

Cireson Portal for Configuration Manager

INSTALLATION GUIDE

Version: 2.0
PUBLISHED: 3-JUL-17

Table of Contents

Introduction	1
Purpose and Audience	1
Version History.....	2
Related Documentation.....	2
Prerequisites and Assumptions	2
Feedback	2
Minimum Requirements	3
Optional Components.....	3
Installing the Prerequisites and Cireson Portal for Configuration Manager.....	4
Account and group requirements.....	4
DNS requirements.....	5
Downloading the Cireson Portal for Configuration Manager	8
Extracting the Portal Installation Files	8
Installing the Cireson Portal for Configuration Manager using the Installer	13
Overview of the Cireson Portal for Configuration Manager Installer.....	13
Installing the Cireson Portal for Configuration Manager using the Installer	13
Extracting the Portal Installer Installation files	13
Providing access to SQL for the Cireson Portal for Configuration Manager	15
Installing the Portal using the Installer	16
Manually Installing the Cireson Portal for Configuration Manager.....	45
Extracting the Portal Installation files for a Manual Installation	45
Providing access to ConfigMgr for the Cireson Portal for Configuration Manager User Account	52
Create and configure a new Website	58
Configuring the IIS Application Pool	64
Configuring file security	71
Create and configuring the new SQL Database	71
Granting the Portal user access to the SQL Databases.....	76
Running the SQL Scripts.....	83
Run the Portal Configuration Wizard.....	90
Installing the Caching Service	104
Post Installation Configuration	110
Verifying the Portal is Working Correctly	113
Backup and Restore	116

- Backing up the Portal 116
- Restoring the Portal 116
- Converting from the Community Edition to the Team Edition of the Portal..... 117
- Upgrade Procedure 117
 - Requesting a License Key 117
 - Entering the License Key to convert the Portal from the Community Edition to the Team Edition 119
- Upgrading from Previous Versions of the Portal 124
- Upgrade Procedure 124
- Appendix A – Manually Installing Microsoft.NET Framework 4.5.2 127

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:

- **Inventory Data Visibility** – Quickly find the information you need through simplified inventory data visibility.
- **User Device Affinity Management** – Manage user to device relationships from the Portal.
- **Computer Cloning and Cleaning** – Copy or remove targeted software deployments from one computer to another.
- **External Tools** – Interface with external remote tools from your browser.
- **Collection Targeted Deployments** – Easily push software on-demand to any client.
- **Software, OS, and MDT** – Enhanced software, OS, and MDT deployment and management.
- **Deployment Templates** – Reduce human error and standardize software and OS deployments with pre-defined templates.
- **Deployment Monitoring** – Quickly find the status of any deployment.
- **Role-Based Administration** – Simplified setup for increased security by setting access and permissions for specific people and job functions.
- **Report Viewer** – Built-in report viewer provides quick and easy access to reports, putting relevant information at your fingertips.
- **Dashboard View** – Get an instant snapshot of the health of your IT systems in one concise view.
- **Commence Integration** – Templates for quick and easy computer provisioning.

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
2.0		Cliff Hobbs	Updated to include: <ul style="list-style-type: none"> • Details of how to perform an installation using the new Installer. • Updated screenshots of the new installation wizard when performing a manual installation. • Updated information for upgrading from previous versions • Relevant updates for version 2.0

Related Documentation

Ref	Document	Author	Status	Version
[1]	Cireson Portal for Configuration Manager Administration Guide	Cliff Hobbs	In progress	2.0
[2]	Cireson Portal for Configuration Manager Troubleshooting Guide	Cliff Hobbs	In progress	2.0

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 later**²

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

² A minimum of .NET Framework version 4.5.2 is required by the Portal Installer which will automatically install this version as part of the setup process if it is not already installed.

