

Cireson Portal for Configuration Manager

INSTALLATION GUIDE

Version: 1.0
PUBLISHED: 13-MAR-17

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Introduction

The Cireson Portal for Configuration Manager is a web-based experience to help manage and standardize daily tasks outside of the native Configuration Manager console.

Productivity-boosting features include:

- Available anywhere, anytime
- Inventory data visibility
- Collection membership visibility
- Software management and deployment
- OSD management and deployment
- MDT integration and deployment
- Templates for software, OSD and deployments
- Role-based administration
- Built-in report viewer

Purpose and Audience

The purpose of this document is to explain how to install and perform the initial configuration of the Cireson Portal for Configuration Manager, referred to as the Portal from here on.

Version History

| Version | Date | Author | Description |
|---------|---------------------------|-------------|-------------|
| 1.0 | 13 th Mar 2017 | Cliff Hobbs | Final |

Related Documentation

| Ref | Document | Author | Status | Version |
|-----|--|-------------|--------|---------|
| [1] | Cireson Portal for Configuration Manager Administration Guide | Cliff Hobbs | Draft | 0.0b |
| [2] | Cireson Portal for Configuration Manager Troubleshooting Guide | Cliff Hobbs | Draft | 0.0a |

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.

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

This Installation Guide is based on an environment containing the following versions (see the [Minimum Requirements](#) section for details of supported configurations):

- Windows Server 2012 R2 for server resources
- Windows 10 for using the Portal
- SQL 2014 with Service Pack 2
- System Center Configuration Manager (ConfigMgr) Current Branch

If you are using different versions to these in your environment you will need to adjust the steps accordingly for those versions.

Feedback

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>

Minimum Requirements

The Cireson Portal for Configuration Manager can either be installed on the ConfigMgr site server or on a separate server that has access to the site server and the site database server provided it meets the following minimum requirements.

NOTE: If you decide to install the Portal on a server other than the ConfigMgr site server, we recommend that server is configured as detailed in this guide.

Regardless of where you install the Portal, the target server has to meet the following minimum software requirements:

- **Microsoft Windows Server 2008 with IIS 7 or later** – Any version of Microsoft Windows Server that is currently supported for ConfigMgr 2012 is currently supported¹.
- **Microsoft System Center Configuration Manager (ConfigMgr) Current Branch/ ConfigMgr 2012** – Any version of ConfigMgr currently supported by Microsoft.
- **Microsoft SQL Server 2012 or later** – Any version of Microsoft SQL Server that is currently supported by Microsoft and that is also supported for ConfigMgr is supported by the Portal with the exception of SQL 2008 (although it remains supported by ConfigMgr, it is no longer under mainstream Microsoft support).
- **.NET Framework 4 or greater**

Optional Components

If you are using the Microsoft Deployment Toolkit (MDT) the Cireson Portal for Configuration Manager can be optionally integrated with this as well as ConfigMgr. This integration can be performed either at the time the Portal is configured or at a later date.

¹ See https://technet.microsoft.com/en-us/library/gg682077.aspx#BKMK_SupConfigServerOS

Installing the Prerequisites and Cireson Portal for Configuration Manager

The following process needs to be followed in order to install the prerequisites and the Cireson Portal for Configuration Manager:

- [Account and group requirements](#)
- [DNS requirements](#)
- [Create and configure a new Website](#)
- [Configuring the IIS Application Pool](#)
- [Configuring file security](#)
- [Create and configuring the new SQL Database](#)
- [Running the SQL Scripts](#)

NOTE: The initial release of the Portal does not include an installer to automate the installation of the majority of these prerequisites and the Portal itself. Cireson is considering providing an installer in a future release to automate as much of the installation as possible.

Account and group requirements

In order to be able to install the Portal you need a standard Active Directory user account that will be used:

- As the application pool identity
- To pull data from ConfigMgr database
- To interact with the ConfigMgr Portal database
- To interact with the MDT database (if you are using MDT)
- To interact with the ReportServer database

NOTE: If you used a service account to install ConfigMgr you will probably use the same account for the Portal. If you either did not use a service account or would like to use a separate account for the Portal, you need to ensure the account is a **Full Administrator** user in ConfigMgr which will add it as a member to the site server's local **SMS Admins** group in order to have access to the SMS Provider.

Also, if the Portal will be configured with the rights to remove a computer object from Active Directory (AD) if it is deleted from the Portal, those permissions are required for the account used for the Portal in AD.

Administrative access to the Portal is controlled through group membership. Depending on your environment you could create a local group on the server that will host the Portal called **Cireson CM Portal Admins** that will contain the user accounts of anyone requiring administrative access to the Portal. In this way controlling who has administrative access to the Portal is simply a case of managing the membership of the **Cireson CM Portal Admins** group.

Both Local and Domain groups are supported by the Portal.

NOTE: Multi Domain/ Forest Environments

In multiple Active Directory (AD) domain / forest environments, a single AD account typically cannot access resources in a foreign domain or forest. In such environments, the Portal allows an account for each domain / forest to be specified allowing the Portal to perform tasks on the domain by using the specified credentials.

This includes actions performed on remote ConfigMgr site servers, in SQL and AD, and machine policy download triggers on client computers.

DNS requirements

In order to be able to install the Cireson Portal for Configuration Manager you need to create a new Alias (CNAME record) in your Domain Name System (DNS) pointing to the address for the Portal on the Internet Information Services (IIS) Server on which the Portal will be installed.

For example:

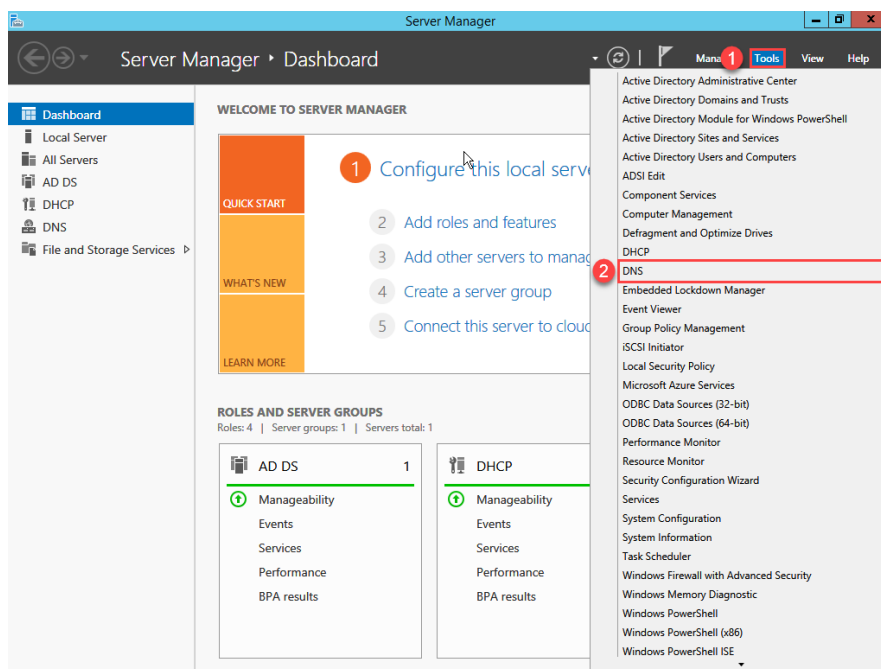
<http://ConfigMgrPortal.mydomain.local>

where *mydomain.local* is the name of your domain.

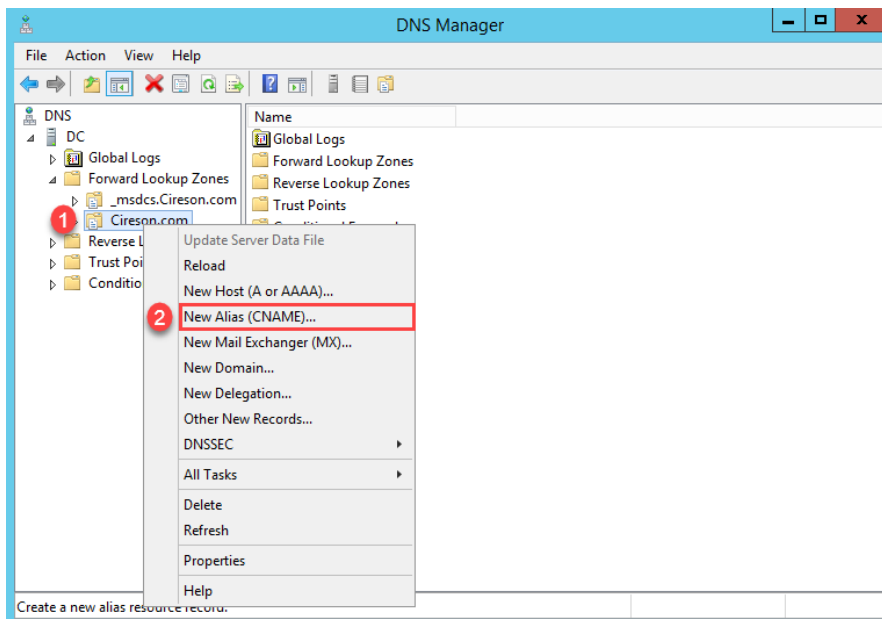
The following procedure walks you through adding a new alias (CNAME) resource record to a zone in Windows Server 2012 R2.

To add an alias (CNAME) resource record to a zone:

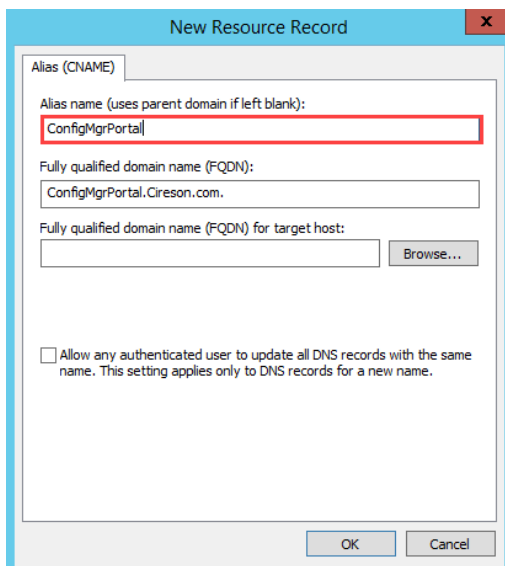
1. Logon to the server where DNS is controlled.
2. Start **Server Manager**.
3. Click the **Tools** menu then select **DNS** which will start the **DNS Manager** Microsoft Management Console (MMC).



4. In the **DNS Manager** navigate to **DNS | <server_name> | Forward Lookup Zones**.
5. Right-click the relevant forward lookup zone where you want to add the Alias resource record for the Portal website name and click **New Alias (CNAME)**. The **New Resource Record** dialog box opens.

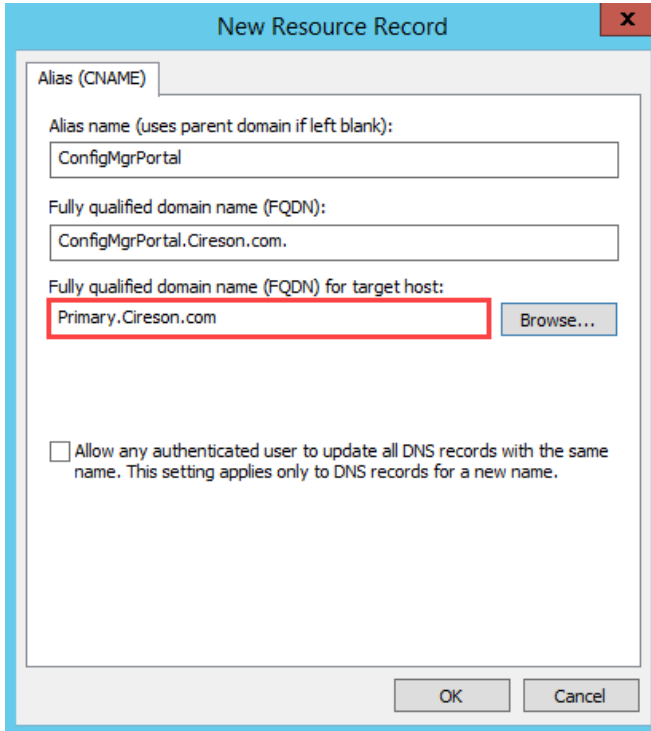


6. In the **New Resource Record** dialog box type the name of the alias to be used for the Portal website name in the **Alias name** field, for example **ConfigMgrPortal**



NOTE: As you type the alias in the **Alias name** field the **Fully qualified domain name (FQDN)** field is automatically populated.

7. If you use Fully Qualified Domain Names (FQDNs) in your environment, in the **Fully qualified domain name (FQDN) for target host** field type the FQDN of the computer on which the Portal will be stored. Alternatively click the **Browse** button to browse the DNS namespace for the host (A) resource record for server on which the Portal will be installed.



The screenshot shows a 'New Resource Record' dialog box with the following fields and controls:

- Alias (CNAME) tab:** Selected.
- Alias name (uses parent domain if left blank):** ConfigMgrPortal
- Fully qualified domain name (FQDN):** ConfigMgrPortal.Cireson.com.
- Fully qualified domain name (FQDN) for target host:** Primary.Cireson.com (highlighted with a red rectangle). A 'Browse...' button is located to the right of this field.
- Checkbox:** ☐ Allow any authenticated user to update all DNS records with the same name. This setting applies only to DNS records for a new name.
- Buttons:** OK, Cancel

8. Click **OK** to add the new record to the zone.

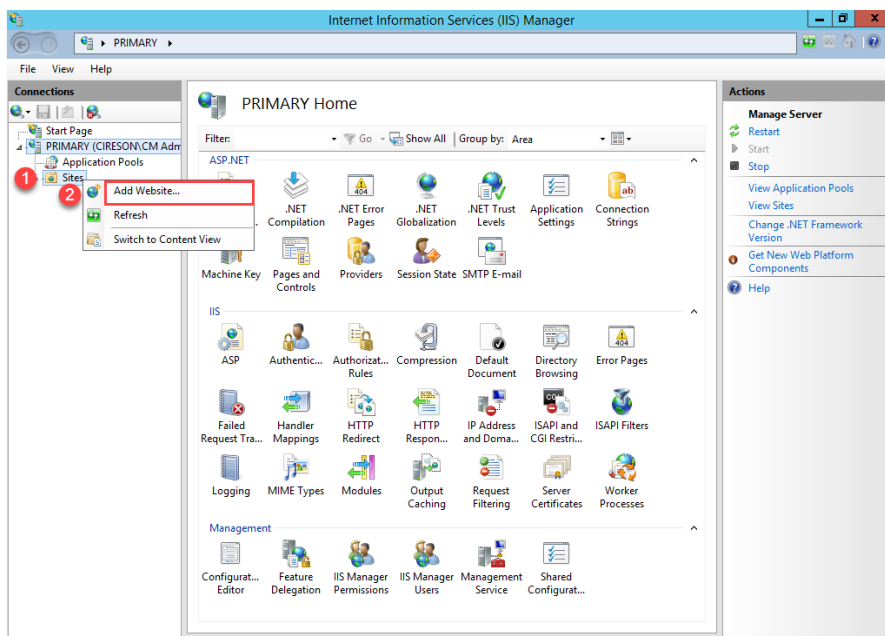
Create and configure a new Website

The next step in the process is to use Internet Information Services (IIS) to create and configure a new Website for the ConfigMgr Portal.

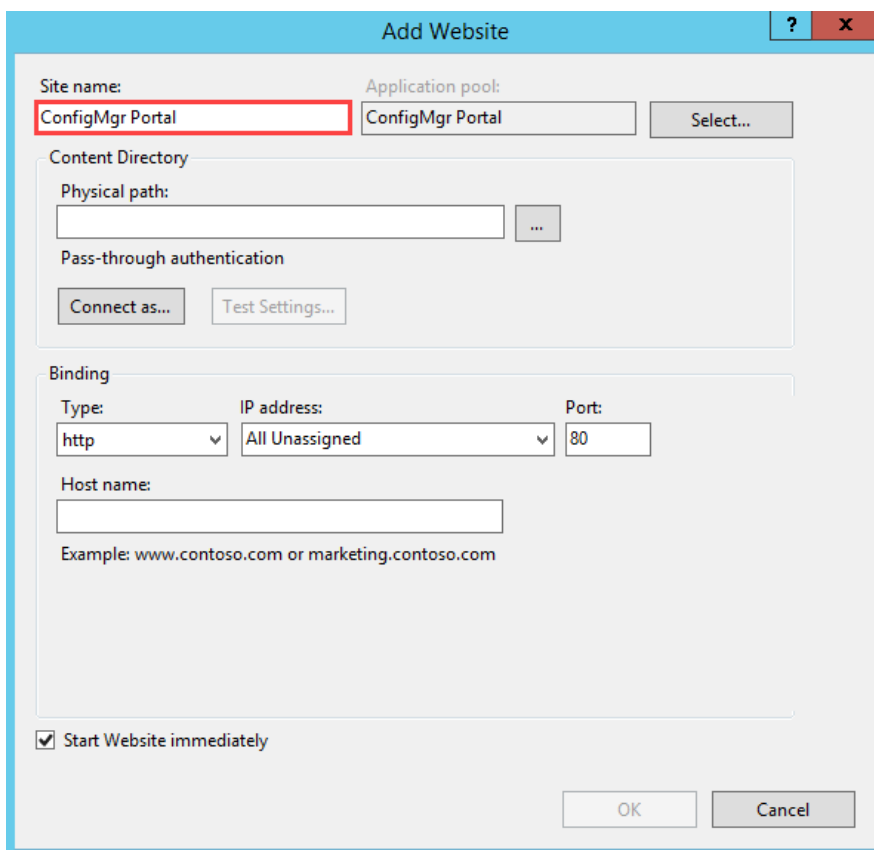
To create and configure a new Website for the Portal:

1. Logon to the server that will host the Portal.
2. Create a new folder under **C:\inetpub** to host the new Website, for example **ConfigMgr Portal**
3. Extract the **Cireson ConfigMgr Portal.zip** to the new folder created in Step 2.
4. Start **Internet Information Services (IIS) Manager**.

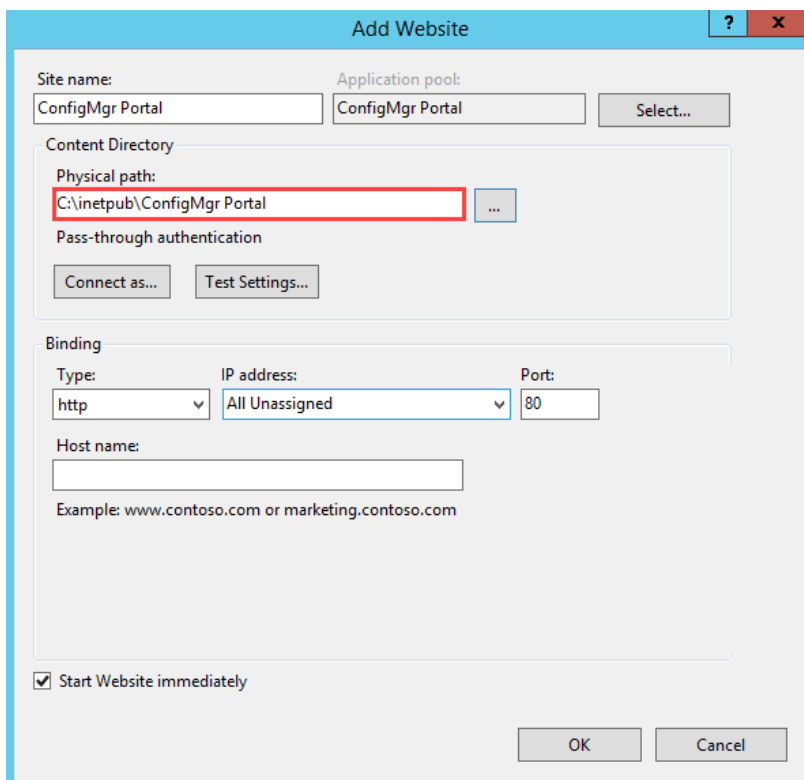
- Expand the server object in the left hand pane, then right-click **Sites** and select **Add Website**.



- On the **Add Website** dialog box, type the name of the Website in the **Site name** field for example **ConfigMgr Portal**

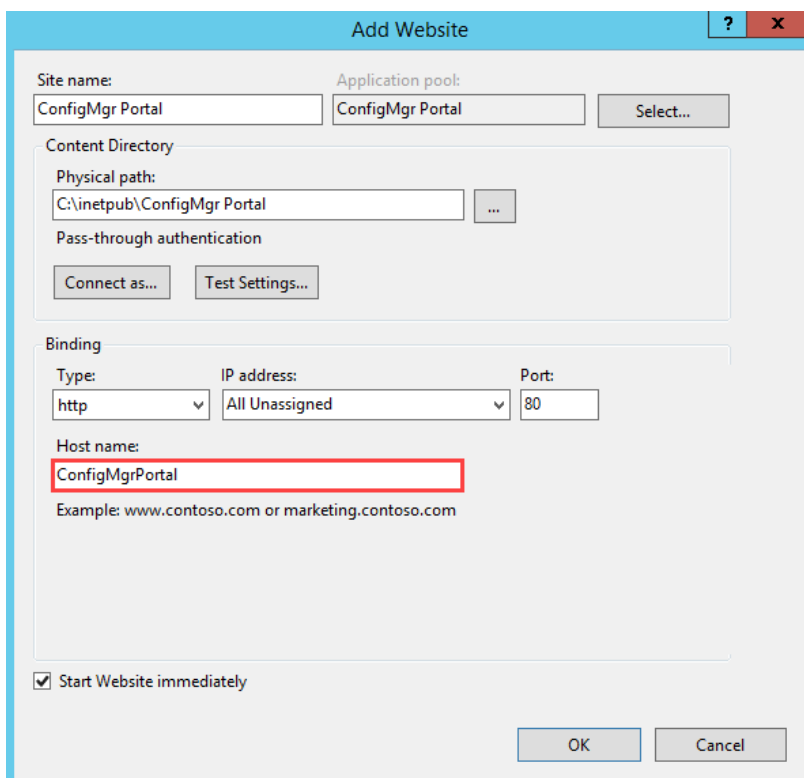


7. In the **Physical path** field, either type the path or browse to the folder created in Step 2.



The screenshot shows the 'Add Website' dialog box. The 'Site name' field contains 'ConfigMgr Portal'. The 'Application pool' dropdown is set to 'ConfigMgr Portal'. In the 'Content Directory' section, the 'Physical path' field is highlighted with a red rectangle and contains the text 'C:\inetpub\ConfigMgr Portal'. Below this, there are buttons for 'Connect as...' and 'Test Settings...'. In the 'Binding' section, the 'Type' dropdown is set to 'http', the 'IP address' dropdown is set to 'All Unassigned', and the 'Port' field contains '80'. The 'Host name' field is empty. Below the 'Host name' field, there is an example: 'Example: www.contoso.com or marketing.contoso.com'. At the bottom, there is a checkbox labeled 'Start Website immediately' which is checked. The 'OK' and 'Cancel' buttons are at the bottom right.

8. In the **Host name** field, type the name for the website, for example **ConfigMgrPortal** (no spaces) then click **OK**.

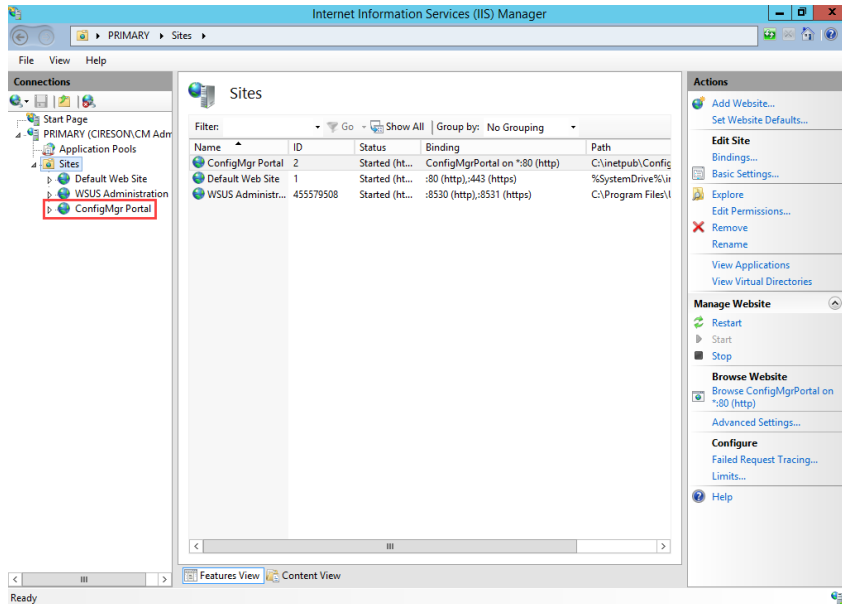


The screenshot shows the 'Add Website' dialog box. The 'Site name' field contains 'ConfigMgr Portal'. The 'Application pool' dropdown is set to 'ConfigMgr Portal'. In the 'Content Directory' section, the 'Physical path' field contains 'C:\inetpub\ConfigMgr Portal'. Below this, there are buttons for 'Connect as...' and 'Test Settings...'. In the 'Binding' section, the 'Type' dropdown is set to 'http', the 'IP address' dropdown is set to 'All Unassigned', and the 'Port' field contains '80'. The 'Host name' field is highlighted with a red rectangle and contains the text 'ConfigMgrPortal'. Below the 'Host name' field, there is an example: 'Example: www.contoso.com or marketing.contoso.com'. At the bottom, there is a checkbox labeled 'Start Website immediately' which is checked. The 'OK' and 'Cancel' buttons are at the bottom right.

