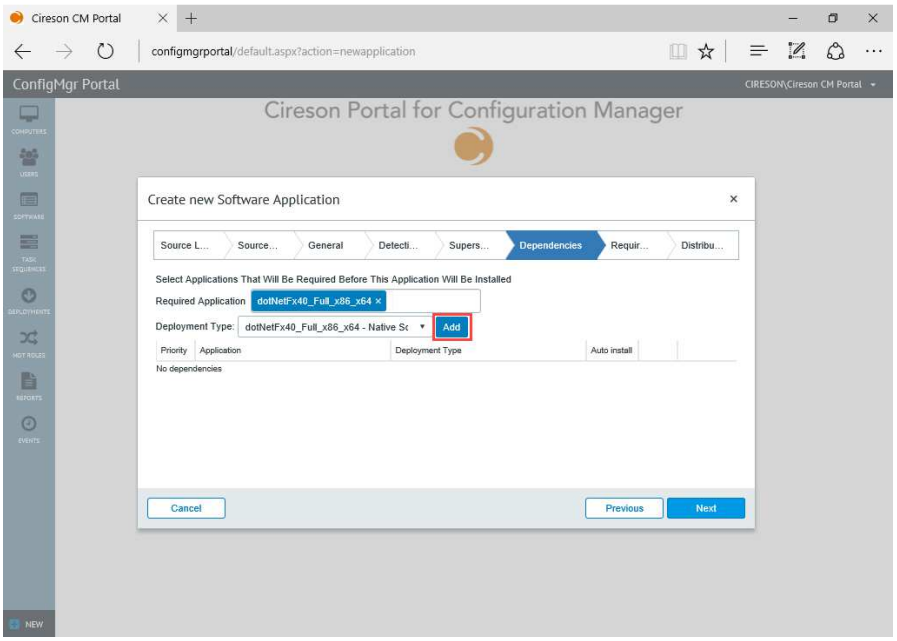
20. Optionally, if this application has dependencies, on the **Dependencies** page, start typing the name of the application to that needs to be installed first in the **Required Application** field which will autocomplete as you type.



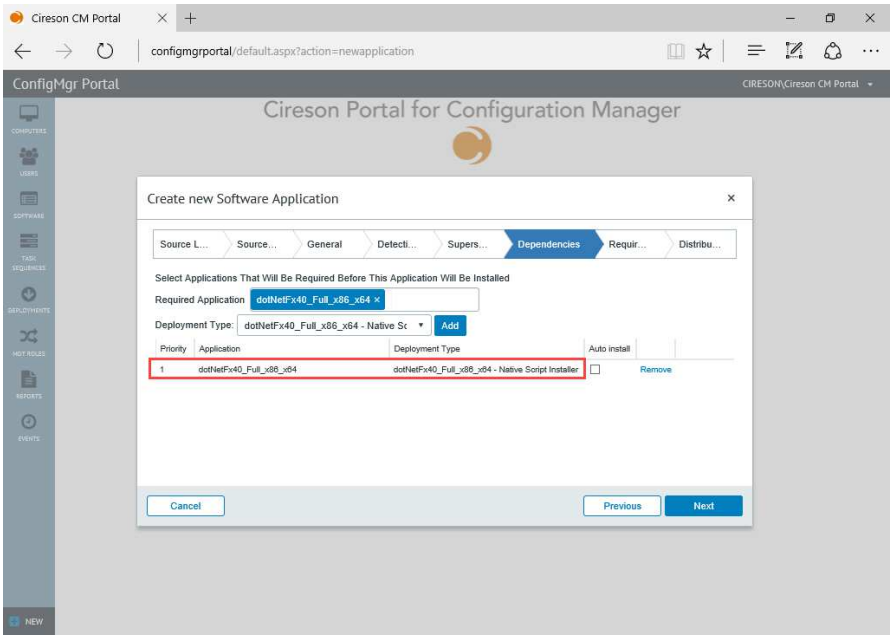
Once you select the application, the **Deployment Type** field updates automatically.



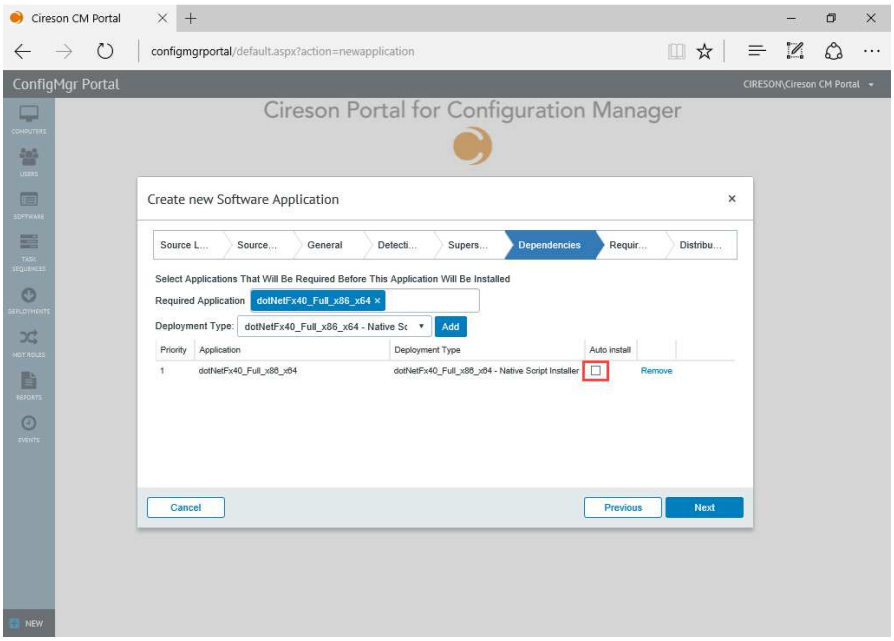
21. Click **Add** to add the application to the list.



The deployment type is added.

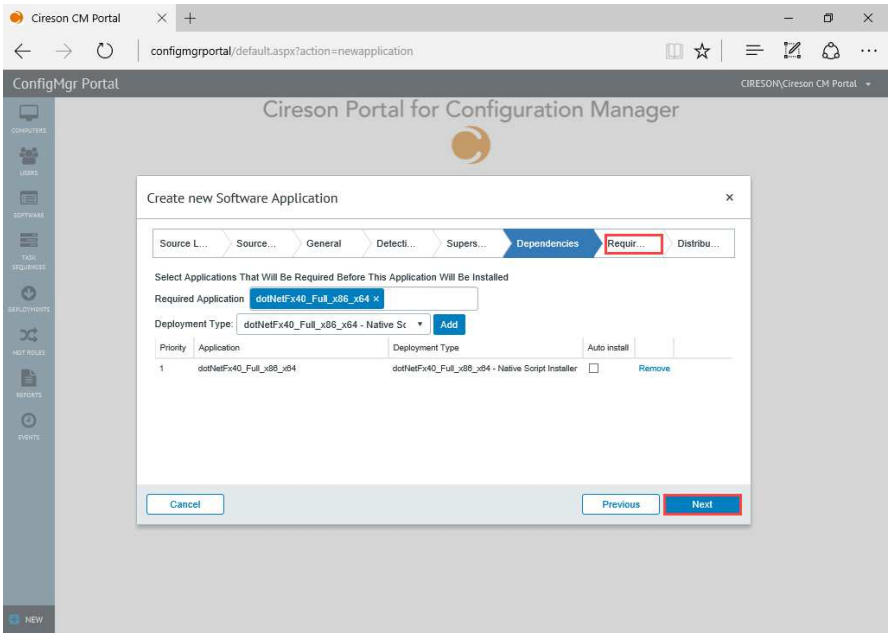


22. Select the **Auto Install** checkbox to have this software automatically installed if required.



23. Add any other required applications and their deployment types.

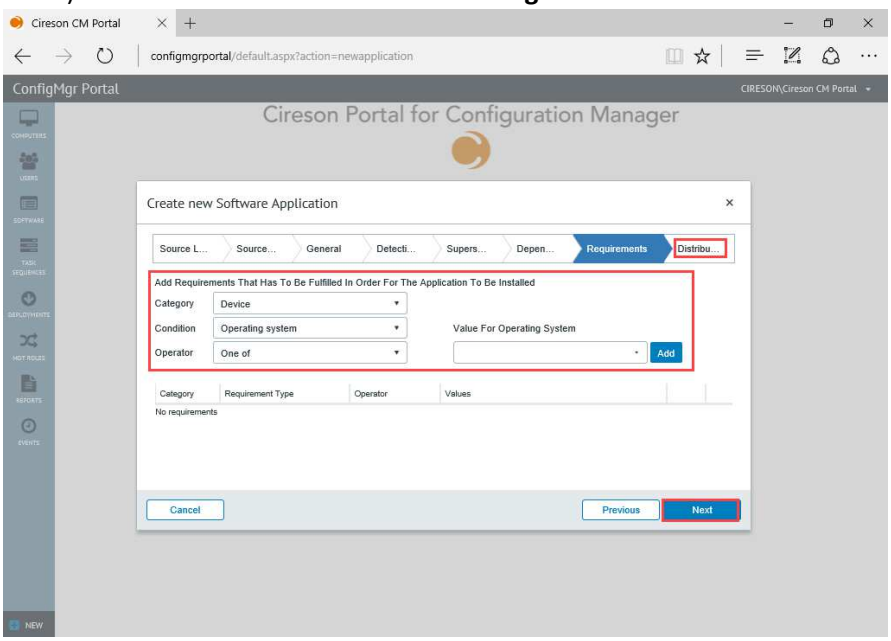
24. Either click the **Requirements** tab or click **Next**



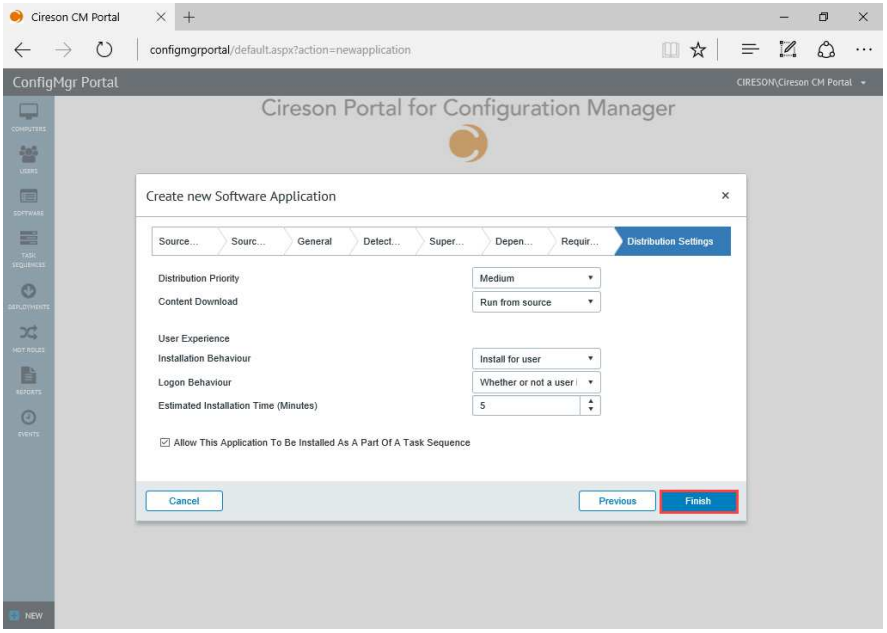
25. On the **Requirements** page, if you do not want to add any requirements that need to be met before the application can be installed, either click the **Distribution Settings** tab or click **Next**

    If you do want to add requirements that need to be met before the application can be installed:

    a) Select the relevant options from the **Category, Condition** and **Operator** dropdowns.
    b) Enter the relevant value in the **Value For <*condition*>** field.
    c) Click **Add**
    d) Either click the **Distribution Settings** tab or **Next**

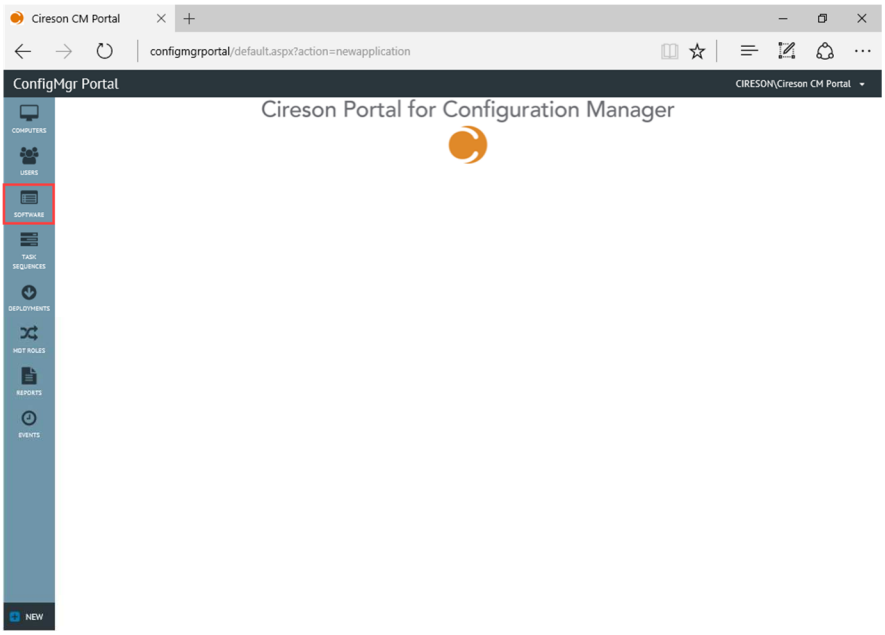


26. Select the relevant options on the **Distribution Settings** page, then click **Finish**

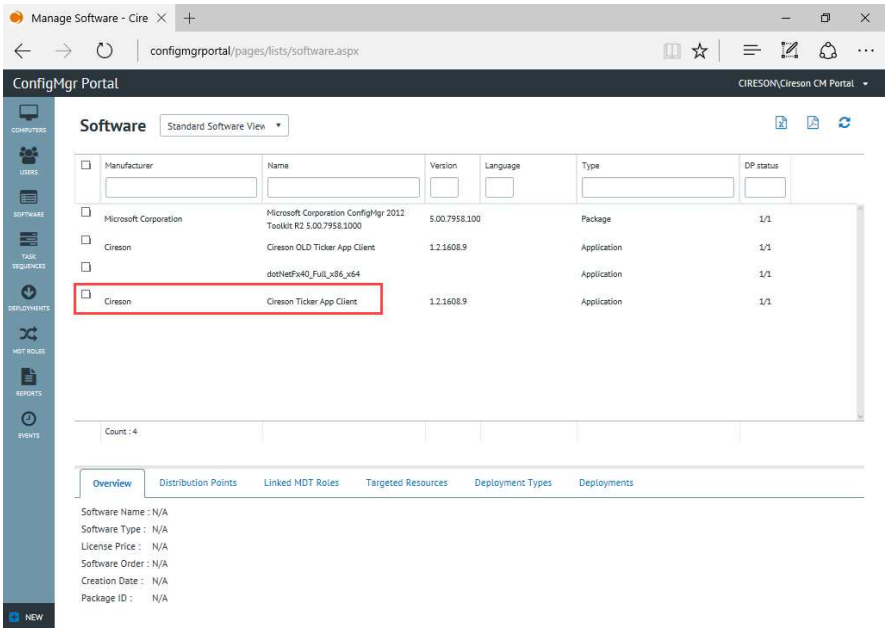


To verify the application has been created successfully:

1. At the bottom of the **Navigation Menu**, select **Software**



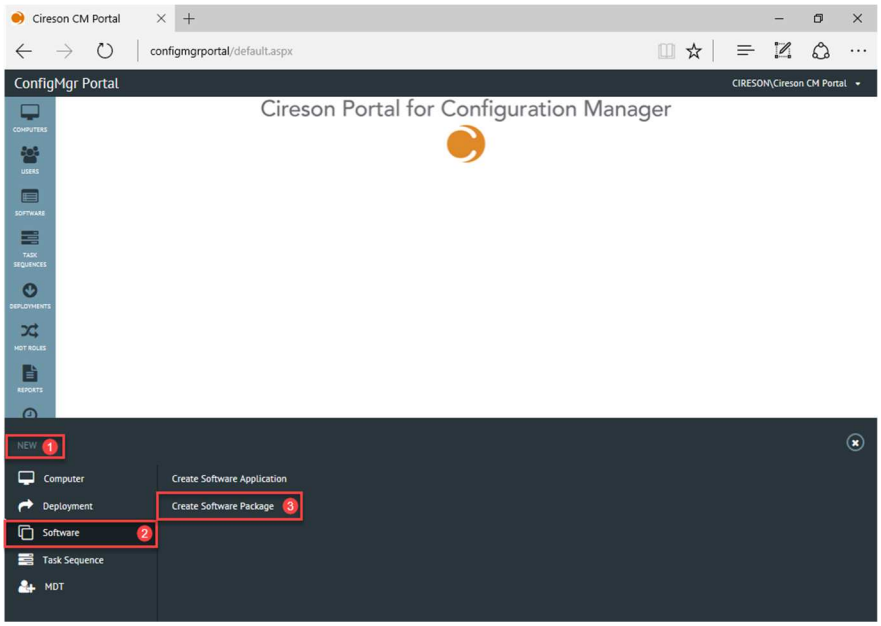
The newly created application is shown in the list of software.



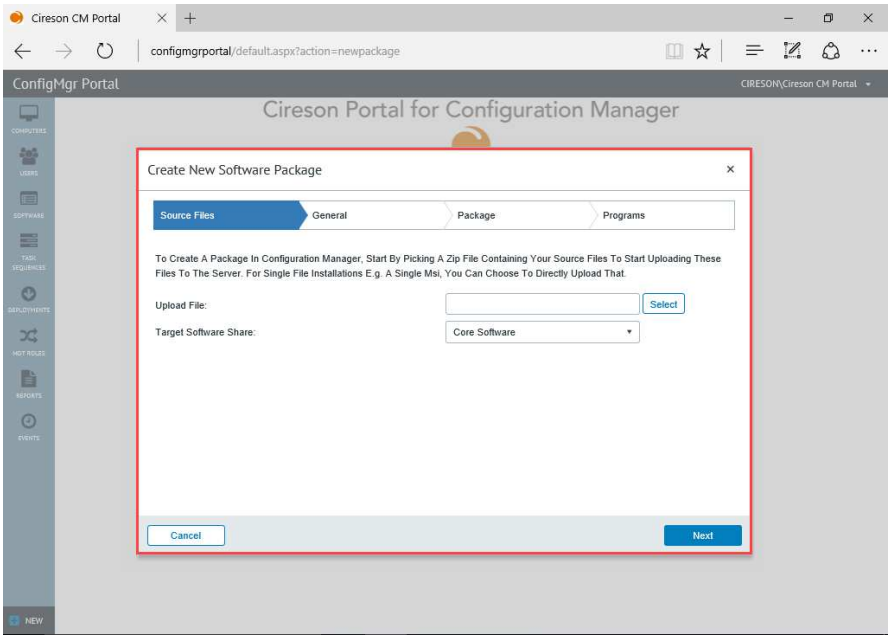
How do I create a new Software Package?

To create a new Software Package:

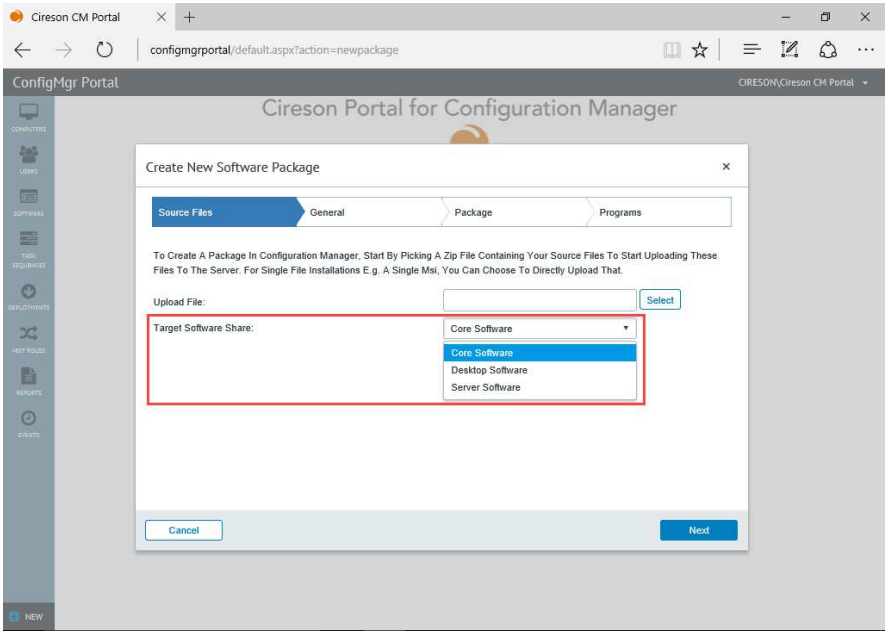
1. At the bottom of the **Navigation Menu**, select **New | Software | Create Software Package**



The **Create New Software Package** wizard appears.

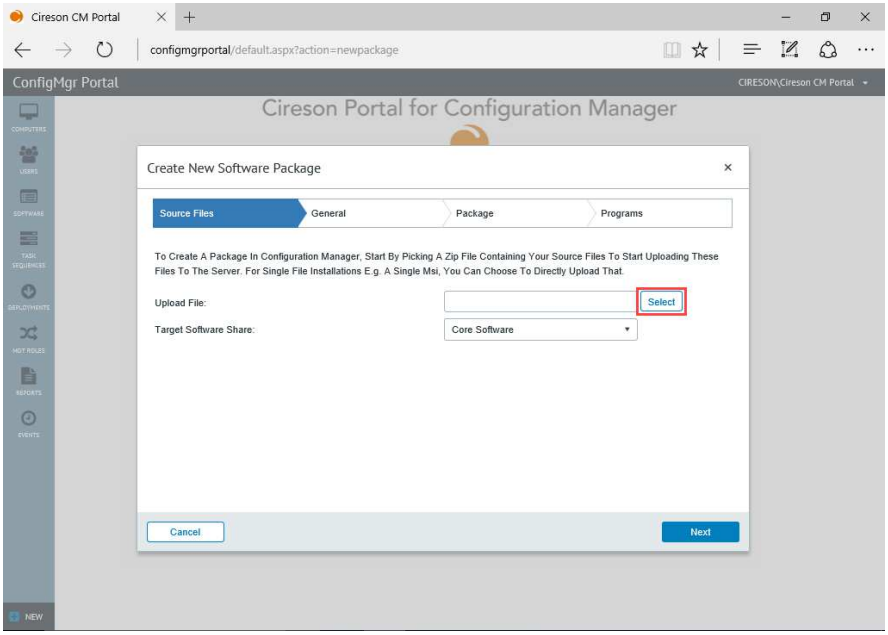


2. On the **Source Files** page of the **Create New Software Package** wizard, select the relevant target software share for the software from the **Target Software Share** dropdown, which defaults to the software source configured as the default.

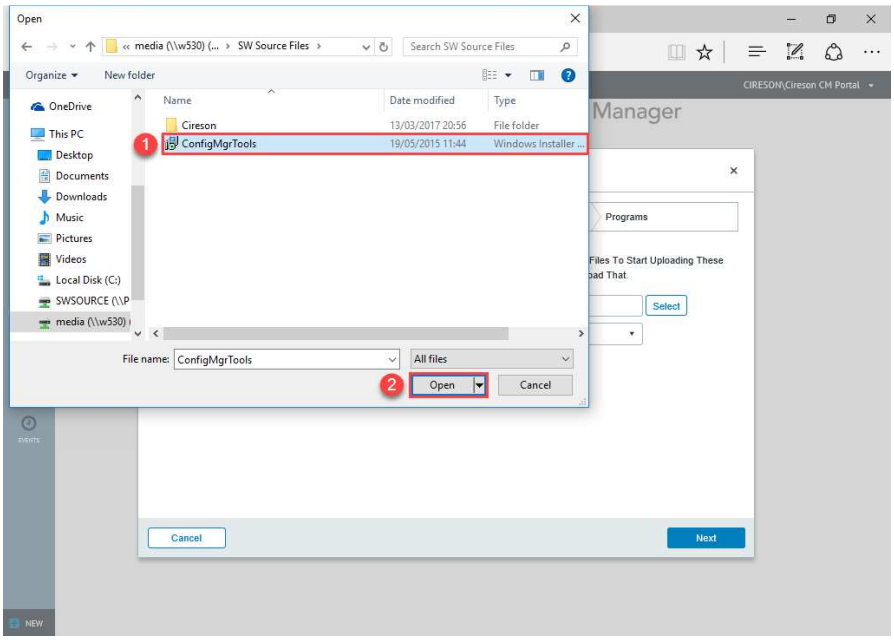


3. Click **Select** to browse to the location containing the source files for your package. The Portal supports ZIP, MSI or EXE files.

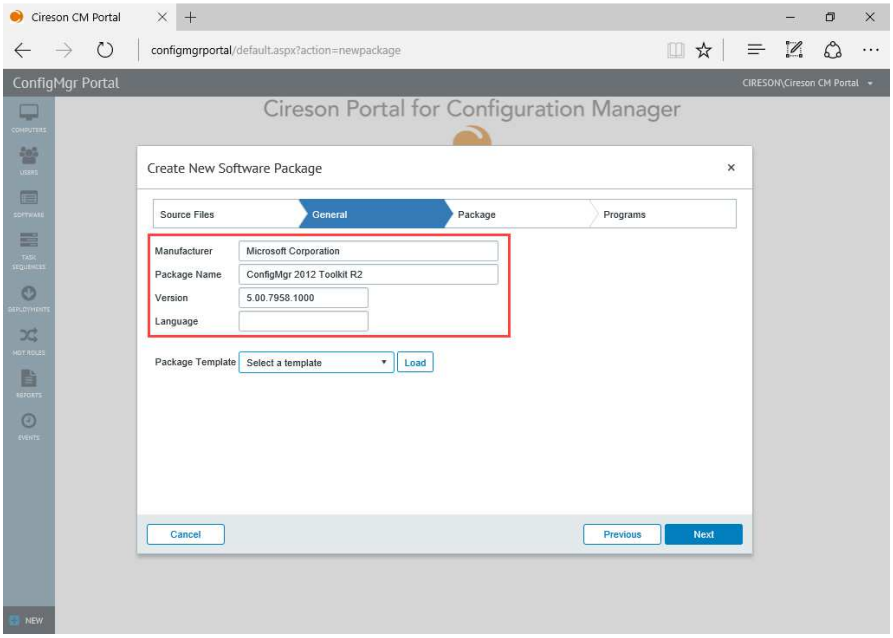
   NOTE: If you use ZIP files, these must contain either the MSI or EXE that can be used to create a package.