Installing the Prerequisites and Cireson Portal for Configuration Manager

The following prerequisites need to be met before the Cireson Portal for Configuration Manager can be installed:

- [Account and group requirements](#)
- [DNS requirements](#)
- [Downloading the Cireson Portal for Configuration Manager](#)
- [Extracting the Portal Installation Files](#)

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:

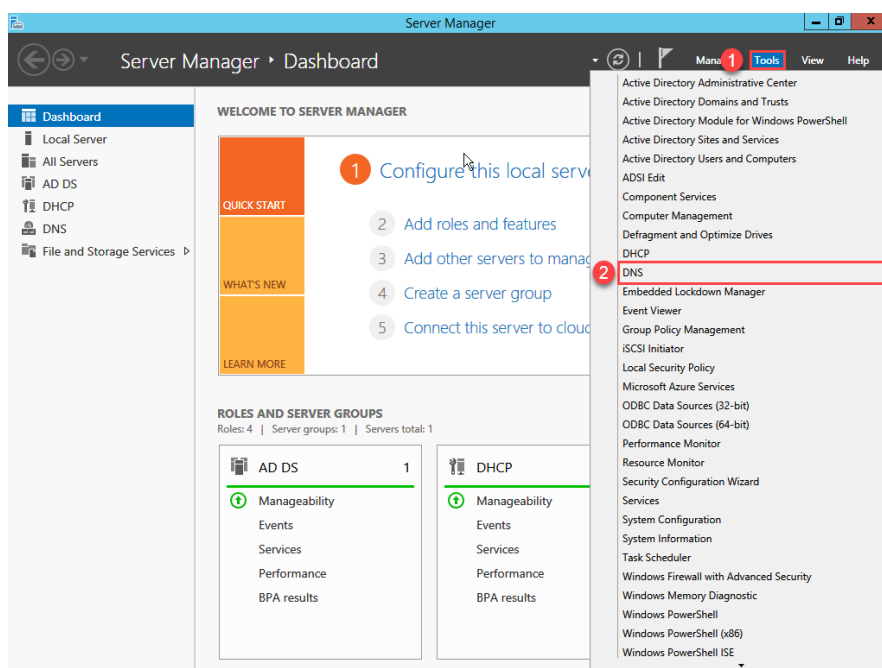
<http://ConfigMgrPortal.mydomain.local>

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.

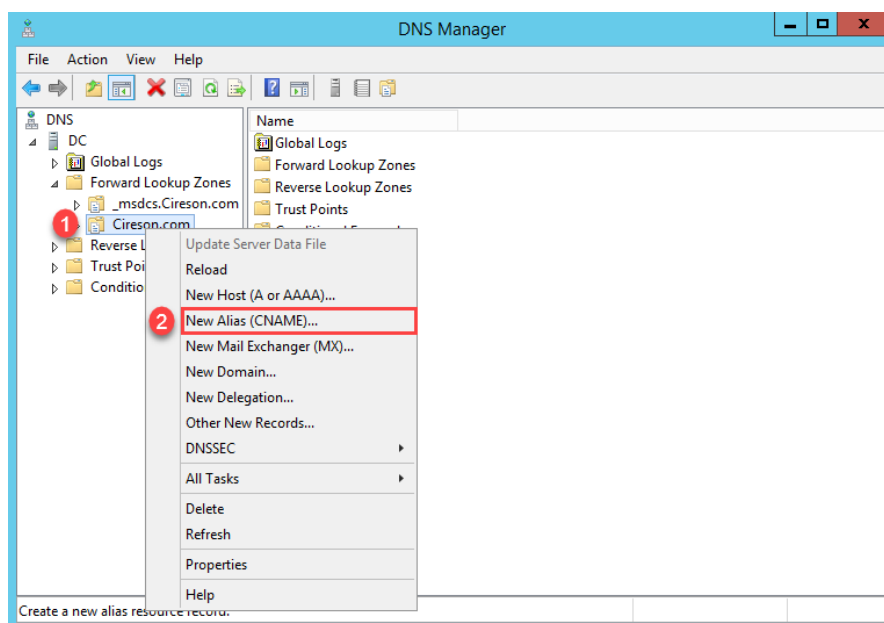
To add an alias (CNAME) resource record to a zone:

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).