IMPORTANT: Make sure to enter the name of the Portal in the **Host name** field and not that of the actual server FQDN. If you enter the FQDN of the server, it will conflict with your Management Point and take it offline causing it to generate Status Message ID 5436:

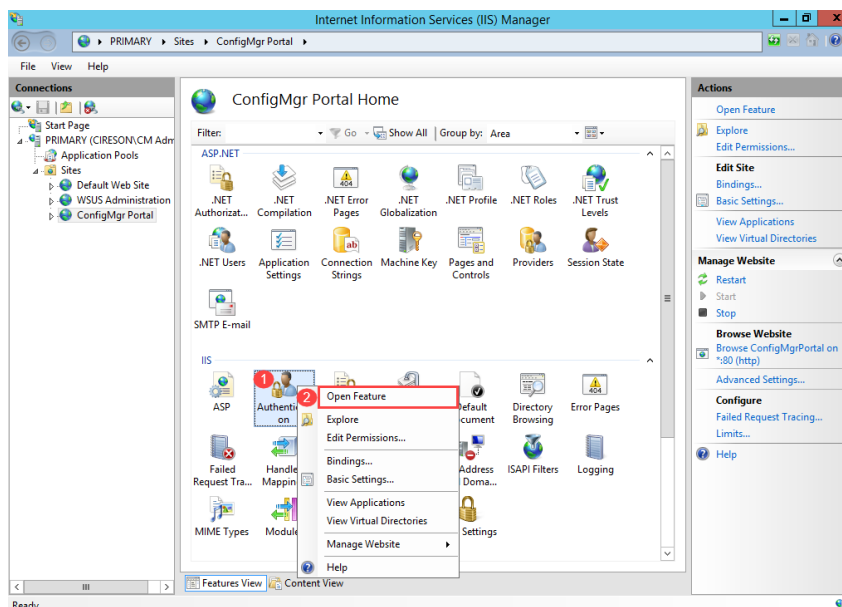
MP Control Manager detected management point is not responding to HTTP requests. The HTTP status code and text is 401, Unauthorized

The new Website will be shown in **Internet Information Services (IIS) Manager**.

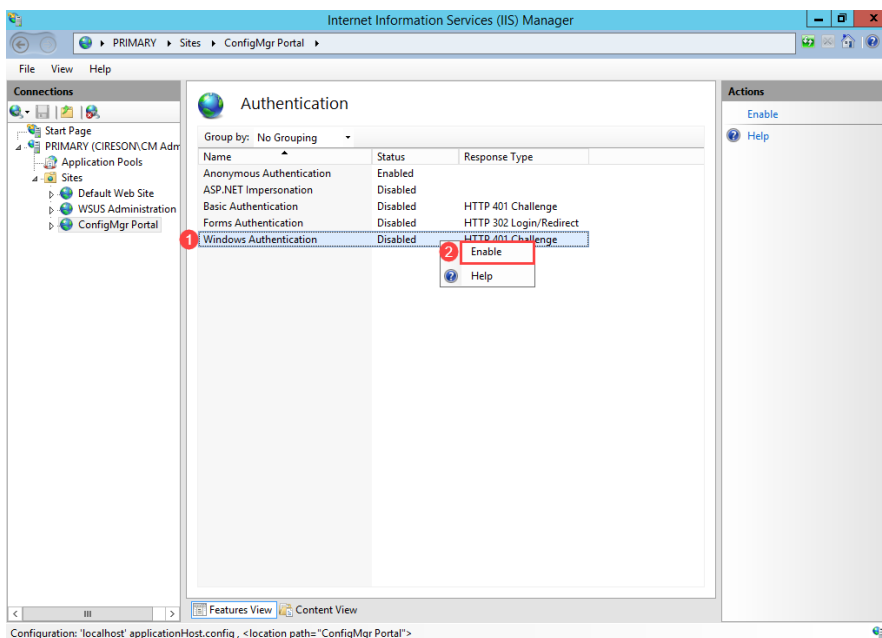


9. Click the newly created Website.

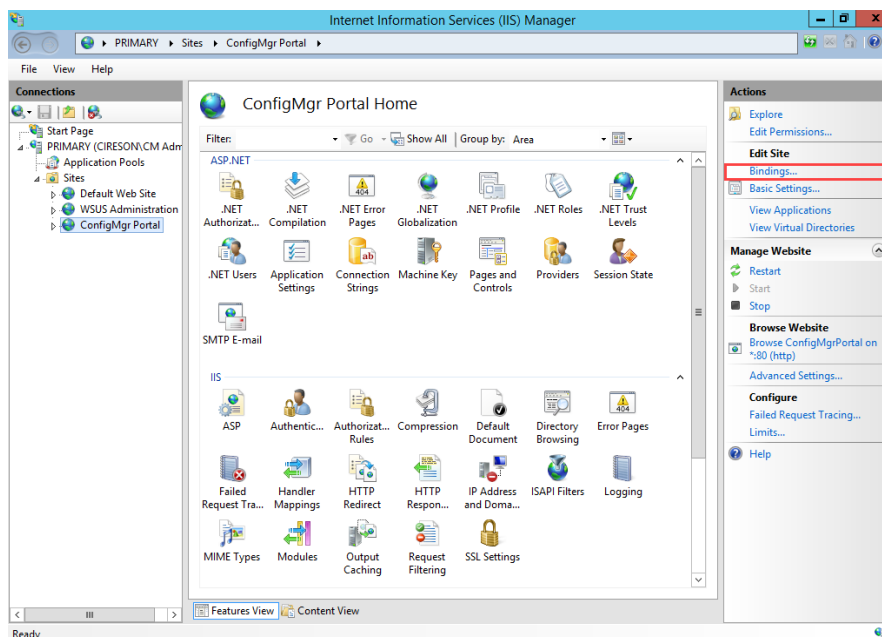
10. Under the **IIS** section of the **ConfigMgr Portal Home** page, right-click **Authentication** and select **Open Feature**.



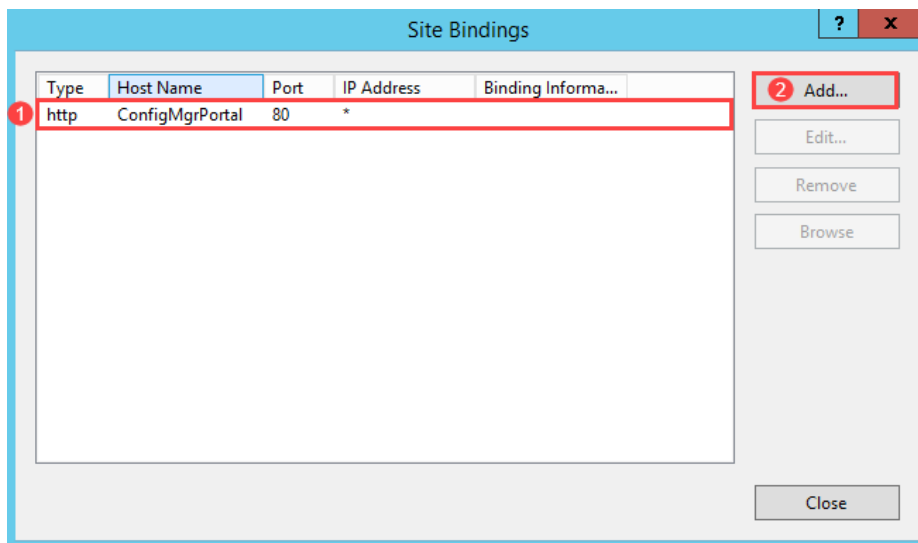
11. On the **Authentication** screen, right-click **Windows Authentication** and select **Enable**.



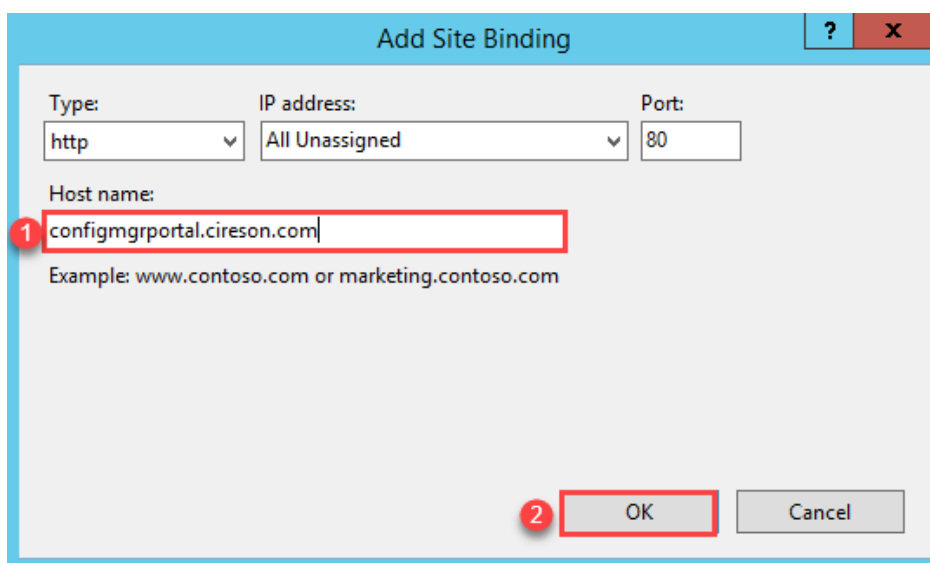
12. Right-click **Anonymous Authentication** and select **Disable**
13. Ensure all other authentication methods are disabled (if any are enabled simply right-click on them and select **Disable**).
14. Click the **ConfigMgr Portal** site under **Sites** to return to the **ConfigMgr Portal Home** page.
15. Under the **Actions** pane click **Bindings**.



16. On the **Site Bindings** dialog box, verify that a binding for the Portal alias already exists then click **Add**.



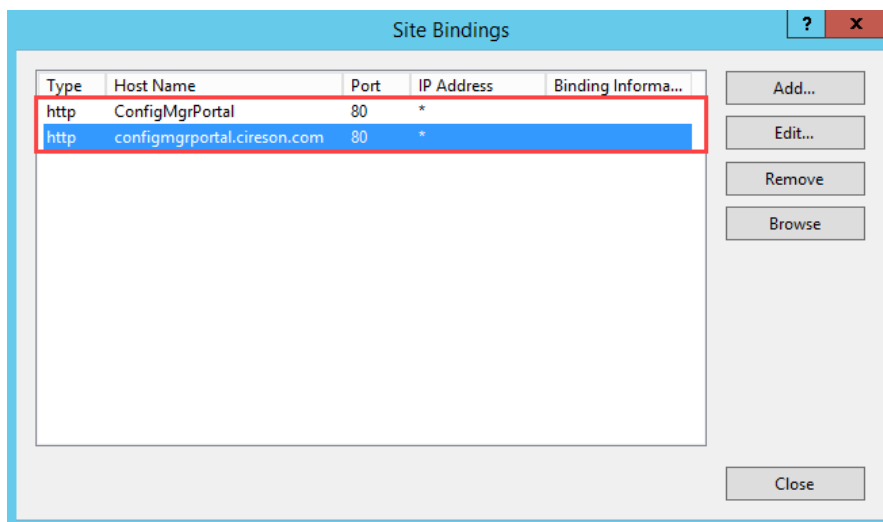
17. On the **Add Site Binding** dialog box type the FQDN of the Portal Website in the **Host name** field then click **OK**.



IMPORTANT: Make sure to enter the FQDN of the Portal in the **Host name** field and not that of the actual server FQDN. If you enter the FQDN of the server, it will conflict with your Management Point and take it offline causing it to generate Status Message ID 5436:

MP Control Manager detected management point is not responding to HTTP requests. The HTTP status code and text is 401, Unauthorized

Both of the bindings should now appear on the **Site Bindings** dialog box.



18. Click **Close**.

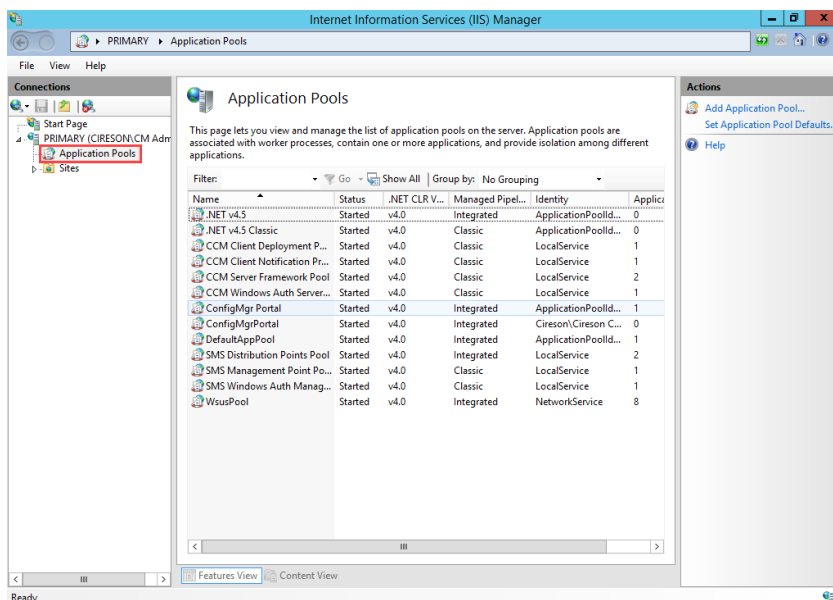
NOTE: Leave **Internet Information Services (IIS) Manager** open as it is required in the next section.

Configuring the IIS Application Pool

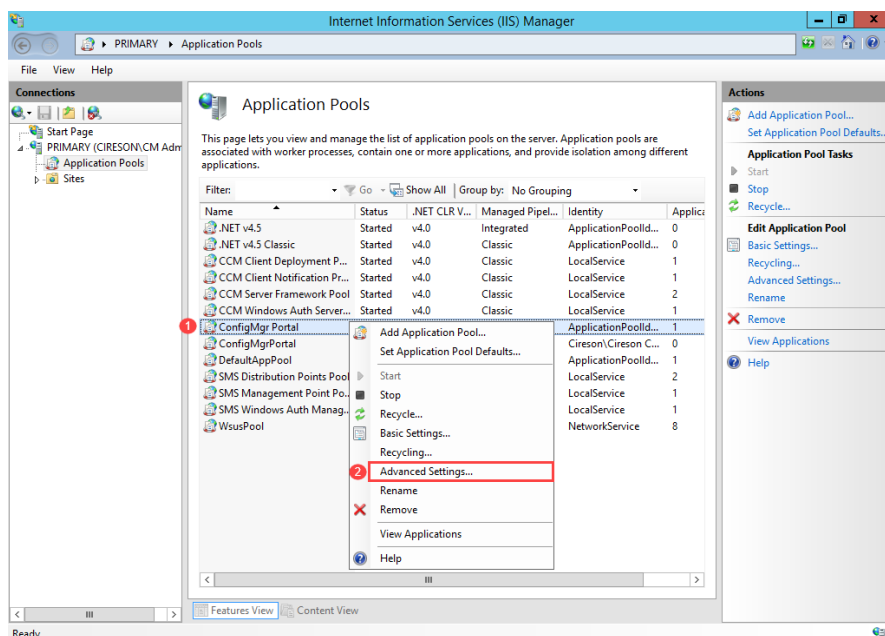
The next stage of the installation process involves configuring the Internet Information Services (IIS) Application Pool.

To configure the IIS Application Pool:

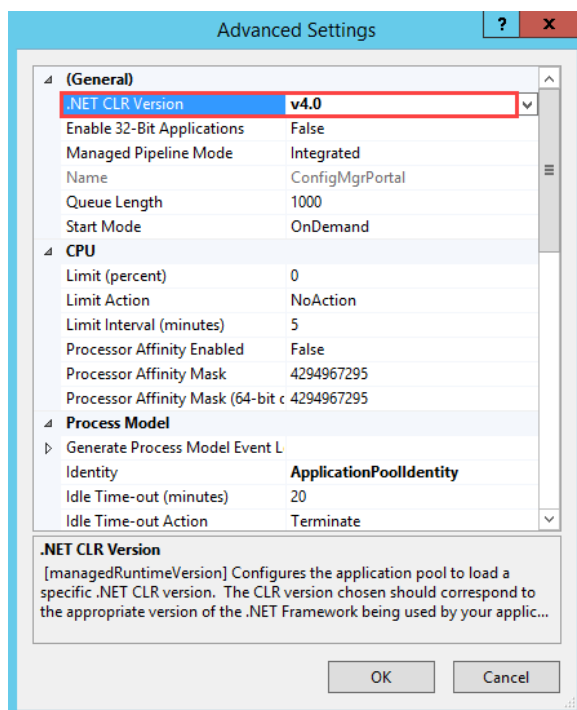
1. Logon to the server that will host the Portal.
2. Start **Internet Information Services (IIS) Manager** (if it isn't already).
3. Navigate to **<server_name> | Application Pools**.



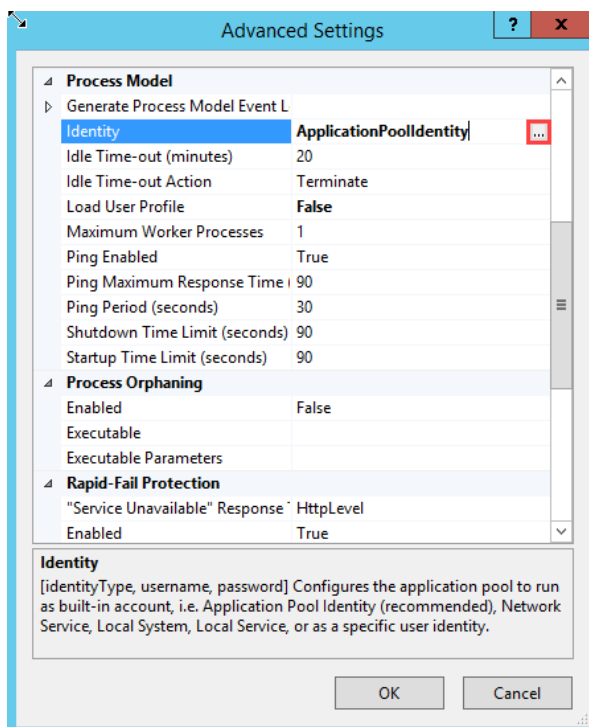
- Right-click the **ConfigMgr Portal** Application Pool and select **Advanced Settings**.



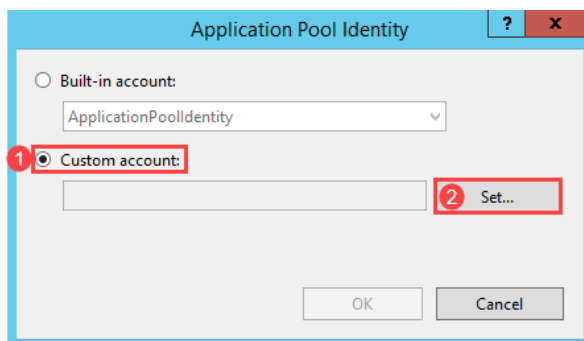
- On the **Advanced Settings** dialog box verify that the **.NET CLR Version** under the **(General)** section is set to **v4.0**



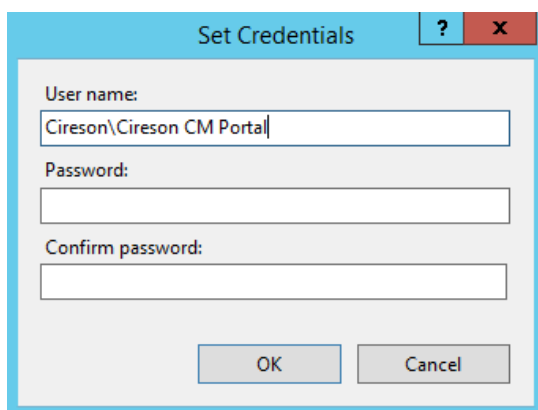
6. Under the **Process Model** section click the ellipses (...) after the **Identity** field.



7. On the **Application Pool Identity** dialog box, select the **Custom account:** option and then click the **Set** button.

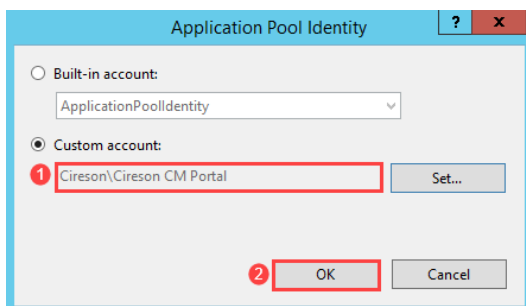


8. On the **Set Credentials** dialog box enter the credentials (including the domain name), for the Portal service account created in the **Account and group requirements** section then click **OK**. For example **Cireson\Cireson CM Portal**.



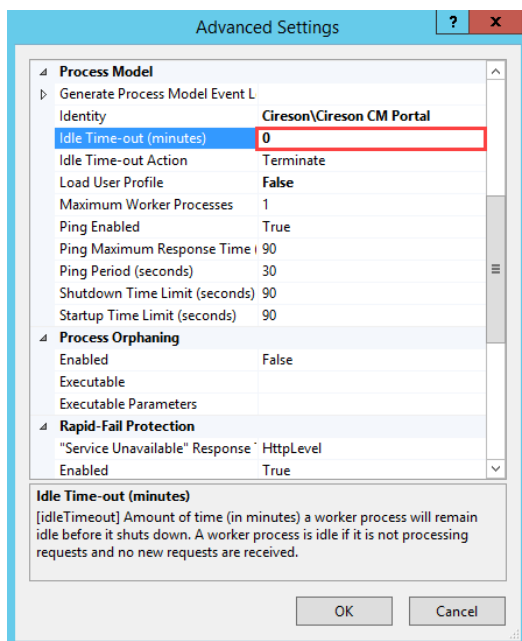
The 'Set Credentials' dialog box has a title bar with a question mark and a close button. It contains three text input fields: 'User name:', 'Password:', and 'Confirm password:'. The 'User name' field is pre-filled with 'Cireson\Cireson CM Portal'. At the bottom are 'OK' and 'Cancel' buttons.

9. On the **Application Pool Identity** dialog box, check that the **Custom account** field contains the correct value then click **OK**.



The 'Application Pool Identity' dialog box has a title bar with a question mark and a close button. It has two radio buttons: 'Built-in account:' and 'Custom account:'. The 'Custom account' radio button is selected. Below it is a text field containing 'Cireson\Cireson CM Portal' with a red box around it and a red '1' next to it. To the right of this field is a 'Set...' button. At the bottom are 'OK' and 'Cancel' buttons, with a red box around the 'OK' button and a red '2' next to it.

10. To avoid potential performance issues with the initial loading of the Portal we recommend changing the value for the **Idle Time-out (minutes)** setting from **20** to **0**.



The 'Advanced Settings' dialog box has a title bar with a question mark and a close button. It contains a tree view with three main sections: 'Process Model', 'Process Orphaning', and 'Rapid-Fail Protection'. Under 'Process Model', the 'Idle Time-out (minutes)' setting is highlighted with a red box and has a value of '0'. Below the tree view is a text box with the following text: '[IdleTimeout] Amount of time (in minutes) a worker process will remain idle before it shuts down. A worker process is idle if it is not processing requests and no new requests are received.' At the bottom are 'OK' and 'Cancel' buttons.

**MORE
INFORMATION:**

If you do not change the value of the **Idle Time-out (minutes)** setting, after 20 minutes of receiving no traffic the Portal's Application Pool will terminate. Then when traffic is received, the Application Pool for the Portal needs to be created, ASP.NET or other frameworks needs to be loaded, and then the Portal needs to be loaded. All of this can take a few seconds. Changing this setting to **0** should not adversely affected IIS.

The next part of the configuration process involves configuring IIS Recycling.

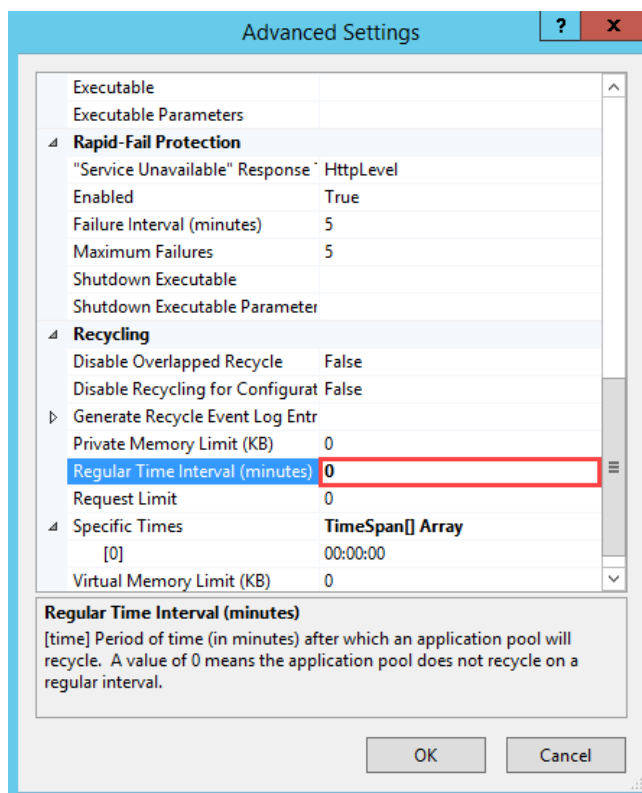
NOTE: We recommend you configure IIS Recycling to occur at a specific time when the system usually has the lightest load, rather than the default of occurring every 1,740 minutes to avoid unexpected errors in the Portal event log similar to:

Thread was being aborted

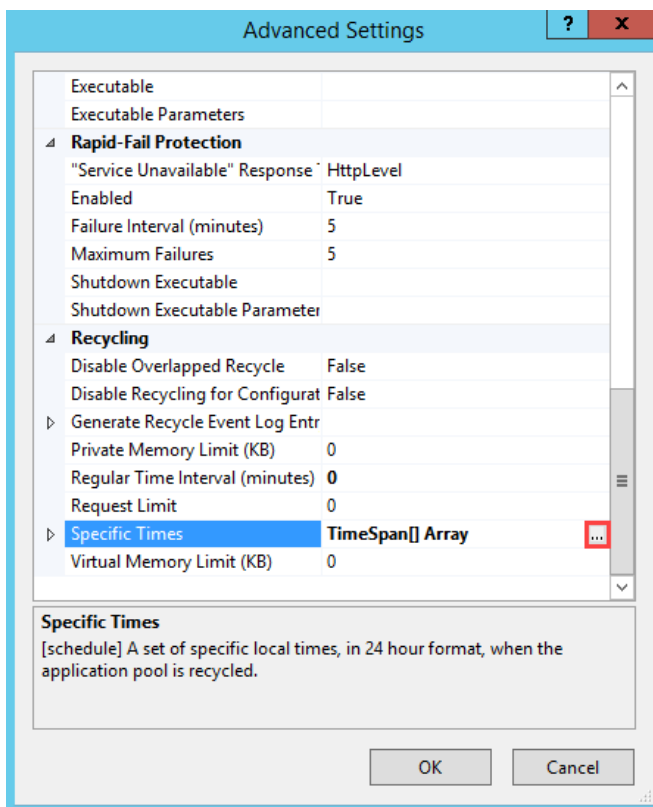
General recommendations are provided in the following section but you should configure this setting (or even disable it), depending on your own environment.