4. Browse to the location containing the source files for the software, select the software then click **Open**

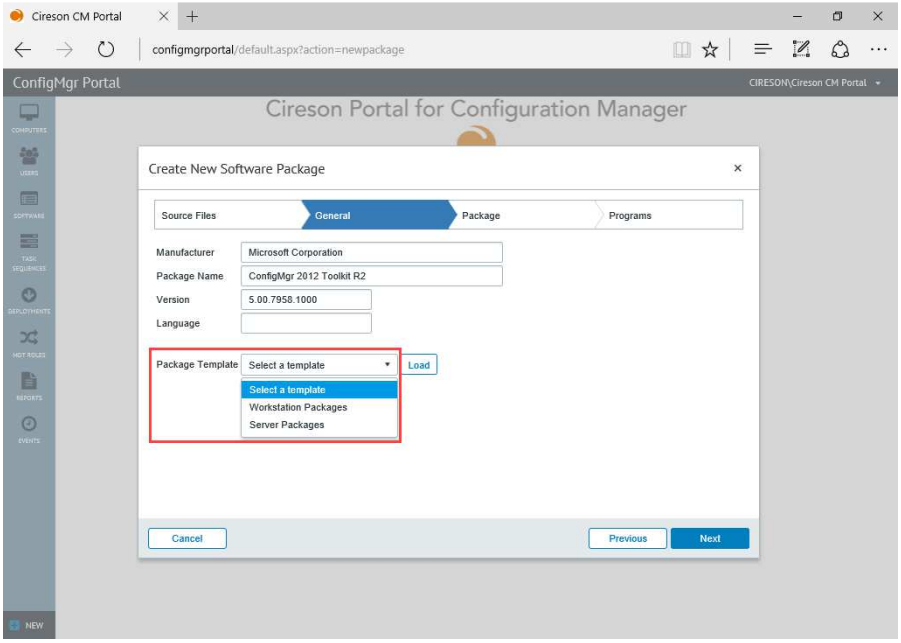


If the software is a **.MSI**, the Portal reads the information from the file and populates the fields on the **General** page automatically.

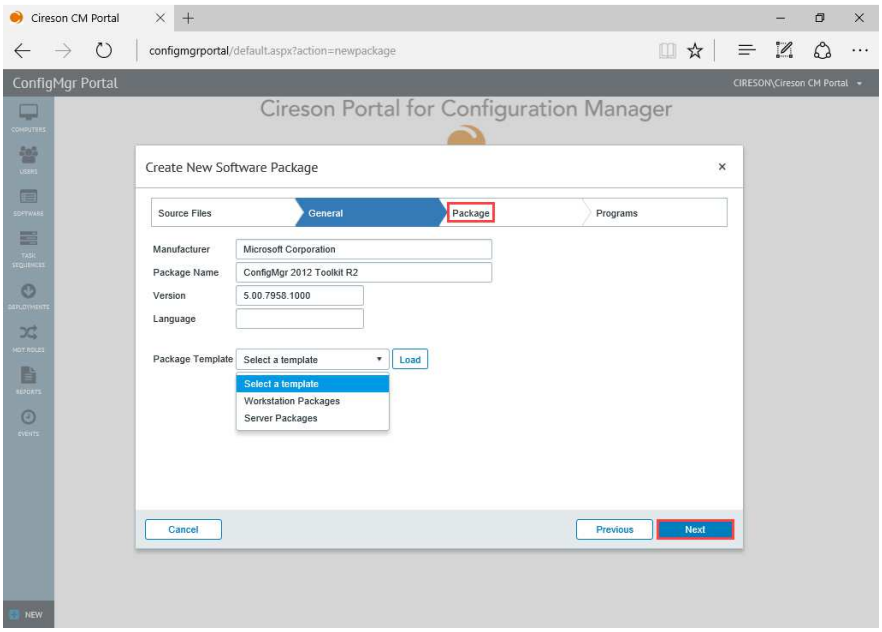


5. If the fields on the **General** page are not populated, complete them with their respective values.

6. Optionally, from the **Package Template** dropdown, select the relevant template you want to use for this package.

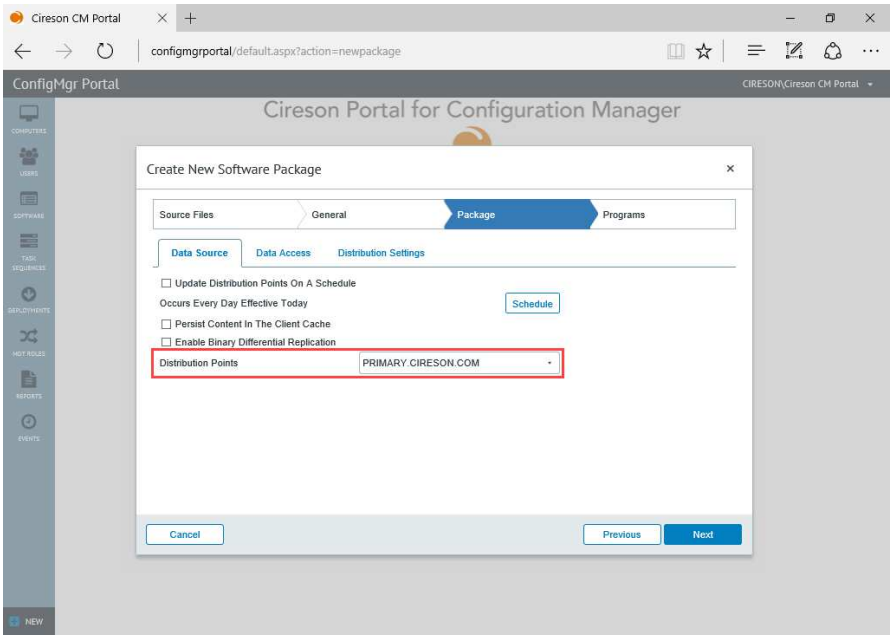


7. Either click the **Package** tab or **Next**

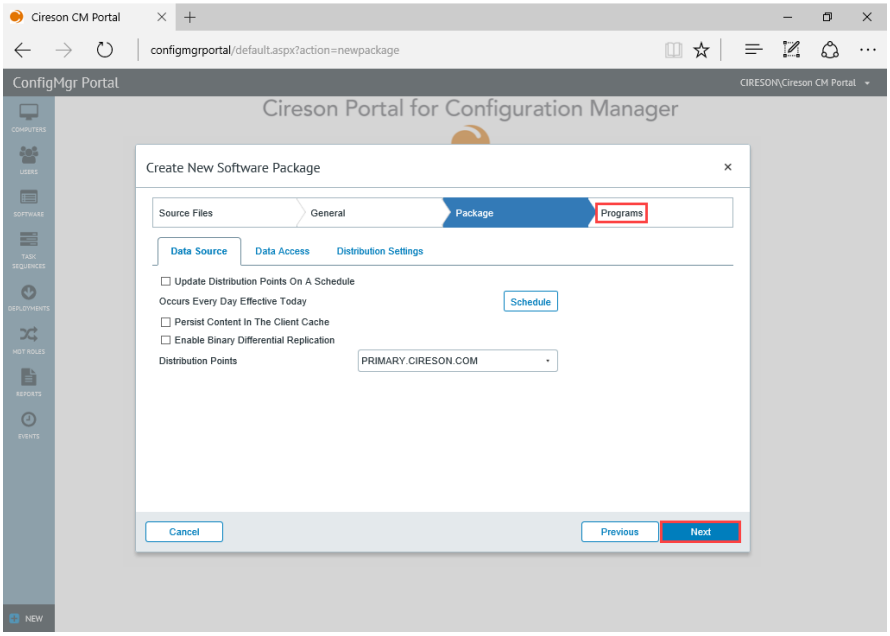


8. On the **Package** page, complete the various settings under the various tabs as required.

   NOTE: You need to select at least one distribution point or distribution point group from the **Distribution Points** dropdown to be able to successfully create a package.

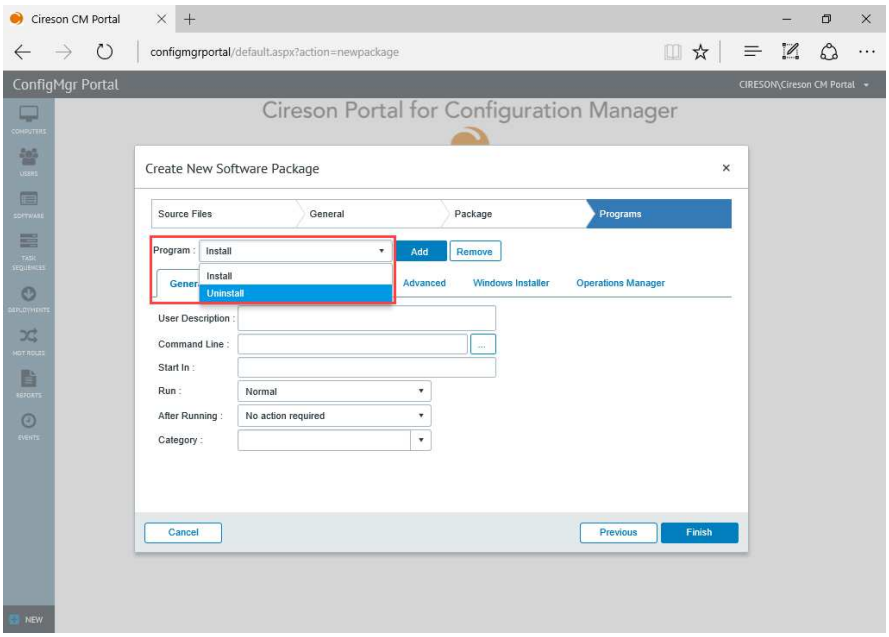


9. Either click the **Programs** tab or **Next**

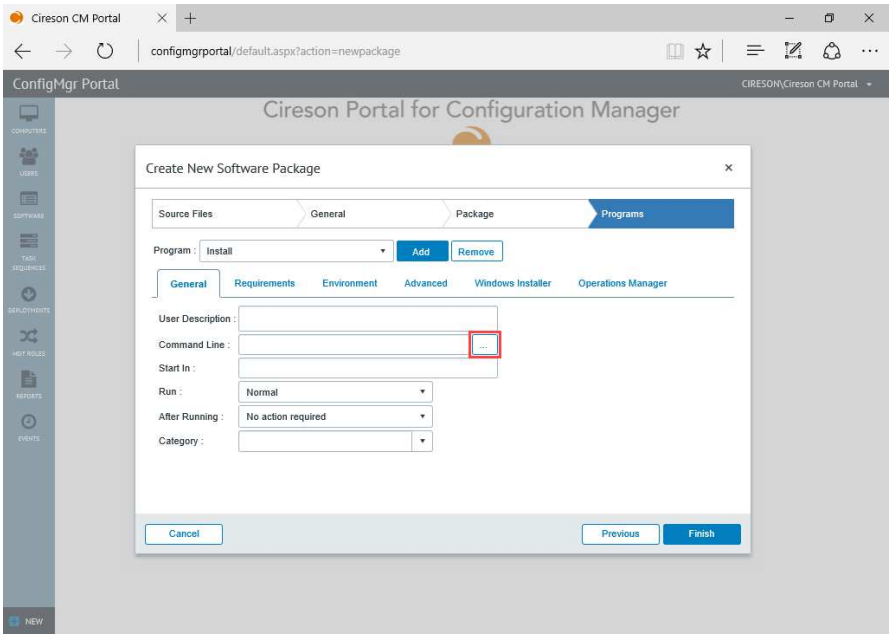


10. From the **Program** dropdown on the **Programs** page, select an existing program or click **Add** to add a new program.

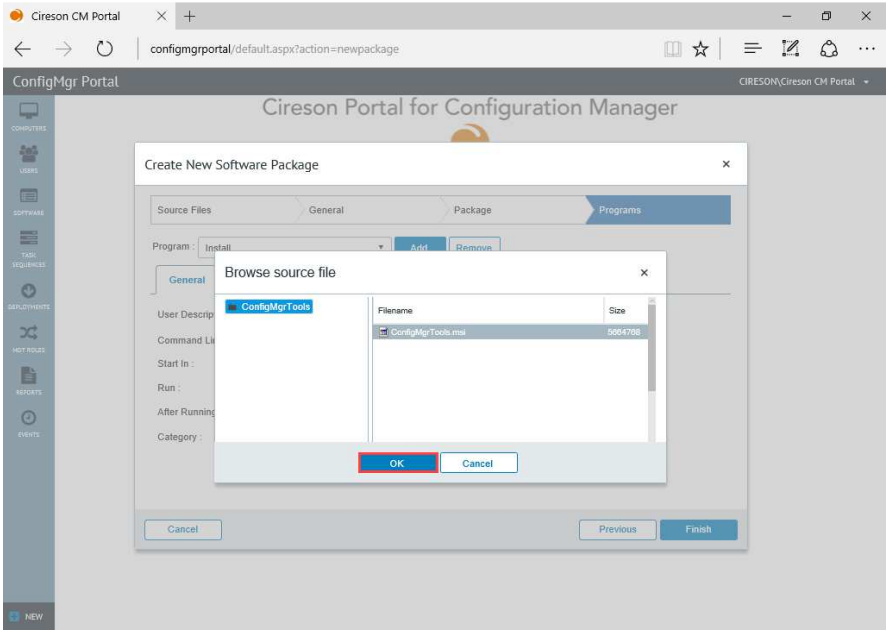
    NOTE: If you click **Add** to add a new program, the **Add New Program** dialog box is displayed prompting for a **Program Name**. Enter the name, then click **OK** to return to the **Create New Software Package** wizard.



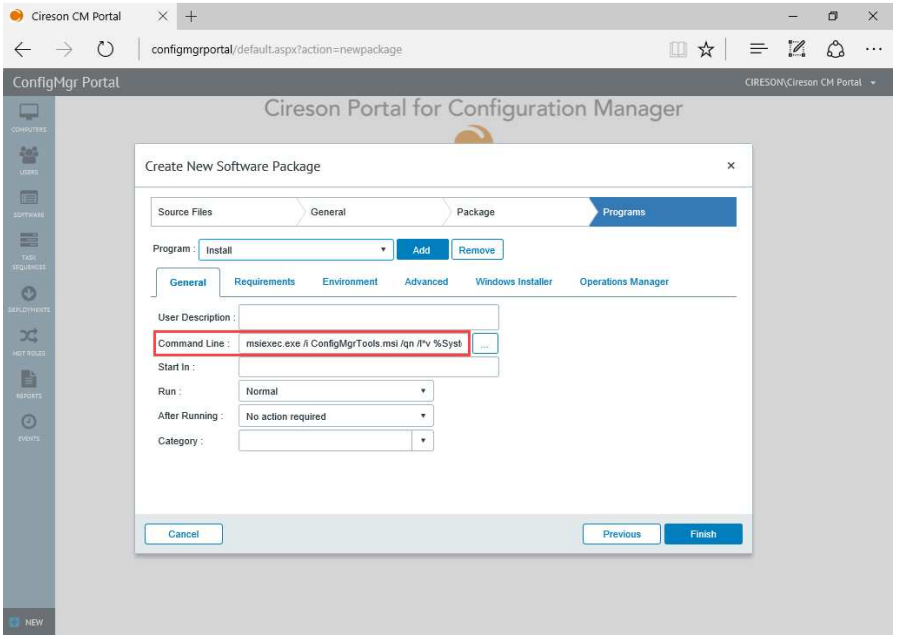
11. In the **Command Line** field, either enter the relevant command line or click the browse button ( ).



12. Browse to the relevant location containing the file to be used for the relevant program then click **OK**



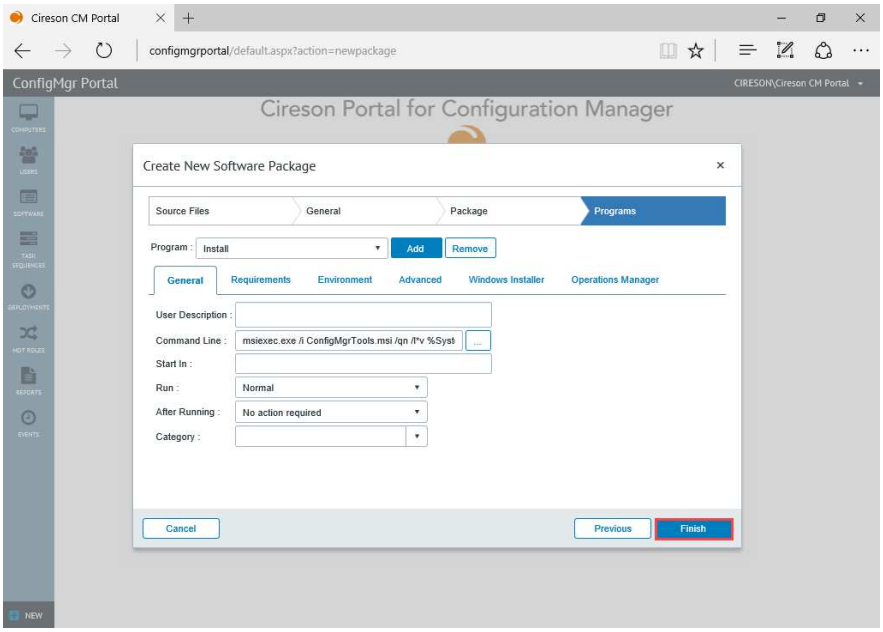
The **Command Line** field is automatically completed for you if this is a **.MSI** file.



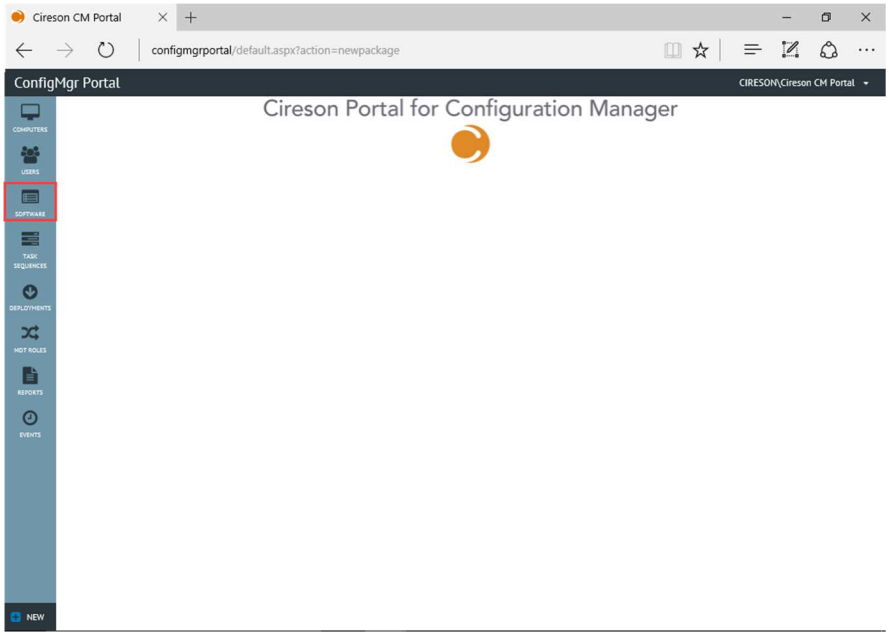
13. Verify that the **Command Line** is correct, amending it as necessary.

    NOTE: For an MSI file, you have to also create the corresponding Uninstall program. To do so simply select **Uninstall** from the **Program** dropdown list and repeat steps 11 – 13.

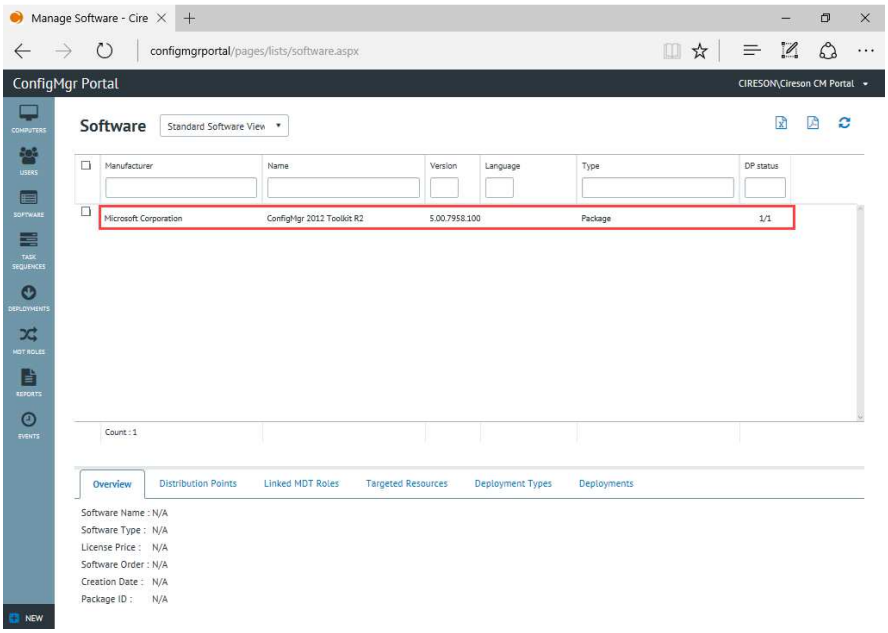
14. Complete the other settings under the various tabs on the **Programs** page as appropriate, then click **Finish**



15. To verify the new Package has been created successfully, from the **Navigation Menu** select **Software**



The newly created software package will be shown.



Task Sequences

This section contains details of the tasks available to you when you select the **Task Sequence** option from the **New** menu on the **Navigation Menu**.

NOTE: See the Task Sequence Management-Related Tasks section for details of how to manage existing task sequences.

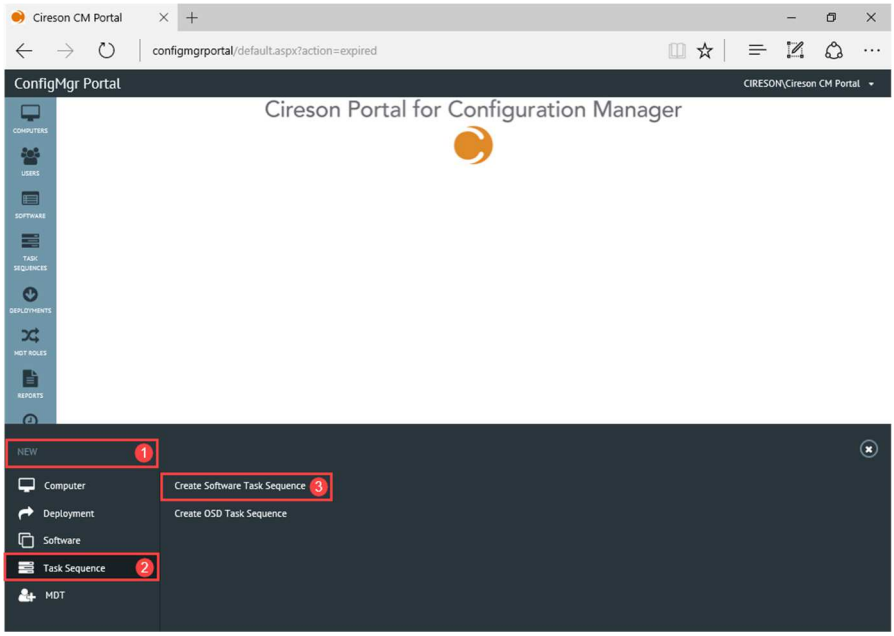
- How do I create a new Software Task Sequence?
- How do I create a new OSD Task Sequence?

How do I create a new Software Task Sequence?

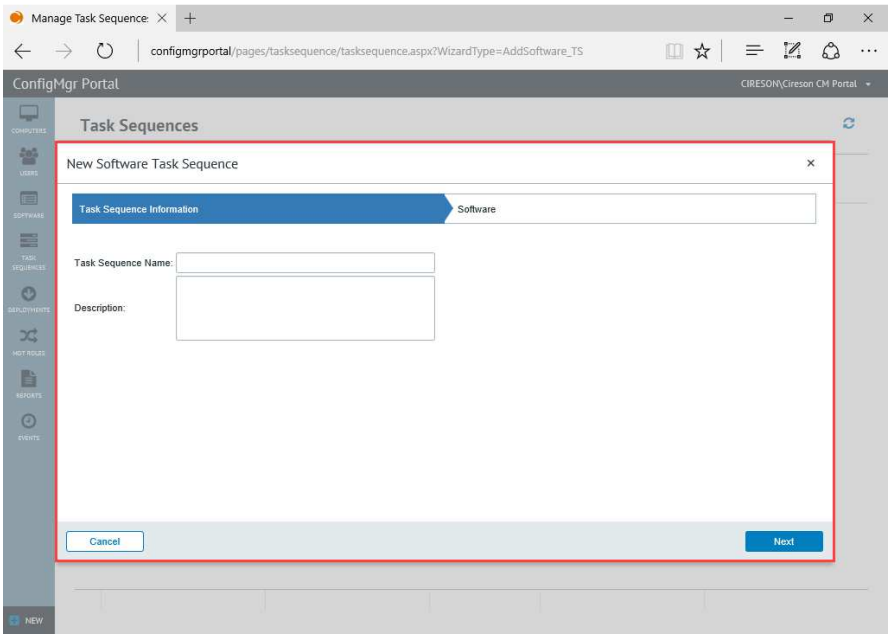
A software task sequence can be used to install a series of software applications or packages in a designated order.

To create a new Software Task Sequence:

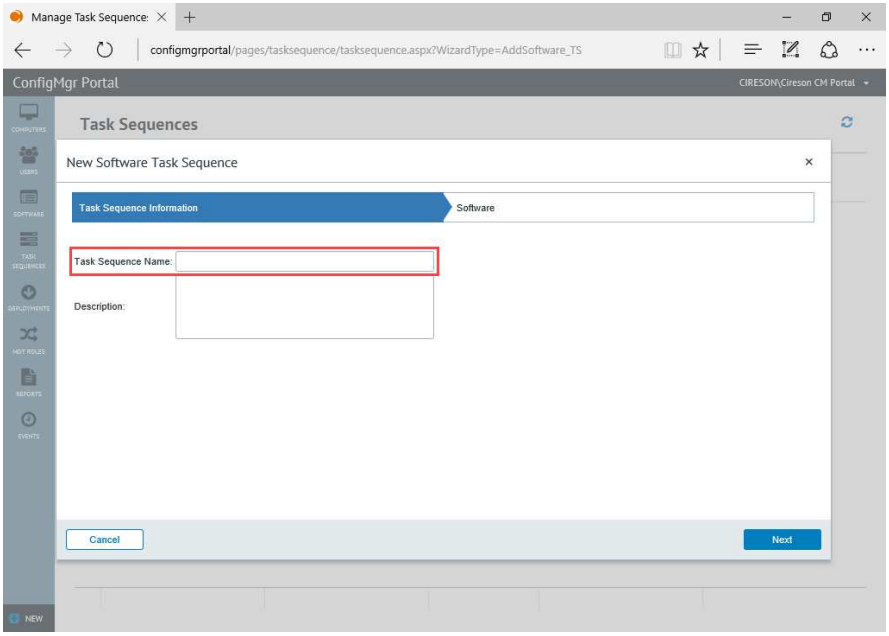
1. At the bottom of the **Navigation Menu**, select **New | Task Sequence | Create Software Task Sequence**



The **New Software Task Sequence** wizard is started.