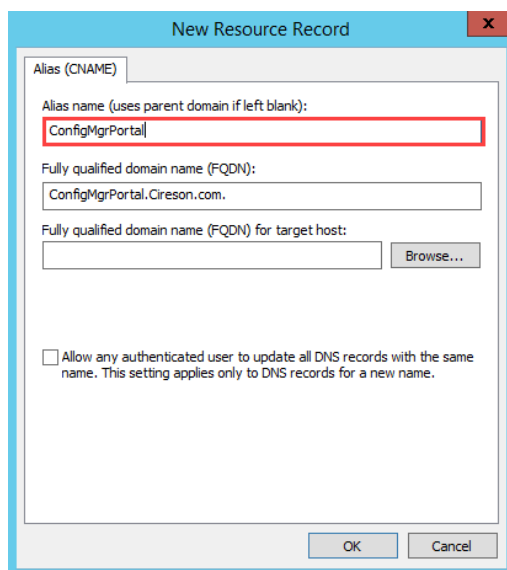


4. In the **DNS Manager** navigate to **DNS | <server_name> | Forward Lookup Zones**.

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.

New Resource Record

Alias (CNAME)

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 Browse...

☐ Allow any authenticated user to update all DNS records with the same name. This setting applies only to DNS records for a new name.

OK Cancel

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

Downloading the Cireson Portal for Configuration Manager

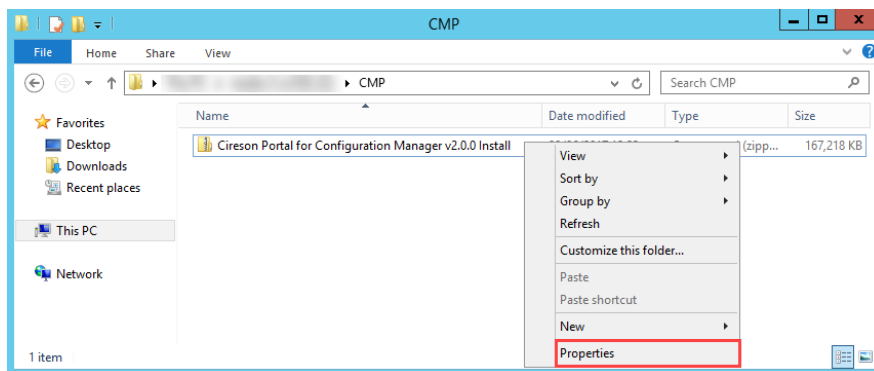
The Cireson Portal for Configuration Manager can be downloaded from the following location:

<http://cireson.com/apps/configuration-manager-portal-community/>

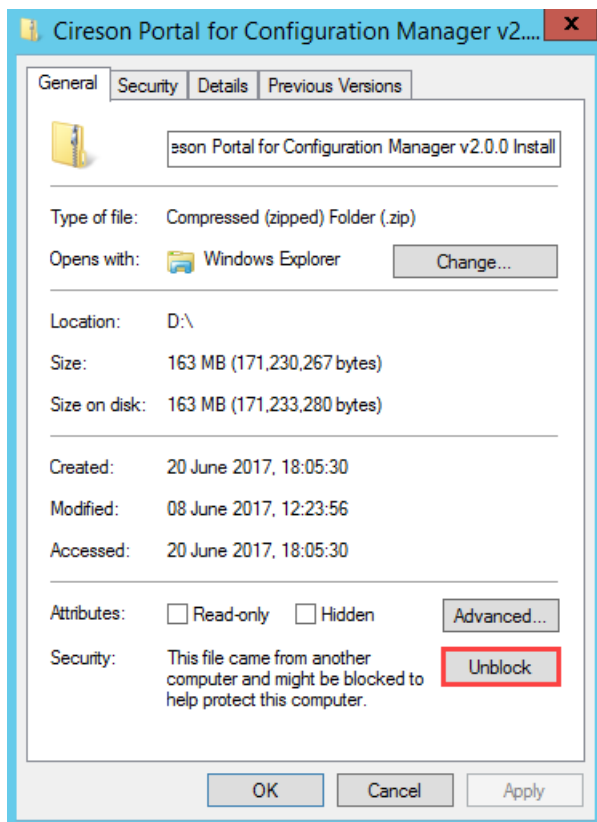
Extracting the Portal Installation Files

Once the ZIP file for the Portal has been downloaded, use the following process to unblock and extract the installation files:

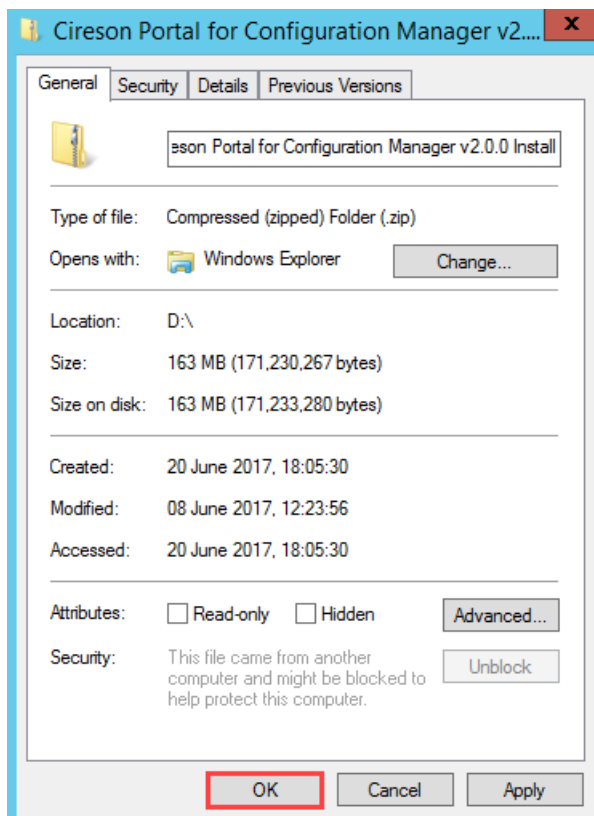
1. Right-click on the **Cireson Portal for Configuration Manager vx.x.x Install.zip** file (where **x.x.x** is the version number), and select **Properties**



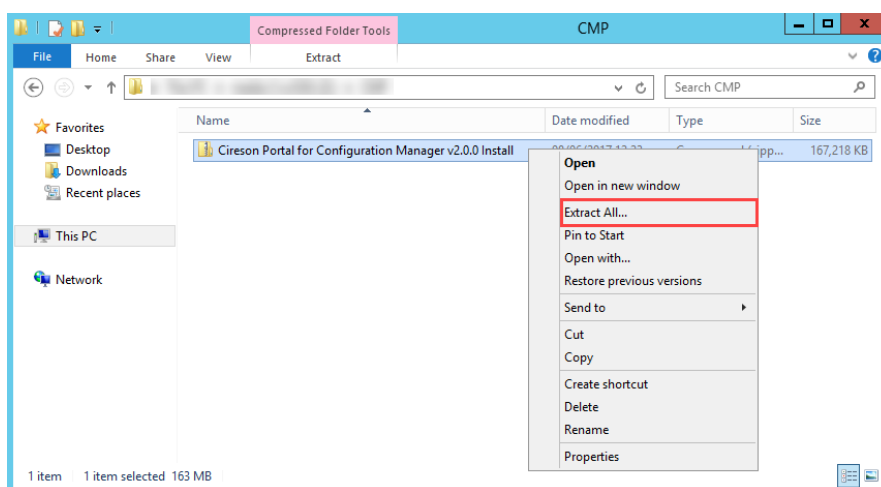
2. On the **Cireson Portal for Configuration Manager vx.x.x Install.zip Properties** dialog box, click **Unblock**