To configure IIS Recycling to occur at a specific time:

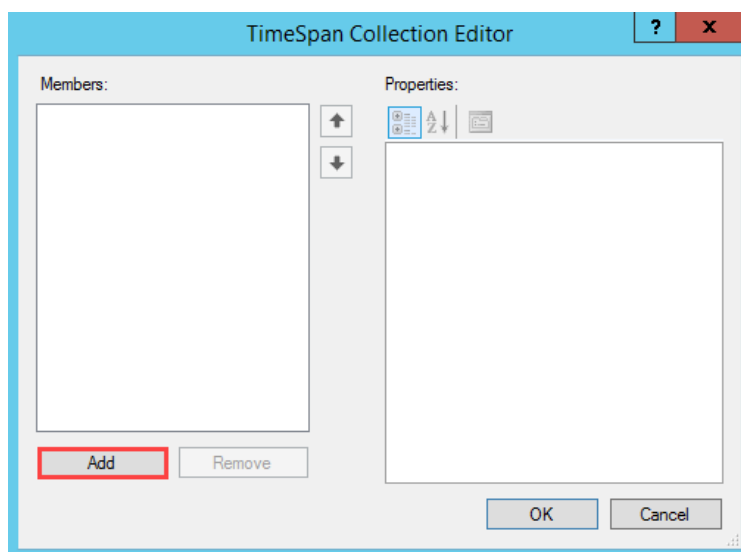
1. Under the **Recycling** section, change the value of the **Regular Time Interval (minutes)** setting from **1740** to **0** otherwise you will be performing IIS recycling both every 1740 minutes and at the specific time specified later in this procedure.



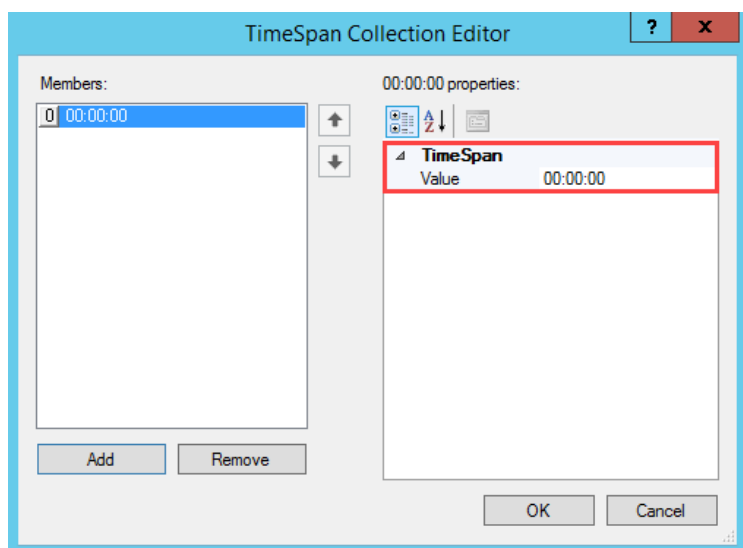
- Next click the ellipses (...) after the **Specific Times** field.



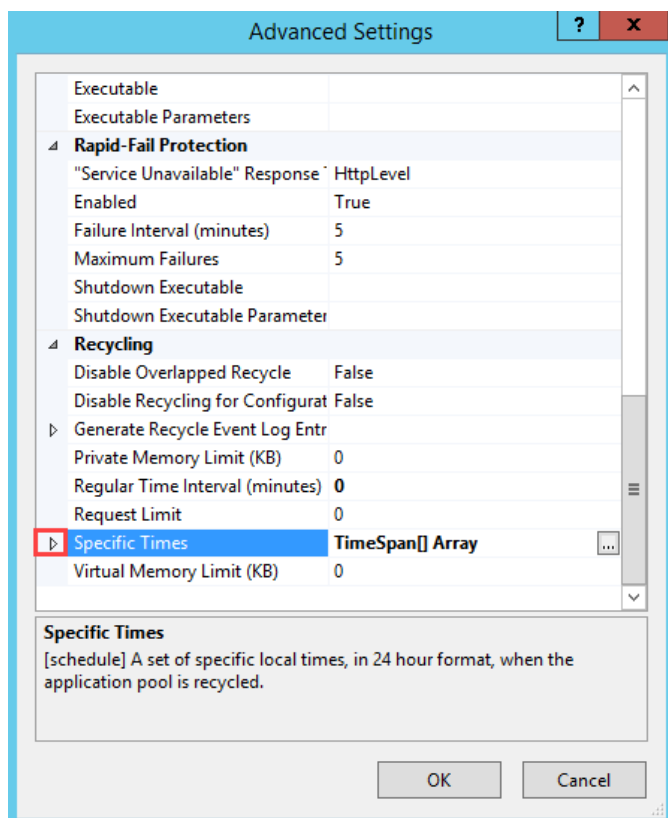
- On the **TimeSpan Collection Editor** dialog box click **Add**.



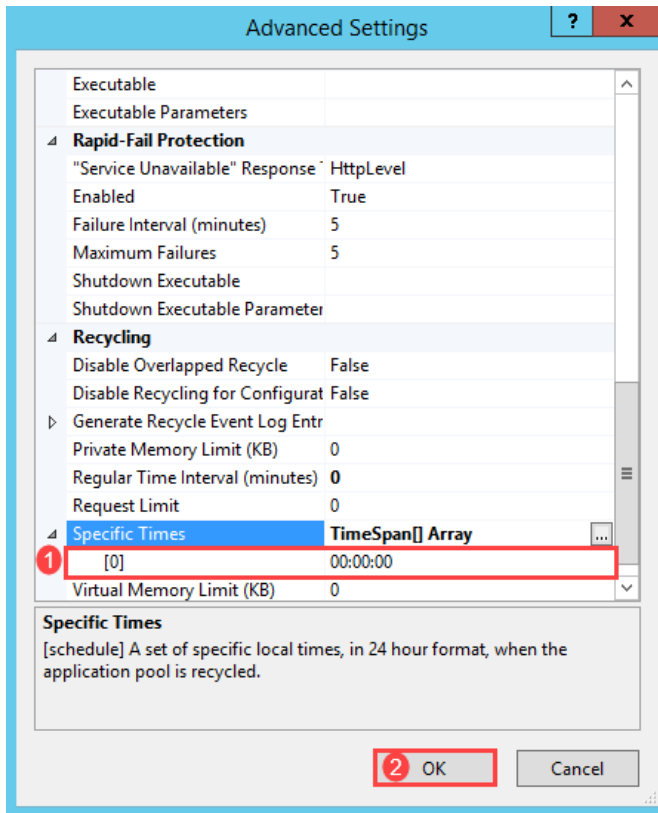
By default, midnight (00:00:00) is added as the default time.



4. Click **OK** to close the **TimeSpan Collection Editor** dialog box.
5. Click the small arrow (▸) preceding the **Specific Times** field to expand it.



6. Verify that the time entry configured in Step 3 is present and set correctly then click **OK**.



7. Close **Internet Information Services (IIS) Manager**

Configuring file security

To configure file security for the Portal:

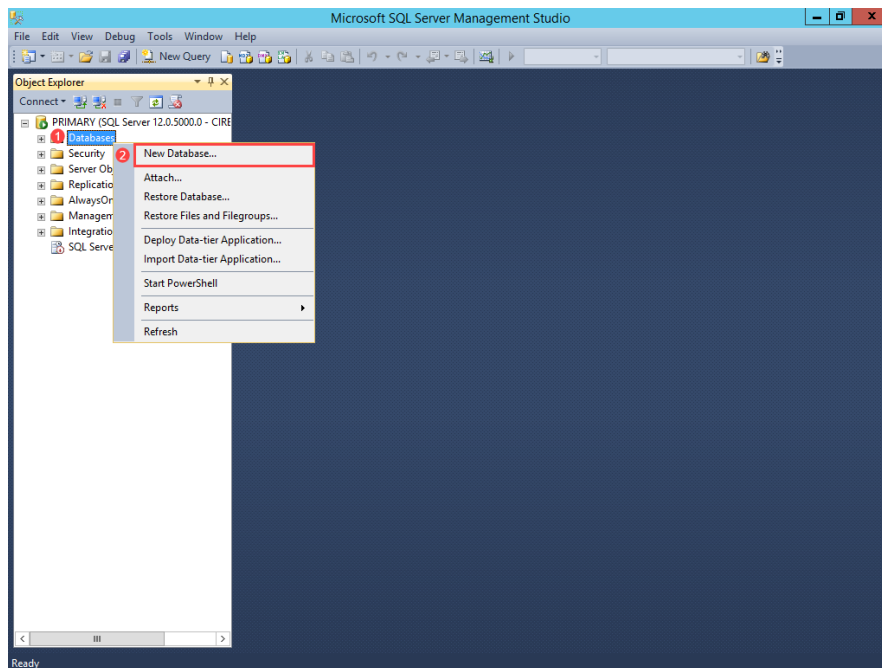
1. Logon to the server that is hosting the Portal.
2. Grant the user account that will be used to run the Portal (for example **Cireson CM Portal**), **Modify** permissions to the **C:\inetpub\ConfigMgr Portal** folder, and all subfolders and files.

Create and configuring the new SQL Database

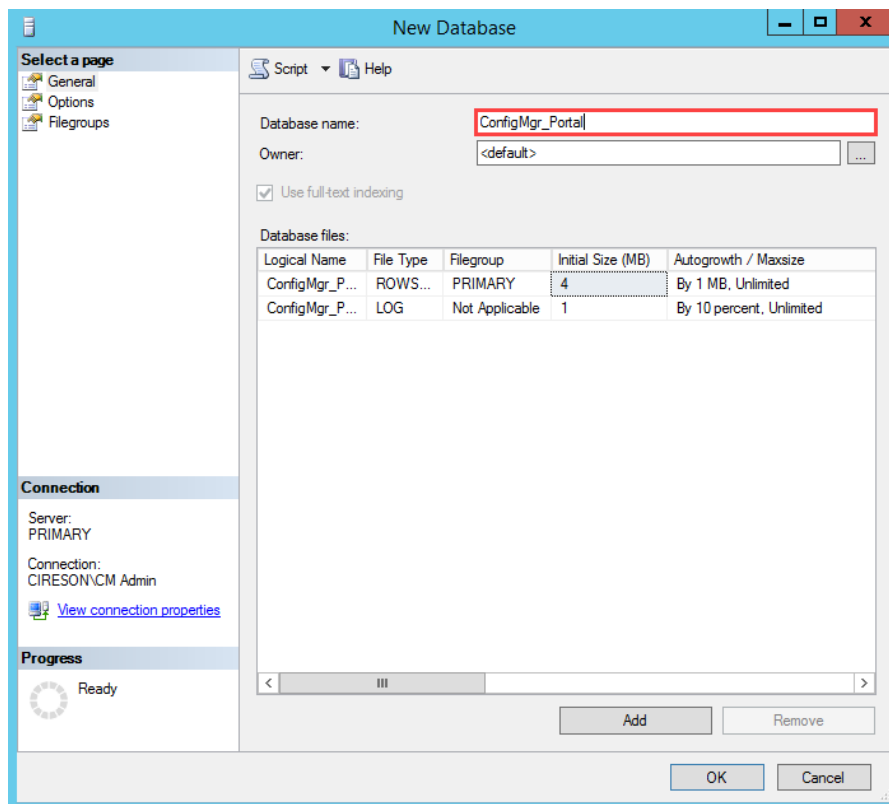
To create the new SQL database for the Portal:

1. Logon to the server that will host the Portal.
2. Start **SQL Server Management Studio** and connect to the SQL Server where the Portal database will be created using an account that has permission to create a database.

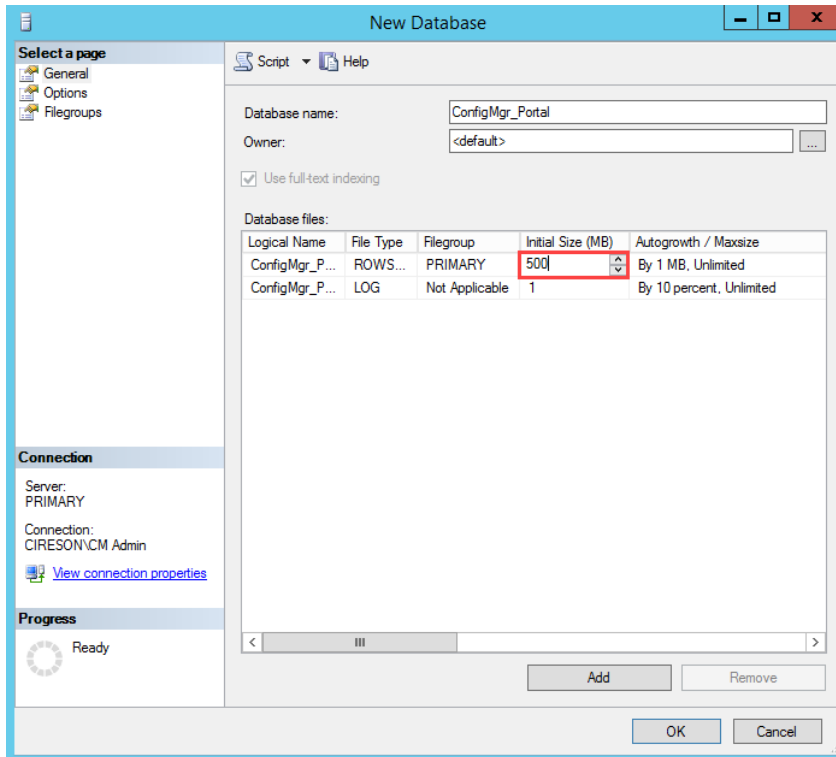
3. Right-click **Databases** and select **New Database**.



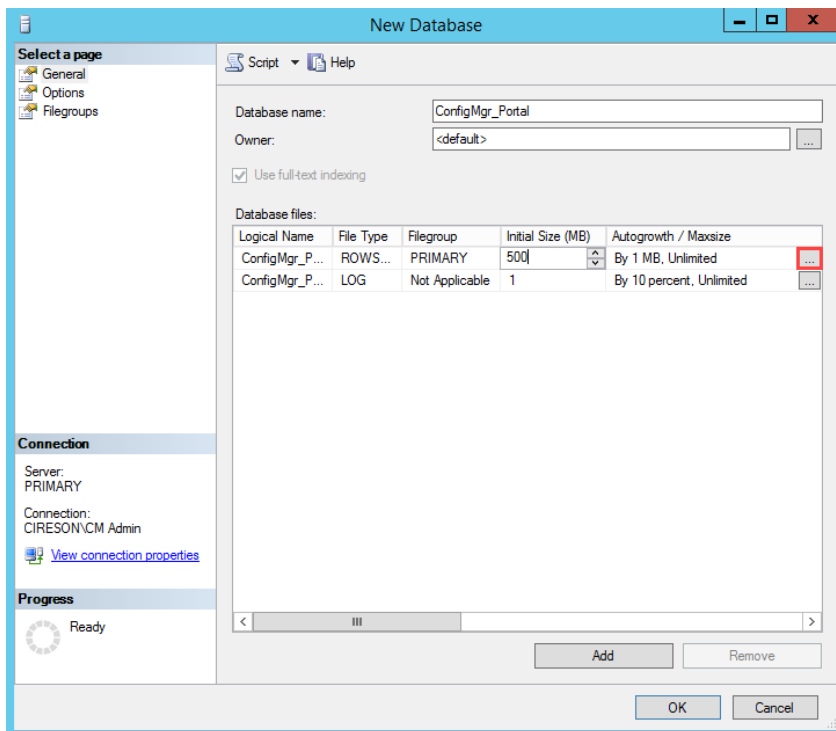
4. On the **New Database** screen, type **ConfigMgr_Portal** in the **Database name** field.



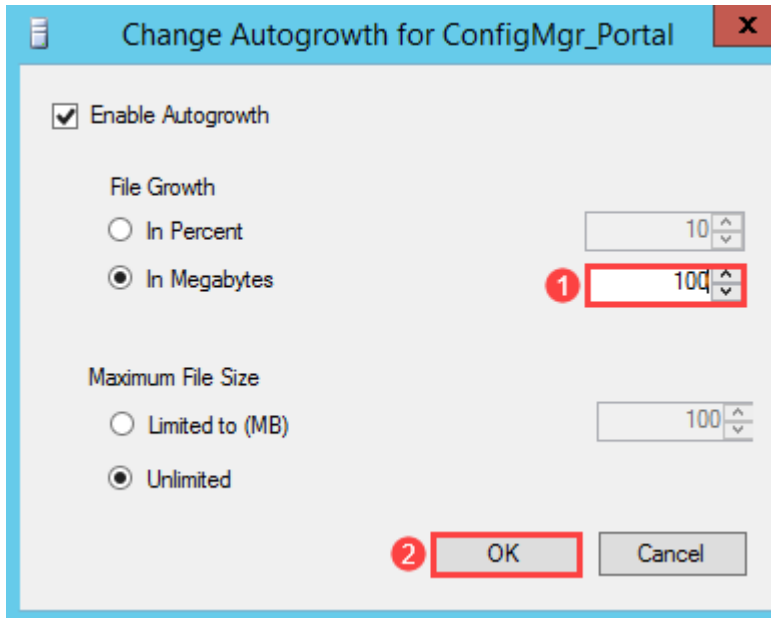
- For the **ConfigMgr_Portal** database, set the **Initial Size (MB)** value to be whichever is the greater of either ten percent of the size of the ConfigMgr site database or **500 MB**.



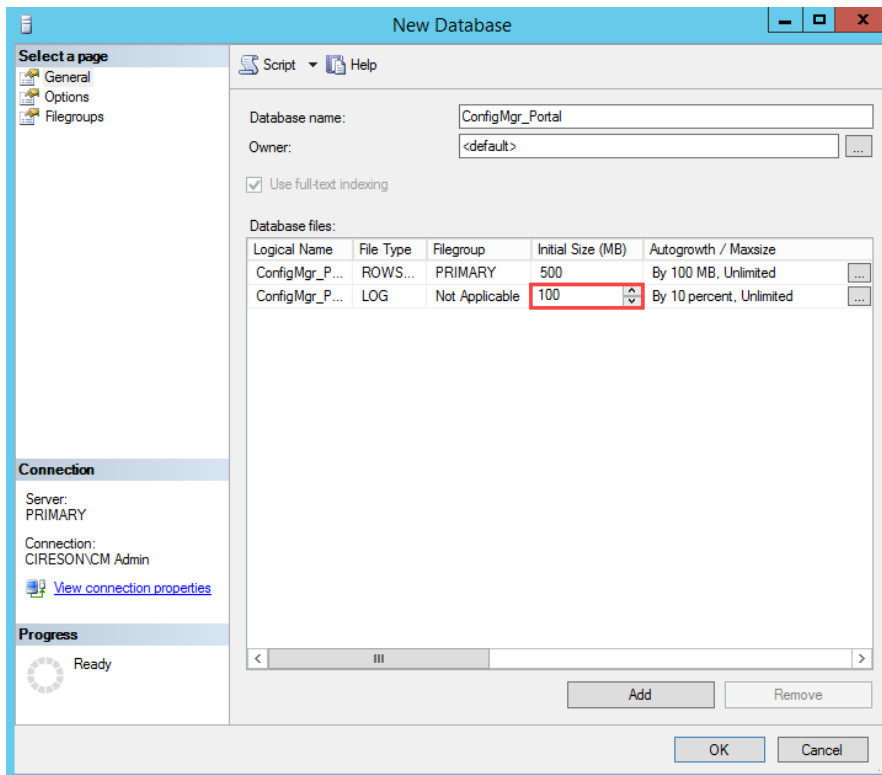
- Click the ellipses (...) after the **Autogrowth / Maxsize** value for the **ConfigMgr_Portal** database (you may need to make the **New Database** dialog box bigger to see these).



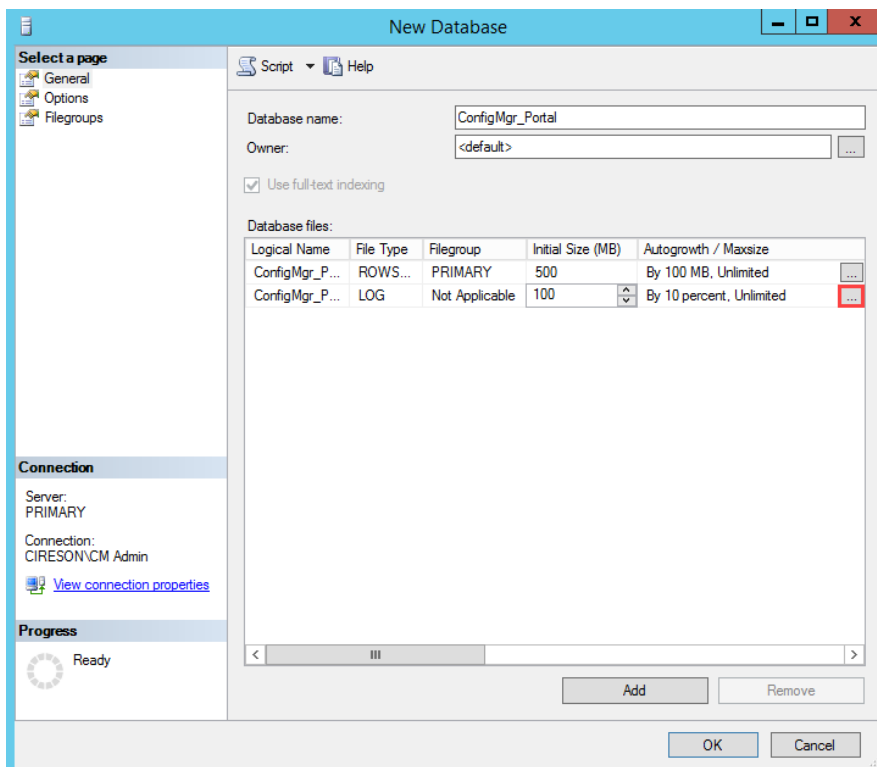
7. In the **Change Autogrowth for ConfigMgr_Portal** dialog box change the **In Megabytes** value to **100** then click **OK**.



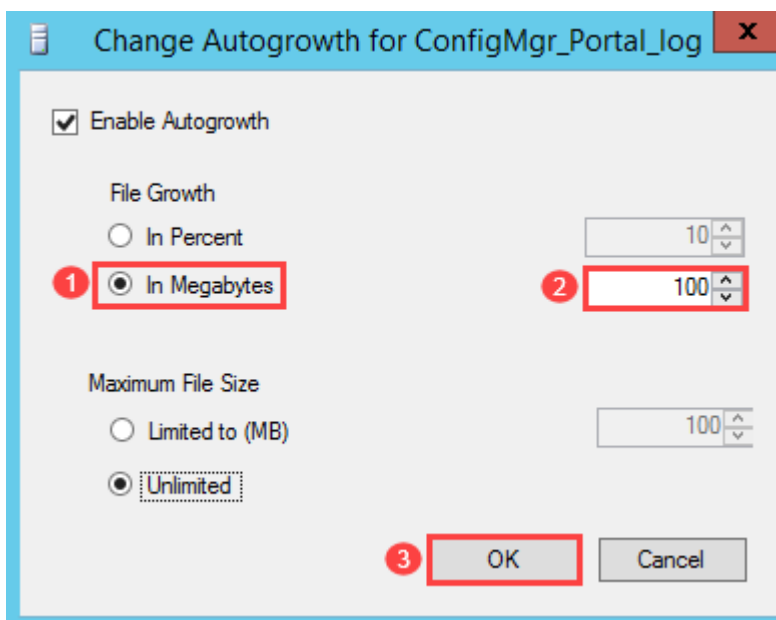
8. For the **ConfigMgr_Portal** SQL Log, set the **Initial Size (MB)** value to be whichever is the greater of either ten percent of the size of the ConfigMgr site database log or **100 MB**.