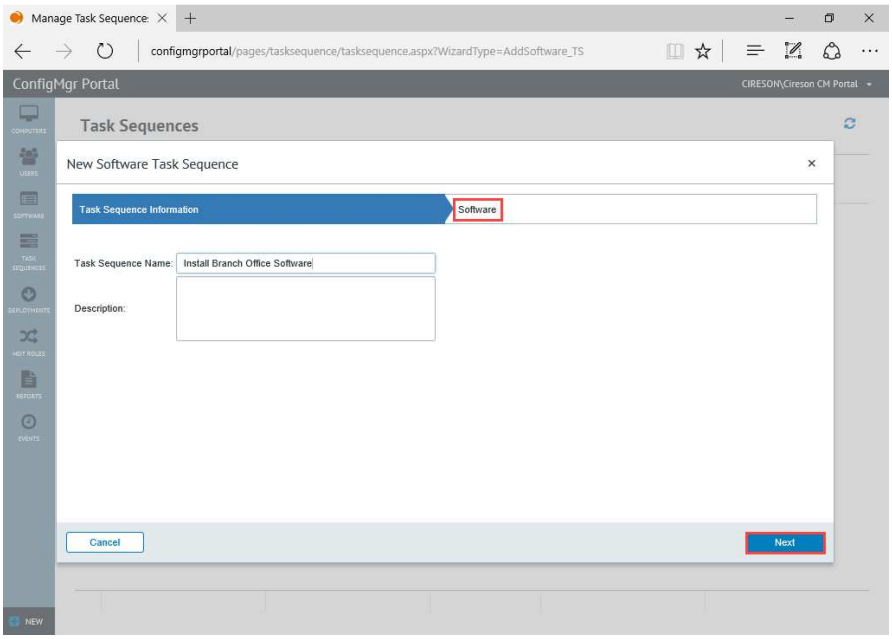


2. On the **Task Sequence Information** page, enter a name for the task sequence in the **Task Sequence Name** field.

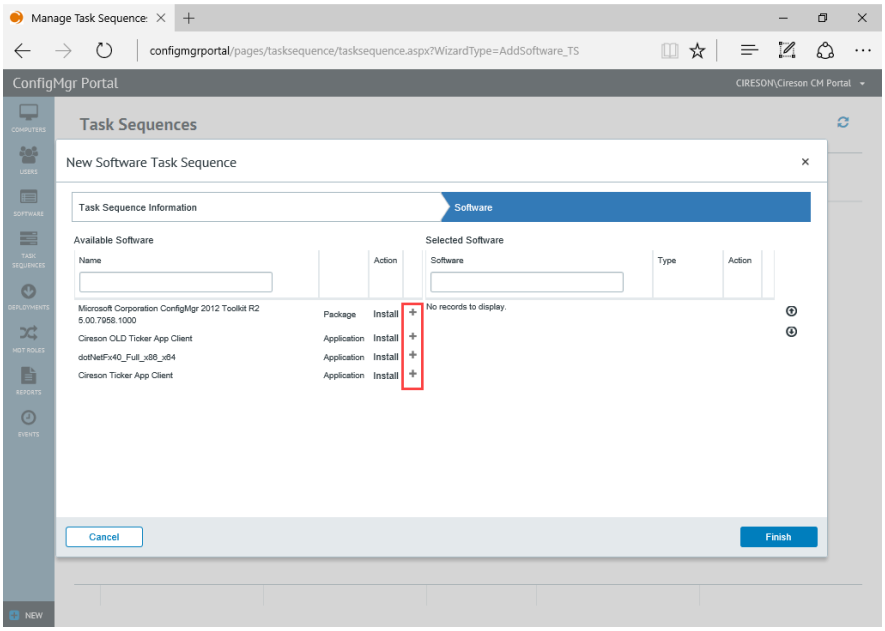


3. In the **Description** field, enter an optional description.

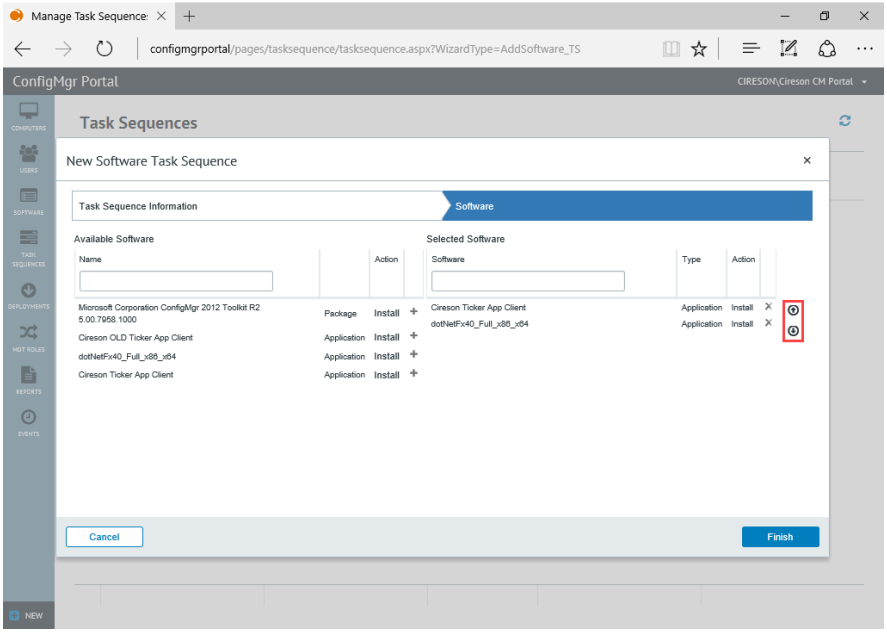
4. Either click the **Software** tab or click **Next**



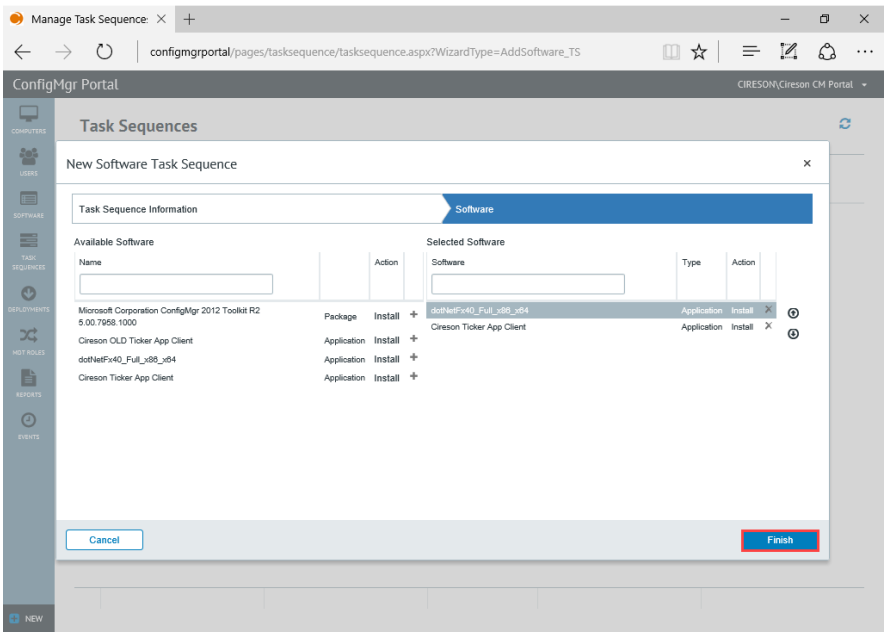
5. On the **Software** page, click **+** beside the relevant software to move it from the list of **Available Software** to the **Selected Software** list.



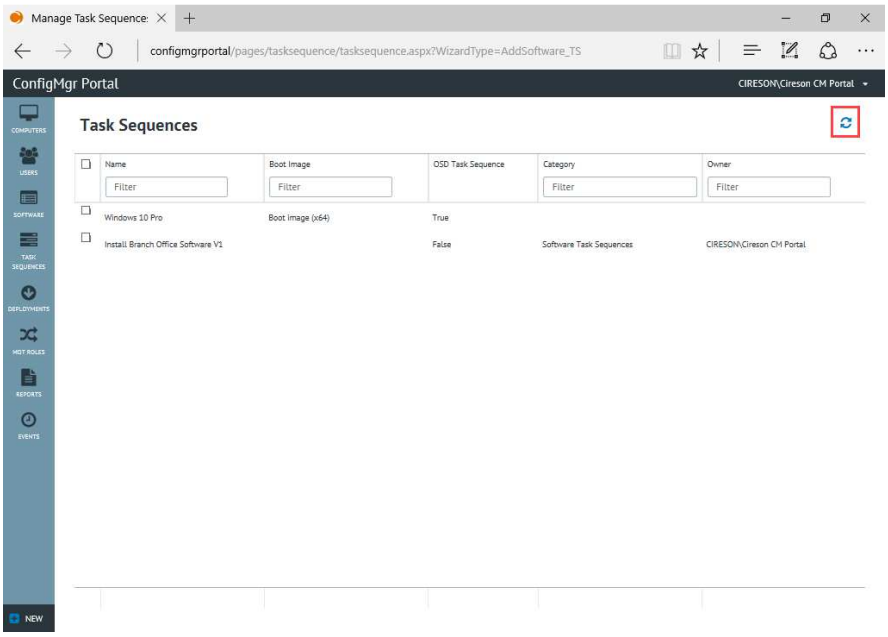
6. If you need to reorder the **Selected Software** list, select the relevant software then use the up and down arrows as required.



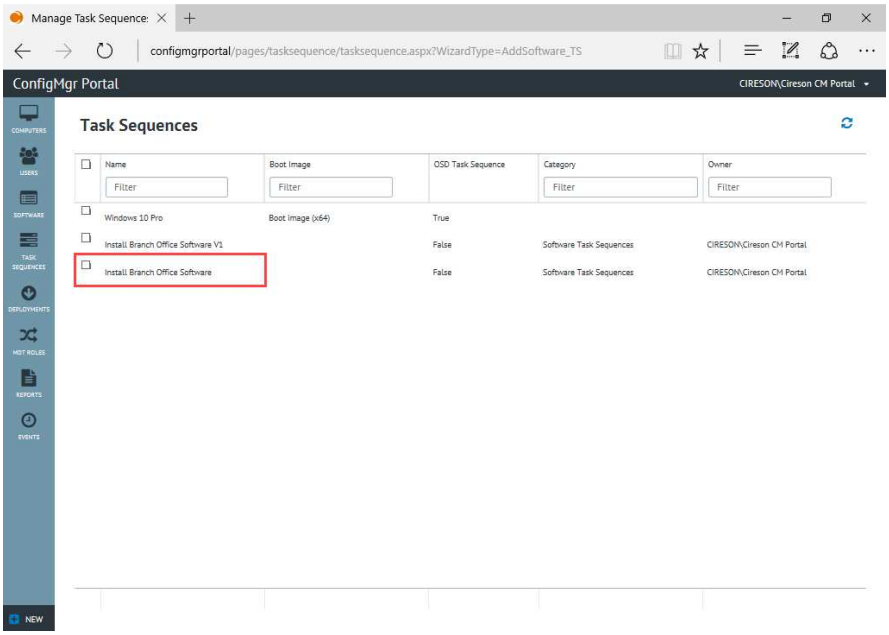
7. Click **Finish**



8. Click the refresh button on the **Task Sequences** page to refresh the list of task sequences.



The newly created Software Task Sequence will appear.

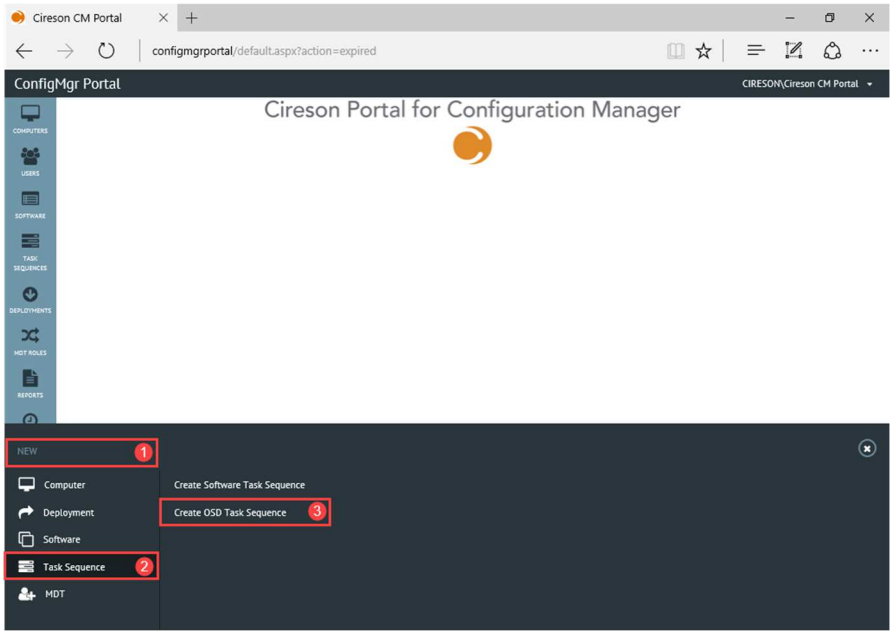


How do I create a new OSD Task Sequence?

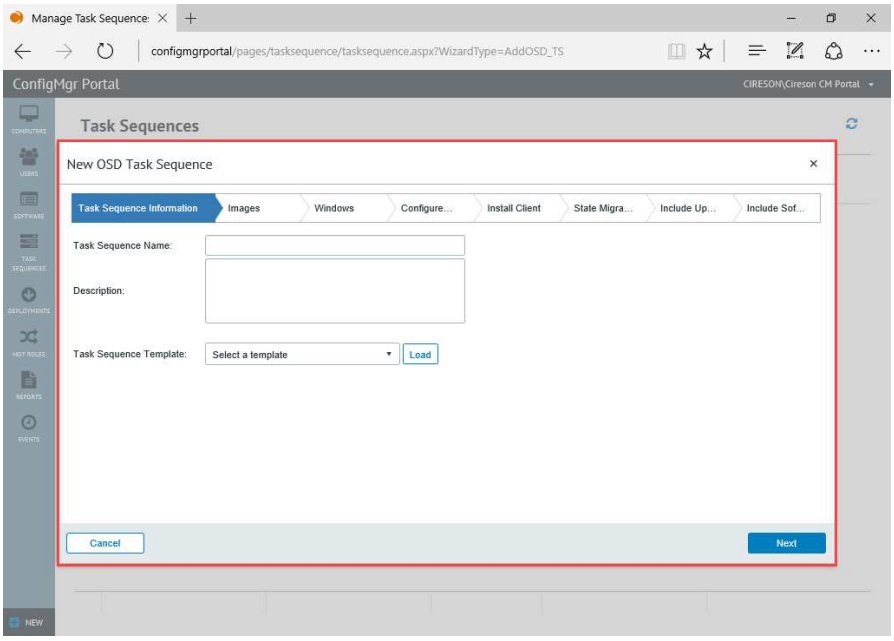
OSD Task Sequences, as their name suggests, are used to deploy operating systems.

To create a new OSD Task Sequence:

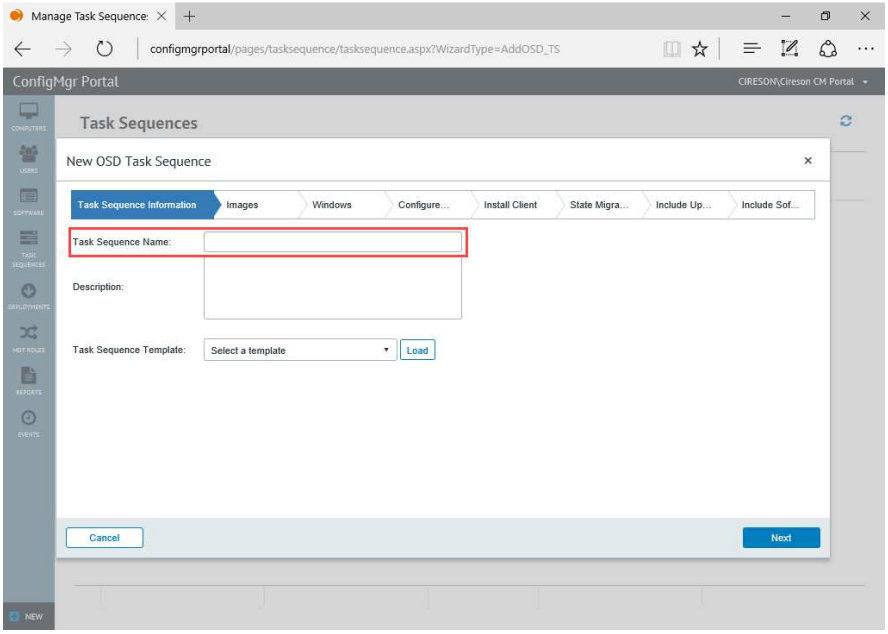
1. At the bottom of the **Navigation Menu**, select **New | Task Sequence | Create OSD Task Sequence**



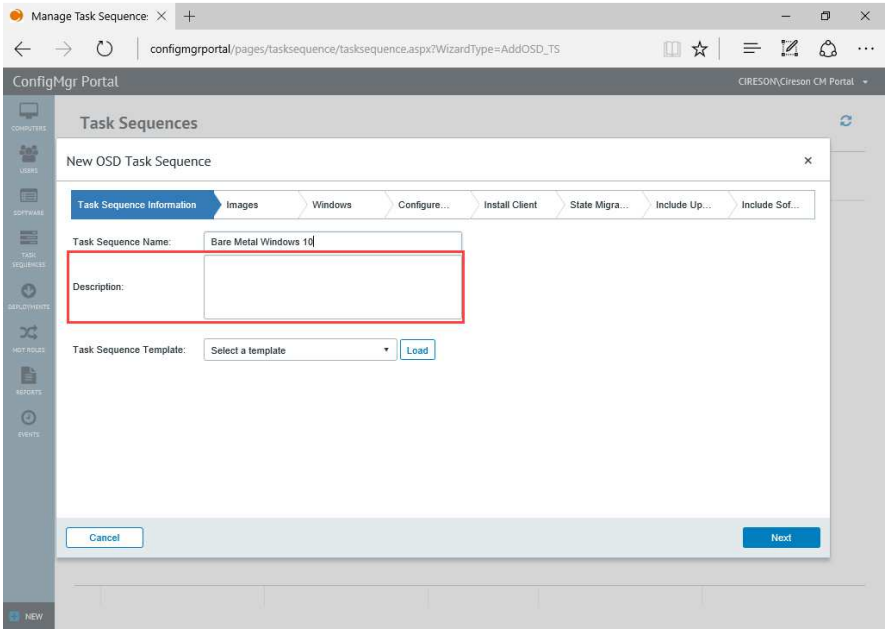
The **New OSD Task Sequence** wizard is started.



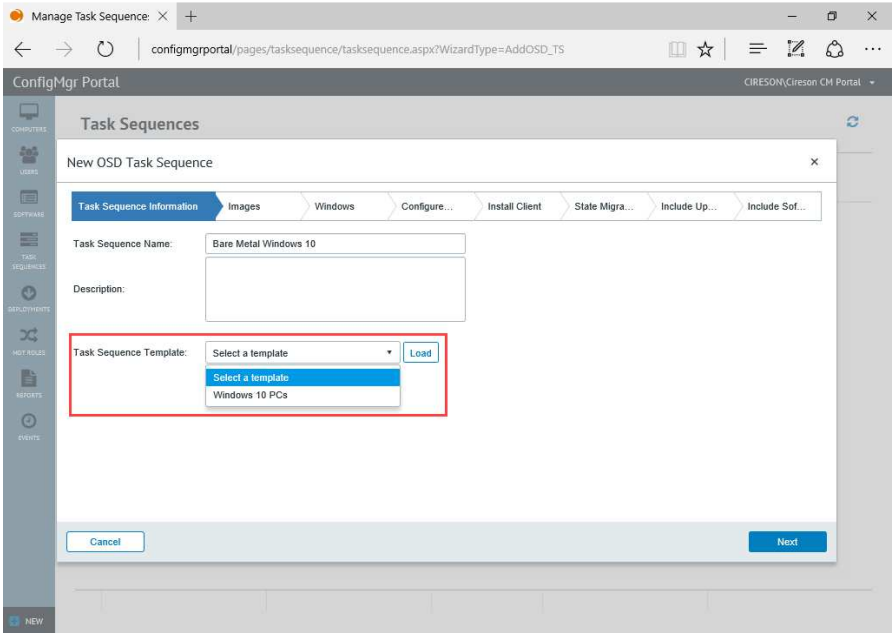
2. On the **Task Sequence Information** page, enter a name for the task sequence in the **Task Sequence Name** field.



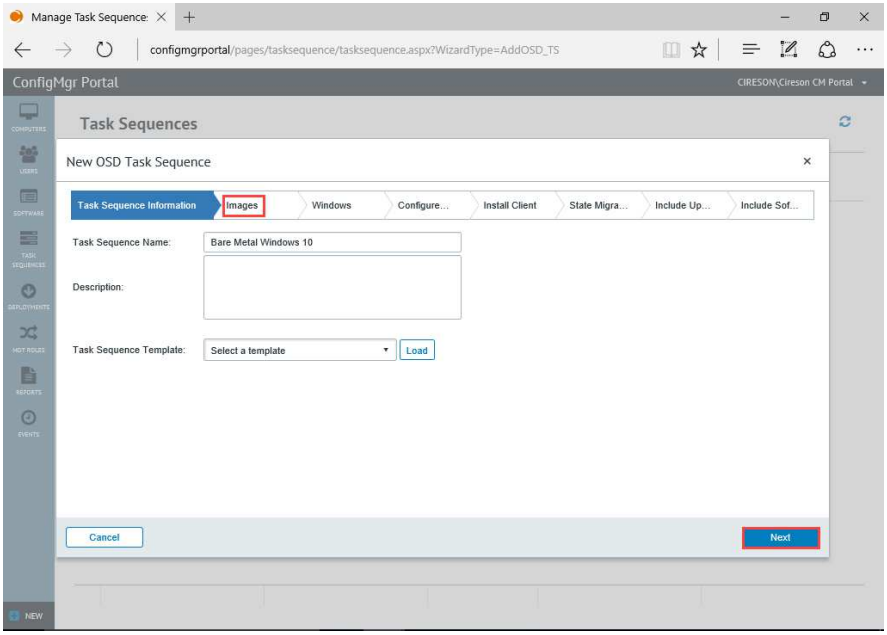
3. In the **Description** field, enter an optional description.



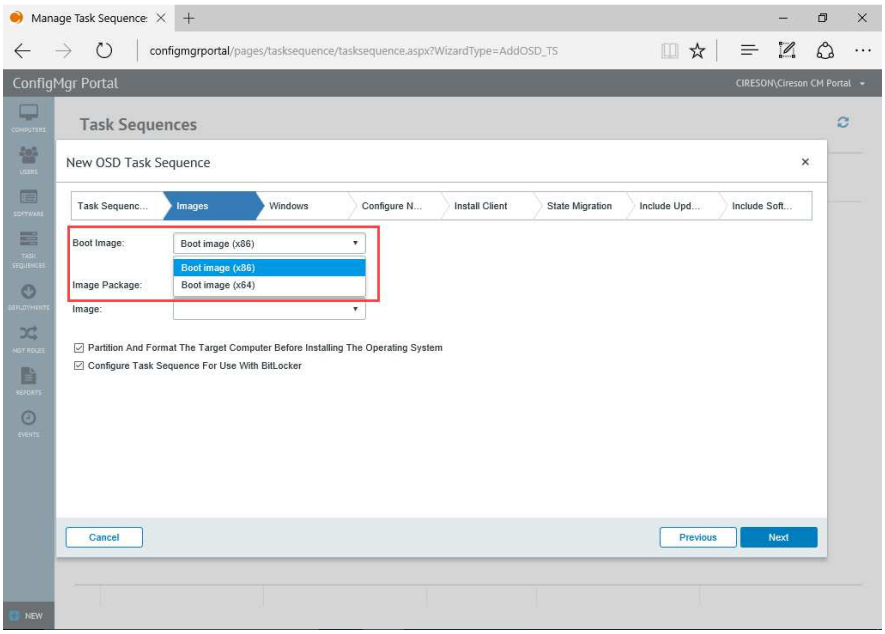
4. If you already have a Task Sequence Template created that you want to apply to this task sequence, select it from the **Task Sequence Template** dropdown, then click **Load**



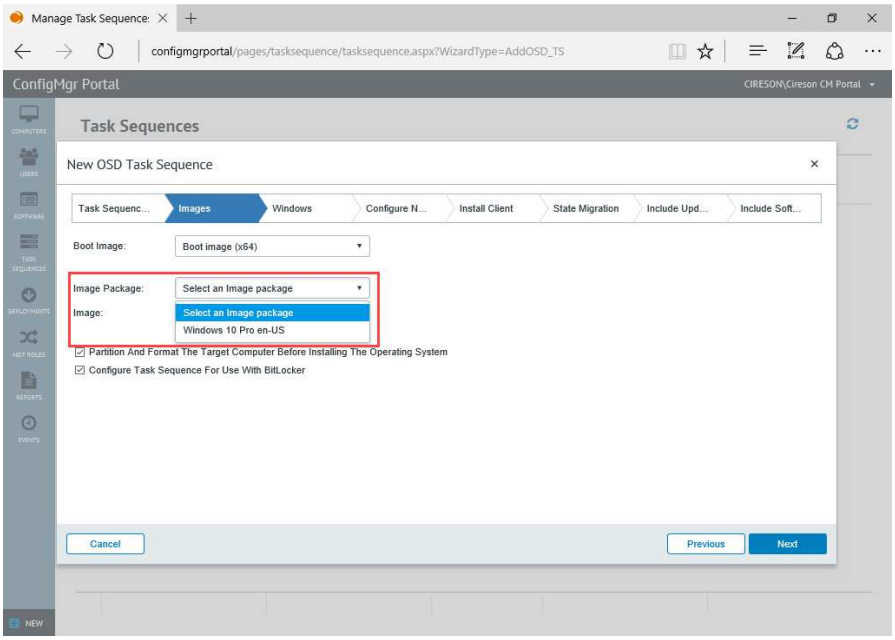
5. Either click the **Images** tab or click **Next**



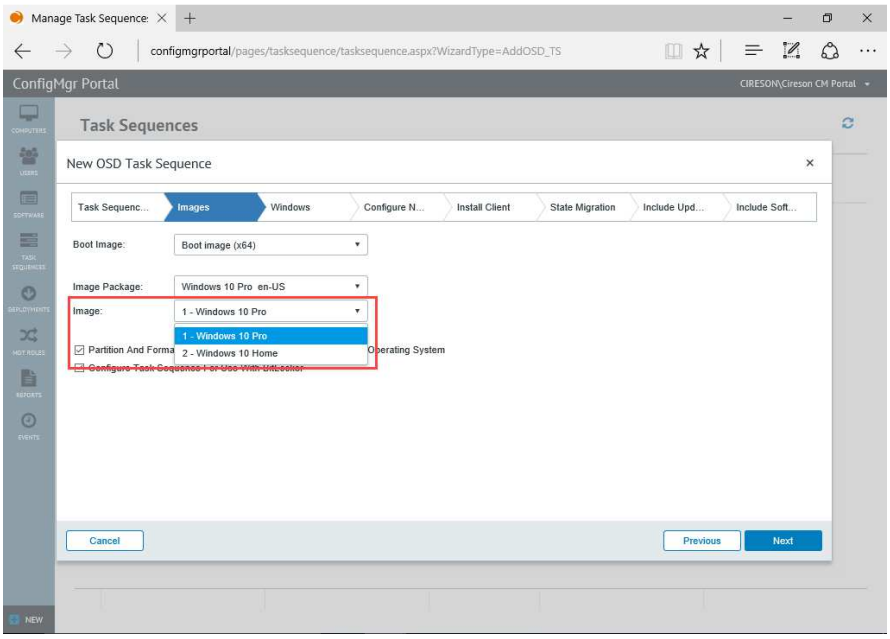
6. On the **Images** page, select the relevant boot image from the **Boot Image** dropdown.