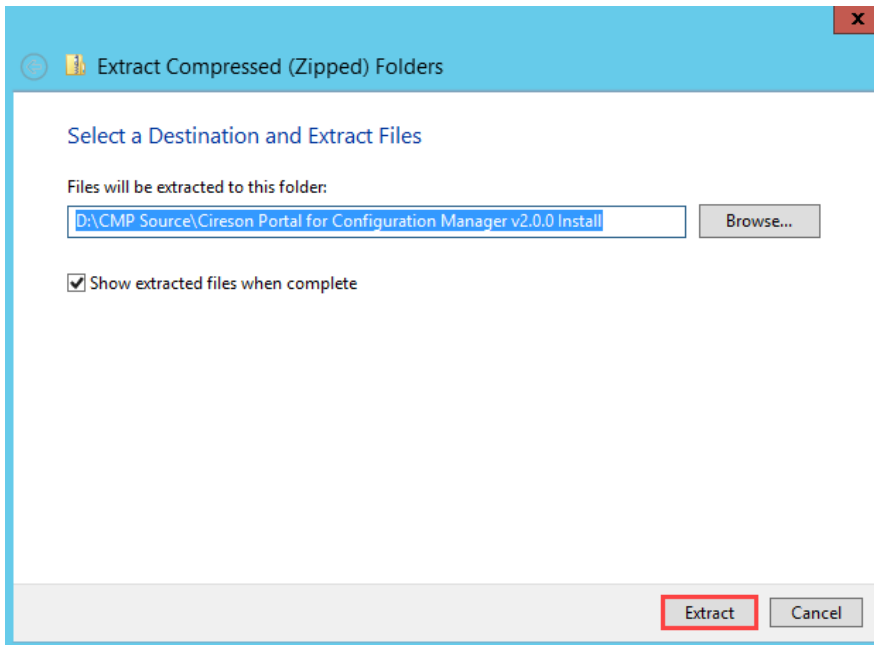
- Click **OK** to close the **Cireson Portal for Configuration Manager vx.x.x Install.zip Properties** dialog box.



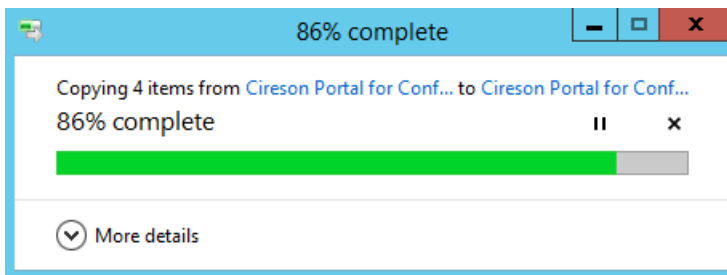
- Right-click on the **Cireson Portal for Configuration Manager v2.0.0 Install.zip** file and select **Extract All**



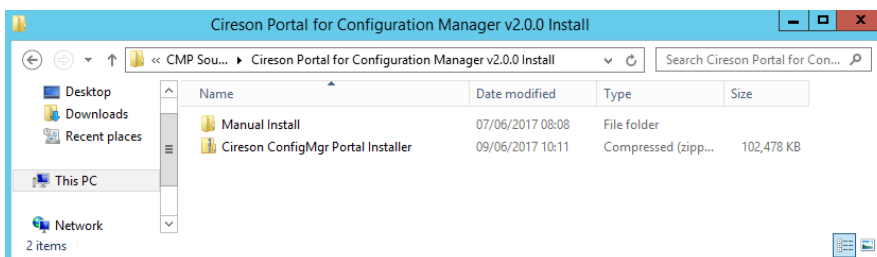
5. On the **Extract Compressed (Zipped) Folders** dialog box, click **Extract** to extract the files to specified location. If you wish to extract the files to a different location, either type the path in the **Files will be extracted to this folder** field, or alternatively click **Browse** to browse to the required location.