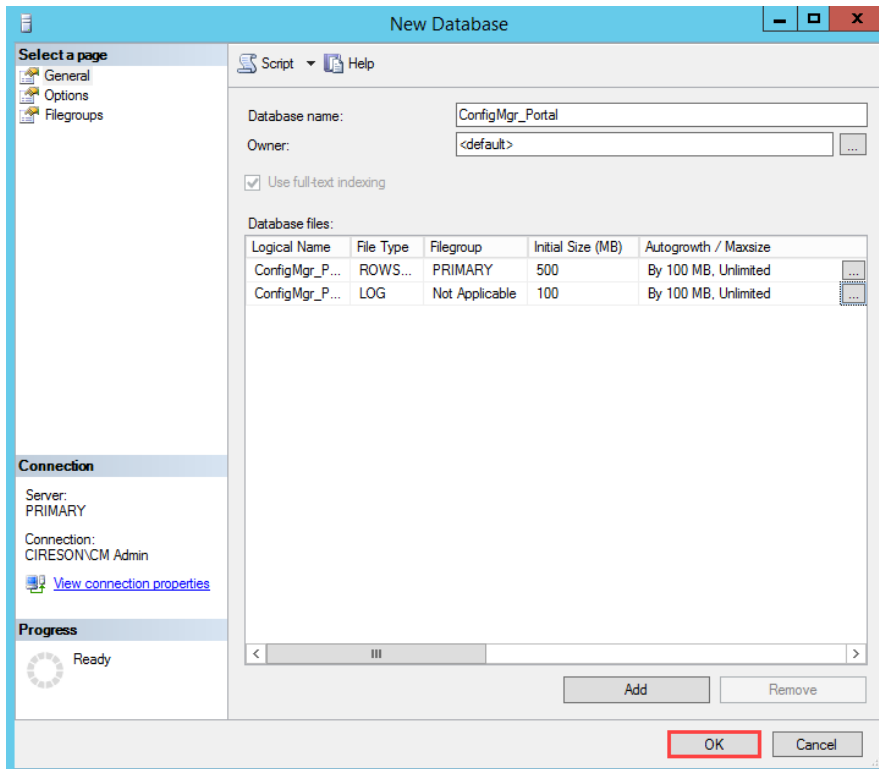


- Click the ellipses (...) after the **Autogrowth / Maxsize** value for the **ConfigMgr_Portal_log** SQL log.



- In the **Change Autogrowth for ConfigMgr_Portal_log** dialog box, select the **In Megabytes** option and change the value to **100** then click **OK**.



11. Click **OK** on the **New Database** screen.

NOTE: By default SQL sets the **Recovery Mode** for the Portal database to **Full** which could result in the Transaction Log growing quite large as all transactions are maintained. Consider setting the **Recovery Mode** to **Simple** to reduce the size of the Transaction Log.

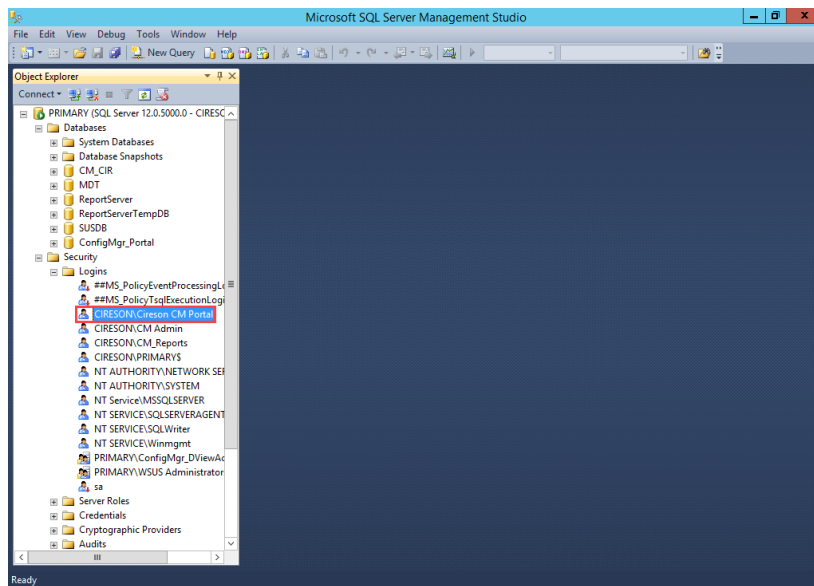
Leave **SQL Server Management Studio** open as it is required in the next part of the process which is to grant the group that will be used for the Portal access to the new database.

To grant the user that will be used for the Portal access to the new database:

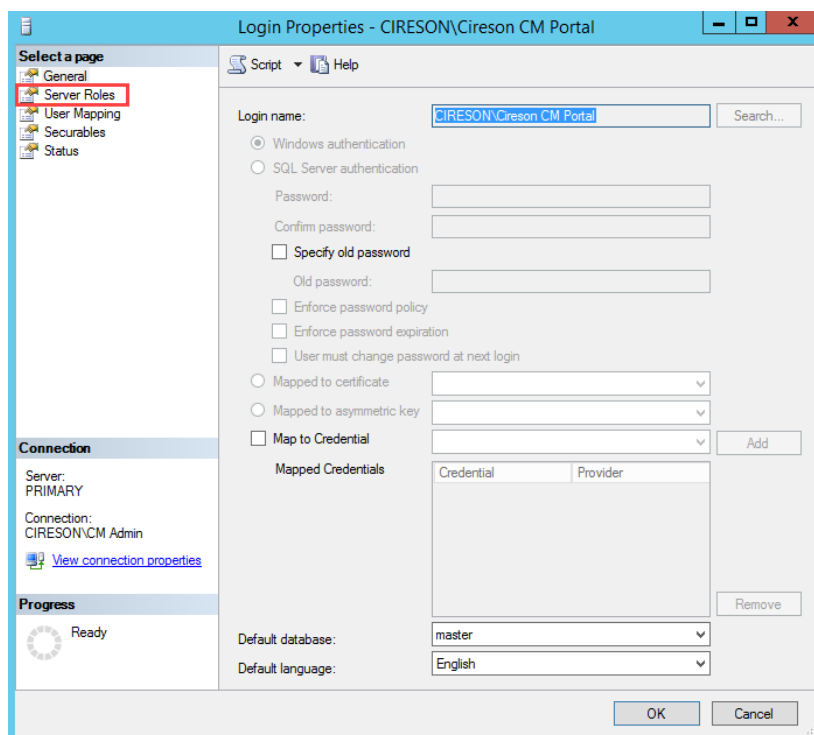
1. Logon to the server that will host the Portal.
2. Start **SQL Server Management Studio**.
3. Navigate to **<server_name> | Security | Logins**.

NOTE: As the Portal account has already been defined as a **Full Administrator** in ConfigMgr, a SQL Login will already exist. If a SQL Login doesn't exist for the Portal account, configure it as a **Full Administrator** in ConfigMgr before proceeding.

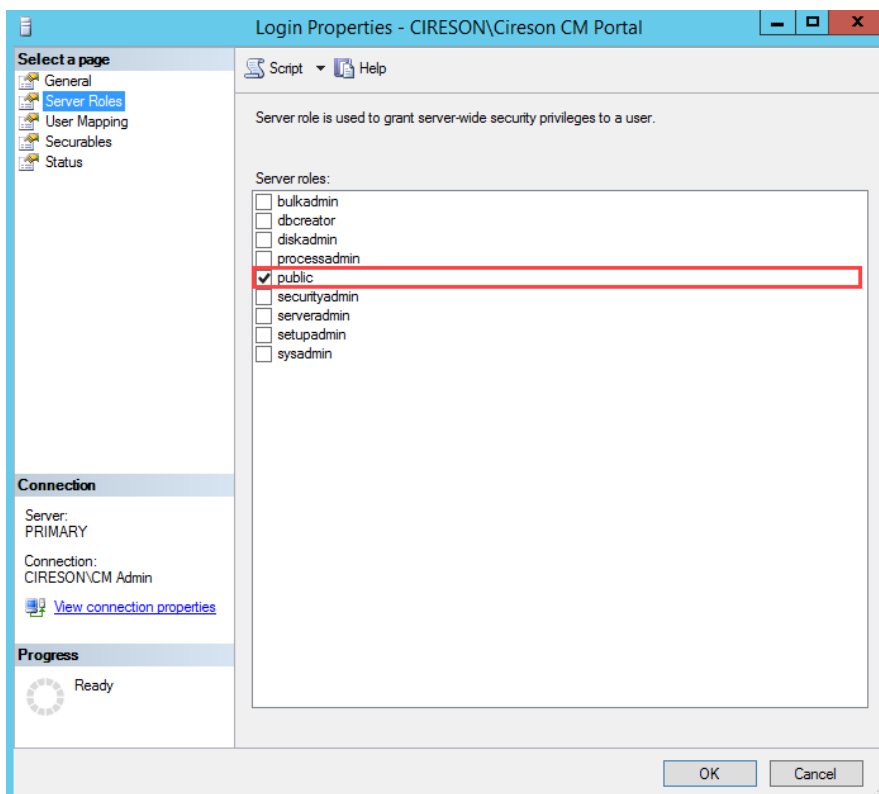
4. Double-click the Login for the Portal user account (for example **Cireson\Cireson CM Portal**).



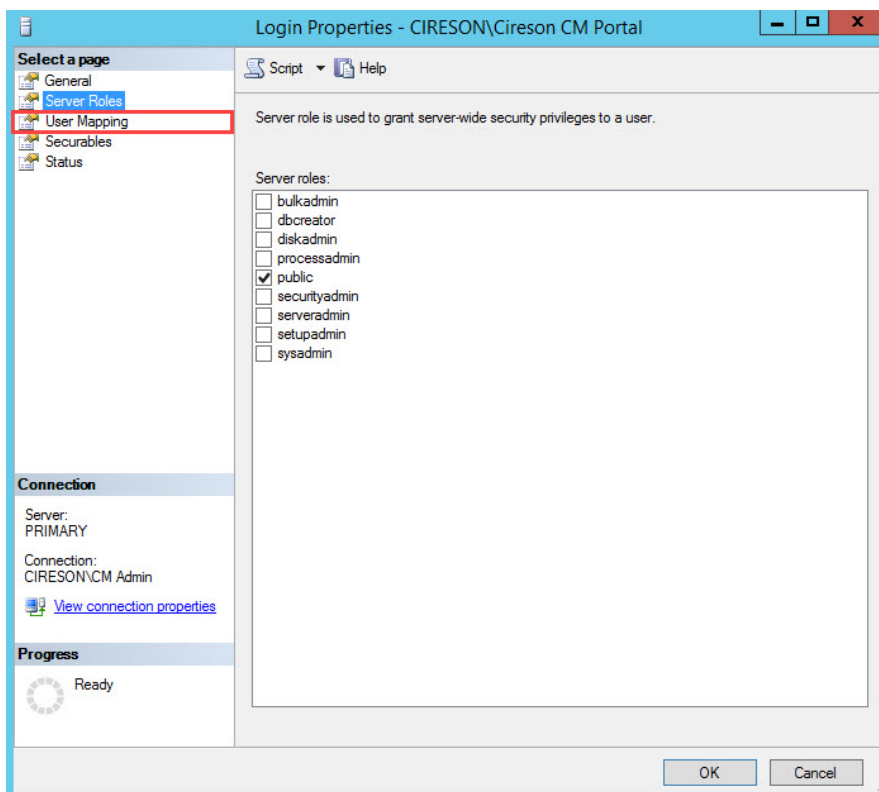
5. Under the **Select a page** section select the **Server Roles** page.



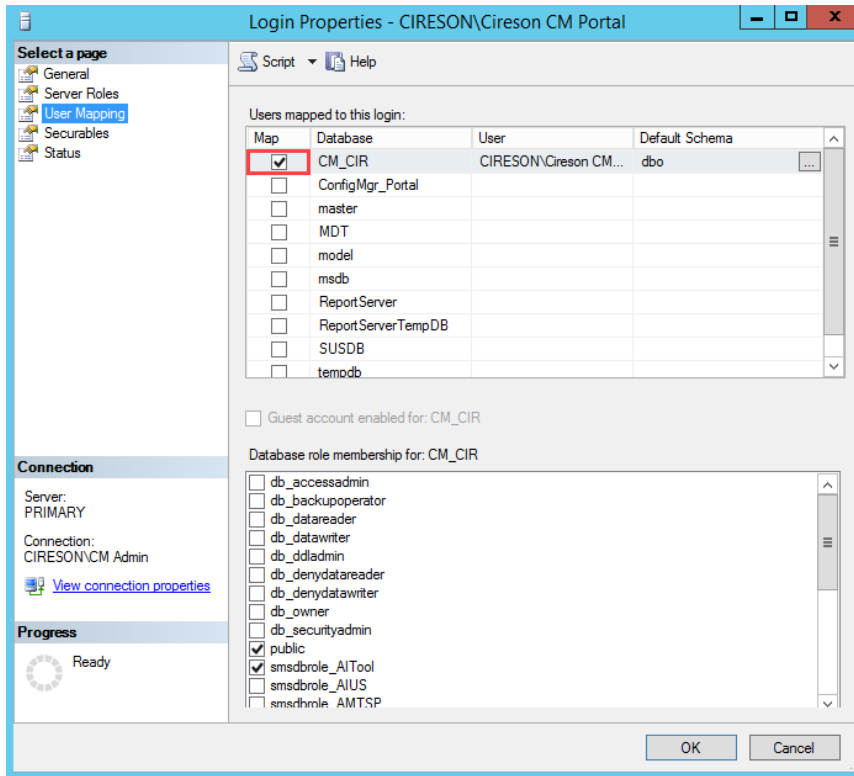
6. Verify that **public** is selected.



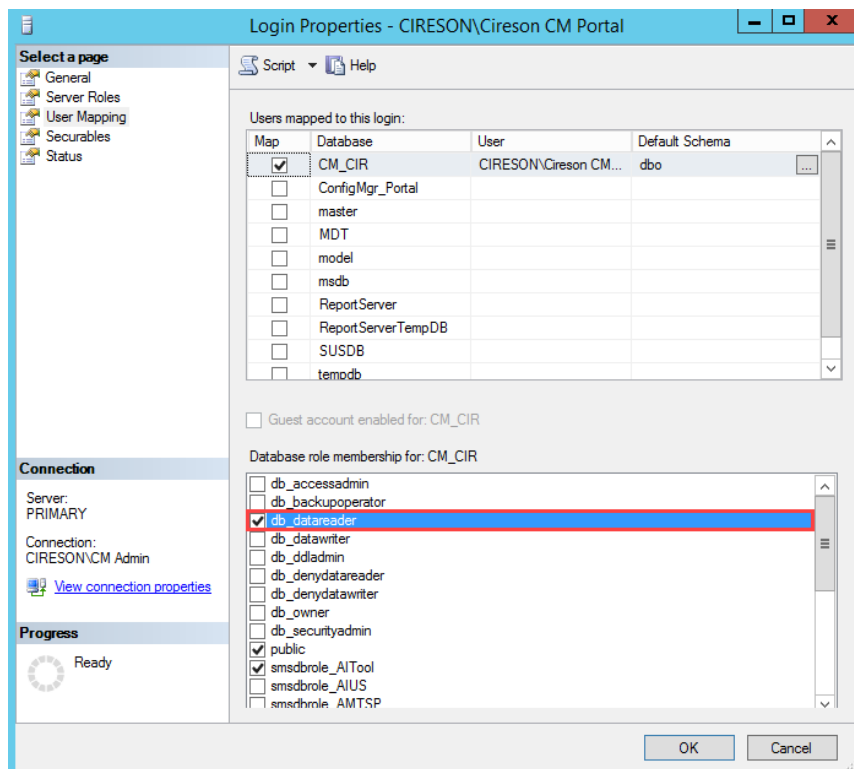
7. Under the **Select a page** section select the **User Mapping** page.



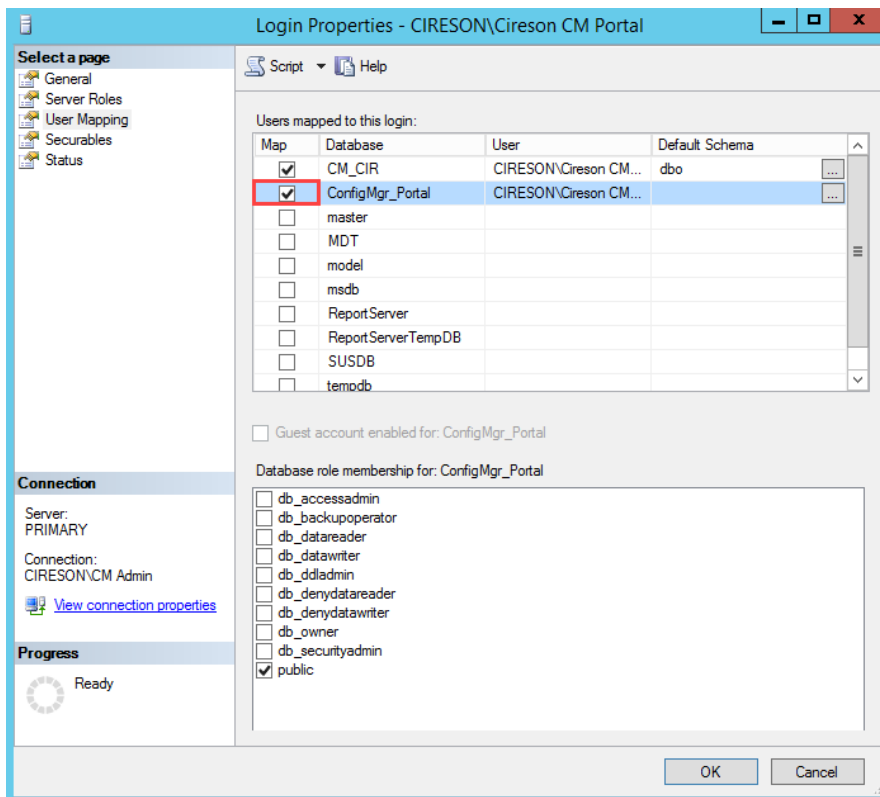
8. Verify that the checkbox in the **Map** column beside the ConfigMgr database (**CM_XXX** by default where **XXX** is your site code) has been checked.



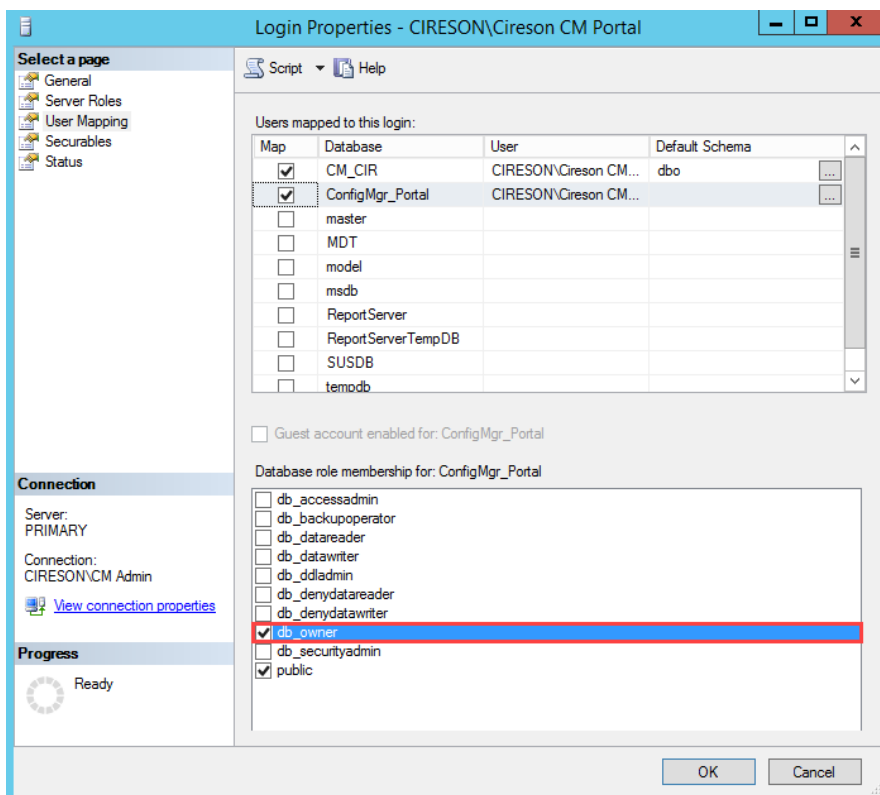
9. Select the checkbox beside **db_datareader**.



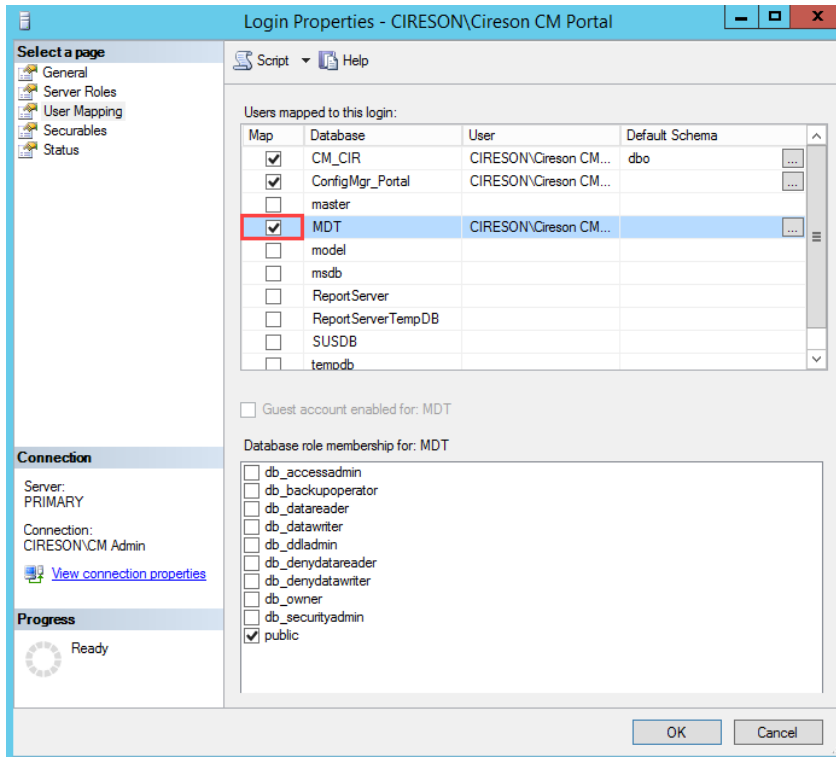
10. Select the checkbox in the **Map** column beside the **ConfigMgr_Portal** database.



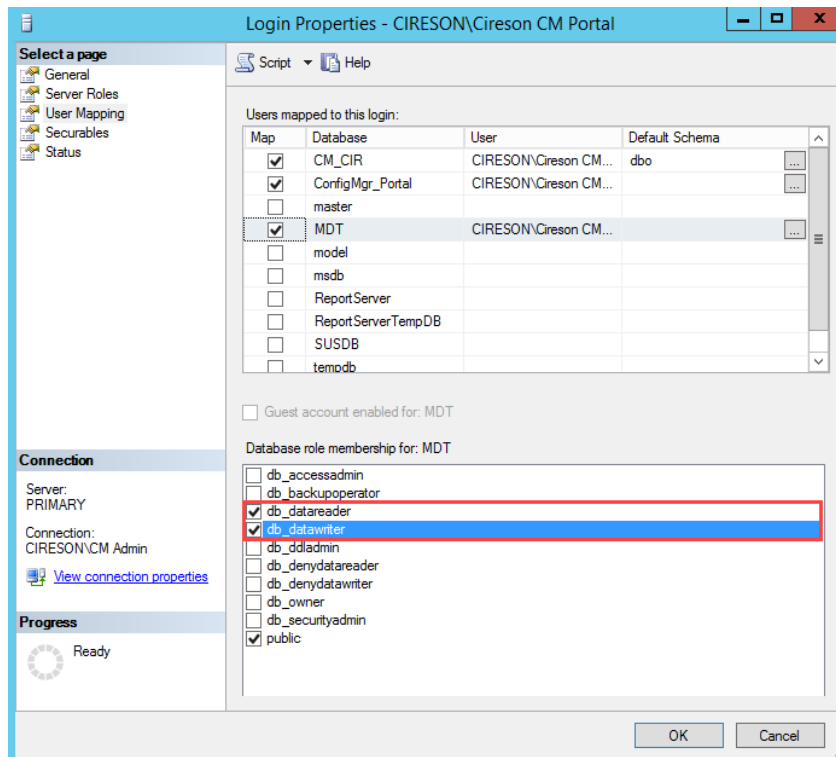
11. Select the checkbox beside **db_owner**.



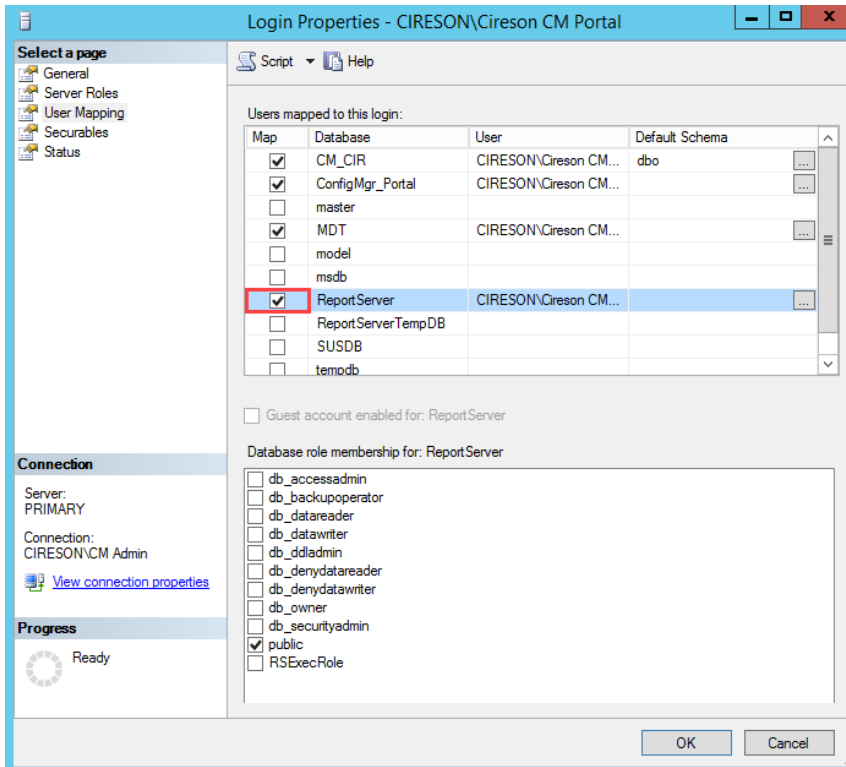
12. If MDT has been installed and you want the Portal to integrate with it, select the checkbox in the **Map** column beside the **MDT** database.