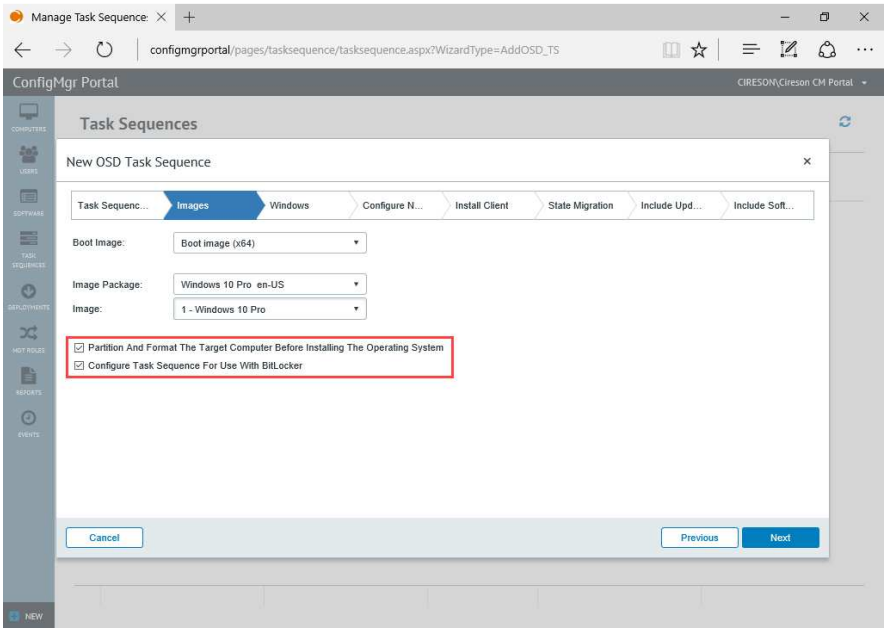
7. Select the relevant image package from the **Image Package** dropdown.



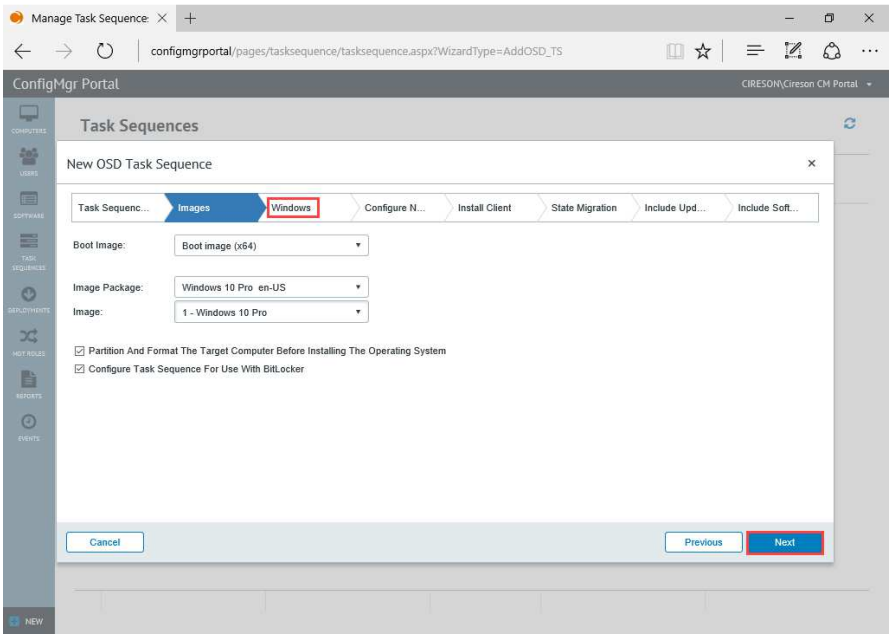
8. Select the relevant image from the **Image** dropdown.



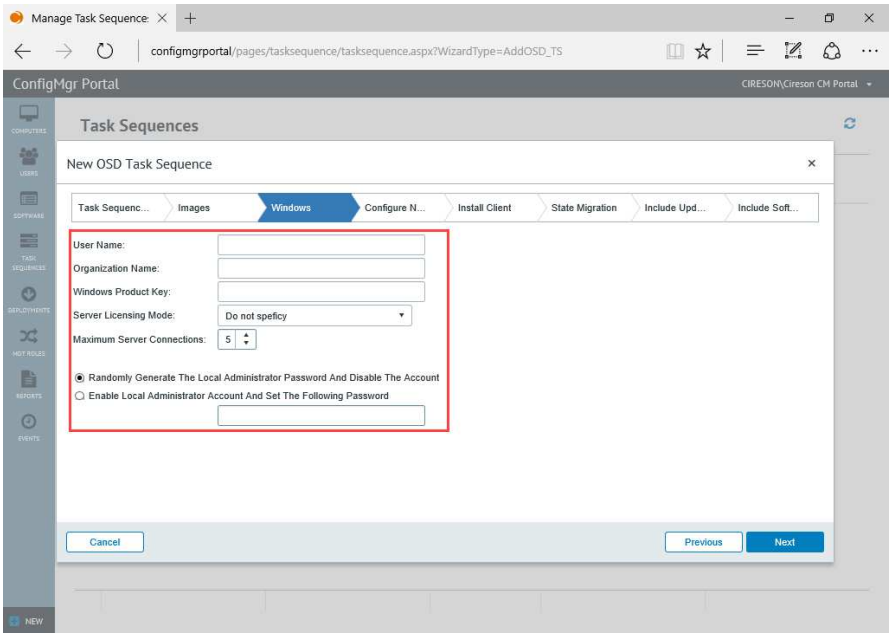
9. Configure the **Partition And Format The Target Computer Before Installing The Operating System** and **Configure Task Sequence For Use With BitLocker** checkboxes as appropriate.



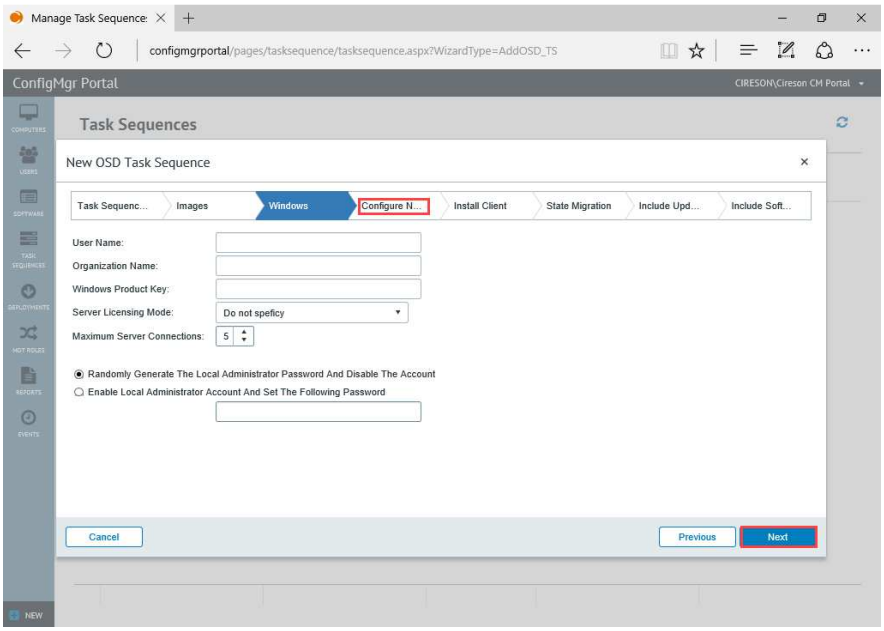
10. Either click the **Windows** tab or click **Next**



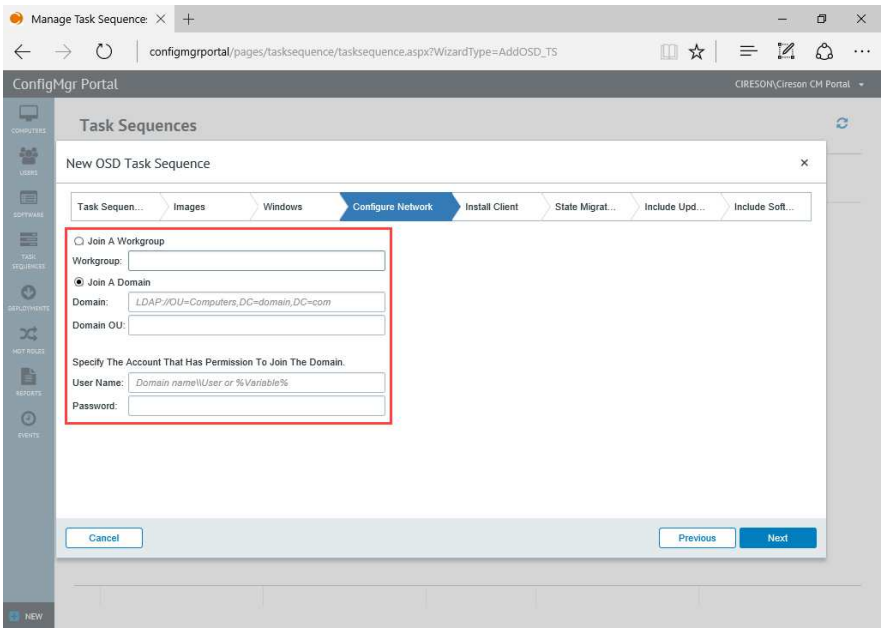
11. Configure the settings on the **Windows** page accordingly.



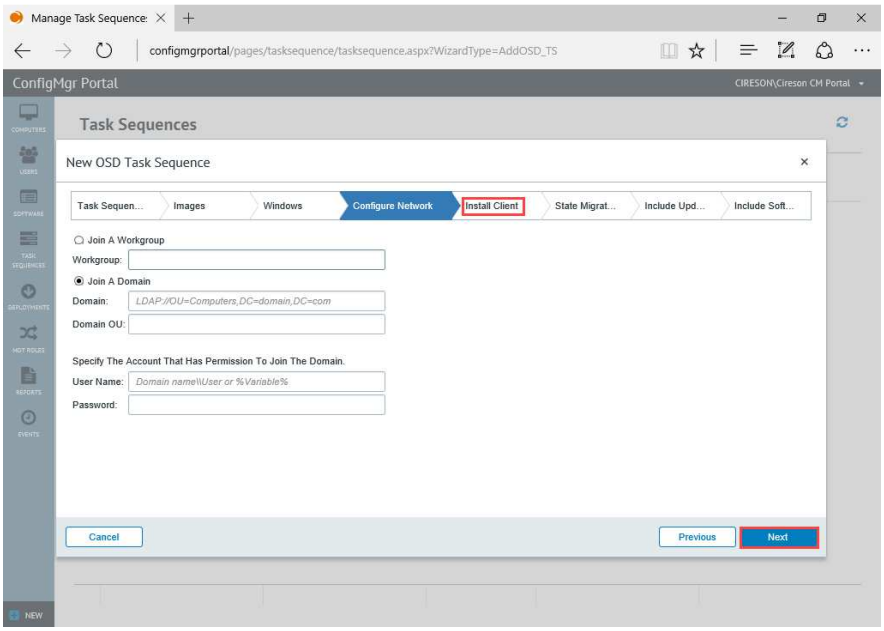
12. Either click the **Configure Network** tab or click **Next**



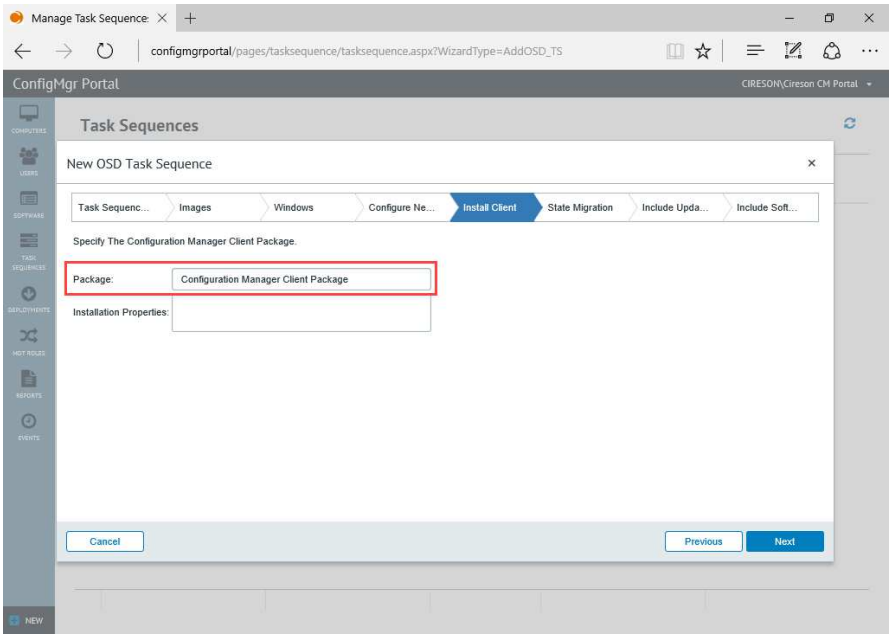
13. Configure the settings on the **Configure Network** page accordingly.



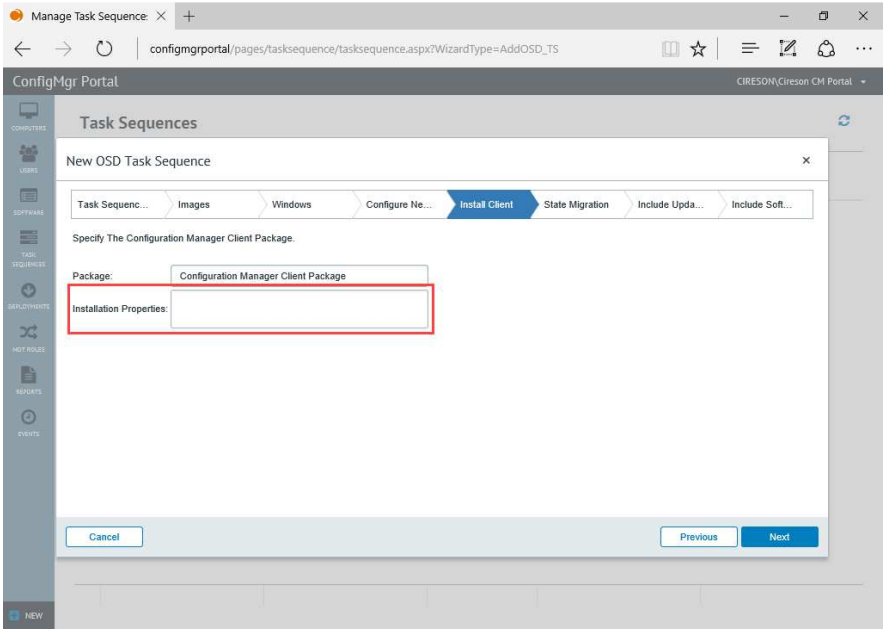
14. Either click the **Install Client** tab or click **Next**



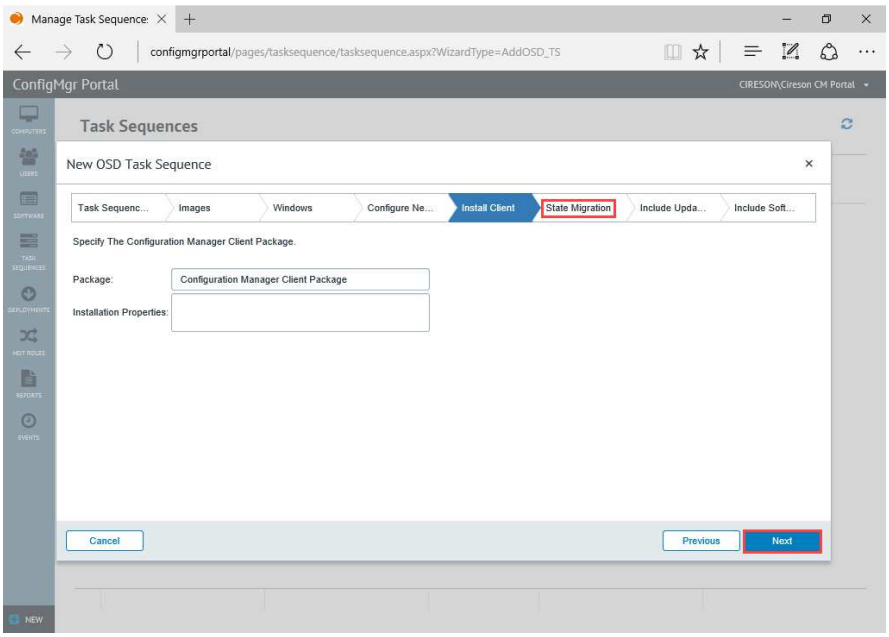
15. On the **Install Client** page, in the **Package** field enter the name of the package that will be used to install the ConfigMgr client once the operating system has been deployed.



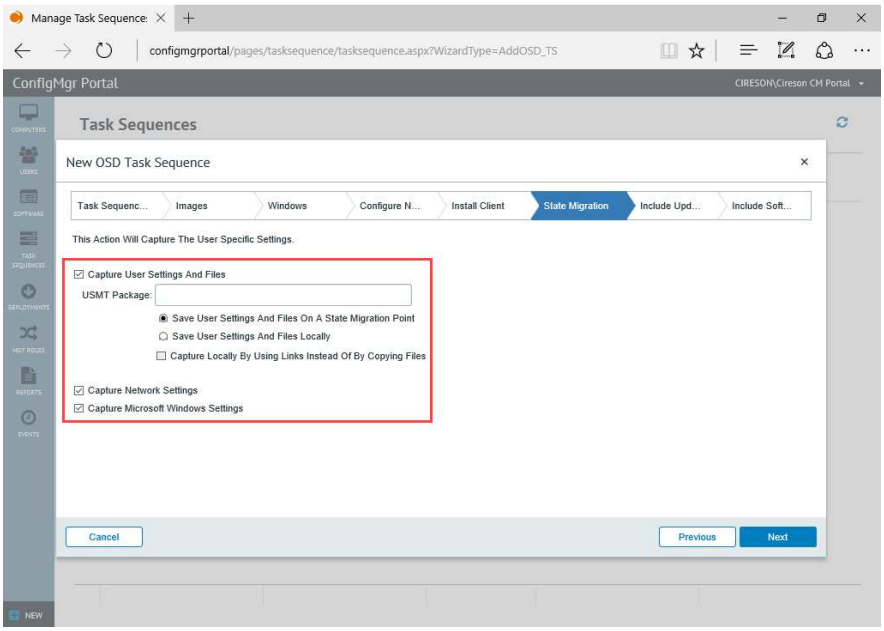
16. In the **Installation Properties** field enter any installation properties the ConfigMgr client installation package should use.



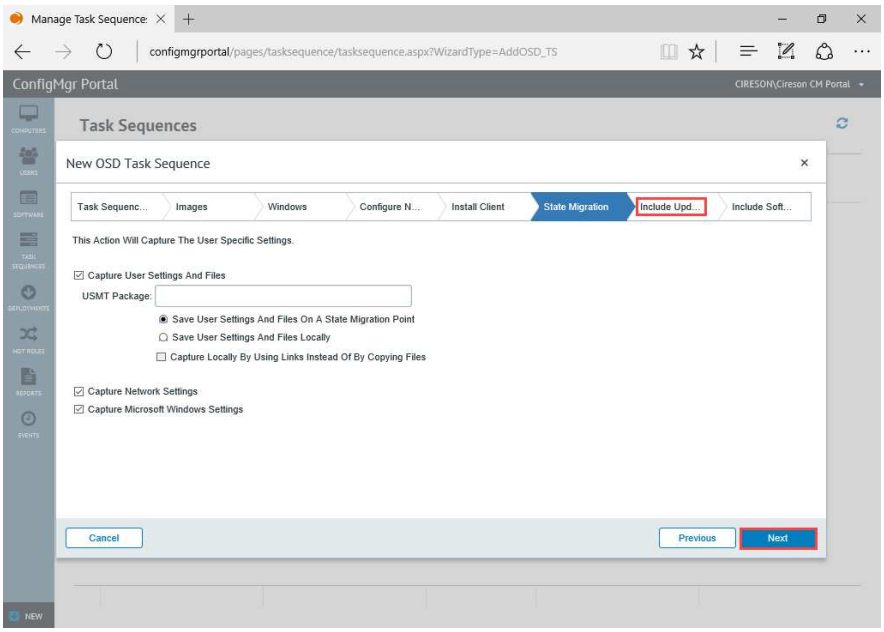
17. Either click the **State Migration** tab or click **Next**



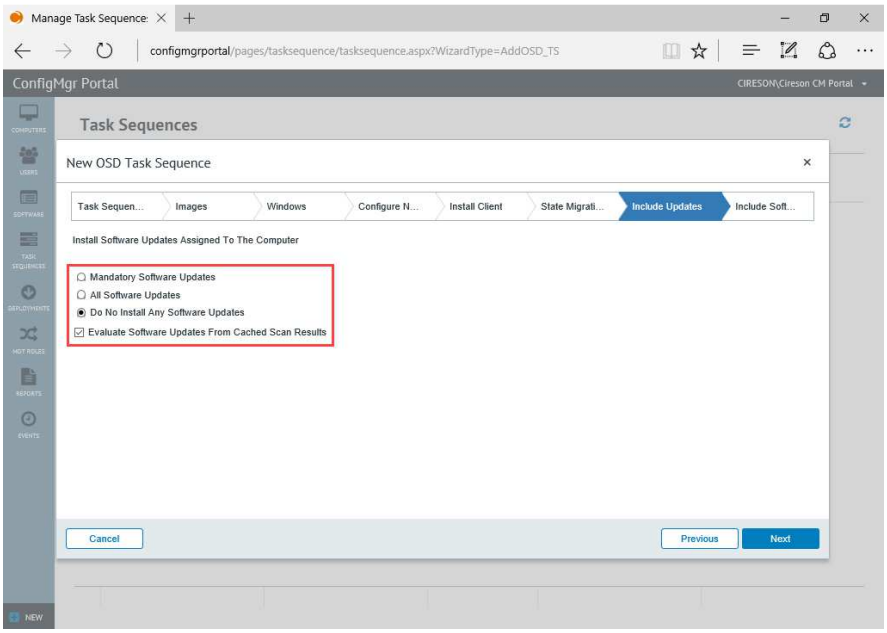
18. Configure the settings on the **State Migration** page accordingly.



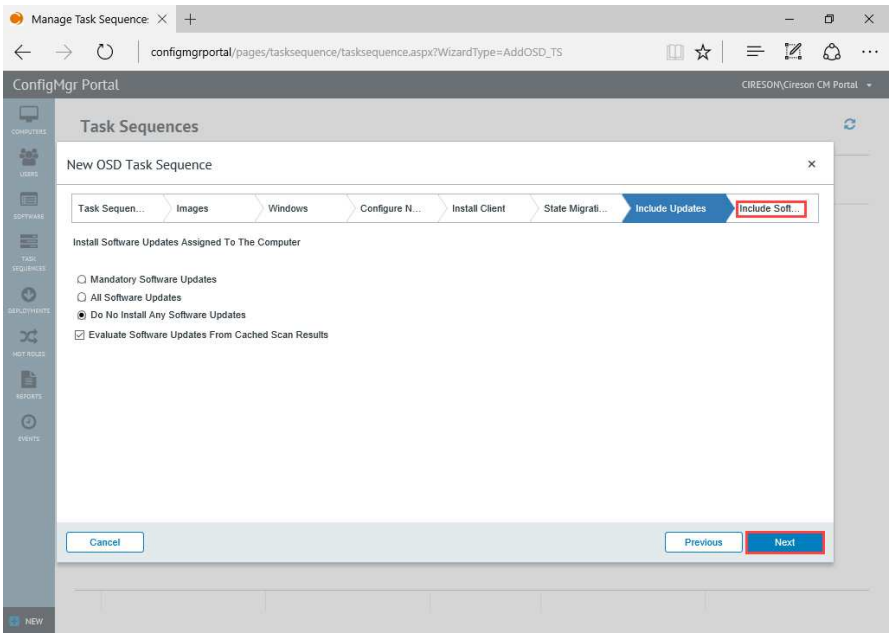
19. Either click the **Include Updates** tab or click **Next**



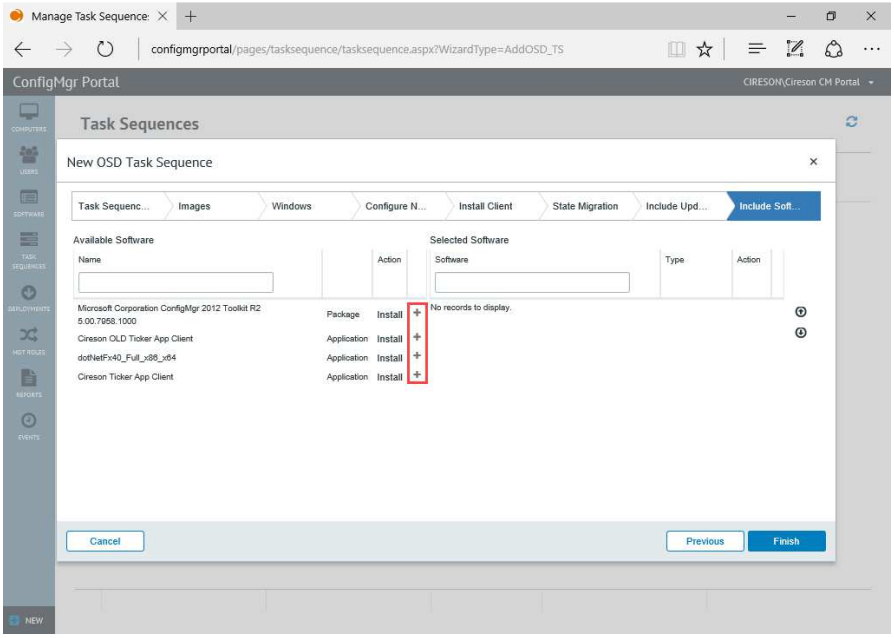
20. Configure the settings on the **Include Updates** page accordingly.



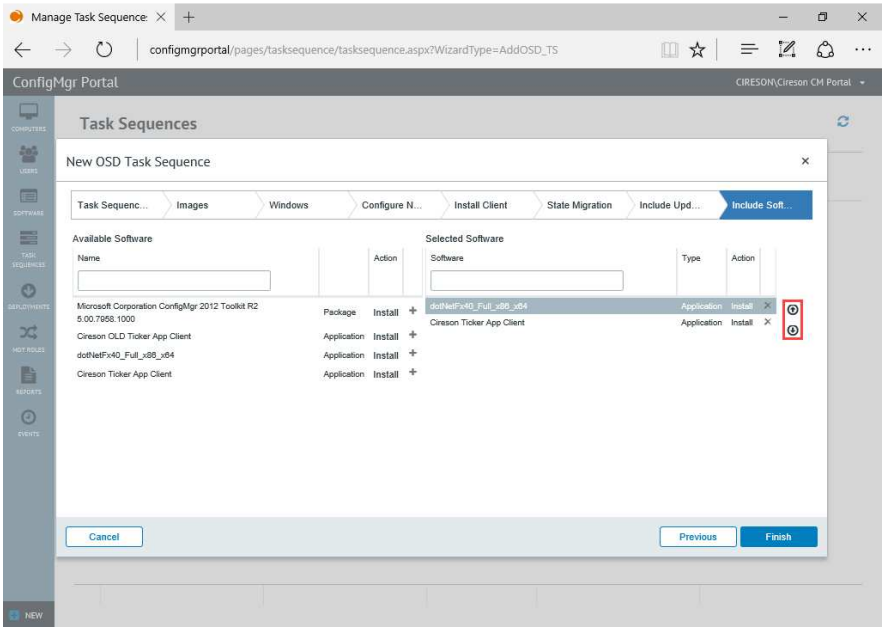
21. Either click the **Include Software** tab or click **Next**



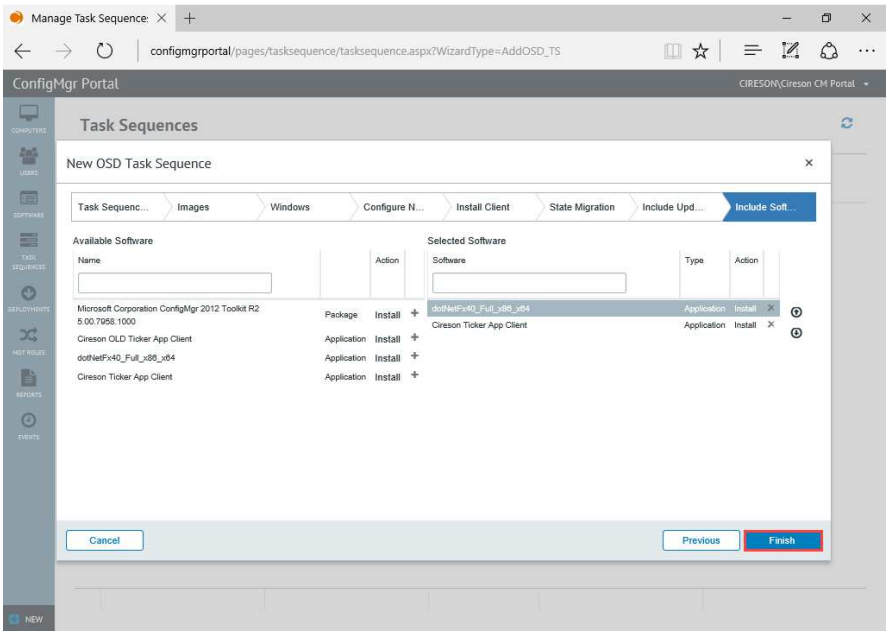
22. On the **Include Software** page, click **+** beside the relevant software to move it from the list of **Available Software** to the **Selected Software** list.