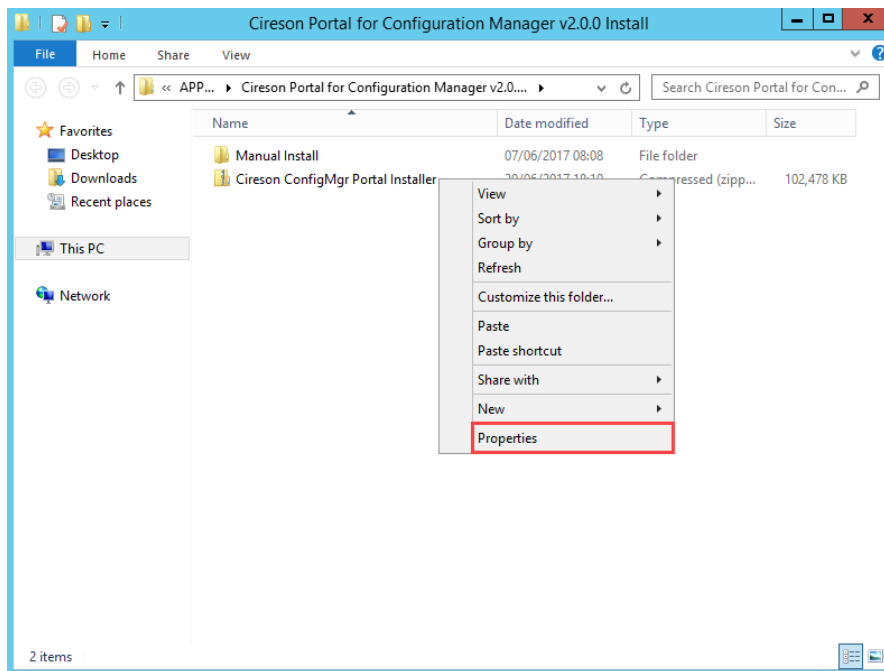
The progress dialog box will be displayed as the files are extracted.



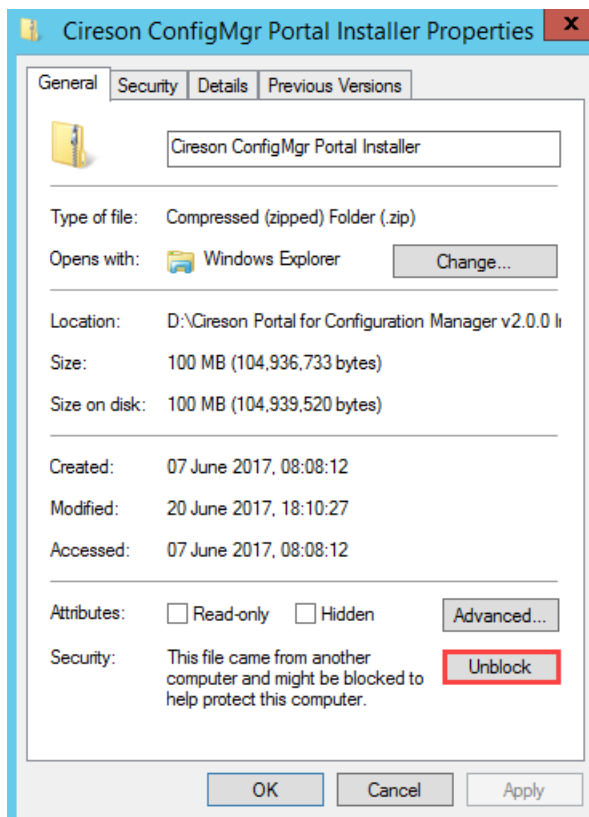
Once the extraction process has completed, the folder specified as the destination will be opened automatically showing the extracted files.



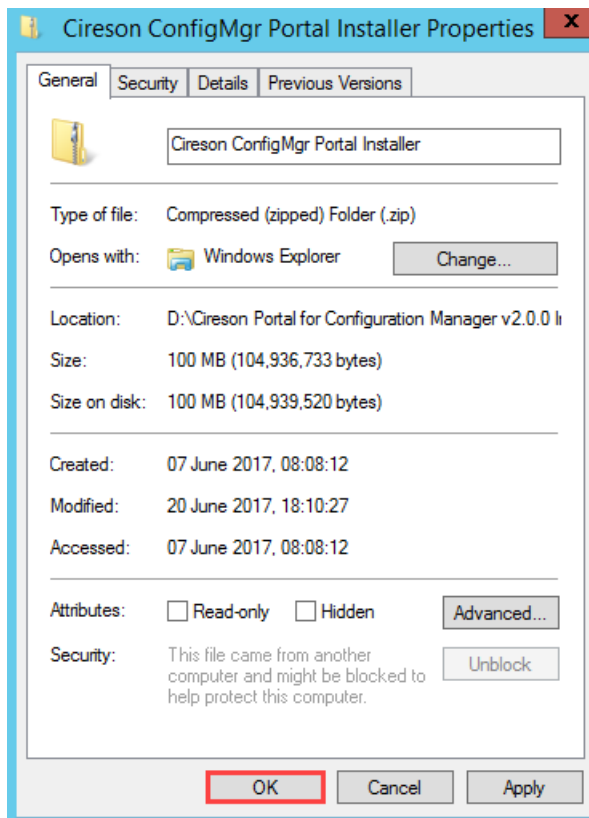
6. Right-click on the **Cireson ConfigMgr Portal Installer.zip** file and select **Properties**



7. On the **Cireson ConfigMgr Portal Installer.zip Properties** dialog box, click **Unblock**



- Click **OK** to close the **Cireson ConfigMgr Portal Installer Properties** dialog box.