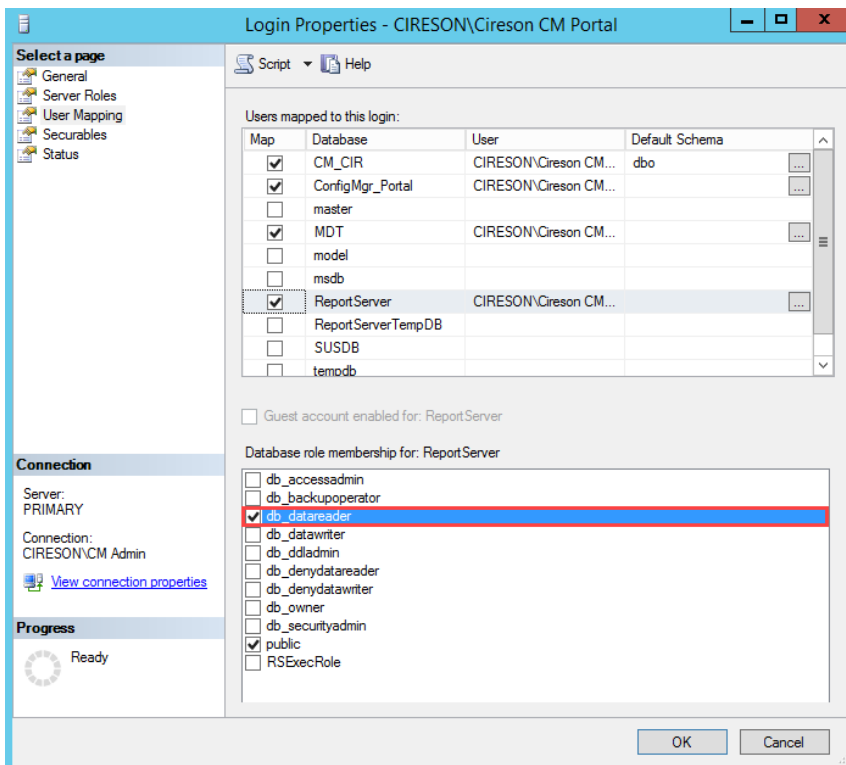
13. Select both the **db_datareader** and **db_datawriter** checkboxes.



14. If you want to use ConfigMgr reports in the Portal, select the checkbox in the **Map** column beside the **ReportServer** database.



15. Select the checkbox beside **db_datareader**.



16. Click **OK** to close the **Login Properties - <domain>\<Portal_SQL_login>** screen.

Running the SQL Scripts

The **Cireson ConfigMgr Portal Hosting Service** uses table states in order to determine if a table scan is required to update resources in the Portal database from the ConfigMgr and MDT databases. This technique minimizes the number of database queries for the Portal Caching Service.

This process requires granting the **VIEW SERVER STATE** permission for the Portal IIS Identity user or the specified SQL account used in the Portal.

NOTE: This permission needs to be granted on the SQL **Master** database by someone logged in with an account that has full SQL administrative rights.

If you choose not to grant the **VIEW SERVER STATE** permission to the Portal account, the Portal will still function properly but it will process all appropriate data each cycle instead of only processing delta updates.

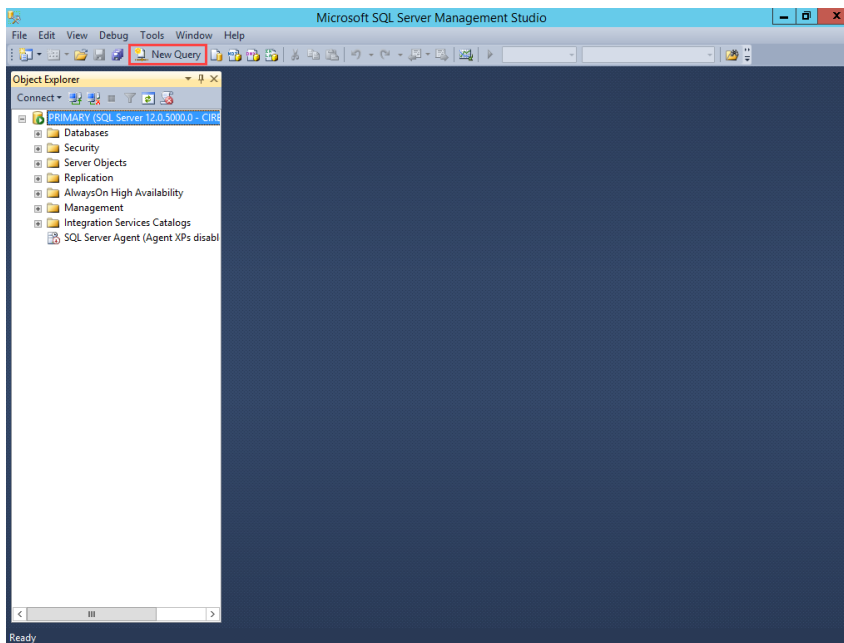
Our recommendation is you grant the **VIEW SERVER STATE** permission as detailed below.

To run the SQL scripts:

1. Logon to the server hosting Portal.

NOTE: For this procedure, you cannot login as the Portal account otherwise Step 4 will fail.

2. Start **SQL Management Studio**.
3. Click **New Query** on the toolbar.



- Enter the following SQL query in the new query window replacing **<Domain>\<ConfigMgr Portal Account>** with the domain name and name of the Portal Account created in the **Account and group requirements** section. If you are using a SQL account omit the domain.

USE master

GRANT VIEW SERVER STATE TO [<Domain>\<ConfigMgr Portal Account>]

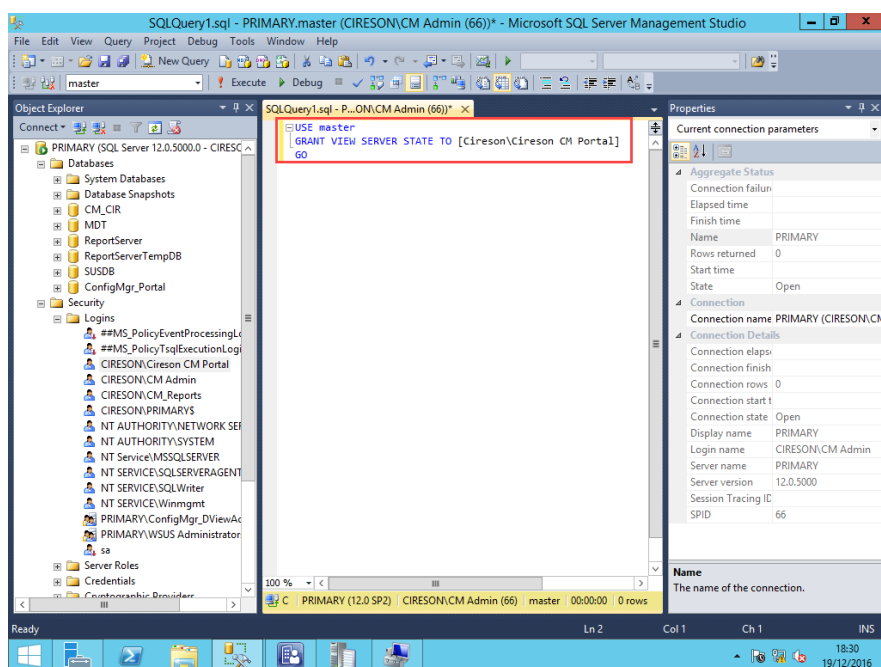
GO

For example, if your domain name is **Cireson** and the account name is **Cireson CM Portal** you would enter:

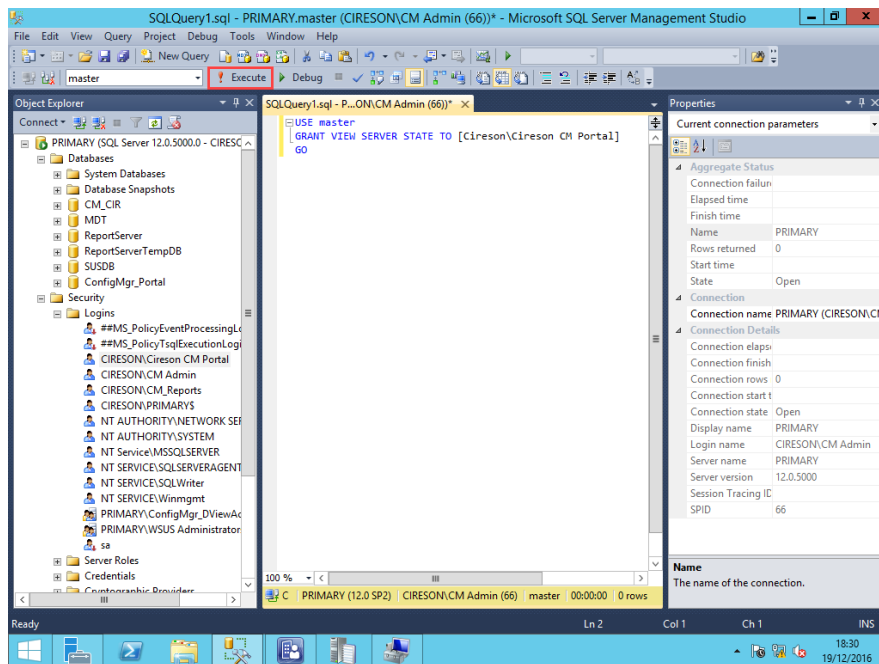
USE master

GRANT VIEW SERVER STATE TO [Cireson\Cireson CM Portal]

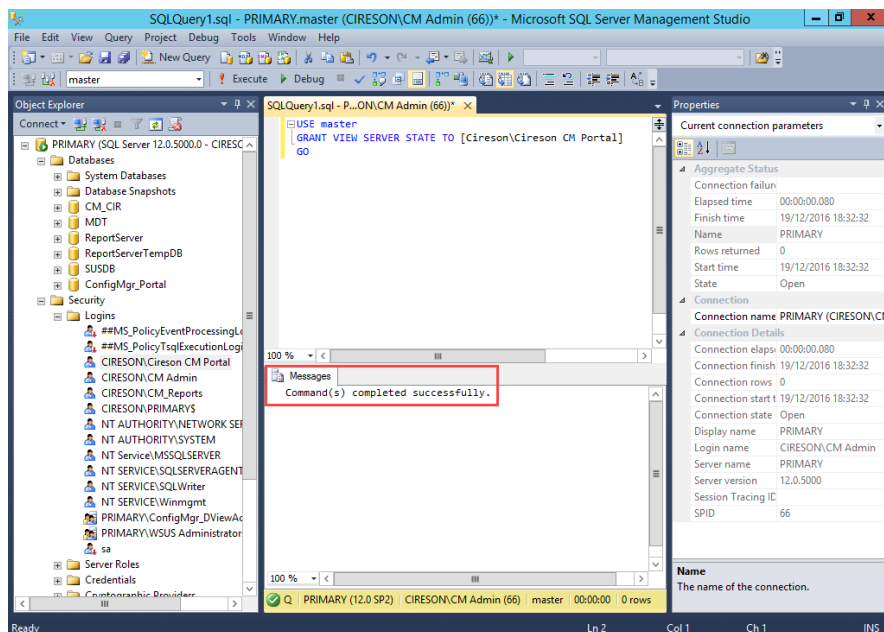
GO



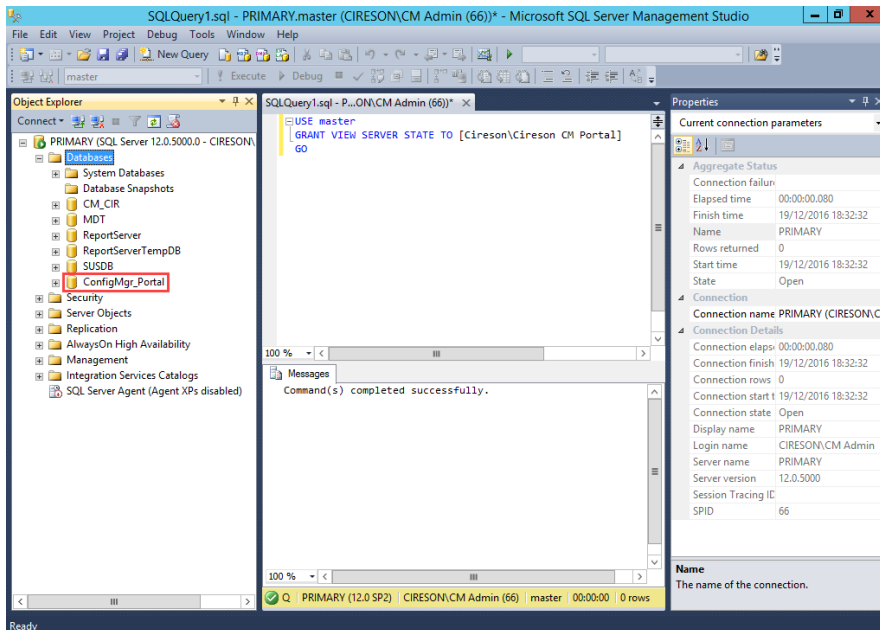
5. Click **Execute** on the toolbar.



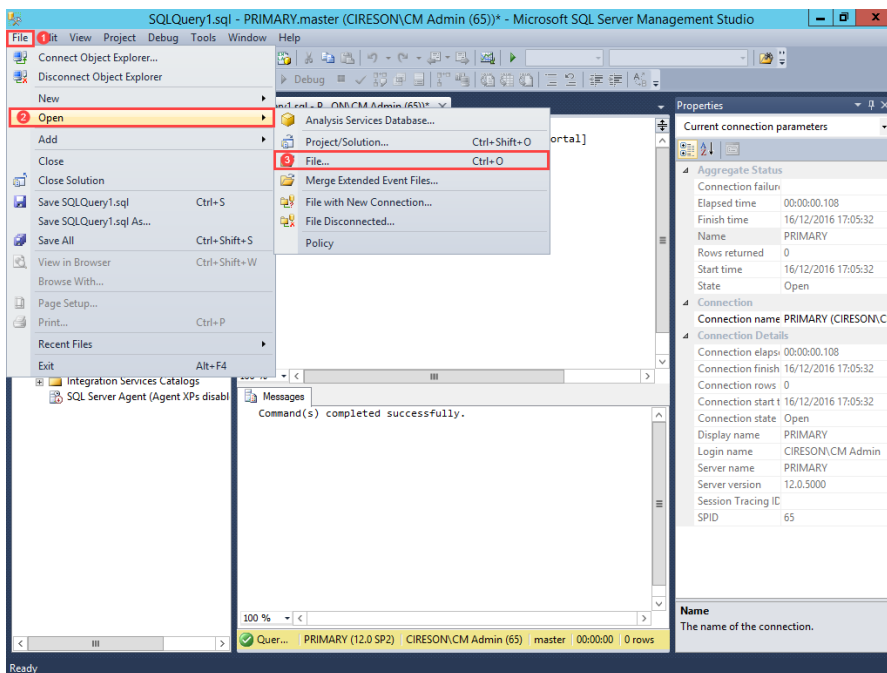
The message **Command(s) completed successfully** will be displayed in the **Messages** pane.



- Next navigate to **Databases** and select the **ConfigMgr_Portal** database.

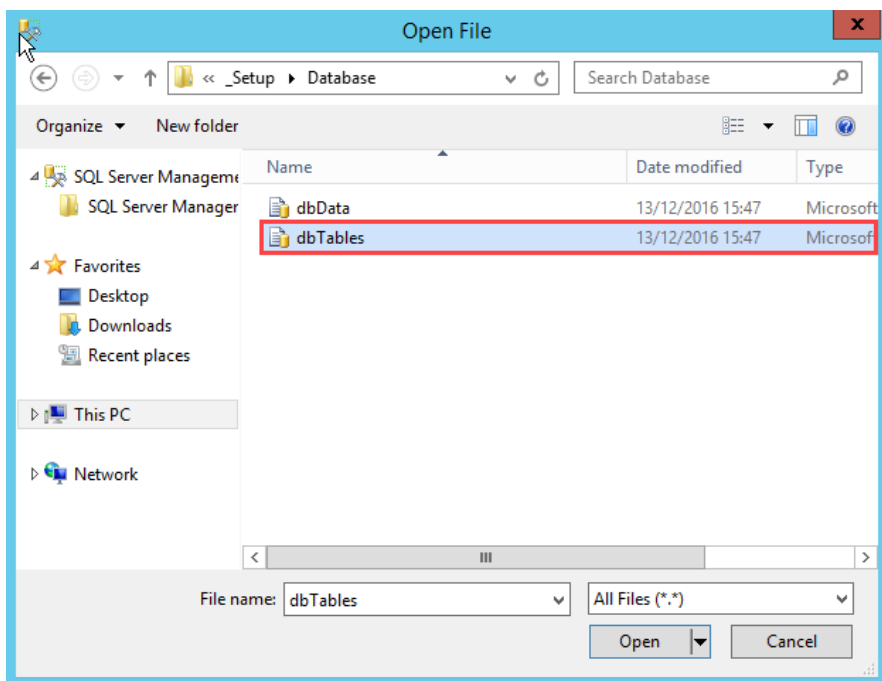


- In SQL Management Studio on the **File** menu select **Open | File**.

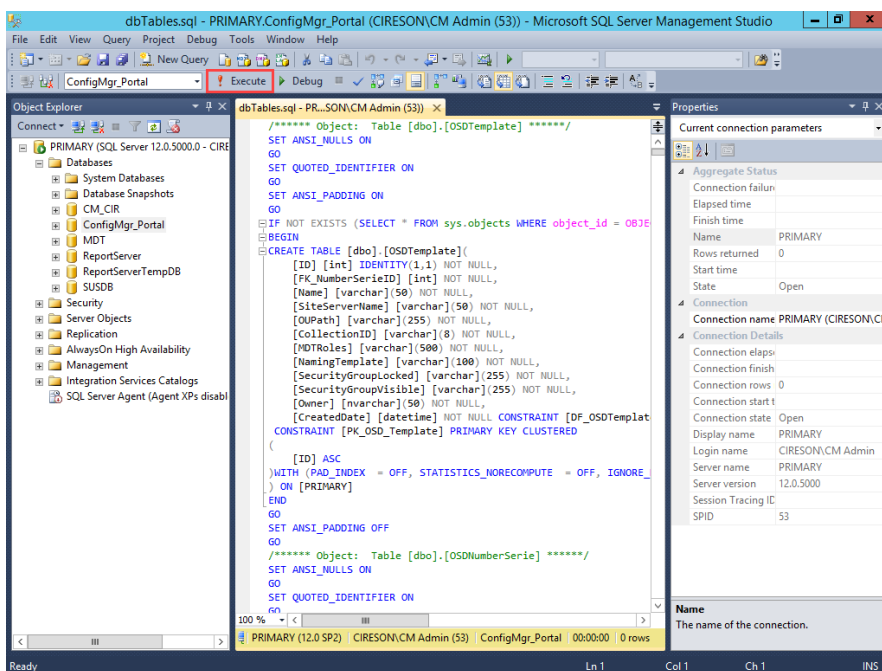


- Browse to the **C:\Inetpub\ConfigMgr Portal_Setup\Database** folder.

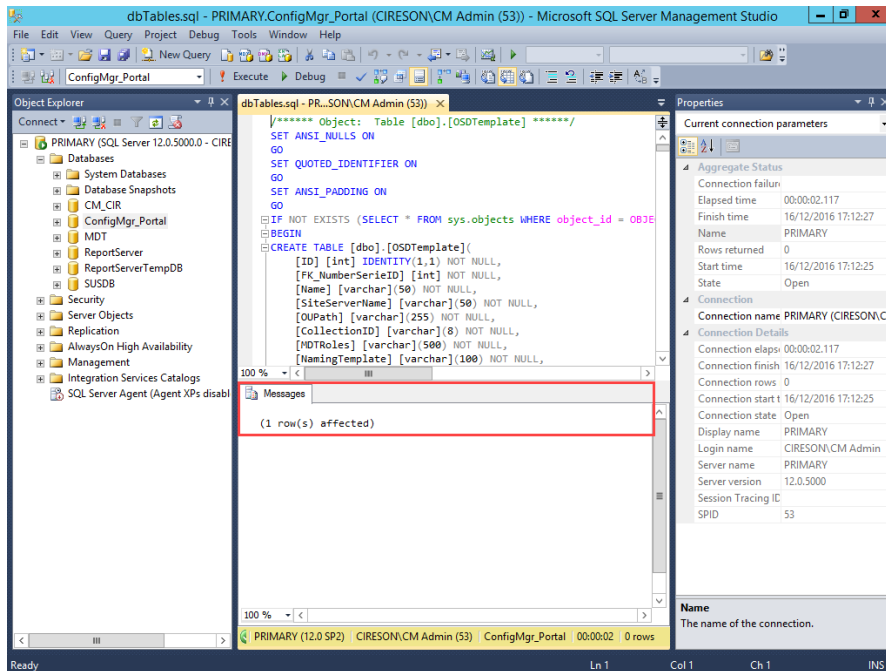
- Double-click **dbTables.sql** which will open it as a query in SQL Management Studio.



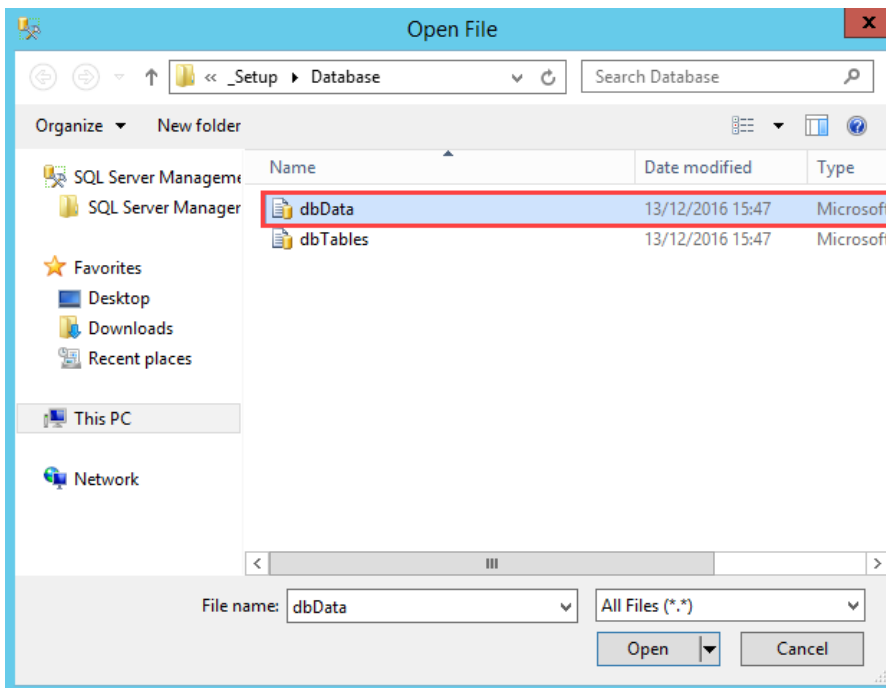
- Click **Execute** on the toolbar.

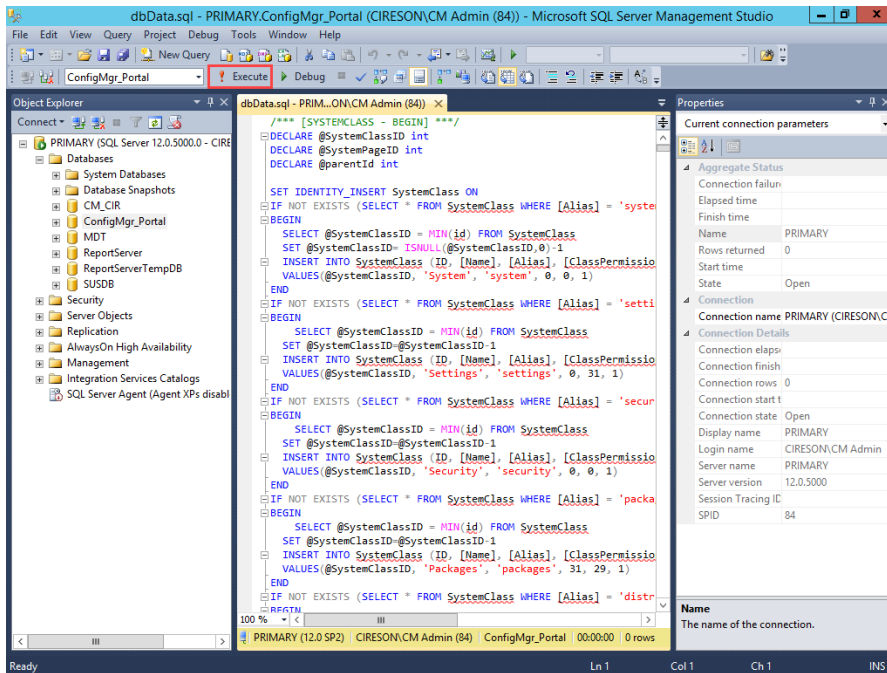


The message **(1 row(s) affected)** will be displayed in the **Messages** pane.