23. To reorder the **Selected Software** list, select the relevant software and then use the up and down arrows as required.

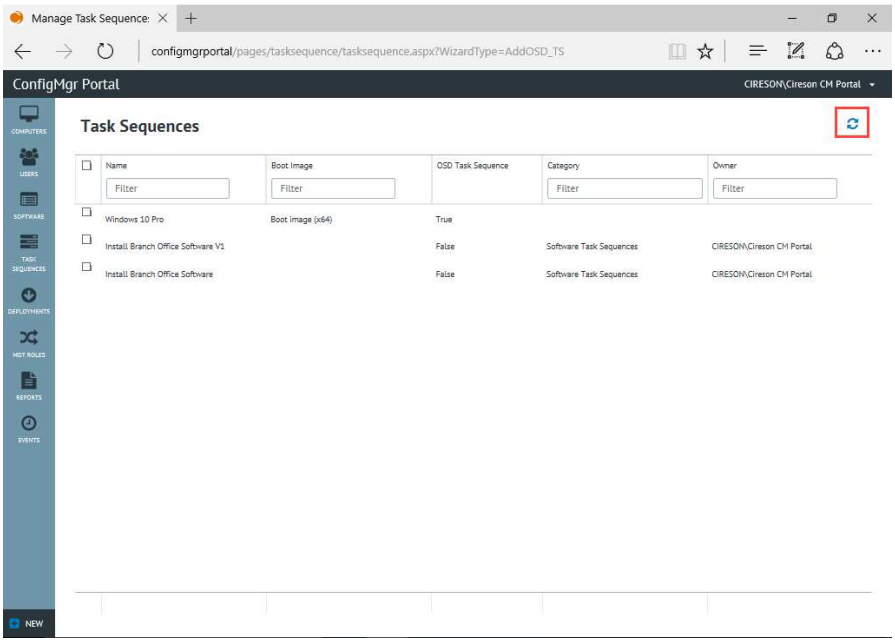


24. Click **Finish**

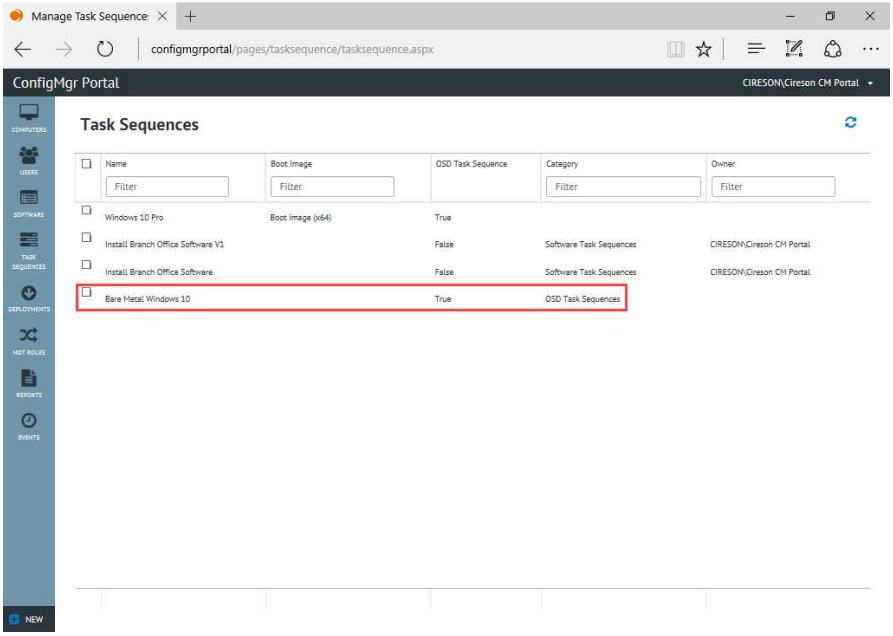


The Portal will now create the new Task Sequence as a background task.

25. Click the refresh button on the **Task Sequences** page to refresh the list of task sequences.



After the background process completes, the newly created Software Task Sequence will appear.



MDT Roles

This section contains details of the tasks available to you when you select the **MDT Role** option from the **New** menu on the **Navigation Menu**.

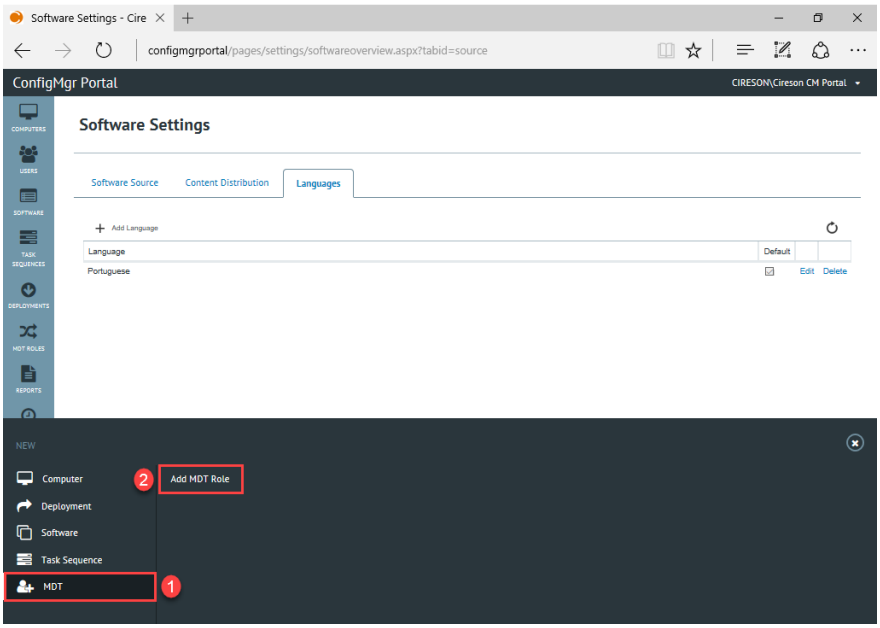
NOTE: See the MDT Roles section for details of how to manage existing MDT Roles.

- How do I create a new MDT Role?

How do I create a new MDT Role?

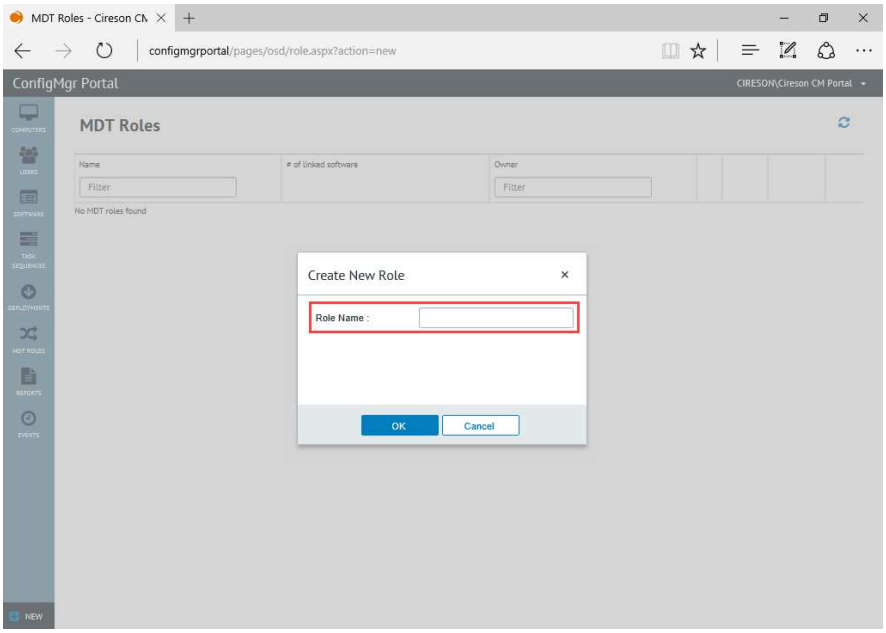
To create a new MDT Role:

1. From the **New** menu, select **MDT | Add MDT Role**

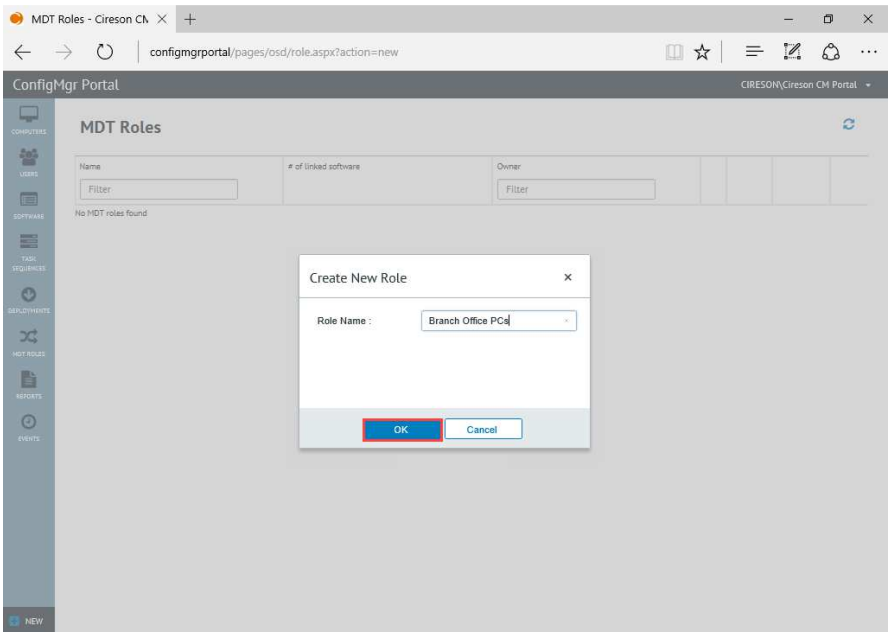


2. On the **Create New Role** dialog box, enter a name for the MDT Role in the **Role Name** field.

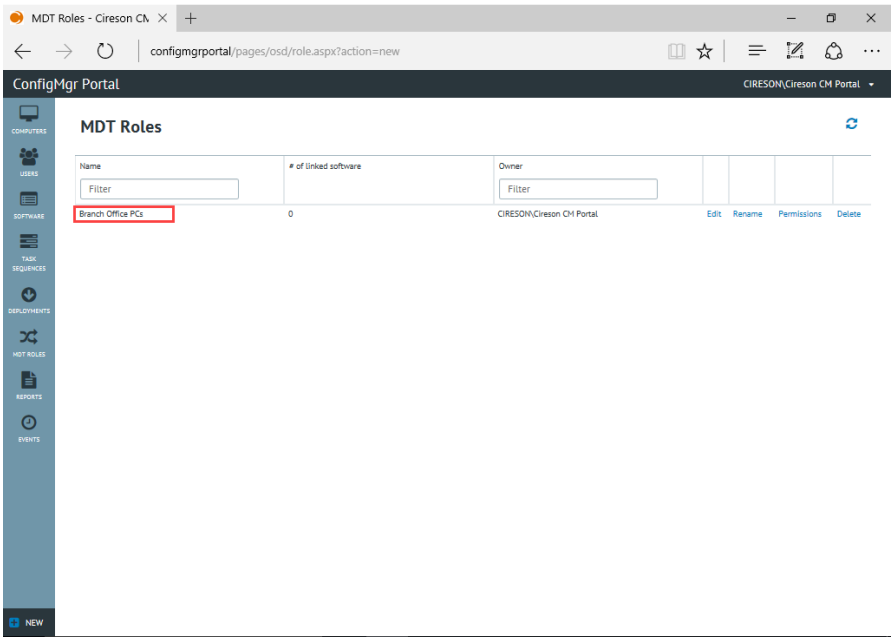
   NOTE: No MDT Roles are defined in the Portal by default.



3. Click **OK**



The newly created Role appears on the **MDT Roles** page.



Frequently Asked Questions

This section contains Frequently Asked Questions (FAQs), related to the Cireson Portal for Configuration Manager.

Feedback/Suggestions

How do I submit suggestions for new features/ improvements to the Portal?

We are constantly looking to improve everything we do. If you have any feedback on this document of the Portal itself, please email team@cireson.com.

Likewise, if you have any Feature Suggestions, please submit them in the Configuration Manager Portal area of the Feature Requests section at https://community.cireson.com

General

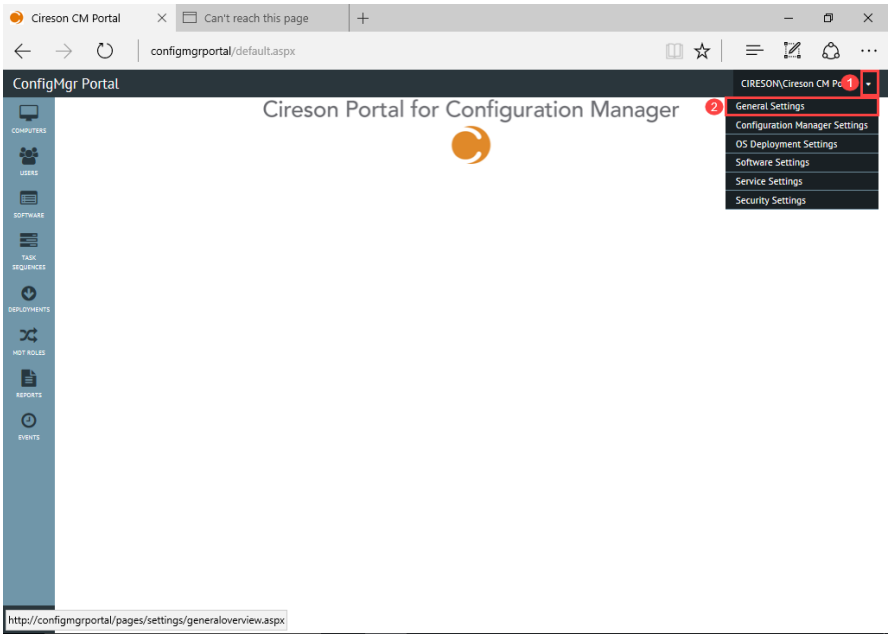
How do I print from the Portal?

Although there is no direct printing facility from the Portal, it is supported to use the print capabilities of your Web browser to print if required.

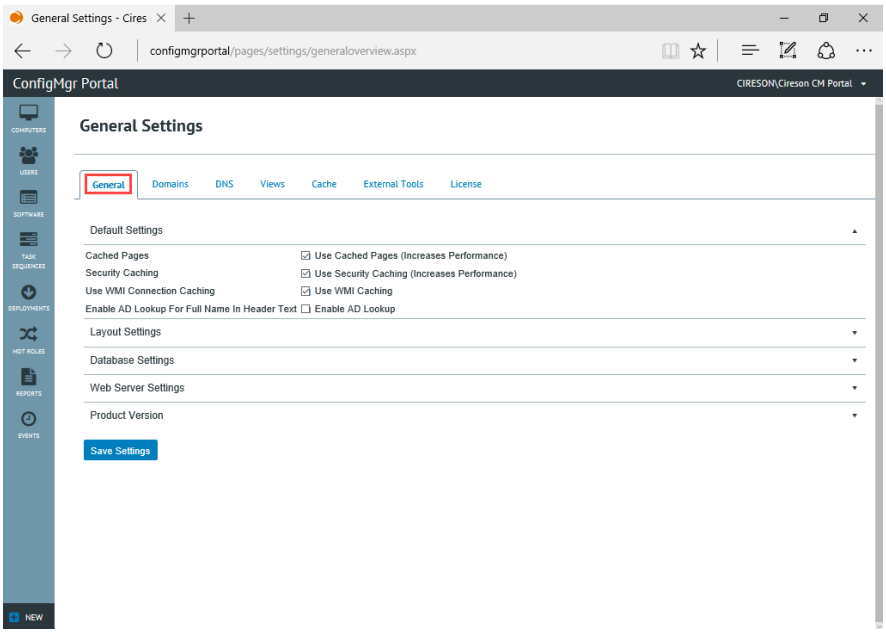
How do I know which version of the Portal I am running?

To see which version of the Portal you are running:

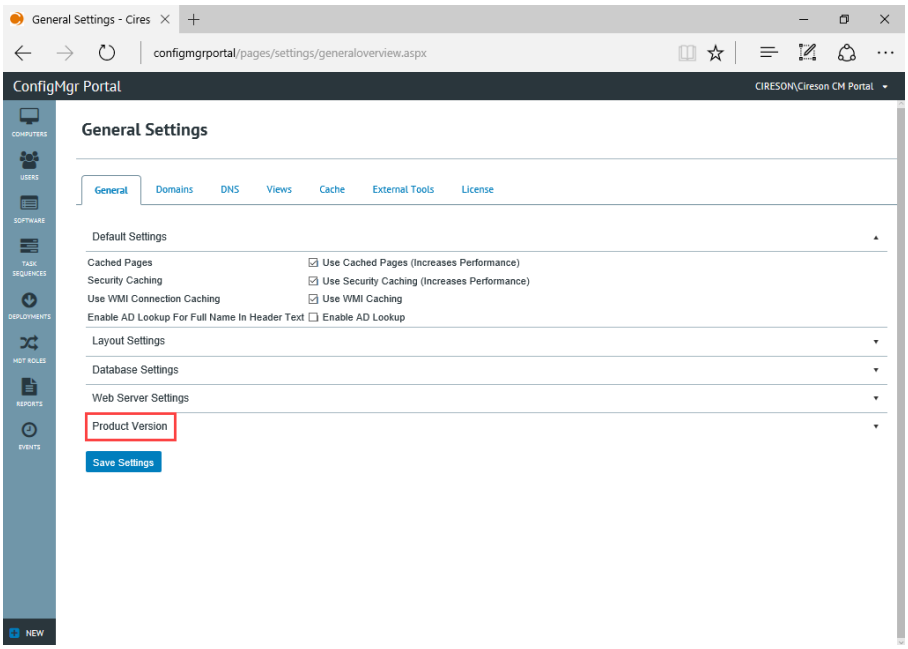
1. Click the down arrow ( ) after the username in the **Portal Header Bar** and select **General Settings**



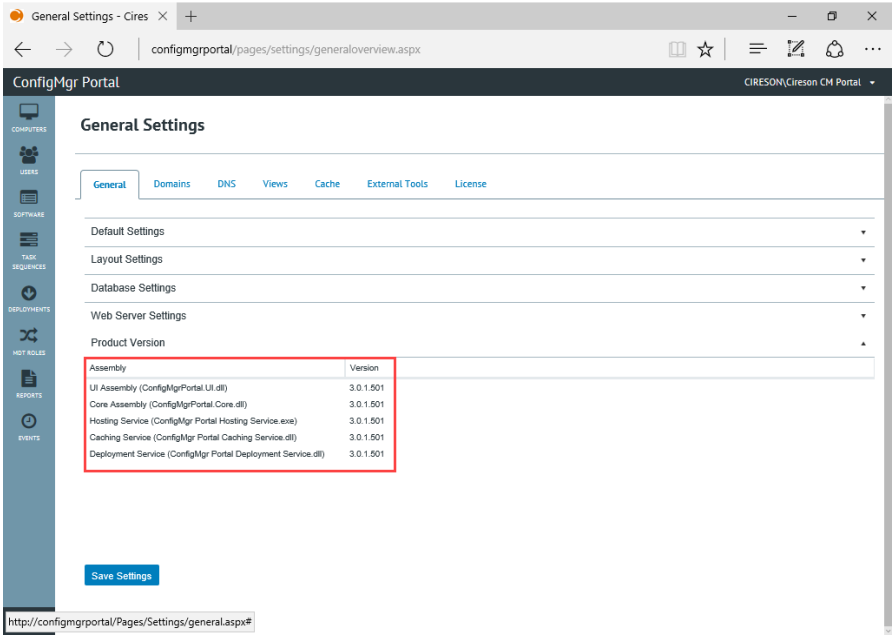
2. Click the **General** tab (if it not already selected)



3. Expand the **Product Version** section.



The version of the Portal you are running is displayed. Version **3.0.1.501** is the version number for the first release of the Cireson Portal for Configuration Manager.



General

Will the Events page tell me which user performed an action in the Portal?

Yes, the **Events** page in the Portal will show the specific user that performed each action including the date, time and the action performed. However, as the connection between the Portal and ConfigMgr is all routed through the single IIS application pool account (or domain account you have configured the Portal to use), all actions in ConfigMgr are shown as being performed by this account.

Reporting

Can I multi-select Reports I want to import?

Currently no. You need to add each report individually.

Can I select a category of Reports I want to import so that all Reports within that category are imported at once?

Currently no. You need to add each report individually.

Appendix A – Location of Settings

This Appendix contains an alphabetically sorted list of all the available settings in the Cireson Portal for Configuration Manager and where to find each one.

NOTE: As some settings have the same name but apply to different areas of the Portal, the name of the relevant area is shown between square brackets [] in the table below.

Setting	Section	Tab	Settings Menu
Action Type	N/A	Content Distribution	Software Settings
AD Group Query Refresh Interval	N/A	General Settings	Configuration Manager Settings
Add External Tool	N/A	External Tools	General Settings
Add Language	N/A	Languages	Software Settings
Add New OU	N/A	Organizational Units	OS Deployment Settings
Add New Sequence	N/A	Number Sequencing	OS Deployment Settings
Add New Template	N/A	OSD Templates	OS Deployment Settings
Add Security Group	N/A	Security Groups	Security Settings
Add selected software if missing	N/A	Content Distribution	Software Settings
Add Software Source	N/A	Software Source	Software Settings
Allow Deleting DNS Records On-Demand From Computer List	N/A	DNS	General Settings
Allow Software Deployment To AD Groups	Specific Rights Assignments	Security Rights	Security Settings
Allow Software Deployment To Servers	Specific Rights Assignments	Security Rights	Security Settings
Application Root (Application Management\Applications)	Application Settings	Software Library	Configuration Manager Settings
Authentication Mode [Database Settings For Configuration Manager]	N/A	General Settings	Configuration Manager Settings

Setting	Section	Tab	Settings Menu
Authentication Mode [Database Settings For MDT]	MDT Integration	General Settings	OS Deployment Settings
Authentication Mode [Database Settings For Portal]	Database Settings	General	General Settings
Authentication Mode [Database Settings For Reporting Services]	N/A	Reporting Services	Configuration Manager Settings
Auto Clear MDT MAC Address Value Upon BIOS GUID Auto Update	Scheduled Task Settings	Service Tasks	Service Settings
Auto Update BIOS GUID Value In MDT For Updated ConfigMgr Computers	Scheduled Task Settings	Service Tasks	Service Settings
Cached Pages	Default Settings	General	General Settings
Clear Cache	N/A	Cache	General Settings
Client licenses	Information	License	General Settings
Collection Membership Rule Type	N/A	General Settings	Configuration Manager Settings
Configuration Manager Server	N/A	General Settings	Configuration Manager Settings
Custom Folder [Application Settings]	Application Settings	Software Library	Configuration Manager Settings
Custom Folder [Collection Settings]	Collection Settings	Software Library	Configuration Manager Settings
Custom Folder [Package Settings]	Package Settings	Software Library	Configuration Manager Settings
Custom Folder [Task Sequence Settings]	Task Sequence Settings	Software Library	Configuration Manager Settings
Database [Database Settings For Configuration Manager]	N/A	General Settings	Configuration Manager Settings
Database [Database Settings For MDT]	MDT Integration	General Settings	OS Deployment Settings
Database [Database Settings For Portal]	Database Settings	General	General Settings
Database [Database settings For Reporting Services]	N/A	Reporting Services	Configuration Manager Settings
Delete Computer DNS Records On Reinstall	N/A	DNS	General Settings

Setting	Section	Tab	Settings Menu
Delete DNS Record	Computer Deletion Methods	General Settings	OS Deployment Settings
Delete From Active Directory	Computer Deletion Methods	General Settings	OS Deployment Settings
Delete From Configuration Manager	Computer Deletion Methods	General Settings	OS Deployment Settings
Delete From MDT Database	Computer Deletion Methods	General Settings	OS Deployment Settings
Delete The Computer's DNS Records On New Install (Based On Computer Name)	N/A	DNS	General Settings
Delete The Computer's DNS Records When Deleting The Computer	N/A	DNS	General Settings
Display A Notice When Selecting More Than This Amount Of Target Resources	Specific Rights Assignments	Security Rights	Security Settings
Distribution Point Groups	N/A	Content Distribution	Software Settings
Distribution Points	N/A	Content Distribution	Software Settings
Enable AD Lookup For Full Name In Header Text	Default Settings	General	General Settings
Enable Configuration Manager Role-Based Administration	N/A	General Settings	Configuration Manager Settings
Enable MDT Integration	MDT Integration	General Settings	OS Deployment Settings
Execution User	N/A	Reporting Services	Configuration Manager Settings
Expires	Information	License	General Settings
For Custom Folder, Create Collections In Manufacturer Folder	Collection Settings	Software Library	Configuration Manager Settings
Get Every	Scheduled Task Settings	Service Tasks	Service Settings
Global Administrator Group	N/A	Global Administrator	Security Settings
IIS Application Pool Identity	Web Server Settings	General	General Settings
Include Language In Application Name	Application Settings	Software Library	Configuration Manager Settings

Setting	Section	Tab	Settings Menu
Include Manufacturer In Application Name	Application Settings	Software Library	Configuration Manager Settings
Include Version In Application Name	Application Settings	Software Library	Configuration Manager Settings
Include Language In Package Name	Package Settings	Software Library	Configuration Manager Settings
Include Manufacturer In Package Name	Package Settings	Software Library	Configuration Manager Settings
Include Version In Package Name	Package Settings	Software Library	Configuration Manager Settings
License Key	License	License	General Settings
Limit Amount Of Resources Selected Per Deployment	N/A	Security Rights	Security Settings
Limit Amount Of Software Objects To Deploy Per Deployment	N/A	Security Rights	Security Settings
Limit To [Display A Notice When Selecting More Than This Amount Of Target Resources]	Specific Rights Assignments	Security Rights	Security Settings
Limit To [Limit Amount Of Resources Selected Per Deployment]	Specific Rights Assignments	Security Rights	Security Settings
Limit To [Limit Amount Of Software Objects To Deploy Per Deployment]	Specific Rights Assignments	Security Rights	Security Settings
New Deployment Scope	N/A	Deployment Scopes	Security Settings
New Template	N/A	Templates	Configuration Manager Settings
New View	N/A	Views	General Settings
On-Demand Created Software Collections Root Folder For Device Targeting	Collection Settings	Software Library	Configuration Manager Settings
On-Demand Created Software Collections Root Folder For User Targeting	Collection Settings	Software Library	Configuration Manager Settings
Package Root (Application Management\Packages)	Package Settings	Software Library	Configuration Manager Settings
Password [Database Settings For Configuration Manager]	N/A	General Settings	Configuration Manager Settings

Setting	Section	Tab	Settings Menu
Password [Database Settings For MDT]	MDT Integration	General Settings	OS Deployment Settings
Password [Database Settings For Portal]	Database Settings	General	General Settings
Password [Database Settings For Reporting Services]	N/A	Reporting Services	Configuration Manager Settings
Password [Reporting Server Properties]	N/A	Reporting Services	Configuration Manager Settings
Product Version (various components)	Product Version	General	General Settings
Register new DNS Server	N/A	DNS	General Settings
Refresh selected software if exists	N/A	Content Distribution	Software Settings
Register New Domain	N/A	Domains	General Settings
Remove selected software if exists	N/A	Content Distribution	Software Settings
Reporting URL	N/A	Reporting Services	Configuration Manager Settings
Root	Collection Settings	Software Library	Configuration Manager Settings
Security Caching	Default Settings	General	General Settings
Security Group	N/A	Security Rights	Security Settings
Specify Where To Create Applications In Configuration Manager	Application Settings	Software Library	Configuration Manager Settings
Specify Where To Create On-Demand Collections In Configuration Manager	Collection Settings	Software Library	Configuration Manager Settings
Specify Where To Create Software Packages In Configuration Manager	Package Settings	Software Library	Configuration Manager Settings
Specify Where To Create Task Sequences In Configuration Manager	Task Sequence Settings	Software Library	Configuration Manager Settings
SQL Server\Instance [Database Settings For Configuration Manager]	N/A	General Settings	Configuration Manager Settings
SQL Server\Instance [Database Settings For MDT]	MDT Integration	General Settings	OS Deployment Settings

Setting	Section	Tab	Settings Menu
SQL Server\Instance [Database Settings For Portal]	Database Settings	General	General Settings
SQL Server\Instance [Database Settings For Reporting Services]	N/A	General Settings	Configuration Manager Settings
SQL Username [Database Settings For Configuration Manager]	N/A	General Settings	Configuration Manager Settings
SQL Username [Database Settings For MDT]	MDT Integration	General Settings	OS Deployment Settings
SQL Username [Database Settings For Portal]	Database Settings	General	General Settings
SQL Username [Database Settings For Reporting Services]	N/A	Reporting Services	Configuration Manager Settings
Store Applications In Manufacturer Folder	Application Settings	Software Library	Configuration Manager Settings
Store Packages In Manufacturer Folder	Package Settings	Software Library	Configuration Manager Settings
System Culture (Date and Time Format)	Layout Settings	General	General Settings
Task Sequence Root (Operating Systems\Task Sequences)	Task Sequence Settings	Software Library	Configuration Manager Settings
Tasks	Scheduled Task Settings	Service Tasks	Service Settings
Use WMI Connection Caching	Default Settings	General	General Settings
User Name	N/A	Reporting Services	Configuration Manager Settings
User Session Timeout (In Minutes)	Web Server Settings	General	General
Valid from	Information	License	General Settings

Appendix B – Settings Menu Reference

This Appendix contains a list sorted by Settings menu, then tab, then group (where applicable), of all available settings in the Cireson Portal for Configuration Manager. For each setting the following information is included:

- Setting name
- Description
- Default value
- Possible values

Appendix A contains an alphabetical list of all settings in the Portal and where each is located.