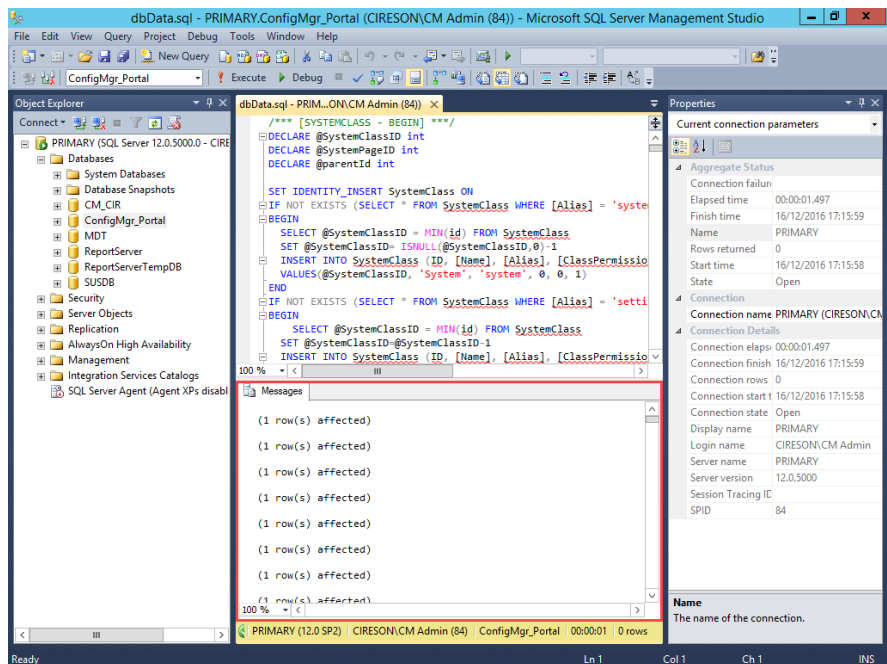


11. In SQL Management Studio on the **File** menu select **Open | File**.
12. Browse to the **C:\Inetpub\ConfigMgr Portal_Setup\Database** folder.
13. Double-click **dbData.sql** which will open it as a query in SQL Management Studio.



14. Click **Execute** on the toolbar.

The message **(1 row(s) affected)** will be displayed numerous times in the **Messages** pane.

15. Close **SQL Management Studio** (you can click **No** when prompted to save any changes to any SQL queries).

This completes the process to create the appropriate tables and required relationships.

Configuring the Cireson Portal for Configuration Manager

Now that the Cireson Portal for Configuration Manager has been installed, it can now be configured. Configuring the Portal is a two-stage process:

- Run the Portal Configuration Wizard
- Install the Caching Service

Run the Portal Configuration Wizard

To run the Portal Configuration Wizard:

1. From a browser (preferably Internet Explorer running on a workstation), enter the following URL in the address field:

`http://<configmgrportal>/_setup/default.aspx`

where **<configmgrportal>** matches one of the IIS bindings for the ConfigMgr Web site created in the **Create and configure a new Website** section.

For example:

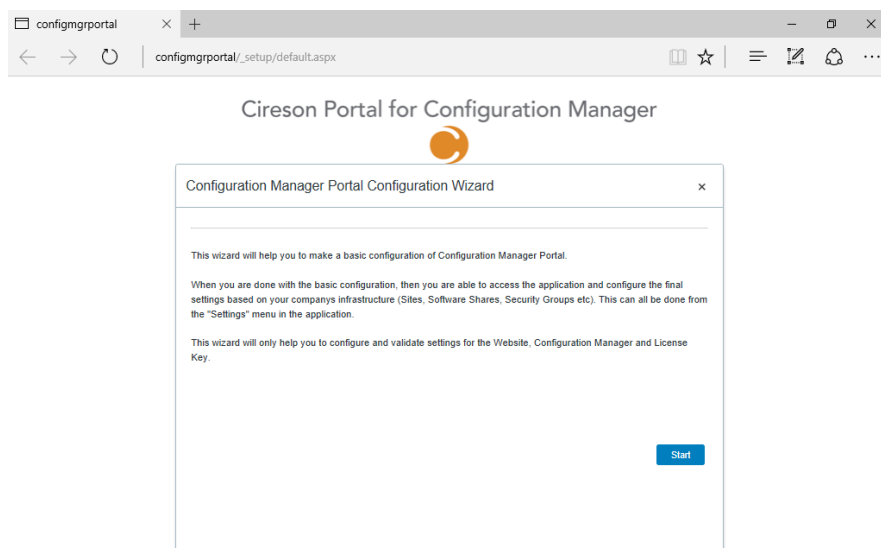
`http://configmgrportal/_setup/default.aspx`

NOTE: The character before the word **Setup** is an underscore (“_”) not a space i.e.

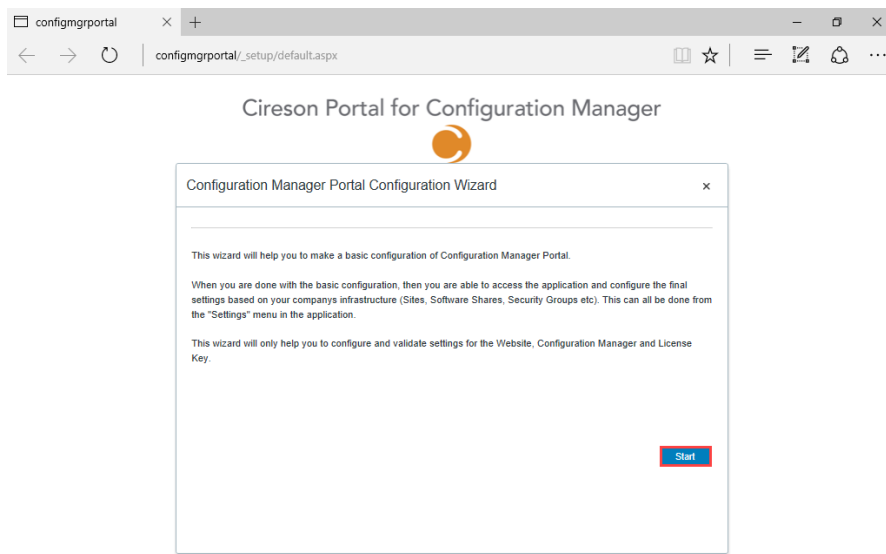
_setup

2. Enter your credentials if prompted.

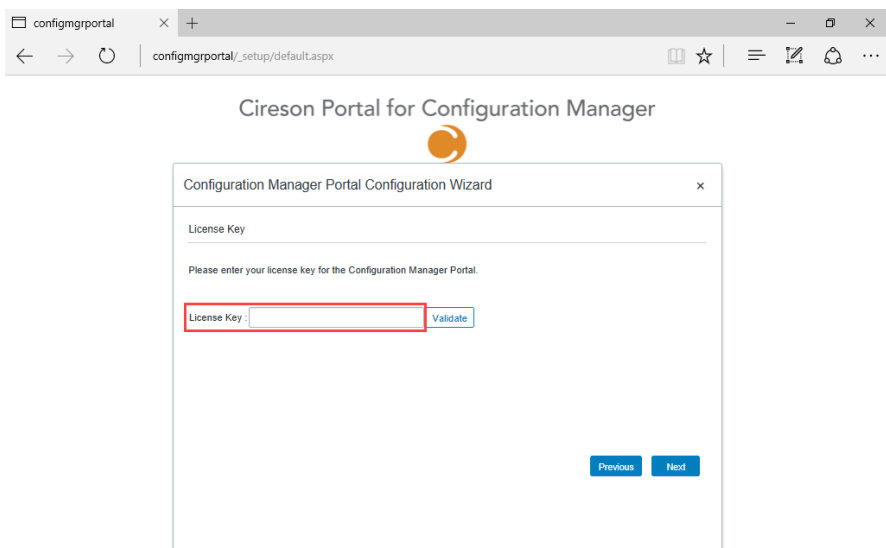
The **Configuration Manager Portal Configuration Wizard** screen will be displayed.



3. Click **Start**

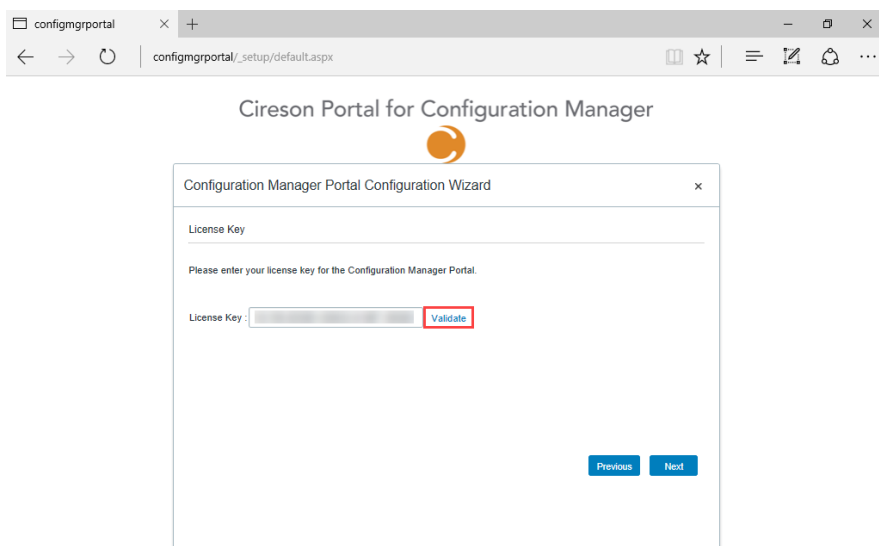


4. On the **License Key** page, enter your License Key in the **License Key** field.

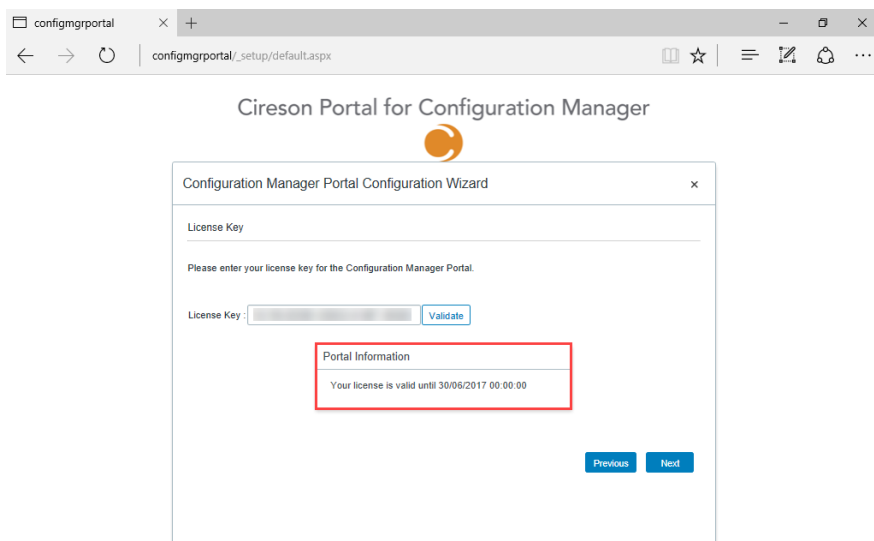


Cireson Portal for Configuration Manager

5. Click **Validate** to ensure it is valid.



A message will be displayed stating how long your license is valid until.



6. Click **Next**

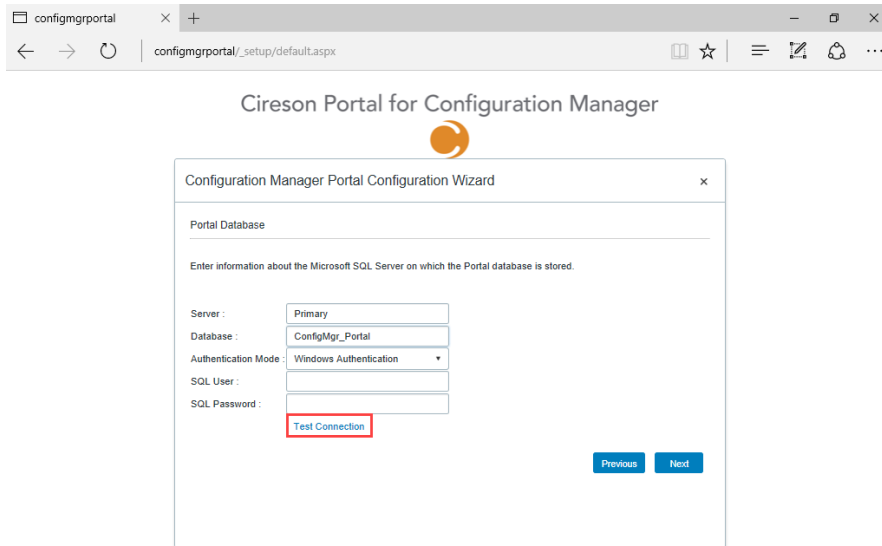
The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. Below the title is a logo and a window titled 'Configuration Manager Portal Configuration Wizard'. The main section is 'License Key'. It contains a text input field for the license key and a 'Validate' button. Below this is a 'Portal Information' box stating 'Your license is valid until 30/06/2017 00:00:00'. At the bottom right are 'Previous' and 'Next' buttons, with 'Next' highlighted in red.

7. On the **Portal Database** page, enter the details of the SQL Server hosting the Portal in the **Server** and **Database** fields.

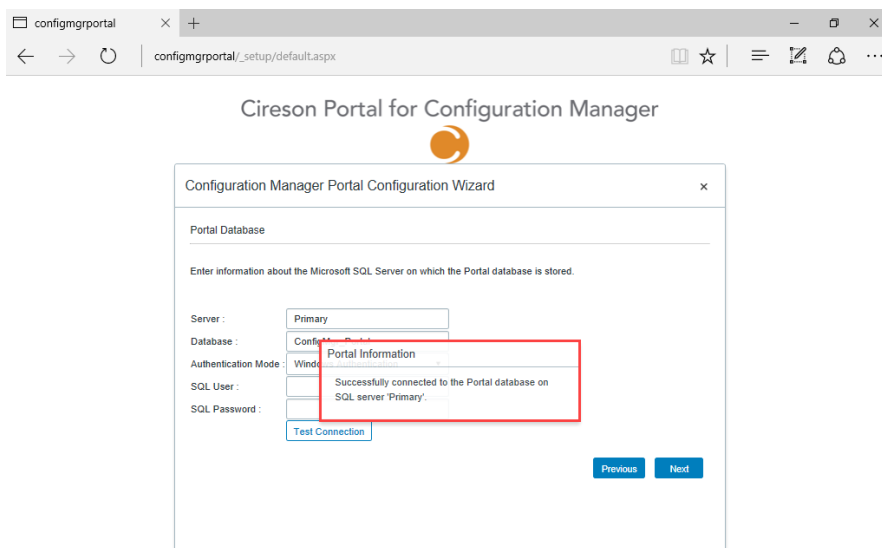
The screenshot shows the same web browser window, but the page title is 'Cireson Portal for Configuration Manager' and the window title is 'Configuration Manager Portal Configuration Wizard'. The main section is 'Portal Database'. It contains a text input field for the database name and a 'Test Connection' button. Below this are fields for 'Server', 'Database', 'Authentication Mode', 'SQL User', and 'SQL Password'. The 'Server' field is set to 'Primary' and the 'Database' field is set to 'ConfigMgr_Portal'. These two fields are highlighted with a red box. At the bottom right are 'Previous' and 'Next' buttons, with 'Next' highlighted in red.

8. If you are using **Windows Authentication** click the **Test Connection** button. If you are using SQL Authentication select this from the **Authentication Mode** dropdown and enter the relevant details in the **SQL User** and **SQL Password** fields before clicking the **Test Connection** button.

NOTE: If you are using Windows Authentication, the IIS Application Pool identity configured in the [Configuring the IIS Application Pool](#) section is used to access the database.



If the connection is successful, you will see the message **Successfully connected to the Portal database on SQL server '<server_name>'.**



9. Click **Next**

The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. Below the title is a logo and a window titled 'Configuration Manager Portal Configuration Wizard'. The window has a tab 'Portal Database'. The main content area contains the text: 'Enter information about the Microsoft SQL Server on which the Portal database is stored.' Below this text are five input fields: 'Server' (containing 'Primary'), 'Database' (containing 'ConfigMgr_Portal'), 'Authentication Mode' (a dropdown menu showing 'Windows Authentication'), 'SQL User' (empty), and 'SQL Password' (empty). There is a 'Test Connection' button below the 'SQL Password' field. At the bottom right of the window are two buttons: 'Previous' and 'Next'.

10. On the **Configuration Manager** page, in the **Site Server** field enter the name of the ConfigMgr site server.

NOTE: In a multi-site environment, this must be the Central Administration/ Central Site and cannot be a Secondary Site.

The screenshot shows the same web browser window as before, but the window title is 'Configuration Manager Portal Configuration Wizard' and the tab is 'Configuration Manager'. The main content area contains the text: 'Enter information about the Configuration Manager Server on which the Portal should integrate. This can only be a Primary Site Server and is typically the Central Site Server.' Below this text are five input fields: 'Site Server' (containing 'Primary'), 'SQL Server' (empty), 'SQL Database' (empty), 'Authentication Mode' (a dropdown menu showing 'Windows Authentication'), 'SQL User' (empty), and 'SQL Password' (empty). There is a 'Test Connection' button below the 'Site Server' field and another 'Test Connection' button below the 'SQL Password' field. At the bottom right of the window are two buttons: 'Previous' and 'Next'.

11. Click **Test connection**

The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. Below the title is a logo and a window titled 'Configuration Manager Portal Configuration Wizard'. The wizard contains a section for 'Configuration Manager' with the following fields: 'Site Server' (set to 'Primary'), 'SQL Server', 'SQL Database', 'Authentication Mode' (set to 'Windows Authentication'), 'SQL User', and 'SQL Password'. A 'Test Connection' button is highlighted with a red box. At the bottom right of the wizard are 'Previous' and 'Next' buttons.

If the connection is successful, you will see the message **Successfully connected to** '**<ConfigMgr_Site_Server_name>**'

The screenshot shows the same web browser window as the previous one. The 'Test Connection' button is highlighted with a red box. A red box also highlights a message box that says 'Portal Information' and 'Successfully connected to 'Primary''. The 'Test Connection' button is still highlighted with a red box.

12. Enter the name of the SQL Server hosting the ConfigMgr database in the **SQL Server** field and the name of the ConfigMgr database in the **SQL Database** field.

Configuration Manager Portal Configuration Wizard

Configuration Manager

Enter information about the Configuration Manager Server on which the Portal should integrate. This can only be a Primary Site Server and is typically the Central Site Server.

Site Server : Primary
Test Connection

SQL Server : Primary
SQL Database : CM_CIR

Authentication Mode : Windows Authentication

SQL User :
SQL Password :

Test Connection

Previous Next

13. If you are using **Windows Authentication** click the **Test Connection** button. If you are using SQL Authentication select this from the **Authentication Mode** dropdown and enter the relevant details in the **SQL User** and **SQL Password** fields before clicking the **Test Connection** button.

NOTE: If you are using Windows Authentication, the IIS Application Pool identity configured in the [Configuring the IIS Application Pool](#) section is used to access the database.

Configuration Manager Portal Configuration Wizard

Configuration Manager

Enter information about the Configuration Manager Server on which the Portal should integrate. This can only be a Primary Site Server and is typically the Central Site Server.

Site Server : Primary
Test Connection

SQL Server : Primary
SQL Database : CM_CIR

Authentication Mode : Windows Authentication

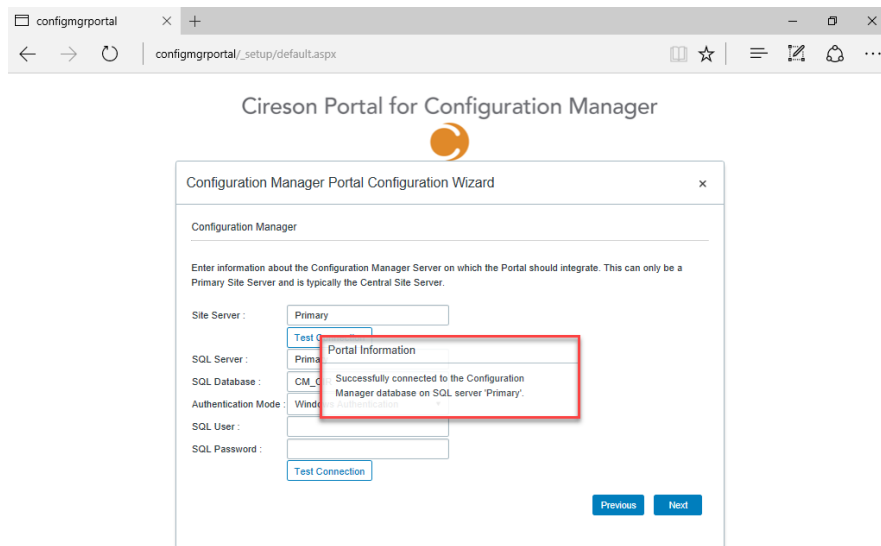
SQL User :
SQL Password :

Test Connection

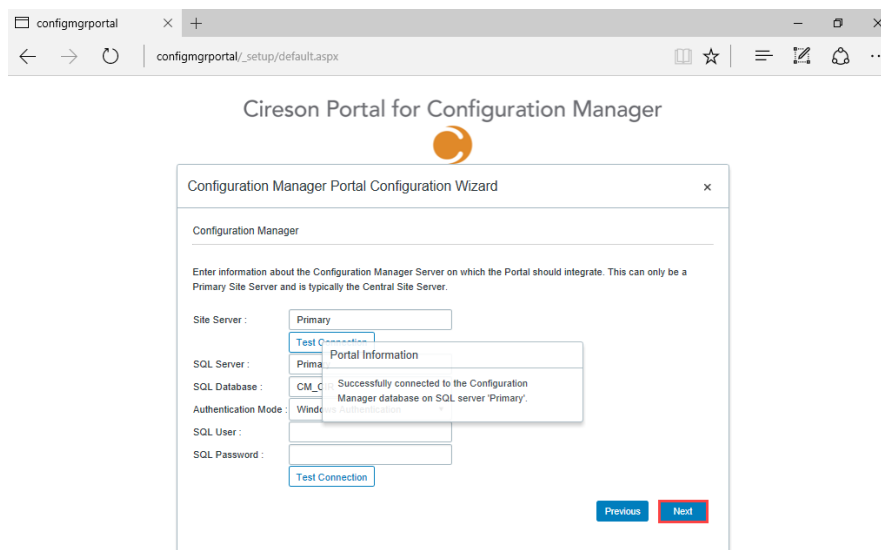
Previous Next

Cireson Portal for Configuration Manager

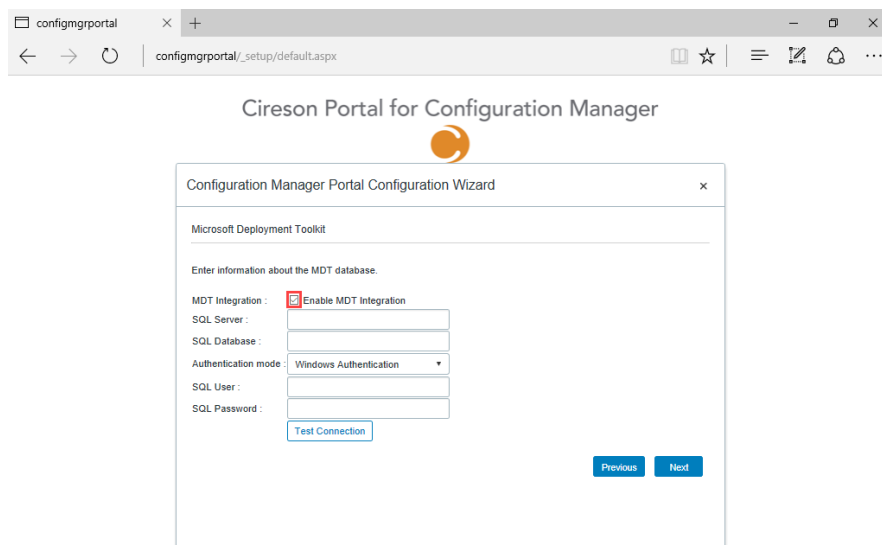
If the connection is successful, you will see the message **Successfully connected to the Configuration Manager database on SQL Server '<server_name>'**.



14. Click **Next**

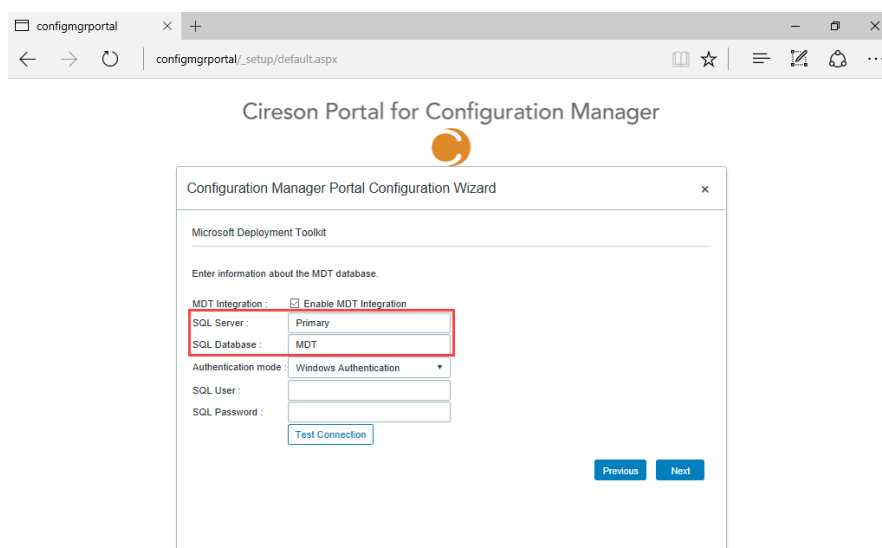


15. If you plan to integrate the ConfigMgr Portal with the Microsoft Deployment Toolkit (MDT), on the **Microsoft Deployment Toolkit** page select the **Enable MDT Integration** checkbox.