General Settings

This section details the various settings under the **General Settings** menu, grouped by tab.

"General" Tab

The **General** tab of the **General Settings** page allows you to set default settings for the Portal, control the layout, configure the database settings for the Portal database, and configure web server settings that are relevant to the Portal. It contains the following groups of settings:

- Default Settings
- Layout Settings
- Database Settings
- Web Server Settings
- Product Version

Default Settings

The **Default Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Cached Pages	This setting controls whether or not results of various pages in the Portal are cached. If enabled, caching can help with the performance of data retrieval.	Checked	Checked or Unchecked

Setting Name	Description	Default Value	Possible Values
Security Caching	This setting controls whether or not access to various pages and actions in the Portal are cached. If enabled, caching can help with the performance of data and page access.	Checked	Checked or Unchecked
Use WMI Connection Caching	This setting controls whether or not required access to Configuration Manager uses WMI caching, which increases performance if enabled.	Checked	Checked or Unchecked
Enable AD lookup for Full Name in Header Text	This setting when enabled, will try to look up the full name of the logged on user from Active Directory based on username, and displays the full name above the **Settings** menu if it succeeds in identifying the full user name.	Unchecked	Checked or Unchecked

Layout Settings

The **Layout Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
System Culture (Date and Time Format)	This setting allows you to force the Portal to use a specific culture such as regional and language settings.	English (United States)	Multiple – see the dropdown for a list of possible value.

Database Settings

The **Database Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
SQL Server\Instance	This setting contains the name of the SQL Server instance that is hosting the Portal database.	User defined	User defined
Database	This setting contains the name of the Portal database.	User defined	User defined

Setting Name	Description	Default Value	Possible Values
Authentication Mode	This setting controls the authentication method used to connect to the SQL Server hosting the Portal	**Windows Authentication**	• Windows Authentication • SQL Authentication
SQL Username	This setting contains the name of the SQL user account used to connect to the SQL Server hosting the Portal database when SQL authentication is enabled.	Blank	User defined
Password	This setting contains the password for the SQL user account used to connect to the SQL Server hosting the Portal database when SQL authentication is enabled.	Blank	User defined

Web Server Settings

The **Web Server Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
User Session Timeout (In Minutes)	This setting controls how long an inactive session is kept before the session is timed out.	30	Value in minutes
IIS Application Pool Identity	This setting shows the user account used for the IIS Application Pool Identity. **NOTE:** This setting cannot be changed from the Portal, and is configured through IIS Manager.	User defined	User defined

Product Version

The **Product Version** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Assembly	This section lists the various components that make up the Portal and the version number of each.	Version of the Portal installed.	Various

"Domains" Tab

The **Domains** tab allows you to see which domains? have been registered with the Portal.

After the Portal has been installed, the domains/forests and their associated account credentials can be specified on the **Domains** tab page within the Portal. To help you specify domains, the Portal queries the registered ConfigMgr site(s) once the Central Administration/ Central Site (in a hierarchy), is accessible and displays the domains for those not registered.

NOTE: Details about the tasks related to this tab can be found in the Domains section.

"DNS" Tab

The **DNS** tab allows you to register DNS servers with the Portal so that when computer-related activities are performed using the Portal DNS can be updated accordingly.

The **DNS** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the DNS section.

Setting Name	Description	Default Value	Possible Values
Delete The Computer's DNS Records When Deleting The Computer	This setting controls whether or not a computer's DNS record is removed when the computer is deleted from the Computers view.	Unchecked	Checked or Unchecked

Setting Name	Description	Default Value	Possible Values
Delete The Computer's DNS Records On New Install (Based On Computer Name)	This setting controls whether or not a computer's DNS record is removed when the computer is detected as being a new computer even though the computer name was previously in the Portal database.	Unchecked	Checked or Unchecked
Delete Computer DNS Records On Reinstall	This setting controls whether or not a computer's DNS record is removed when the computer is reinstalled.	Unchecked	Checked or Unchecked
Allow Deleting DNS Records On-Demand From Computer List	This setting controls whether or not a computer's DNS record is removed via a right-click action in the **Computers** view	Checked	Checked or Unchecked

"Views" Tab

The **Views** tab displays the current defined views and allows them to be edited, their permissions to be changed, or for them to be deleted. Views allow you to control what resources are shown in the Portal based on configured criteria (like a ConfigMgr query). The Portal ships with standard views for Computers, Users, and Software. Custom views can be created as required.

NOTE: Details about the tasks related to this tab can be found in the Views section.

"Cache" Tab

The **Cache** tab allows you to flush the various objects that make up the Portal Caching service which can help in cases where what you see in the ConfigMgr Console differs to what is shown in the Portal, especially in scenarios where you create an object in the Portal which is visible in the ConfigMgr Console, but not in the Portal. Clearing the cache will 'reset' the view of objects.

"External Tools" Tab

The **External Tools** tab displays the current defined external tools and allows them to be edited, their permissions to be changed, or for them to be deleted.

Any external tools that haven added to the Portal are shown in the **External Tools** menu when you right-click on a computer in the **Content List** of the **Computers** page, provided you have been granted the relevant permissions to be able to see them.

> **NOTE:** Details about the tasks related to this tab can be found in the External Tools section.

"License" Tab

The **License** tab displays your license key for the Portal including its validity and the number of client licenses you have purchased.

Configuration Manager Settings

This section details the various settings under the **Configuration Manager Settings** menu, grouped by tab.

"General Settings" Tab

The **General Settings** tab of the **Configuration Manager Settings** page allows you to configure various settings related to the ConfigMgr site server the Portal connects to.

The **General Settings** tab contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Configuration Manager Server	This setting designates the computer that hosts the Configuration Manager site installation as a primary site or central administration site.	User defined	User defined
Collection Membership Rule Type	This setting configures how resources are added to new or existing collections when requested from the Portal.	Direct Membership	• Direct Membership • WQL (List of Values)
AD Group Query Refresh Interval	This setting defines the recurrence schedule on the WQL query rule for evaluating members based on Active Directory groups by ConfigMgr.	24 hours	Numeric value of every: • Days • Hours • Minutes
Enable Configuration Manager Role-Based Administration	This setting controls whether the Role Based Administration settings defined in ConfigMgr are applied in the Portal. By default, this is unchecked meaning that security of the Portal, who can use it, which items they can see, and which actions they can perform, is controlled using the security model in the Portal. When enabled, this setting uses the Configuration Manager's security configuration (RBA) for access to collections and resources for actions such as software distribution.	Unchecked	Checked or Unchecked

Setting Name	Description	Default Value	Possible Values
SQL Server\Instance	This setting contains the name of the SQL Server instance that is hosting the ConfigMgr site database.	User defined	User defined
Database	This setting contains the name of the ConfigMgr site database.	User defined	User defined
Authentication Mode	This setting controls the authentication method used to connect to the SQL Server hosting the ConfigMgr site database.	Windows Authentication	• Windows Authentication • SQL Authentication
SQL Username	This setting contains the name of the SQL user account used to connect to the SQL Server hosting the ConfigMgr site database when SQL authentication is enabled.	Blank	User defined
Password	This setting contains the password for the SQL user account used to connect to the SQL Server hosting the ConfigMgr site database when SQL authentication is enabled.	Blank	User defined

"Reporting Services" Tab

The **Reporting Services** tab of the **Configuration Manager Settings** page contains the configuration details of both the SQL Server Reporting Services Server and database connection settings. These settings need to be configured correctly before reports can be registered with the Portal.

The **Reporting Services** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the Reporting section.

Setting Name	Description	Default Value	Possible Values
Reporting URL	This setting configures the URL to access the Report Server.	Blank	User defined

Setting Name	Description	Default Value	Possible Values
Execution User	This setting configures the account that is used to interact with the SQL Server Reporting Services server.	Use IIS Application Pool Account	• Use IIS Application Pool Account • Use Specific Account
User Name	If the **Execution User** setting is set to **Use Specific Account**, this setting is the username of the account that should be used as the **Execution User**	Blank	User defined
Password	If the **Execution User** setting is set to **Use Specific Account**, this setting is the password of the account that should be used as the **Execution User**	Blank	User defined
SQL Server\Instance	This setting contains the name of the SQL Server instance that is hosting the Reporting Services database.	User defined	User defined
Database	This setting contains the name of the SQL Server Reporting Services database.	User defined	User defined
Authentication Mode	This setting controls the authentication method used to connect to the SQL Server hosting the SQL Server Reporting Services database.	Windows Authentication	• Windows Authentication • SQL Authentication
SQL Username	This setting contains the name of the SQL user account used to connect to the SQL Server hosting the SQL Server Reporting Services database when SQL authentication is enabled.	User defined	User defined
Password	This setting contains the password for the SQL user account used to connect to the SQL Server hosting the SQL Server Reporting Services database when SQL authentication is enabled.	User defined	User defined

"Software Library" Tab

The **Software Library** tab of the **Configuration Manager Settings** page allows you configure various settings for packages, applications, task sequences, and collections.

The **Software Library** tab contains the following groups of settings:

- Package Settings
- Application Settings
- Task Sequence Settings
- Collection Settings

Package Settings

The **Package Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Specify Where To Create Software Packages In Configuration Manager	This setting controls which folder that packages created in the Portal are stored in Configuration Manager.	Package Root (Application Management\Packages)	• Package Root (Application Management\Packages) • Custom Folder
Store Packages In Manufacturer Folder	This setting controls whether or not packages created in the Portal are stored in folders created for each unique manufacturer.	Unchecked	Checked or Unchecked
Include Manufacturer In Package Name	This setting controls whether or not the name of the manufacturer of the software is included in the package name when created from the Portal.	Unchecked	Checked or Unchecked
Include Version In Package Name	This setting controls whether or not the software version for the package is included in the package name when created from the Portal.	Unchecked	Checked or Unchecked

Setting Name	Description	Default Value	Possible Values
Include Language In Package Name	This setting controls whether or not the language of the package is included in the package name when created from the Portal.	Unchecked	Checked or Unchecked

Application Settings

The **Application Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Specify Where To Create Applications In Configuration Manager	This setting controls which folder that applications created in the Portal are stored in Configuration Manager.	Application Root (Application Management\Applications)	• Application Root (Application Management\Applications) • Custom Folder
Store Applications In Manufacturer Folder	This setting controls whether or not applications created in the Portal are stored in folders created for each unique manufacturer.	Unchecked	Checked or Unchecked
Include Manufacturer In Application Name	This setting controls whether or not the name of the manufacturer of the software is included in the application name when created from the Portal.	Unchecked	Checked or Unchecked
Include Version In Application Name	This setting controls whether or not the software version for the application is included in the package name when created from the Portal.	Unchecked	Checked or Unchecked
Include Language In Application Name	This setting controls whether or not the language of the application is included in the package name when created from the Portal.	Unchecked	Checked or Unchecked

Task Sequence Settings

The **Task Sequence Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Specify Where To Create Task Sequences In Configuration Manager	This setting controls the folder where task sequences created in the Portal are stored in Configuration Manager.	Task Sequence Root (Operating Systems\Task Sequences)	• Task Sequence Root (Operating Systems\Task Sequences) • Custom Folder

Collection Settings

The **Task Sequence Settings** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Specify Where To Create On-Demand Collections In Configuration Manager	This setting controls the folder where collections created in the Portal are stored in Configuration Manager.	Standard root folder	• Root • Custom Folder
On-Demand Created Software Collections Root Folder For Device Targeting	This setting controls the folder where device based collections created in the Portal are stored in Configuration Manager.	Device Collections	• Device Collections • Custom folder
On-Demand Created Software Collections Root Folder For User Targeting	This setting controls the folder where user based collections created in the Portal are stored in Configuration Manager.	User Collections	• User Collections • Custom folder
For Custom Folder, Create Collections In Manufacturer Folder	If checked, a new folder is created under the designated custom folder, with the manufacturer name of the software being deployed.	Unchecked	• Checked • Unchecked

"Templates" Tab

The **Templates** tab of the **Configuration Manager Settings** page allows you to create new templates and edit existing ones. Templates are preset defaults for common actions such as creating or deploying software. Templates allow you to set default values for the settings that you care about the most. Using templates gives you the peace of mind that everything should work and be consistent in your environment without having to worry that the users creating or deploying software have forgotten to set these settings appropriately for your environment. For example, you might want to have different deployment settings for your servers compared to your workstations. Access to who can create and access the templates can be controlled through permissions.

The following type of templates can be created:

- Package
- Application
- OSD Task Sequence
- Package Deployment
- Application Deployment
- Task Sequence Deployment

The **Templates** tab shows all the existing templates that have been created and provides the ability to add new templates or for existing templates the ability to edit, change the permissions, and delete them.

NOTE: Details about the tasks related to this tab can be found in the Templates section.

OS Deployment Settings

This section details the various settings under the **OS Deployment Settings** menu, grouped by tab.

"General Settings" Tab

The **General Settings** tab of the **OSD Overview** page allows you to configure the default settings for operating system deployments performed from the Portal. This tab also allows you to configure settings for MDT, and computer deletions methods.

The **General Settings** tab contains the following groups of settings:

- MDT Integration
- Computer Deletion Methods

MDT Integration

The **MDT Integration** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
SQL Server\Instance	This setting contains the name of the SQL Server instance that is hosting the MDT database.	User defined	User defined
Database	This setting contains the name of the MDT database.	User defined	User defined
Authentication Mode	This setting controls the authentication method used to connect to the SQL Server hosting the MDT database.	Windows Authentication	• Windows Authentication • SQL Authentication
SQL Username	This setting contains the name of the SQL user account used to connect to the SQL Server hosting the MDT database when SQL authentication is enabled.	User defined	User defined
Password	This setting contains the password for the SQL user account used to connect to the SQL Server hosting the MDT database when SQL authentication is enabled.	User defined	User defined

Setting Name	Description	Default Value	Possible Values
Enable MDT Integration	This setting determines whether the Portal is integrated with MDT or not.	Whatever was selected during setup	Checked or Unchecked

Computer Deletion Methods

The **Computer Deletion Methods** group contains the settings in the following table.

Setting Name	Description	Default Value	Possible Values
Delete From MDT Database	This setting controls whether or not a computer, when deleted from the Portal in the Computers list, is also deleted from the MDT database.	Unchecked	Checked or Unchecked
Delete From Configuration Manager	This setting controls whether or not a computer, when deleted from the Portal in the Computers list, is also deleted from Configuration Manager.	Checked	Checked or Unchecked
Delete From Active Directory	This setting controls whether or not a computer, when deleted from the Portal in the Computers list, is also deleted from Active Directory.	Unchecked	Checked or Unchecked
Delete DNS Record	This setting designates whether or not a computer, when deleted from the Portal in the Computers list, also deletes its record from DNS.	Unchecked	Checked or Unchecked

"Organizational Units" Tab

The **Organizational Units** tab of the **OS Deployment Settings** page allows you to manage any Organizational Units to be used when deploying an operating system when the Portal is integrated with MDT. In addition to creating new Organizational Units, this tabs allows them to be edited, their permissions to be changed, or for them to be deleted.

NOTE: Details about the tasks related to this tab can be found in the Organizational Units section.

"Number Sequencing" Tab

The **Number Sequencing** tab of the **OS Deployment Settings** page allows you to create a set sequence of numbers that can be used for automating the generation of computer names when deploying systems. In addition to creating number sequences, this tabs allows them to be edited, their permissions to be changed, or for them to be deleted.

NOTE: Details about the tasks related to this tab can be found in the Number Sequencing Series section.

"OSD Templates" Tab

The **OSD Templates** tab of the **OS Deployment Settings** page allows you to create templates to preset items for a machine when it is deployed using ConfigMgr OSD such as the ConfigMgr site it is assigned to, the number sequence used to name it, the Organizational Unit it should be added to, amongst others. In addition to creating OSD Templates, this tabs allows them to be edited, their permissions to be changed, or for them to be deleted.

NOTE: OSD Templates are not related in any way to templates you can create under **Configuration Manager Settings**.

Details about the tasks related to this tab can be found in the OSD Templates section.

Software Settings

This section details the various settings under the **Software Settings** menu, grouped by tab.

"Software Source" Tab

The **Software Source** tab of the **Software Settings** page allows you to manage the repositories where software files is stored when new packages are created within the Portal. In addition to creating Software Sources, this tabs allows them to be edited or deleted.

NOTE: Details about the tasks related to this tab can be found in the Software Source section.

"Content Distribution" Tab

The **Content Distribution** tab of the **Software Settings** page allows you to see which content has been distributed to your distribution points (DPs). It also allows you to distribute content to DP groups as well as adding, refreshing, or removing software from a DP/DP group.

The **Content Distribution** tab contains the fields in the following table.

Field Name	Description	Default Value	Possible Values
Manufacturer	Manufacturer of the software.	Blank[1]	User defined
Name	Name of the software.	Blank	User defined
Version	The version number of the software.	Blank	User defined
Language	Language of the software.	Blank	User defined
Type	The Type of software.	Blank	• Application • Package • Task Sequence
DP Status	For each item of content shows the number of DPs the content has been targeted to (first number) and distributed to (second number).	0/0	Numeric values for DPs.

[1] Depends on the type of software being created. For example, for an MSI, these values will be set automatically.

Field Name	Description	Default Value	Possible Values
Distribution Point Groups	This setting allows you to select any applicable distribution point groups from Configuration Manager that you want to perform the specific action as set in the **Action Type** dropdown.	None	All DP groups that have been defined.
Distribution Points	This setting allows you to select any applicable distribution points from Configuration Manager that you want to perform the specific action as set in the **Action Type** dropdown.	Unchecked	Checked or Unchecked
Action Type	This setting controls which action is to be implemented on the appropriate distribution points or distribution point groups as selected in the two previous settings.	Add selected software if missing	• Add selected software if missing • Refresh selected software if exists • Remove selected software if exists

"Languages" Tab

The **Languages** tab of the **Software Settings** page allows you to add language names that can be used to identify software that has been localized into that language. In addition to adding languages, this tabs allows them to be edited or deleted.

NOTE: Details about the tasks related to this tab can be found in the Languages section.

Service Settings

This section details the various settings under the **Service Settings** menu, grouped by tab.

"Registered Services" Tab

The **Registered Services** tab of the **Service Settings** page shows the services that form part of the Portal which is currently only the Hosting service.

NOTE: Details about the tasks related to this tab can be found in the Registered Services section.

"Service Tasks" Tab

The **Service Tasks** tab of the **Service Settings** page allows you to configure how often the Portal queries the ConfigMgr database for Group, User, Computer, Software, and Deployment Scope.

NOTE: The **Group** and **Deployment Scope** options are not actually synchronizing items with the ConfigMgr database. In this context:

- **Group –** The Portal allows you to create groups that can be used for targeting resources (like a ConfigMgr query), typically users such as of the users in a specific department in my organization. The Portal's caching service will then use the membership criteria you've configured for the group to retrieve resources from the ConfigMgr site database that meet that criteria. In this way when you come to use the group for say a software deployment, it is already populated with the relevant resources.
- **Deployment Scope –** Works in the same way as Groups, but for Deployment Scopes these are created in the Portal as detailed in Deployment Scopes.

The **Service Tasks** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the Service Tasks section.

The **Auto Update BIOS GUID Value In MDT For Updated ConfigMgr Computers** and **Auto Clear MDT MAC Address Value Upon BIOS GUID Auto Update** are only visible if you have enable MDT integration.

Setting Name	Description	Default Value	Possible Values
Tasks	This setting contains a list of the objects whose synchronization schedule you can configure. The default settings for each of the possible values are: • Group – Every 1 hour • User – Every 20 minutes • Computer – Every 10 minutes • Software – Every 24 hours • Deployment Scope – Every 4 hours	Group	• Group • User • Computer • Software • Deployment Scope
Auto Update BIOS GUID Value In MDT For Updated ConfigMgr Computers	This setting controls whether or not the MDT database is updated with a computer's BIOS GUID when the computer is updated in Configuration Manager.	Unchecked	Checked or Unchecked
Auto Clear MDT MAC Address Value Upon BIOS GUID Auto Update	This setting controls whether or not the MDT database is updated with a computer's MAC address when the computer BIOS GUID is updated in Configuration Manager.	Unchecked	Checked or Unchecked

Security Settings

This section details the various settings under the **Security Settings** menu, grouped by tab.

"Deployment Scopes" Tab

The **Deployment Scopes** tab of the **Security Settings** page allows you to create and manage Deployment Scopes that are used to deploy software (including task sequences) to your resources. In addition to creating Deployment Scopes, this tabs allows them to be edited, their permissions to be changed, or for them to be deleted.

The **Deployment Scopes** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the Deployment Scopes section.

Setting Name	Description	Default Value	Possible Values
New Deployment Scope	This setting allows you to create either a **Computer Scope** or a **User Scope**	None	• Computer Scope • User Scope

"Security Groups" Tab

The **Security Groups** tab of the **Security Settings** page allows you to add Active Directory users and/or groups to the Portal which can then be granted the relevant permissions to the objects in the Portal they require access to.

The **Security Groups** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the Security Groups section.

Setting Name	Description	Default Value	Possible Values
Add Security Group	This button allows you to add a new security group.	None	User defined

"Security Rights" Tab

The **Security Rights** tab of the **Security Settings** page allows you to control which objects the Portal user/group can see in the Portal, and what rights they have.

The **Security Rights** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the Security Rights Security Rightssection.

Setting Name	Description	Default Value	Possible Values
Security Group	This setting provides a dropdown list showing existing Portal security groups.	None	Existing security groups
Area Rights	This setting controls the rights that the security group has to the following key areas of the Portal (which also contain sub-items): • Browse (the Navigation Menu) • New • Settings	None	Checked or Unchecked
Allows Software Deployment To AD Groups	This setting controls whether or not members of the security group are allowed to deploy software to user groups in additional to computers and users.	Unchecked	Checked or Unchecked
Allow Software Deployment To Servers	This setting controls whether or not members of the security group are allowed to deploy software to Configuration Manager clients that are running Windows Server operating systems.	Unchecked	Checked or Unchecked
Limit Amount Of Software Objects To Deploy Per Deployment	This setting allows you to control the number of software objects (packages, applications and task sequences) that can be deployed at once during one software deployment to the value set in the **Limit To** box which by default is blank.	Unchecked	Checked or Unchecked

Limit Amount Of Resource Selected Per Deployment	This setting allows you to control the number of resources that can be added to a software deployment via the value set in **Limit To** box which by default is blank.	Unchecked	Checked or Unchecked
Display A Notice When Selecting More Than This Amount OF Target Resources	This setting allows you to display a notice when more than the number of resources added to the deployment exceeds the value set in **Limit To** box which by default is blank.	Unchecked	Checked or Unchecked

"Global Administrator" Tab

The **Global Administrator** tab of the **Security Settings** page allows you to control which group has full administrative access to the Portal.

The **Global Administrator** tab contains the settings in the following table.

NOTE: Details about the tasks related to this tab can be found in the Global Administrator section.

Setting Name	Description	Default Value	Possible Values
Global Administrator Group	This setting contains the name of the group that that full administrative access to the Portal. This value is written to the **<SystemAdministratorGroup>** setting in the **<Security>** section of the **Configuration.xml** file (located in the **C:\inetpub\ConfigMgr Portal** folder).	As set during the installation of Portal.	User defined

Appendix C – Configuring an Account to Delete Computer Records from DNS

This Appendix details how to create an account that is able to delete computer records from DNS. This process involves the following steps:

- Creating an account in Active Directory for the Portal to use to delete computer records
- Configuring the DNS Server with the account to be used by the Portal to delete computer records
- Registering a DNS Server with the Portal

Creating an account in Active Directory for the Portal to use to delete computer records

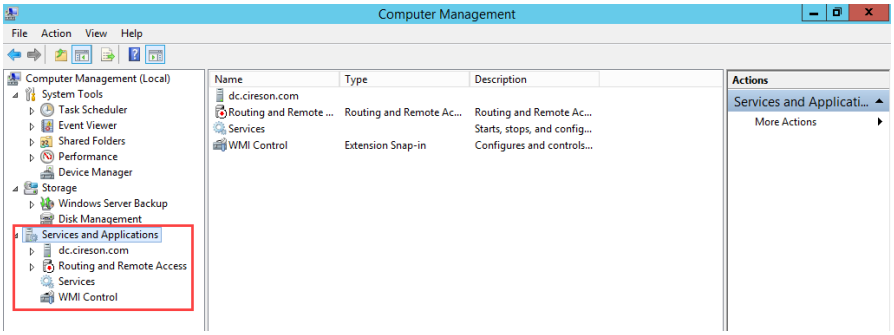
Create a non-administrative user account in Active Directory to be used by this process.