The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. Below the title is a logo and a window titled 'Configuration Manager Portal Configuration Wizard'. Inside the wizard, the 'Microsoft Deployment Toolkit' section is active. It contains the instruction 'Enter information about the MDT database.' and several fields: 'MDT Integration' (checked), 'SQL Server', 'SQL Database', 'Authentication mode' (set to 'Windows Authentication'), 'SQL User', and 'SQL Password'. A 'Test Connection' button is located below the 'SQL Password' field. At the bottom right of the wizard are 'Previous' and 'Next' buttons.

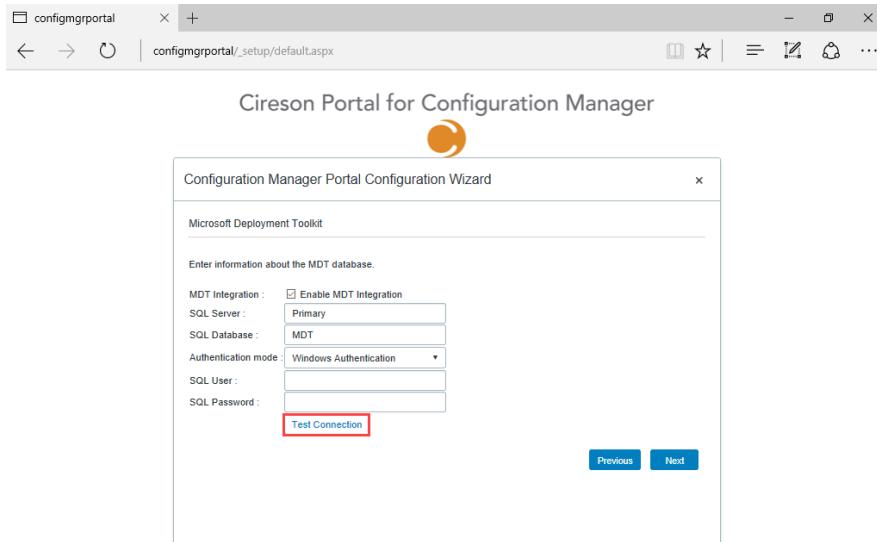
16. Enter the name of the SQL Server hosting the MDT database in the **SQL Server** field and the name of the MDT database in the **SQL Database** field.



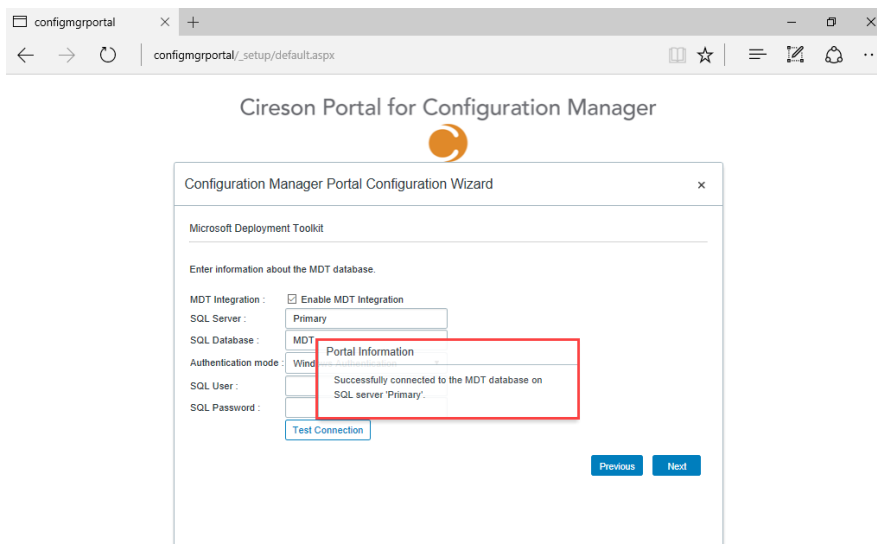
This screenshot is identical to the previous one, but with a red rectangular box highlighting the 'SQL Server' and 'SQL Database' input fields. In this step, the 'SQL Server' field contains the text 'Primary' and the 'SQL Database' field contains the text 'MDT'. All other elements, including the checked 'Enable MDT Integration' checkbox and the 'Test Connection' button, remain the same.

17. If you are using **Windows Authentication** click the **Test Connection** button. If you are using SQL Authentication select this from the **Authentication mode** dropdown and enter the relevant details in the **SQL User** and **SQL Password** fields before clicking the **Test Connection** button.

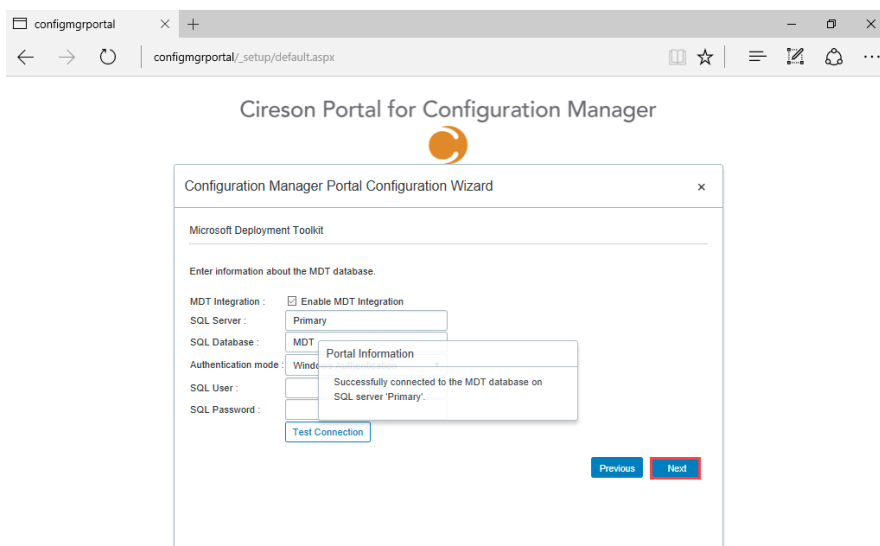
NOTE: If you are using Windows Authentication, the IIS Application Pool identity configured in the [Configuring the IIS Application Pool](#) section is used to access the database.



If the connection is successful, you will see the message **Successfully connected to the MDT database on SQL Server '<server_name>'**.



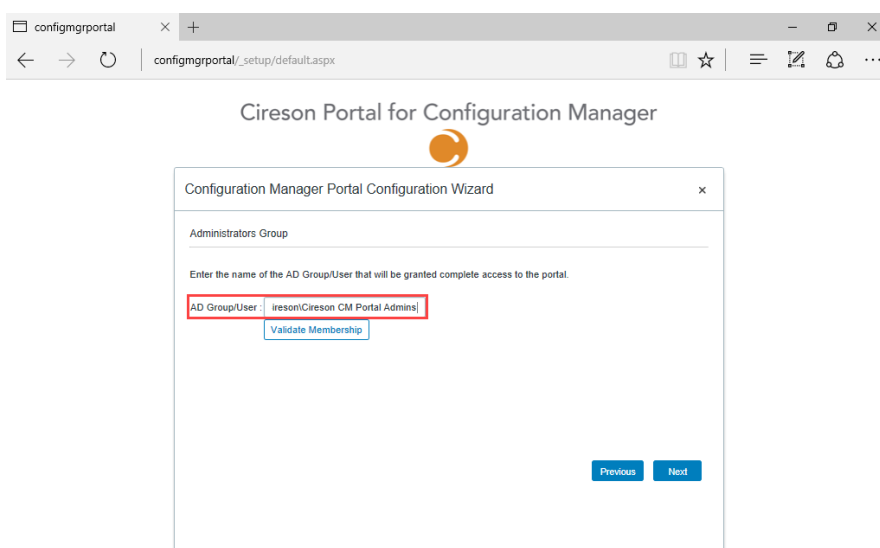
18. Click **Next**



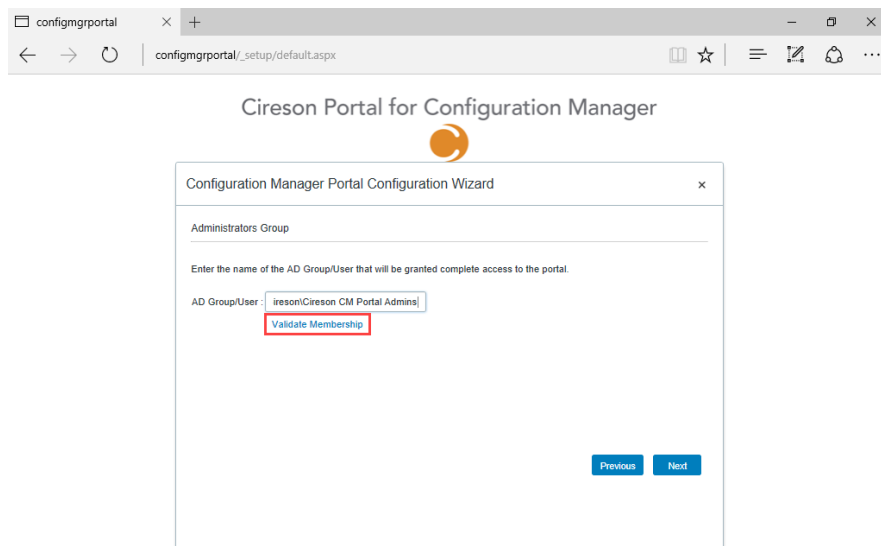
19. On the **Administrators Group** page, in the **AD Group/User** field enter the name of the Active Directory group/user that will have full access to the Portal in the format **<domain>\<name>** or **<server_name>\<name>**

NOTE: The validation of this group is performed using the IIS Application Pool identity configured in the [Configuring the IIS Application Pool](#) section.

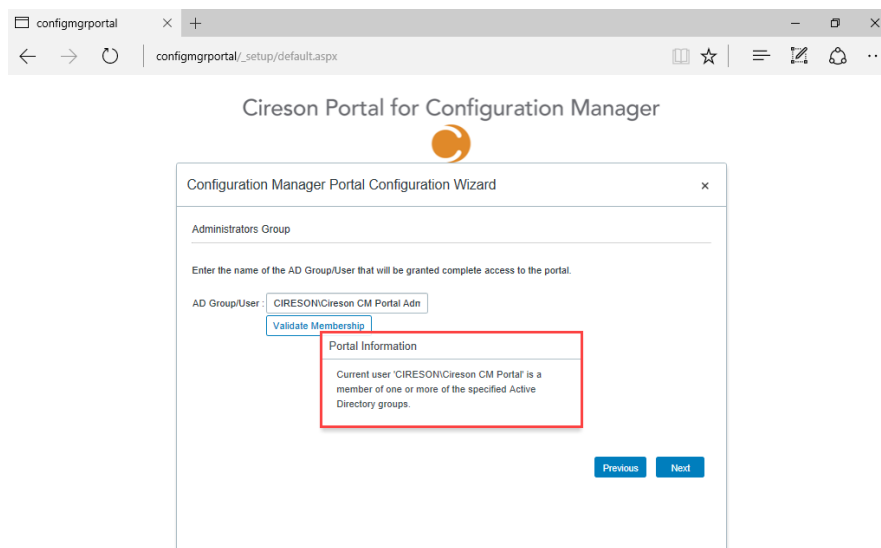
It is recommended that the user running the Portal Configuration Wizard is a member of this group.



20. Click **Validate Membership**



If the validation is successful, you will see the message **Current user '*<domain>\<user_name>*' is a member of one or more of the specified Active Directory groups.**



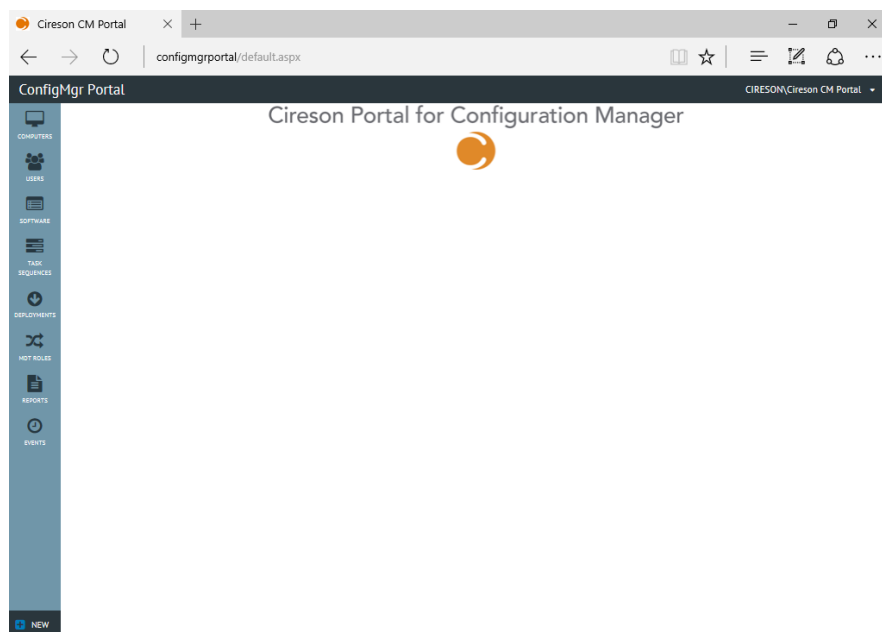
21. Click **Next**

The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. The main content area is titled 'Configuration Manager Portal Configuration Wizard'. Under the 'Administrators Group' section, it prompts the user to 'Enter the name of the AD Group/User that will be granted complete access to the portal.' The 'AD Group/User' field contains the text 'CIRESON\Cireson CM Portal Adn'. A 'Validate Membership' button is located below the field. A 'Portal Information' box displays the message: 'Current user 'CIRESON\Cireson CM Portal' is a member of one or more of the specified Active Directory groups.' At the bottom right, there are 'Previous' and 'Next' buttons. The 'Next' button is highlighted with a red border.

22. Click **Finish** on the **Wizard Complete** page to complete the installation of the Portal.

The screenshot shows the same web browser window as in the previous step. The page title remains 'Cireson Portal for Configuration Manager'. The main content area is titled 'Configuration Manager Portal Configuration Wizard'. Under the 'Wizard Complete' section, it states: 'This completes the configuration wizard. Click "Finish" to save your settings and close this wizard.' Below this, a note says: 'Note that all settings in this wizard can be changed directly in the application if desired.' At the bottom right, there are 'Previous' and 'Finish' buttons. The 'Finish' button is highlighted with a red border.

The **Cireson Portal for Configuration Manager** page will then be displayed.



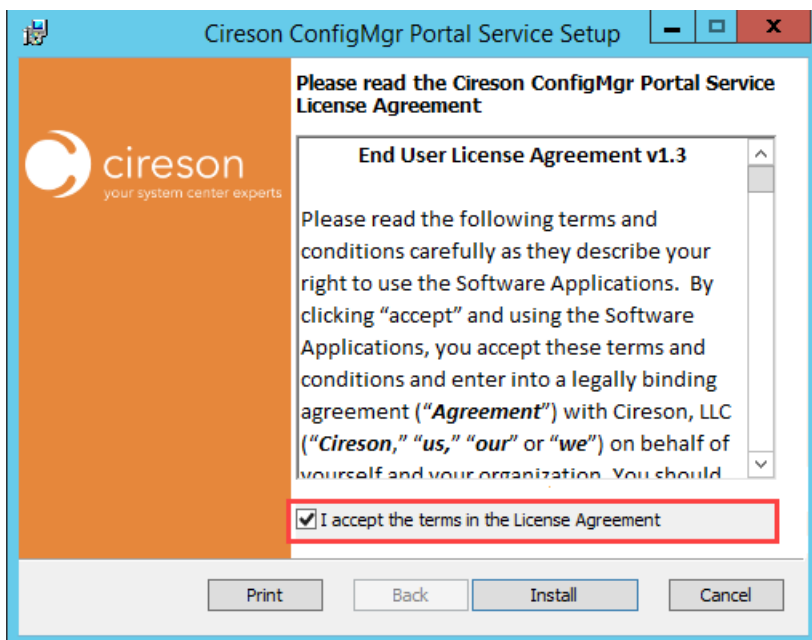
Installing the Caching Service

The ConfigMgr Portal uses a caching service to query information from the ConfigMgr database and insert it into the ConfigMgr Portal database. By default, the Caching Service installs to **C:\Program Files\Cireson\Portal for Configuration Manager\Services**.

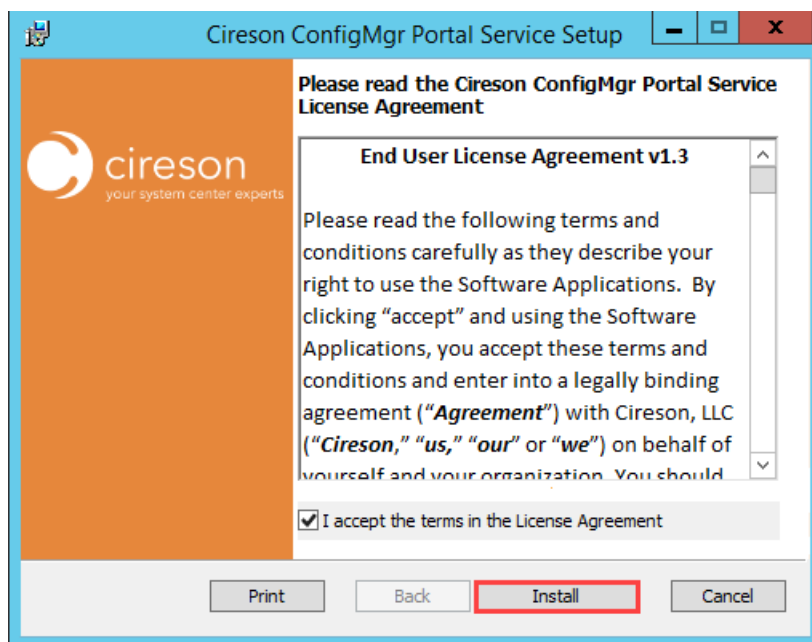
To install the Portal Caching Service:

1. Logon to the server that is hosting the Portal.
2. Run either **Cireson ConfigMgr Portal Service x64.msi** or **Cireson ConfigMgr Portal Service x86.msi** depending on the architecture of the machine you are running which will start the **Cireson ConfigMgr Portal Service Setup** installation.

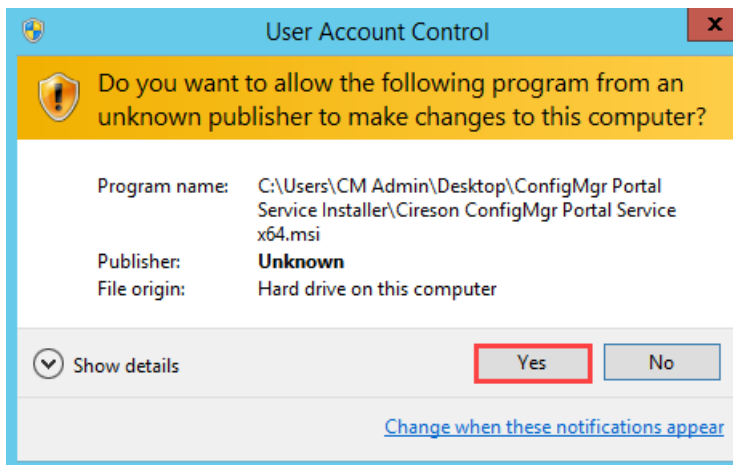
3. Select the **I accept the terms in the License Agreement** checkbox.



4. Click **Install**

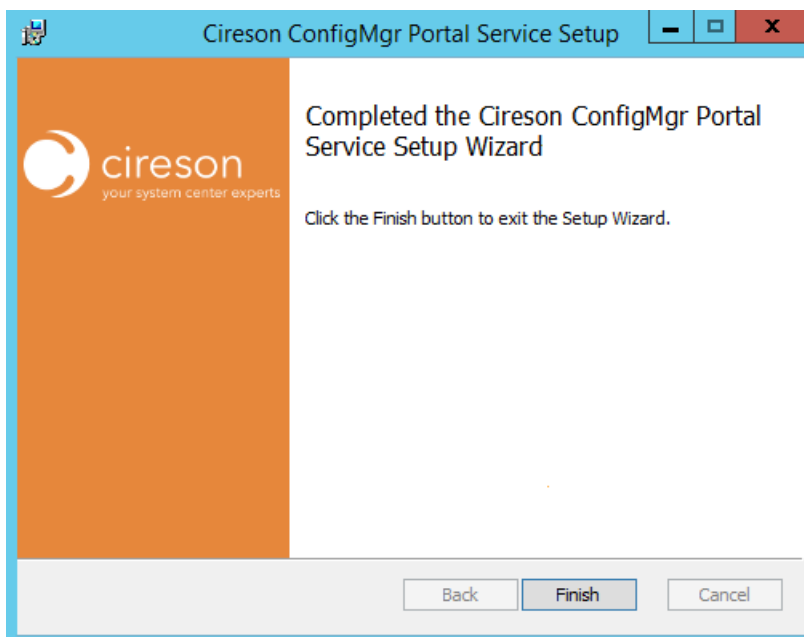


5. Click **Yes** on the **User Account Control** dialog box if it is displayed.

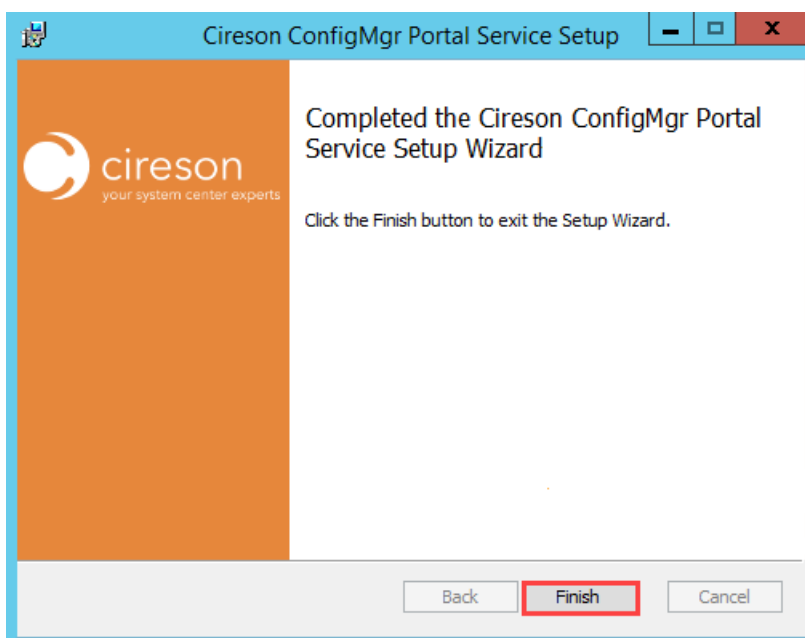


Setup will then install the Cireson ConfigMgr Portal Service.

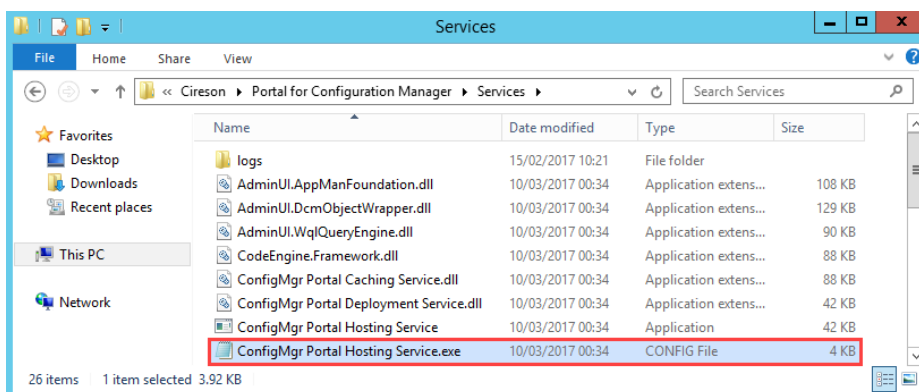
Once the installation has completed, the **Completed the Cireson ConfigMgr Portal Service Setup Wizard** screen will be displayed.



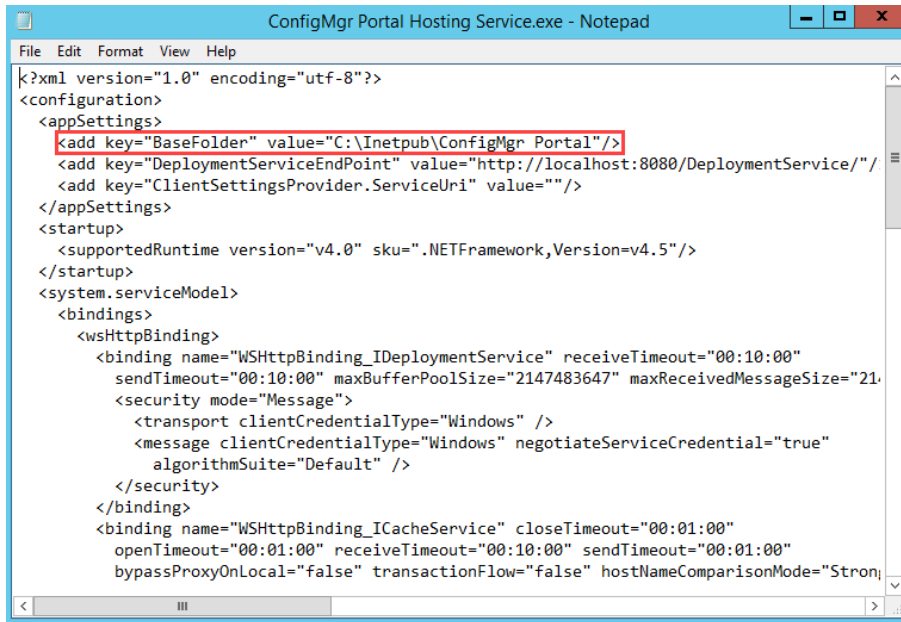
- Click **Finish** to close setup wizard.