Configuring the DNS Server with the account to be used by the Portal to delete computer records

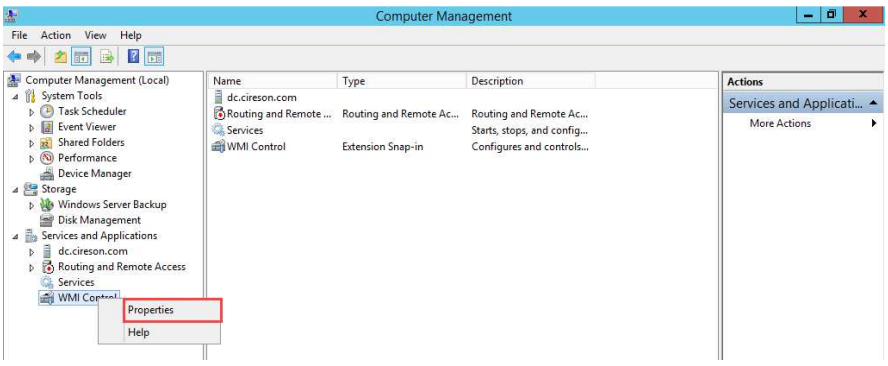
The next part of the process is to configure each DNS Server to be registered with the Portal, to allow the Portal to delete computer records using the account created in the previous section.

To configure the DNS Server to allow the Portal to delete computer records from DNS:

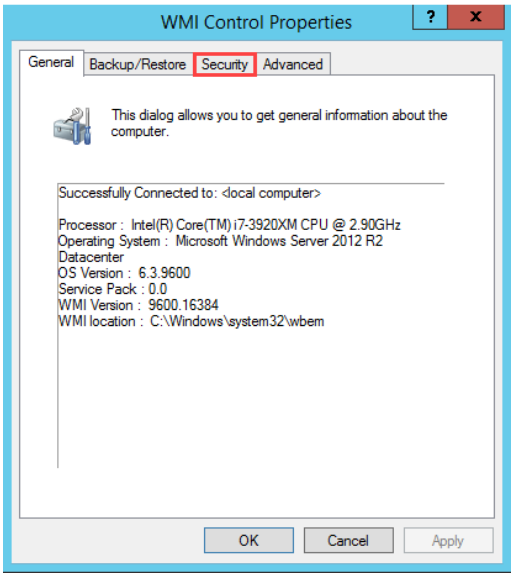
1. Using an administrative account, logon to the server hosting the DNS Server role that is to be registered with the Portal.
2. Load **Computer Management**
3. Expand **Services and Applications**



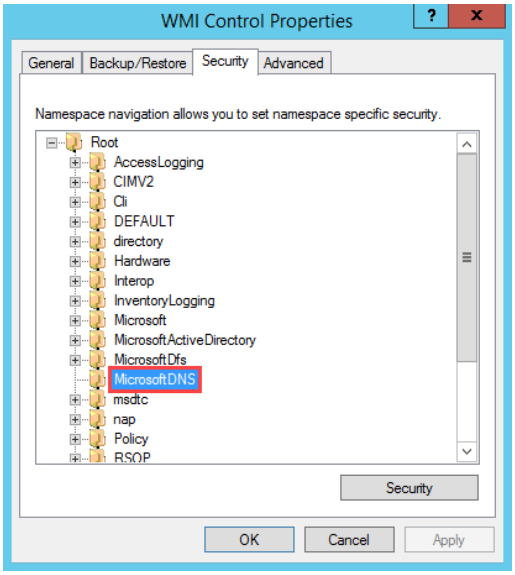
4. Right-click **WMI Control** and select **Properties**



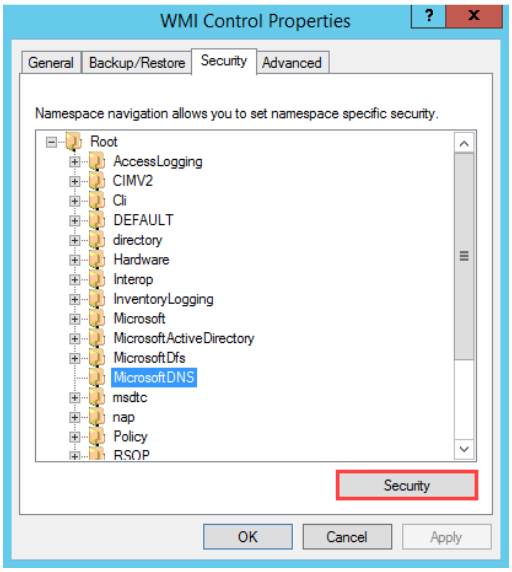
5. On the **WMI Control Properties** dialog box, click the **Security** tab.



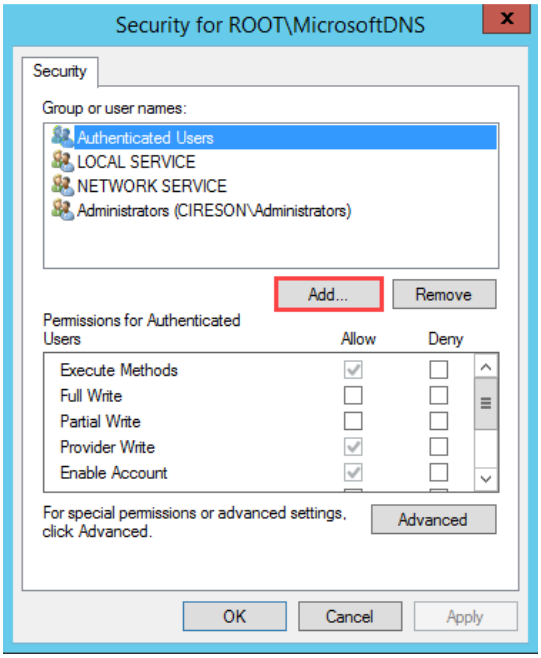
6. Navigate to **Root | MicrosoftDNS**



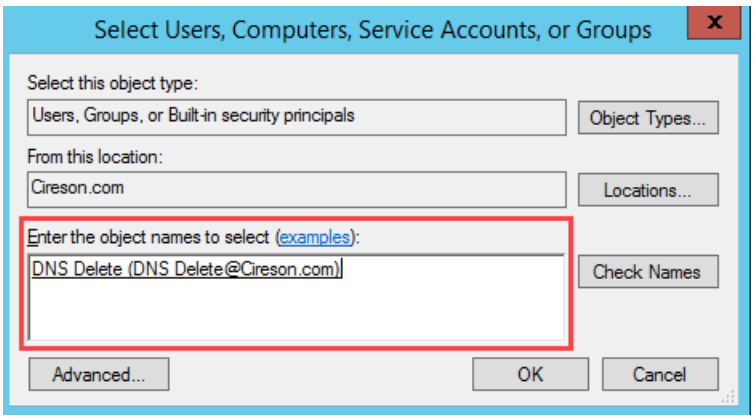
7. Click **Security**



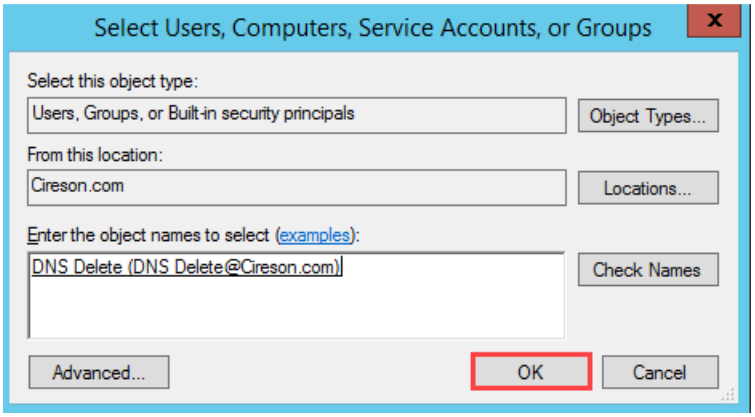
8. On the **Security for ROOT\MicrosoftDNS** dialog box, click **Add…**



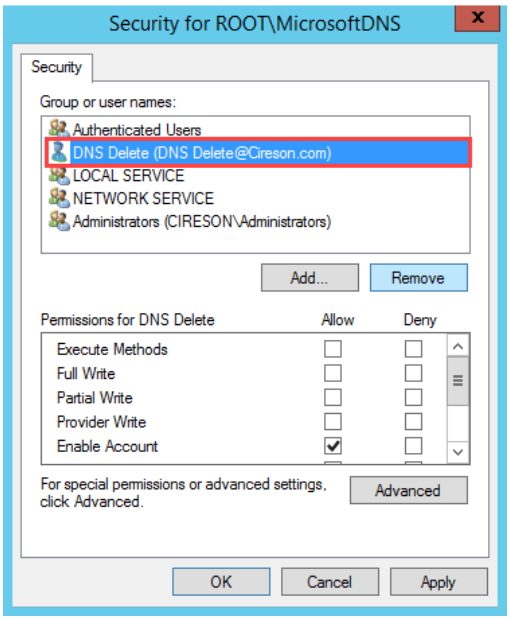
9. On the **Select Users, Computers, Service Accounts, or Groups** dialog box, type the name of the account created in the Creating an account in Active Directory for the Portal to use to delete computer records Creating an account in Active Directory for the Portal to use to delete computer section in the **Enter the object names to select** field, then click **Check Names**



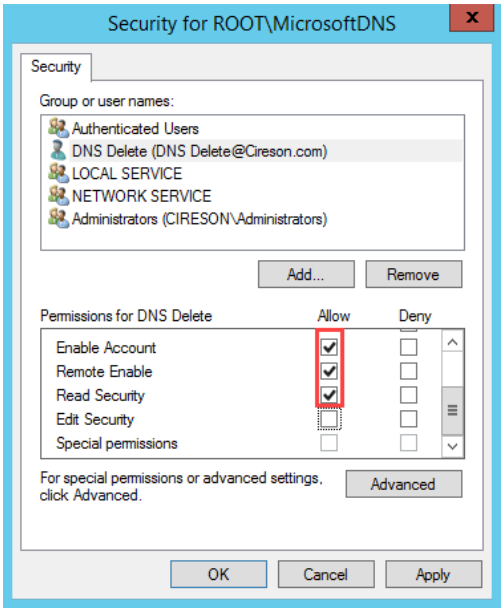
10. Click **OK** to close the **Select Users, Computers, Service Accounts, or Groups** dialog box.



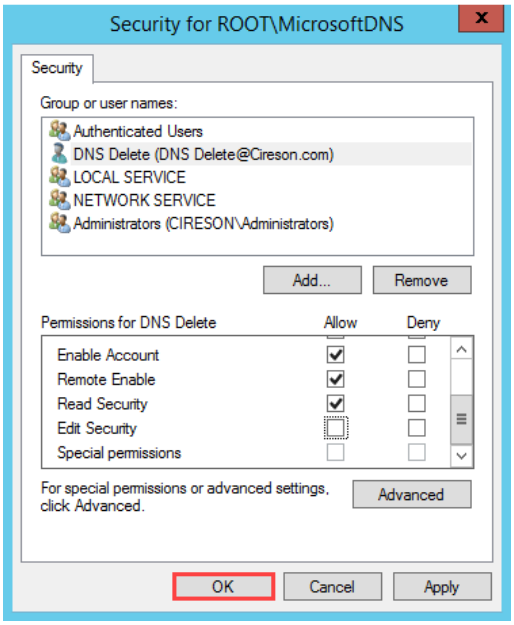
11. On the **Security for ROOT\MicrosoftDNS** dialog box, ensure the account to be used for DNS deletion is selected.



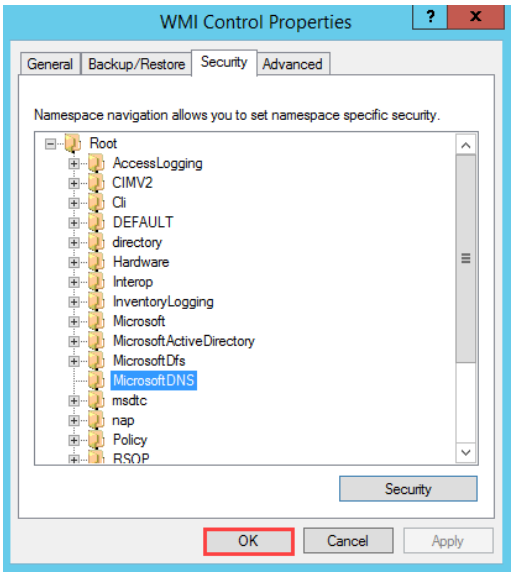
12. Select all the **Allow** checkboxes except for **Edit Security** and **Special permissions** (the last two in the list).



13. Click **OK** to close the **Security for ROOT\MicrosoftDNS** dialog box.



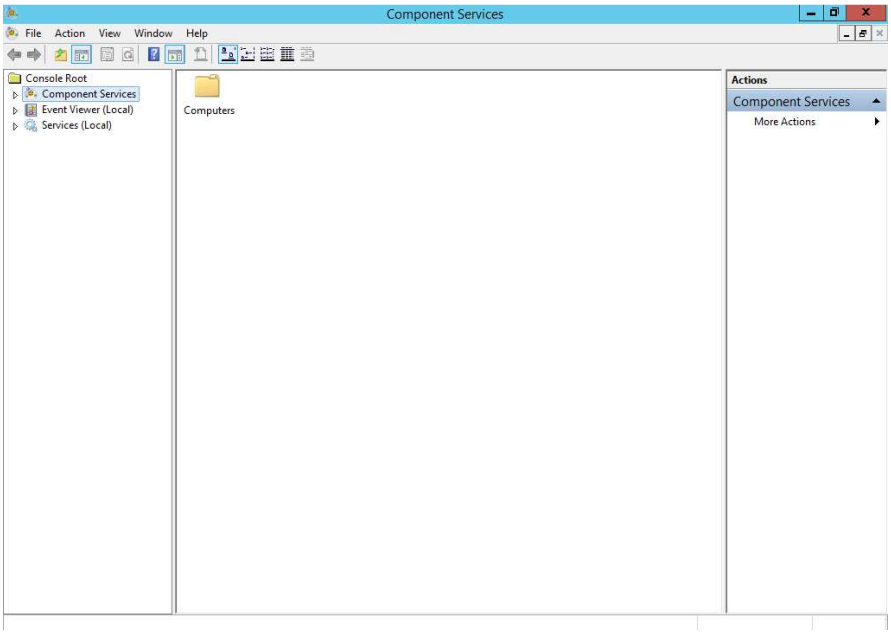
14. Click **OK** to close the **WMI Control Properties** dialog box.



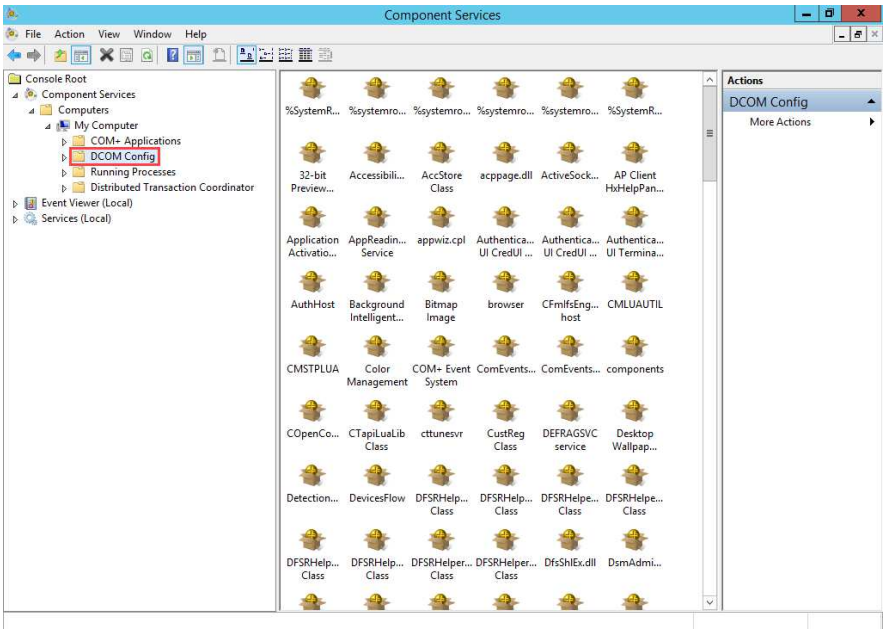
15. Close **Computer Management**
16. Ensure the firewall on the DNS server accepts WMI/DCOM traffic[2].

[2] See https://msdn.microsoft.com/en-us/library/aa822854 if required.

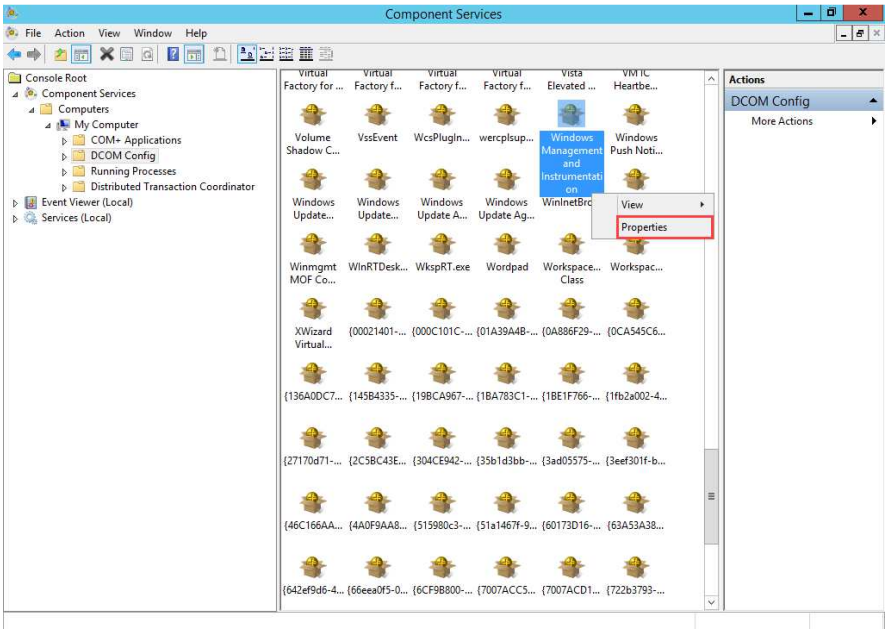
17. Load **Component Services**



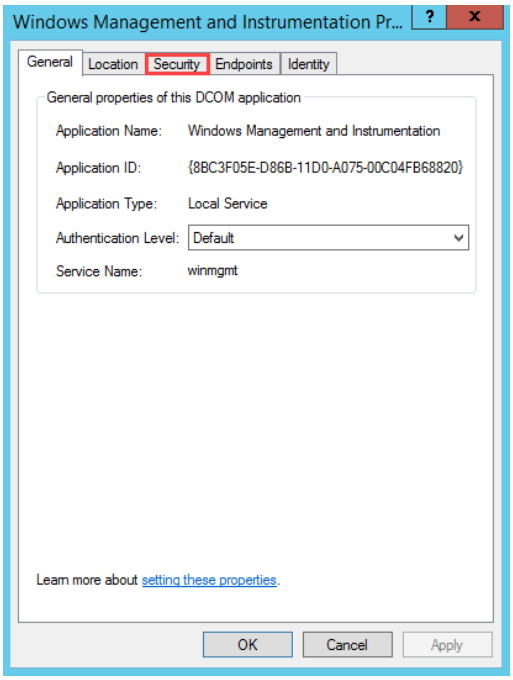
18. Navigate to **Console Root | Component Services | Computers | My Computer | DCOM Config**



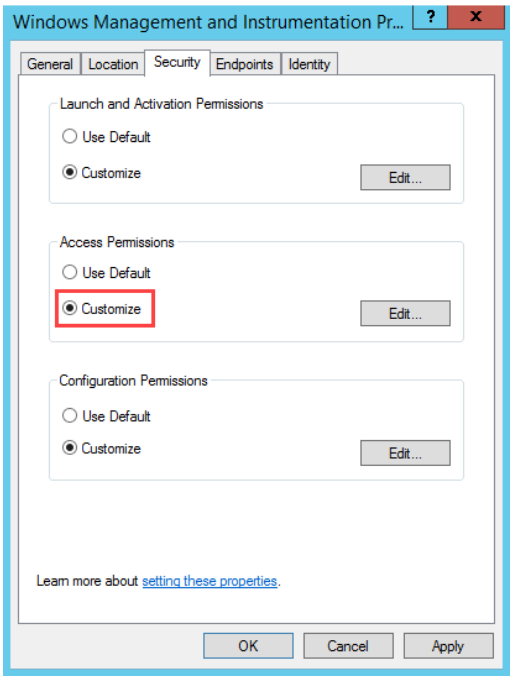
19. Right-click **Windows Management and Instrumentation** and select **Properties**



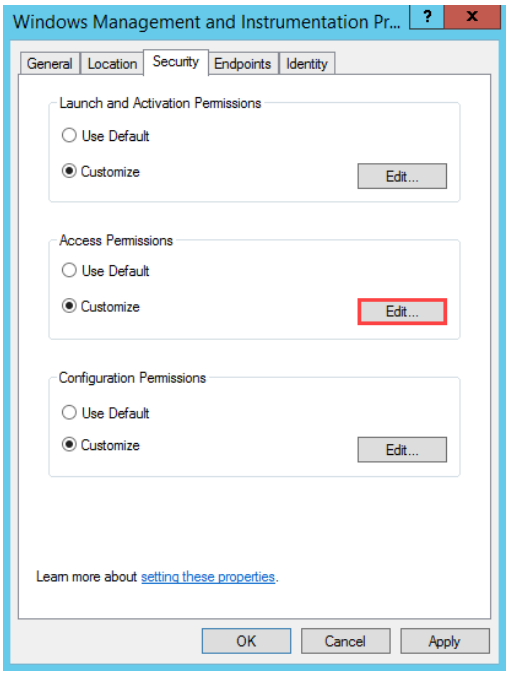
20. Click the **Security** tab.



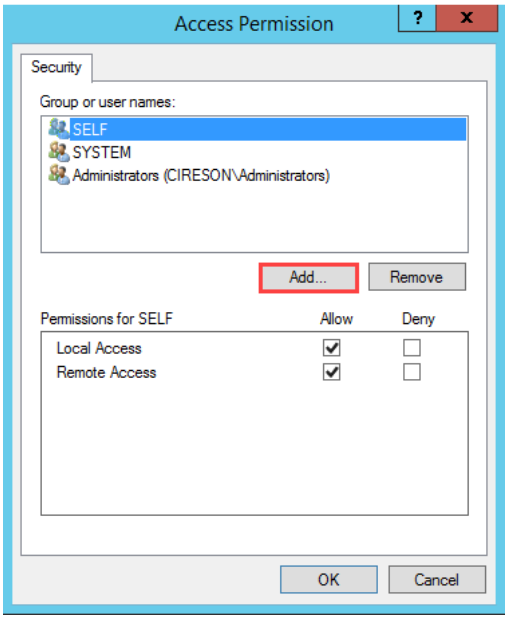
21. On the **Windows Management and Instrumentation Properties** dialog box, under the **Access Permissions** section select **Customize**



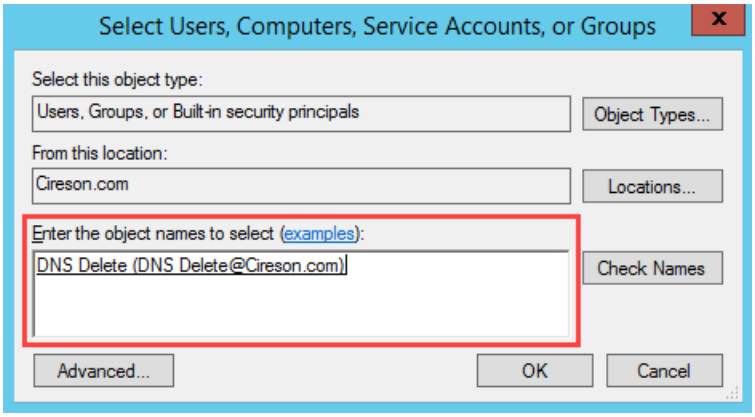
22. Click **Edit…**



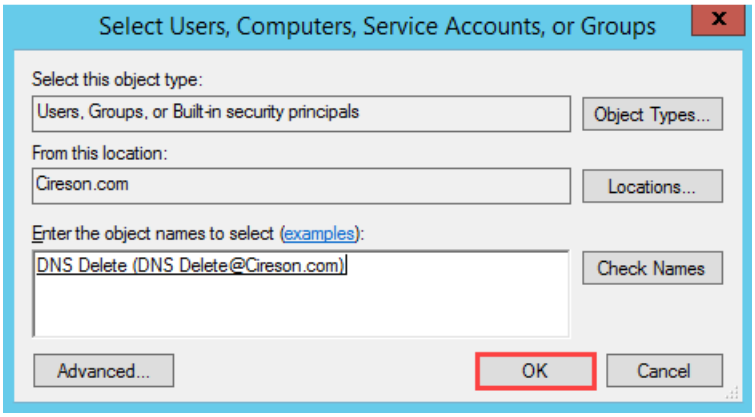
23. On the **Access Permission** dialog box, click **Add…**



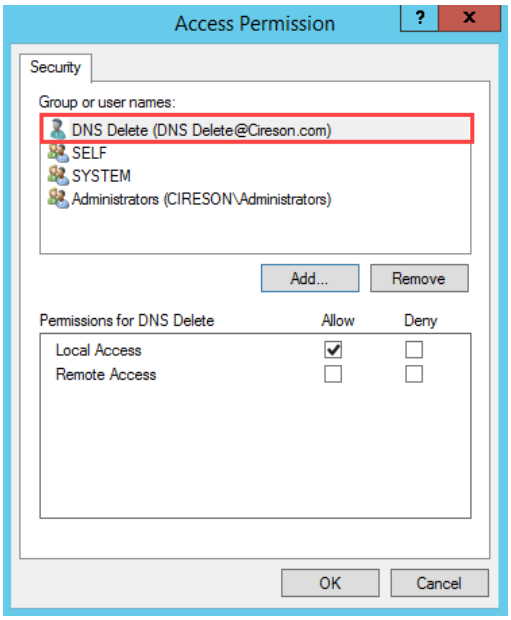
24. On the **Select Users, Computers, Service Accounts, or Groups** dialog box, type the name of the account created in the Creating an account in Active Directory for the Portal to use to delete computer records section in the **Enter the object names to select** field, then click **Check Names**



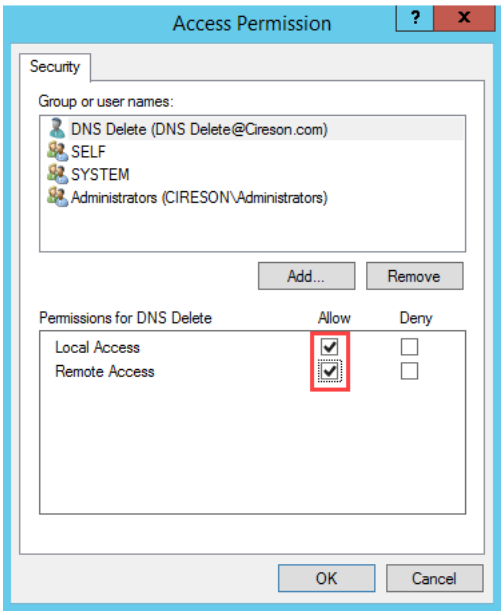
25. Click **OK** to close the **Select Users, Computers, Service Accounts, or Groups** dialog box.