- Navigate to the location where the Caching Service was installed (by default **C:\Program Files\Cireson\Portal for Configuration Manager\Services**).
- Open the XML Configuration file called **ConfigMgr Portal Hosting Service.exe.config** in Notepad.



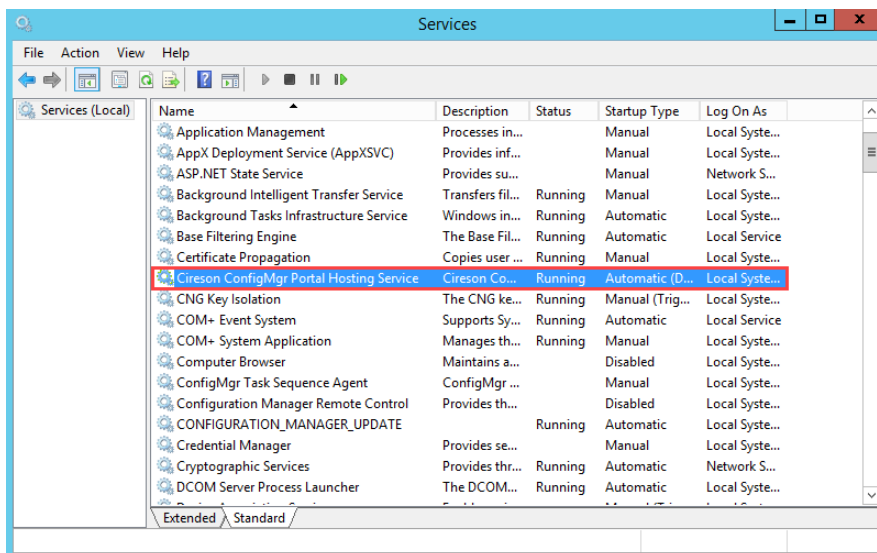
- Verify that the **BaseFolder** key is set correctly to the path of the Portal files, for example **C:\Inetpub\ConfigMgr Portal**



```

<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <add key="BaseFolder" value="C:\Inetpub\ConfigMgr Portal"/>
    <add key="DeploymentServiceEndPoint" value="http://localhost:8080/DeploymentService/" />
    <add key="ClientSettingsProvider.ServiceUri" value="" />
  </appSettings>
  <startup>
    <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.5"/>
  </startup>
  <system.serviceModel>
    <bindings>
      <wsHttpBinding>
        <binding name="WSHttpBinding_IDeploymentService" receiveTimeout="00:10:00"
          sendTimeout="00:10:00" maxBufferPoolSize="2147483647" maxReceivedMessageSize="2147483647" />
        <security mode="Message">
          <transport clientCredentialType="Windows" />
          <message clientCredentialType="Windows" negotiateServiceCredential="true"
            algorithmSuite="Default" />
        </security>
      </binding>
      <binding name="WSHttpBinding_ICacheService" closeTimeout="00:01:00"
        openTimeout="00:01:00" receiveTimeout="00:10:00" sendTimeout="00:01:00"
        bypassProxyOnLocal="false" transactionFlow="false" hostNameComparisonMode="Strongest" />
    </bindings>
  </system.serviceModel>
</configuration>
  
```

- Start **Services.msc** and verify that the **Cireson ConfigMgr Portal Hosting Service** is running. If it is not start it.



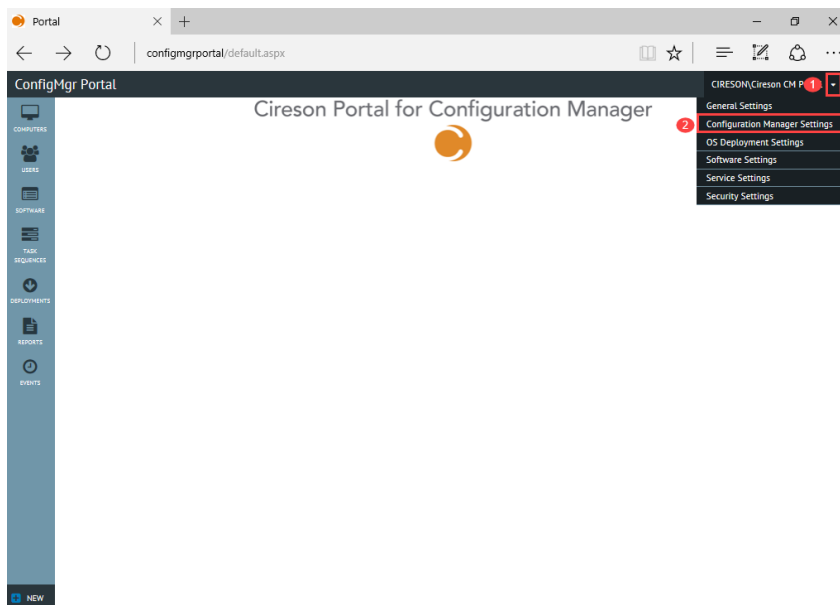
This completes the installation of the Cireson ConfigMgr Portal. The next section looks at the post installation configuration tasks that need to be completed.

Post Installation Configuration

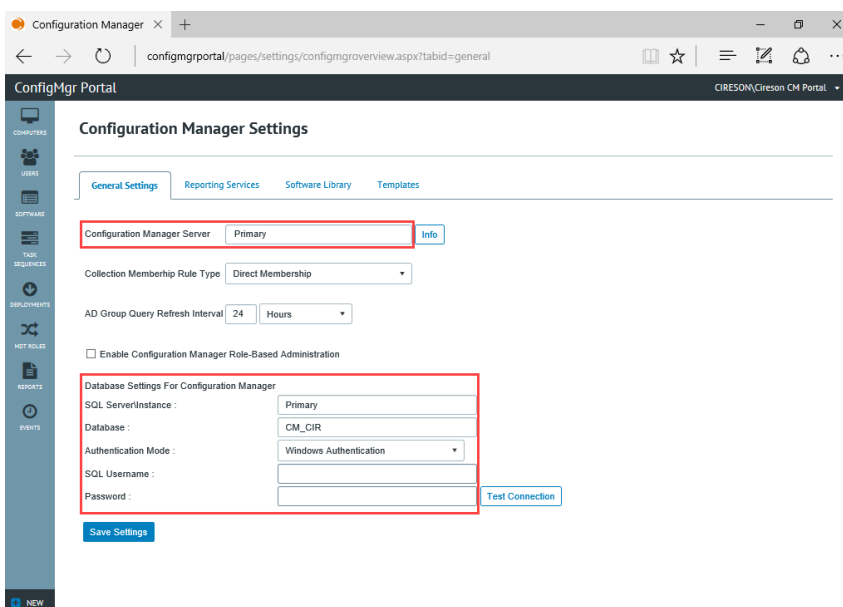
Now that the Portal has been installed, there are a few post installation configuration steps that need to be completed as detailed in this section.

To complete the Portal post installation configuration steps:

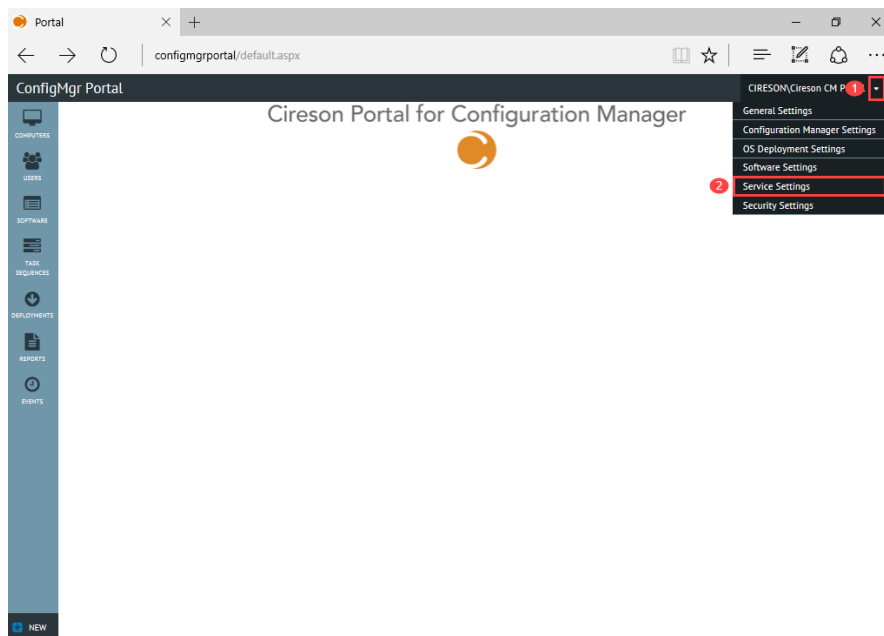
1. Start a browser and connect to the Portal (<http://configmgrportal/default.aspx>).
2. Using the dropdown beside the logged on username, navigate to **Configuration Manager Settings**



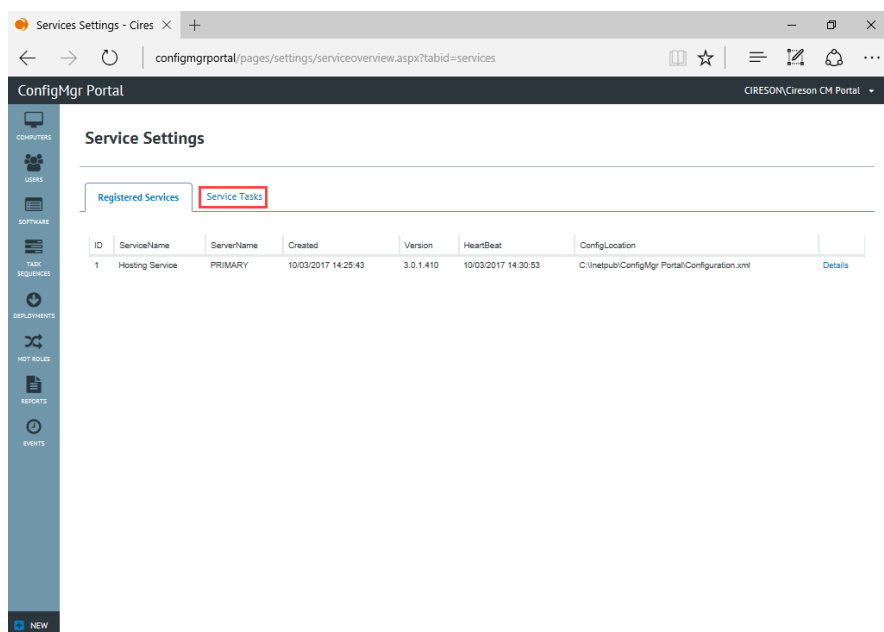
3. Verify that the settings under both the **Configuration Manager Server** and **Database Settings For Configuration Manager** sections are configured correctly, correcting then saving them if required.



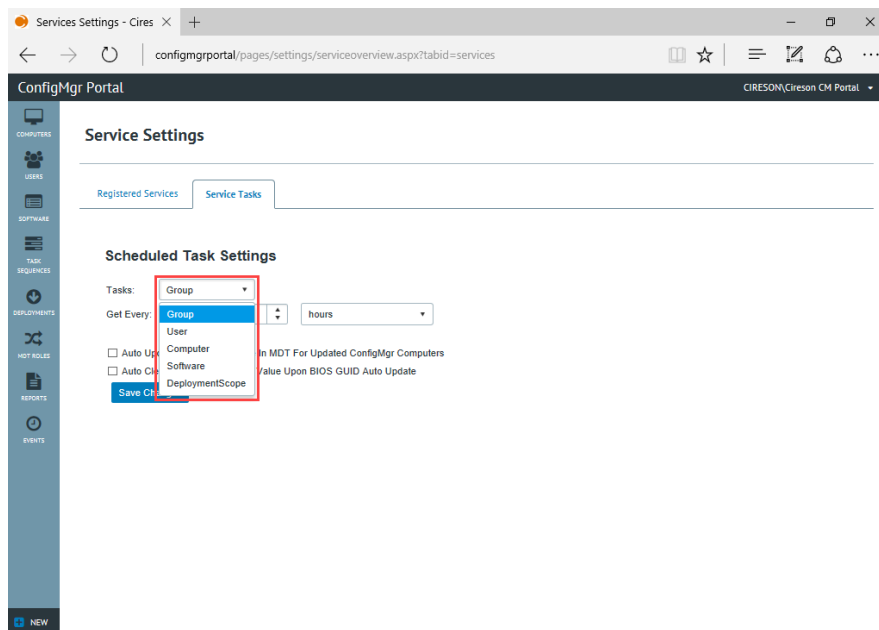
- Using the dropdown beside the logged on username, navigate to **Service Settings**



- Click the **Service Tasks** tab.



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



7. Configure how often the Portal should query the ConfigMgr database for the relevant data then click **Save Changes**.

The default frequencies are shown in the table below:

| Task | Default Frequency of Every... |
|-----------------|-------------------------------|
| Group | 1 hour |
| User | 20 minutes |
| Computer | 10 minutes |
| Software | 24 hours |
| DeploymentScope | 4 hours |

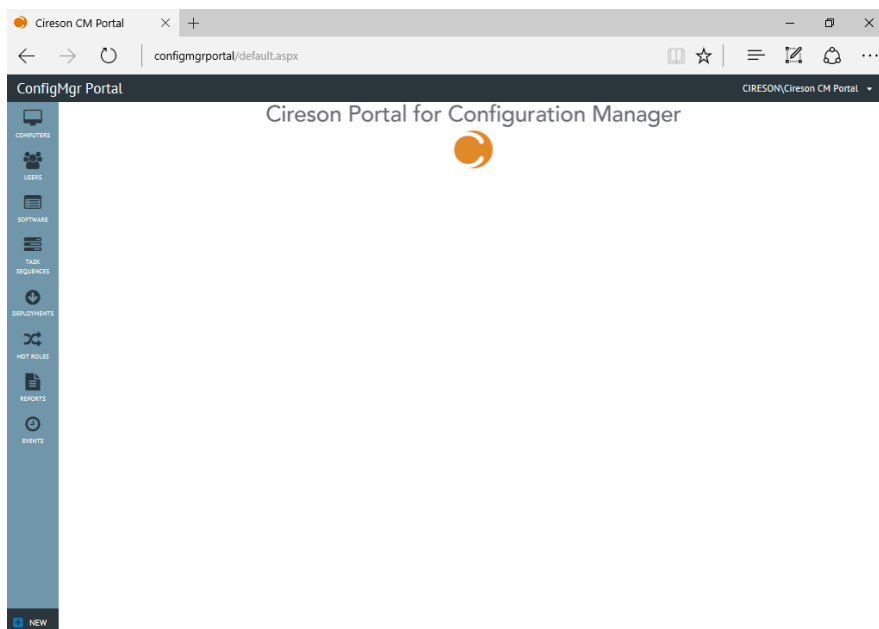
8. Repeat Steps 6 and 7 as required for the other objects you wish to configure.

Verifying the Portal is Working Correctly

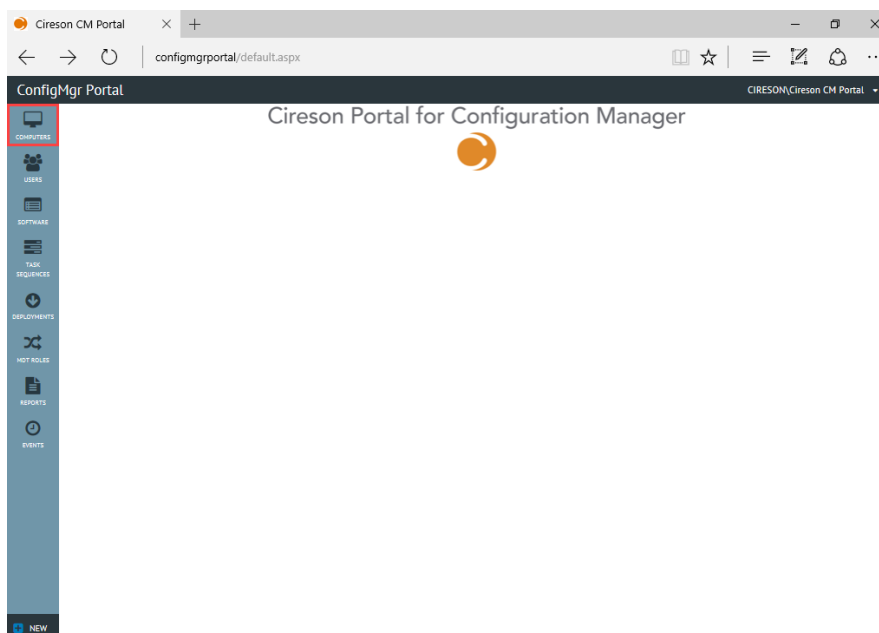
The final part of the process is to verify that the Portal is actually able to successfully retrieve data from the ConfigMgr database.

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

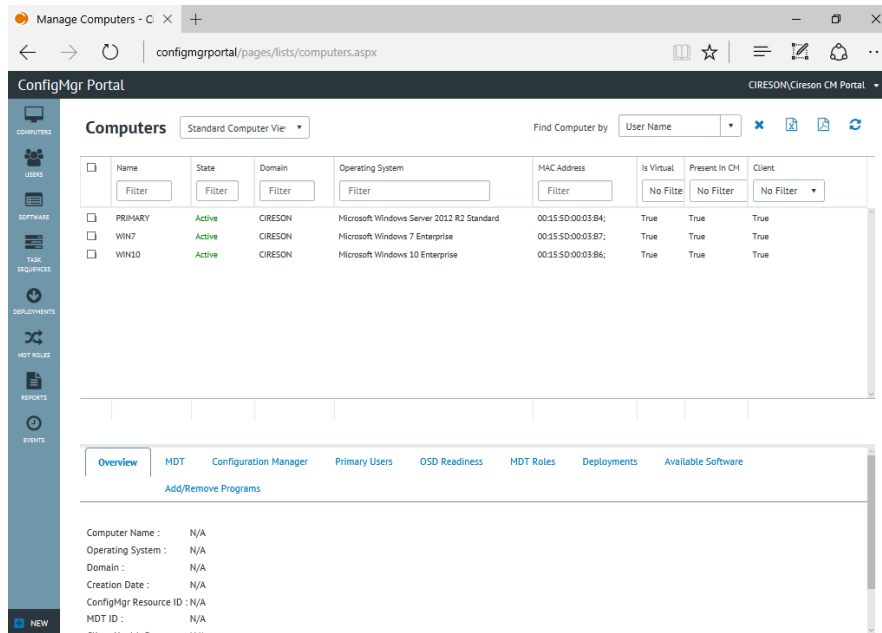
1. Start a browser and connect to the Portal (<http://configmgrPortal>). The **Cireson Portal for Configuration Manager** will be displayed.



2. From the **Navigation** menu select an option to display the data retrieved from the ConfigMgr database by the Portal. For example, to retrieve a list of computers navigate to **Computers**



3. Verify the Portal shows only installed ConfigMgr Clients (which is how the default **Standard Computer View** for computers is configured).



NOTE: The primary purpose of the Cireson ConfigMgr Portal is for deployment purposes so it defaults to only showing computers you can deploy to i.e. have the ConfigMgr Client installed.

It is possible to create custom views for example to show discovered resources, or those marked as obsolete and even decommissioned computers.

Details of how to create custom views can be found in the Administrators Guide.

This completes the post installation configuration of the Portal.

Backup and Restore

This section details how to backup and restore the Portal.

Backing up the Portal

Backing up the Portal is simply a case of making sure that the following are backed up on a regular basis:

- Portal SQL database
- Directory containing the Portal files from the server where the Portal is installed for example **C:\Inetpub\ConfigMgr Portal²**

Restoring the Portal

Should you need to restore the Portal for any reason the restore process is a two-step procedure:

1. **Restoring the SQL Backup** – The most recent backup of the Portal database should be restored and then checks run using this guide to ensure the security rights are still present.
2. **Restoring the ConfigMgr Portal folder structure** – The next step is to restore the most recent backup of the Portal folder structure (for example **C:\Inetpub\ConfigMgr Portal**). Alternatively recreate the installation directory as detailed in the [Create and configure a new Website](#) section then overwrite the **Configuration.xml** and **Web.config** files created in this directory with the one from the most recent backup.

² At a minimum, the **Configuration.xml** and **Web.config** files needs to be backed up.

Upgrading from Pre-release Versions

This section details how to upgrade the Cireson Portal for Configuration Manager from pre-release versions.

NOTE: If you are running a pre-release version of the Cireson Portal for Configuration Manager, this section provides the necessary steps to upgrade to the current release.

If this is a new installation of the Cireson Portal for Configuration Manager, follow the procedures in the '**Installation Guide.PDF**' included in the **CMP Build.zip** download.

Upgrade Procedure

To upgrade from previous versions to the current version:

1. Extract the **CMP Build.zip** file to a temporary folder
 - a. This zip file contains the following files:
 - i. **Release Notes.html** (the release notes for this build)
 - ii. **Installation Guide.PDF** (the installation instructions for new installs)
 - iii. **ConfigMgr Portal.zip** (the installation files for the website)
 - iv. **ConfigMgr Portal Service Installers.zip** (the Windows Installer files for the Cireson ConfigMgr Portal Hosting Service installation)
 - v. **Upgrade Guide.PDF** (this document)
2. Stop the Portal web site via Internet Information Services Manager
 - a. This should not be necessary, but it doesn't hurt to do so 😊
3. Copy your existing **Configuration.xml** file from your installation location (for example, **C:\Inetpub\ConfigMgr Portal**) to a backup location
 - a. This file will be overwritten during the upgrade and you will want to have your version of the file to restore later as it contains the configuration of your implementation of the Cireson Portal for Configuration Manager
4. From **Control Panel**, uninstall the **Cireson ConfigMgr Portal Service**
 - a. This service needs to be upgraded, so uninstall the existing one and in a later step, you will install the newer version of the service
5. Extract the contents of the **ConfigMgr Portal.zip** from the temporary folder to your web site installation folder (such as **C:\Inetpub\ConfigMgr Portal**)
 - a. You will be prompted to replace a large number of files (over 1,700), which you should allow to complete
6. Copy your original **Configuration.xml** file copied in Step 3 to the web site installation folder (such as **C:\Inetpub\ConfigMgr Portal**) overwriting the new version of the file
 - a. You will need to replace the new **Configuration.xml** with your own so that you don't have to reconfigure a number of settings you had previously completed
7. Ensure that your IIS application pool account has **Modify** rights to the web site installation folder (such as **C:\Inetpub\ConfigMgr Portal**)
 - a. In the pre-release installation document, it was only listed as needing **Read** rights to the folder, and **Modify** rights to a couple of files. You now should ensure that the account has **Modify** rights to the entire folder and all files and subfolders.
8. On the SQL Server computer that is hosting your Cireson Portal for Configuration Manager database, start **SQL Server Management Studio**

- a. Select the Cireson Portal for Configuration Manager database, and then execute the two SQL scripts that are provided with the Preview 2 release that are now in your **C:\Inetpub\ConfigMgr Portal_Setup\Database** folder):
 - i. **dbTables.sql**
 - ii. **dbData.sql**
 - b. Executing these two scripts is necessary due to database schema changes from the initial Preview release
9. Extract the **ConfigMgr Portal Service Installers.zip** to a temporary folder, and then run the appropriate Windows Installer file to install either the 64-bit or 32-bit service
 - a. The Cireson ConfigMgr Portal Service has changed from the preview release so needs to be reinstalled
10. From the **C:\Program Files\Cireson\Portal for Configuration Manager\Services** folder, open the **ConfigMgr Portal Hosting Service.exe.config** file in Notepad and verify that the "**BaseFolder**" value is correct for your web site installation
 - a. The default path is set to **C:\Inetpub\ConfigMgr Portal**. If this is not your web site installation folder, set the "**BaseFolder**" value to reflect your installation
11. Start the **Cireson ConfigMgr Portal Hosting Service**
 - a. Verify the log files for the service in the **C:\Program Files\Cireson\Portal for Configuration Manager\Services\logs** folder
 - i. **hostingService.log** (should indicate that the service found your server and database and started successfully)
 - ii. **CachingService.log** (should see it identifying computers, users and software for your environment)
12. Start the Portal web site via Internet Information Services Manager
 - a. If you stopped the web site in Step 2, then you need to start it again to use it 😊
13. Verify your version – now visible within the Portal:
 - a. Start your browser
 - b. Log into the Portal web site
 - c. In the upper right corner of the Portal, hover the mouse over your logged-on user name
 - d. In the **Settings** menu that appears below your name, click **General Settings**
 - e. In the **General Settings** page, expand the "**Product Version**" section at the bottom
 - i. The **Version** should display as 3.0.1.501

Upon upgrade, the Caching Service will automatically perform a full update cycle just as if it were a new installation. This is done to retrieve any new values for existing objects that are now implemented through database schema changes.

As you upgrade, if your trial license has expired, you will be prompted to supply a new license key, which will automatically take you to the **Configuration Manager Portal Configuration Wizard** where you can enter the new license key that you'd receive from the Cireson sales team.

With that, you should be all set and ready to enjoy all the new features and functions in the latest release of the Cireson Portal for Configuration Manager. If you have not already done so, please be sure to read the included Release Notes as well. That document will note any important known issues in this release, as well as listing new features and capabilities for your testing.