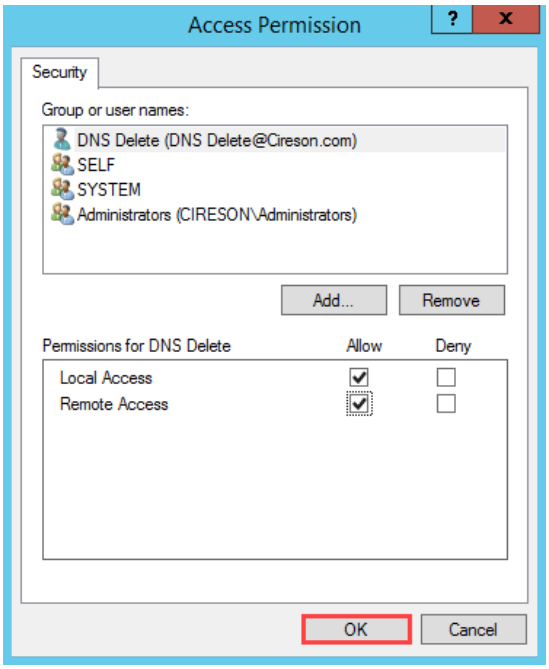
26. On the **Access Permission** dialog box, ensure the account to be used for DNS deletion is selected.



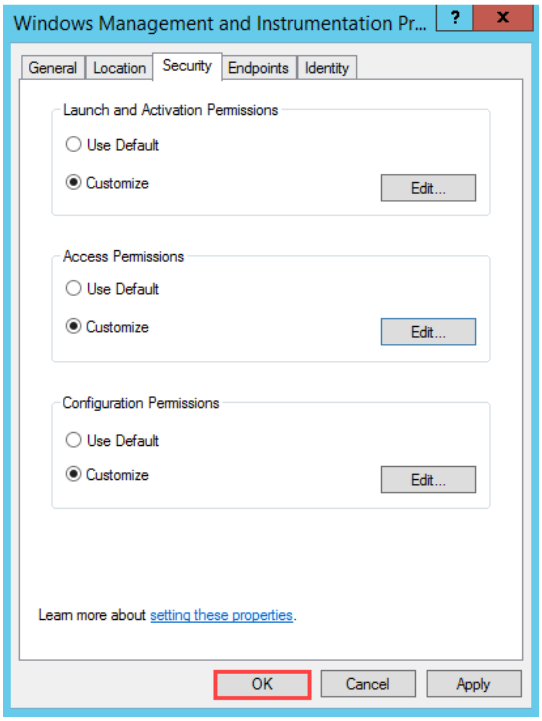
27. Verify the **Allow** checkbox is selected for **Local Access**, then check the **Allow** checkbox for **Remote Access**



28. Click **OK** to close the **Access Permission** dialog box.



29. Click **OK** to close the **Windows Management and Instrumentation Properties** dialog box.

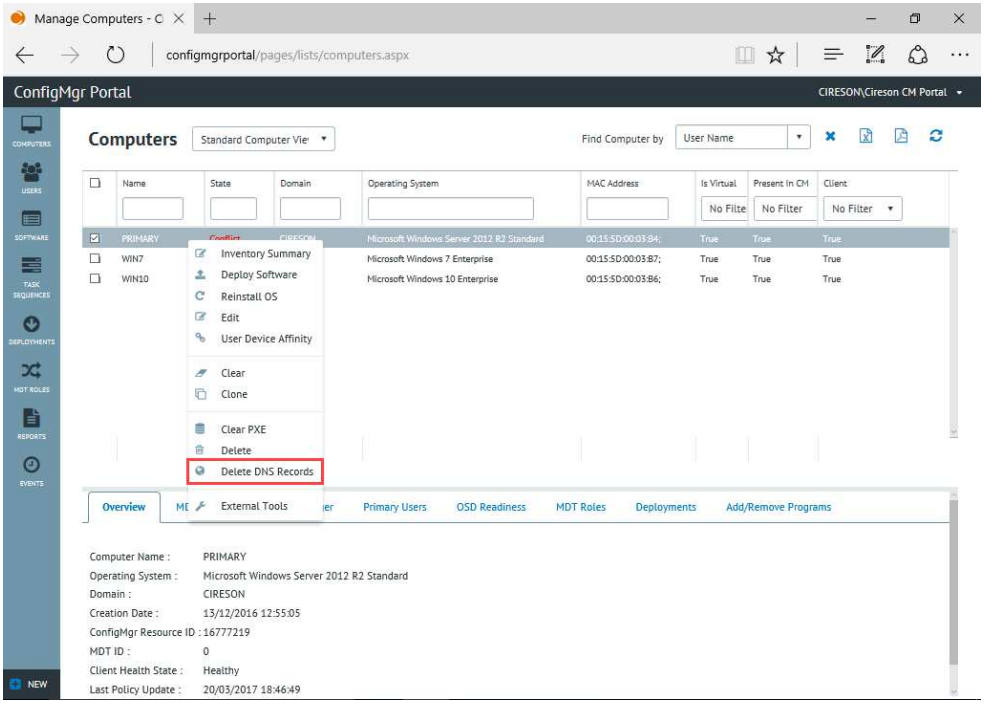


30. Close **Component Services**
31. Repeat this process on all DNS Servers to be registered with the Portal.

Registering a DNS Server with the Portal

Once the previous sections of this Appendix have been completed, The DNS server needs to be registered with the Portal as detailed in How do I register a new DNS Server?

Once the DNS Server has been registered with the Portal, right-clicking on a Computer will now display the **Delete DNS Records** option which is explained in How do I Delete a computer's DNS Records?



Appendix D – How to install the Cireson App Launcher

This Appendix contains details of how to install the free Cireson App Launcher and use it to configure the External Tools feature of the Portal.

The Cireson Application Launcher is a small application that runs in the system tray and runs a small web API on a workstation allowing you to launch supported local applications from a web browser using a custom URL, or HTTP request.

By default, the current version ships configured for the following four tools:

- Cireson's Remote Manage Utility[3]
- Remote Desktop
- Cireson's User Device Affinity Utility[4]
- Ping

The Cireson App Launcher is installed to the current user's ***%appdata%*\Local\Programs\cireson-app-launcher** directory. This is where you will find the **applauncher.log** and the executable files.

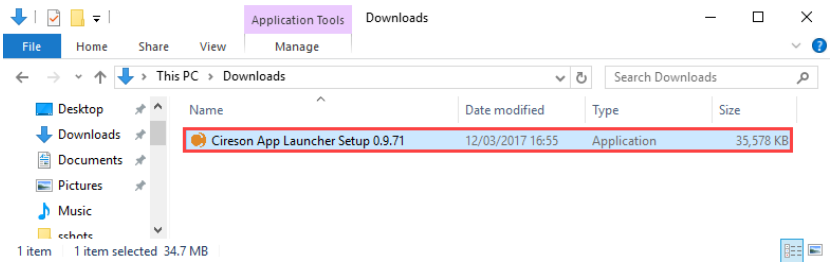
This section details the tasks related to the Cireson App Launcher:

- How do I install the Cireson App Launcher?
- How do I use the Cireson App Launcher to configure External Tools in the Portal?

How do I install the Cireson App Launcher?

To install the Cireson App Launcher:

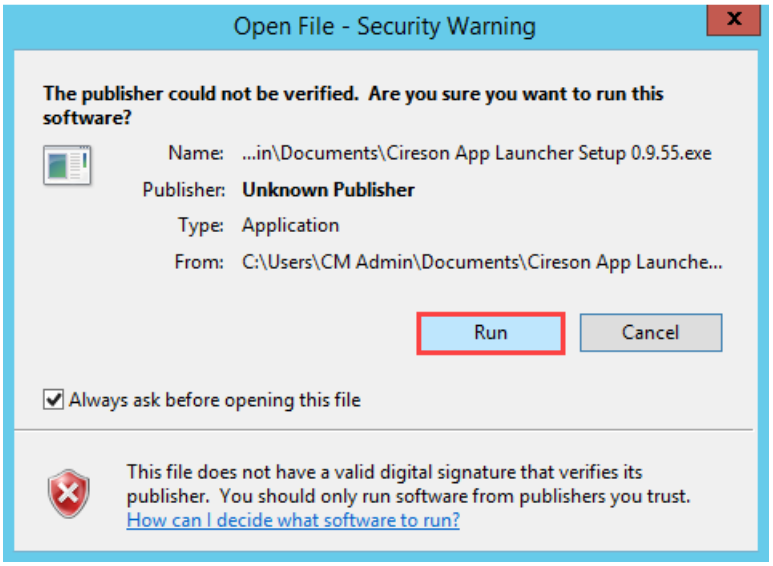
1. Download the latest version of the Cireson App Launcher from the Cireson Software Downloads page at: http://softwaredownloads.cireson.com/#/
2. Logon to the workstation where you want to install the Cireson App Launcher.
3. Double-click the **Cireson App Launcher Setup <*version*>.exe**



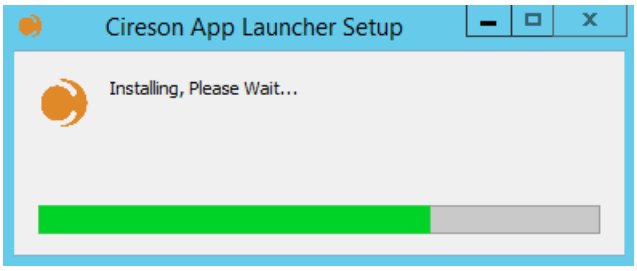
[3] The Cireson Remote Manage utility is a free utility available for download at http://cireson.com/apps/remote-manage/

[4] The Cireson User Device Affinity utility is a free utility available for download at http://cireson.com/apps/user-device-affinity/

4. Click **Run** on the **Open File – Security Warning** dialog box if it's displayed.



The **Cireson App Launcher Setup** page will appears while it is being installed.



How do I use the Cireson App Launcher to configure External Tools in the Portal?

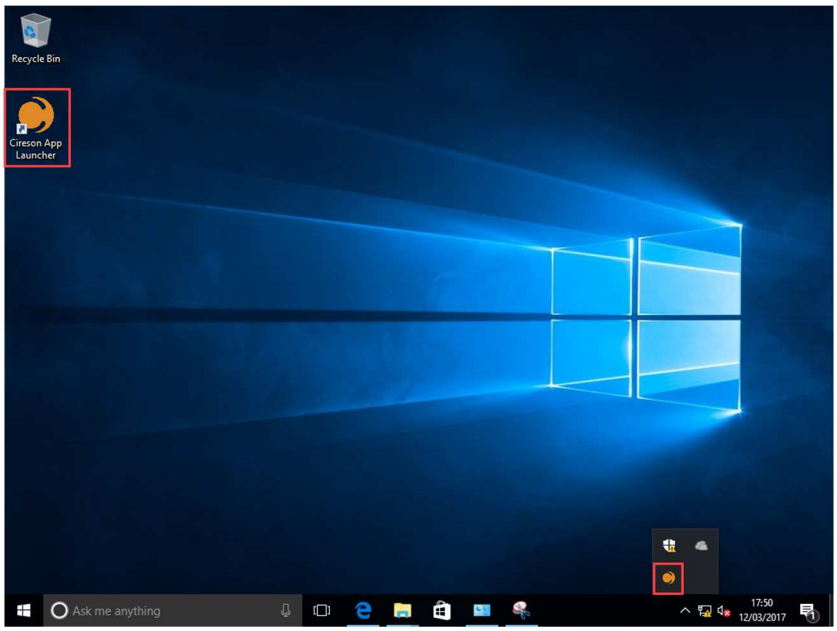
Currently the Cireson Portal for Configuration Manager will have support for the App Launcher out of the box, but you will need to configure the remote tools to work with the App Launcher.

To use the Cireson App Launcher to configure an External Tool in the Portal:

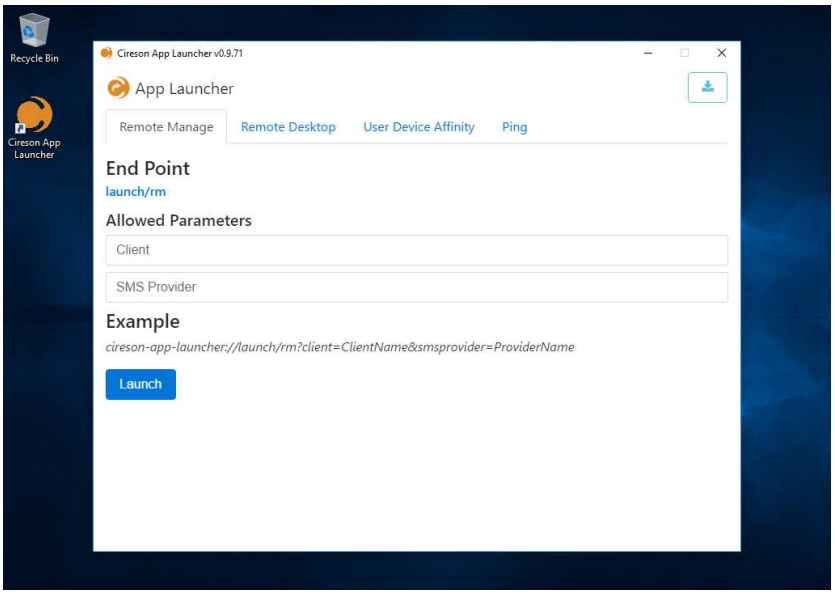
1. Login to the workstation where the Cireson App Launcher has been installed.

2. Load the **Cireson App Launcher** by either:

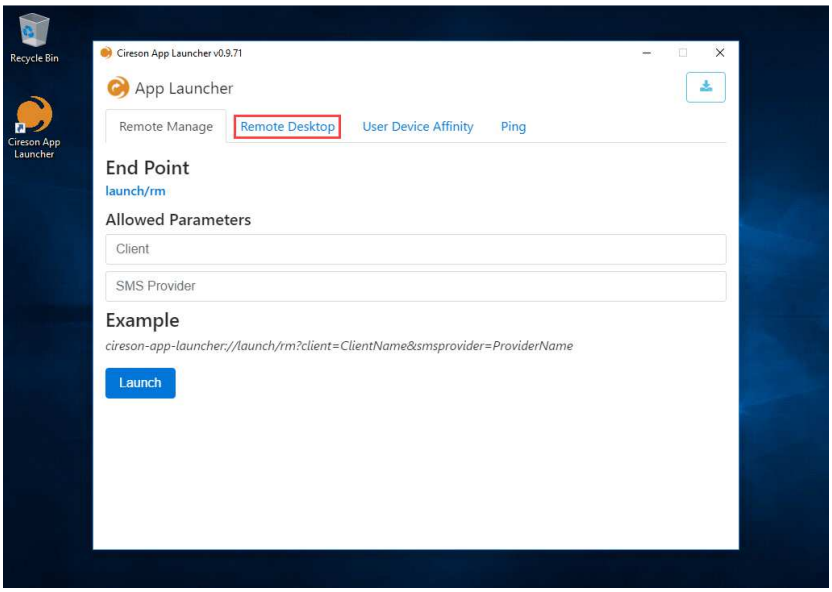
    - Double-clicking the **Cireson App Launcher** shortcut on the desktop if the App Launcher isn't running.
    - Clicking the Cireson logo in the System Tray.



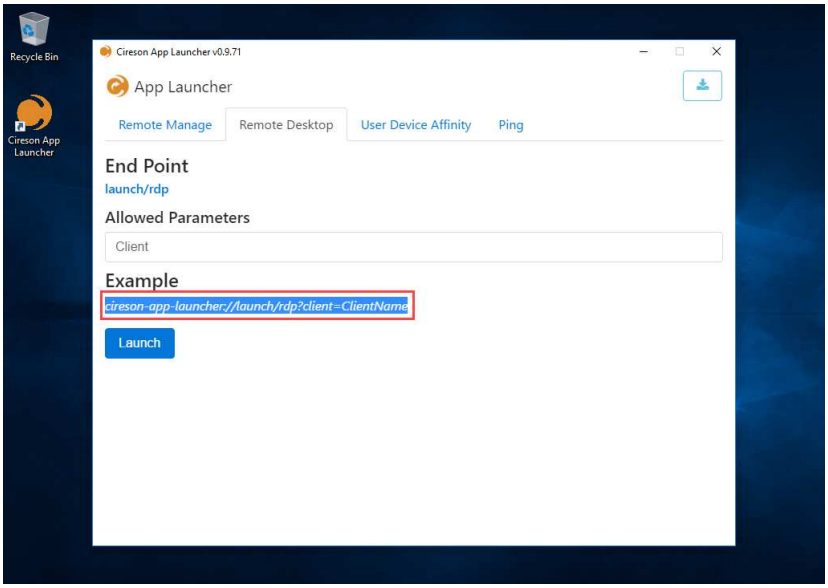
The Cireson App Launcher is loaded.



3. Click the relevant tab for the relevant External Tool you want to add to the Portal. In this example, we will configure Remote Desktop, so click the **Remote Desktop** tab.

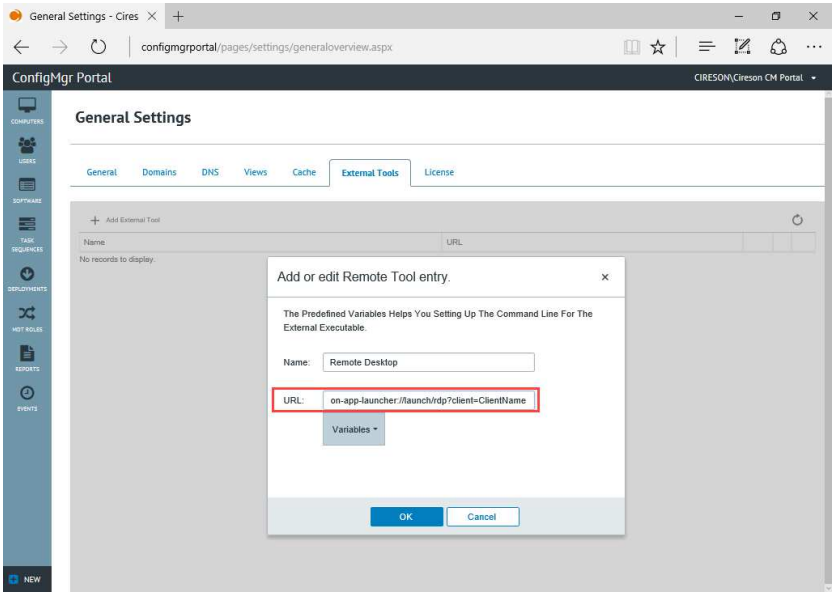


4. Highlight and copy the command line under the **Example** section.

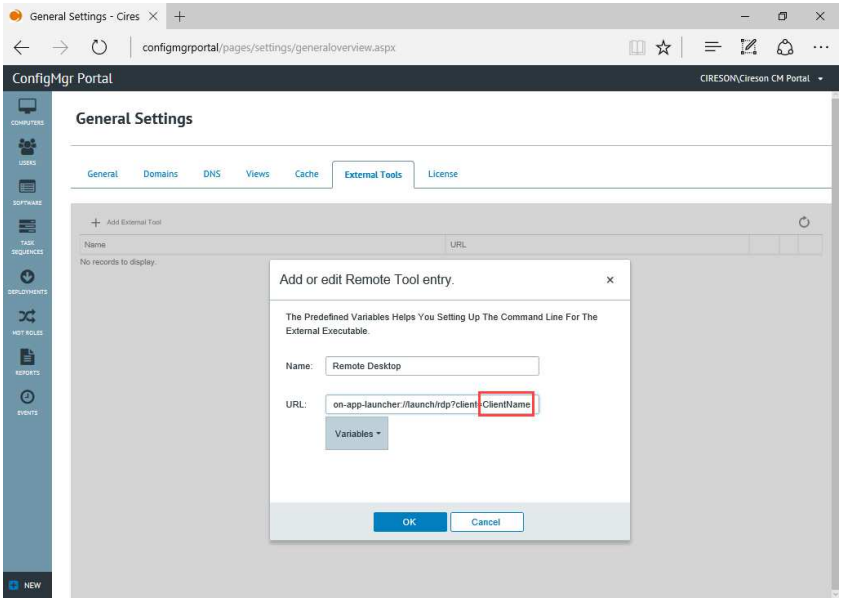


5. Create a new External Tool called **Remote Desktop** as detailed in How do I add a new External Tool?

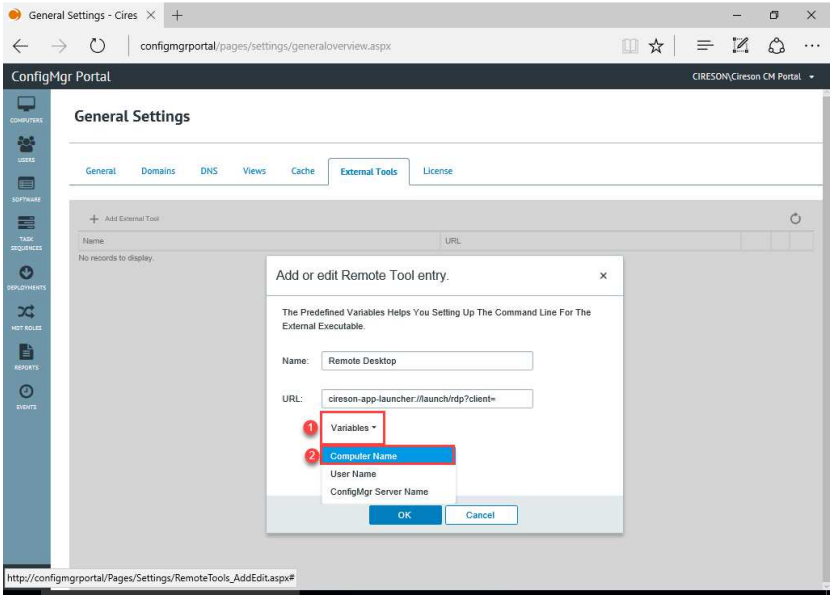
6. When you get to Step 5. in that process, paste the example command copied from the **Cireson App Launcher** in Step 4. of this process and paste it into the **URL** field on the **Add or edit Remote Tool entry** dialog box.



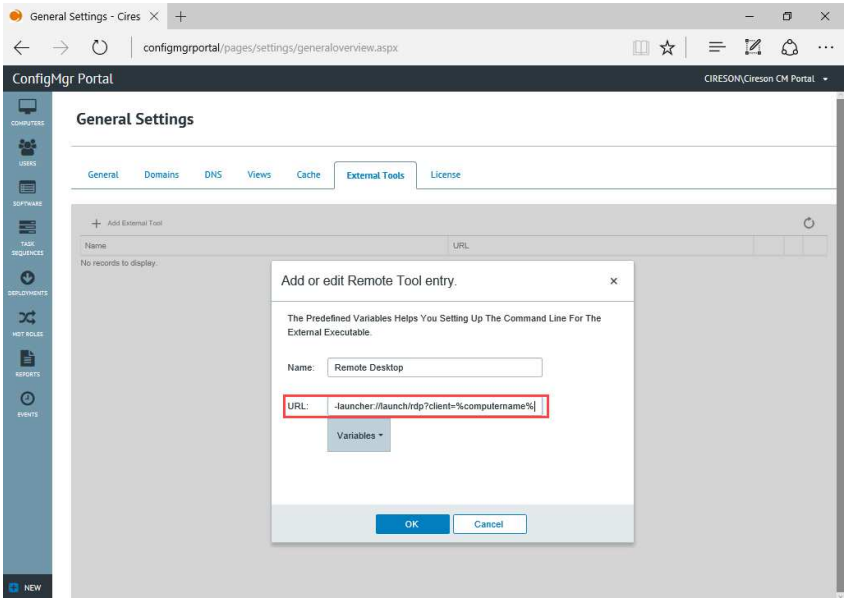
7. Any parameters contained in the **URL** field need to be replaced with the corresponding variable in the Portal. For example, for **Remote Desktop**, delete **Client Name** at the end of the **URL**



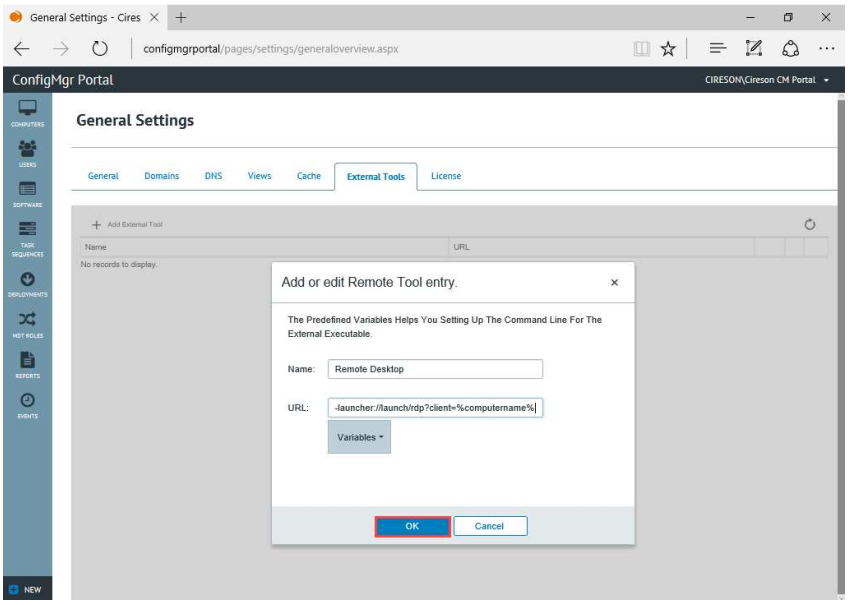
8. From the **Variables** dropdown list, select the relevant variable. For example, for Remote Desktop, select **Computer Name**



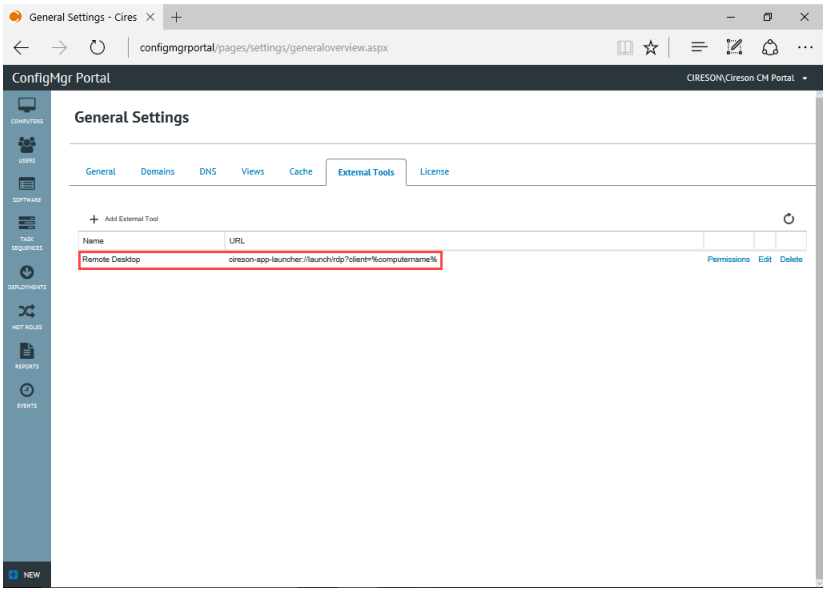
This will update the **URL** with the selected variable.



9. Click **OK**



The **External Tools** tab automatically refreshes showing the newly added External Tool.



This completes the Cireson Portal for Configuration Manager Administration Guide.