This completes the installation of the prerequisites for the Cireson Portal for Configuration Manager. The next phase in the process is to install the Portal using either the Installer or manually.

Installing the Cireson Portal for Configuration Manager using the Installer

Starting with version 2.0, there are two methods to install the Cireson Portal for Configuration Manager:

- Using the Installer
- Manually

This section details how to install the Portal using the Installer. See the [Manually Installing the Cireson Portal for Configuration Manager](#) section if you prefer to install the Portal manually.

Overview of the Cireson Portal for Configuration Manager Installer

First introduced in Version 2.0, the Cireson Portal for Configuration Manager:

- Automatically performs the following tasks which had to be performed manually in previous versions:
 - Creates the IIS website and Application Pool, configuring them as required.
 - Creates SQL-related tasks such as creating the CMP database running the required scripts, setting security on the CMP and ConfigMgr databases as required to enable integration, etc.
 - Installs the Windows Hosting Service the CMP used for interaction between the CMP website, the CMP database, and the ConfigMgr database.
 - Integrates with MDT, if configured.
- Provides options to perform a full installation, or a custom installation which allows you to select which components you want to install.
- Allows you to specify custom settings for the IIS website if required, such as the installation name, web site name and port.
- Provides the ability to control the settings for the Hosting Service such as running the service under the context of a specific user account or using the Local System account, as well as specifying the port numbers for the Deployment Service and Cache Service if required.

Installing the Cireson Portal for Configuration Manager using the Installer

The process for installing the Portal using the Installer is broken down into the following key stages:

- [Extracting the Portal Installer Installation files](#)
- [Providing access to SQL for the Cireson Portal for Configuration Manager](#)
- [Installing the Portal using the Installer](#)

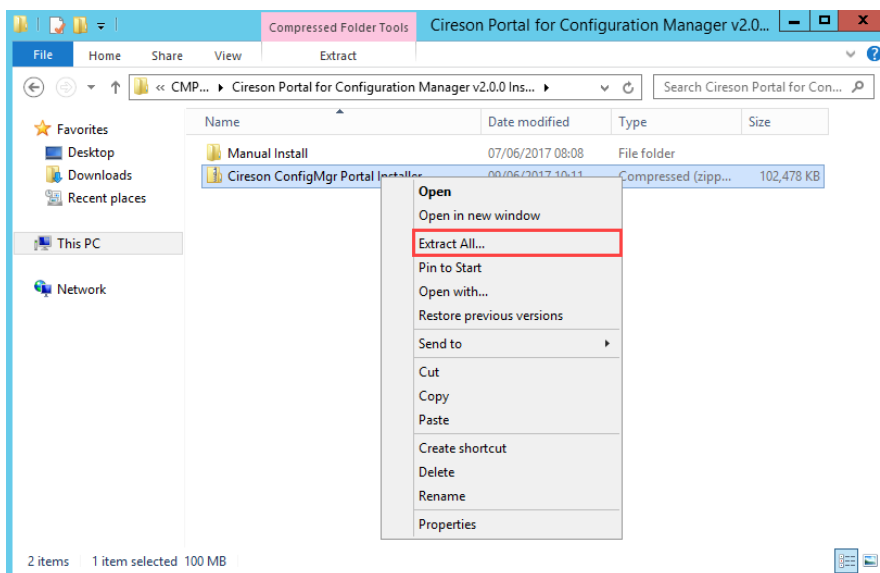
Extracting the Portal Installer Installation files

The first part of the Portal installation process using the Installer, is to extract the Portal installation files.

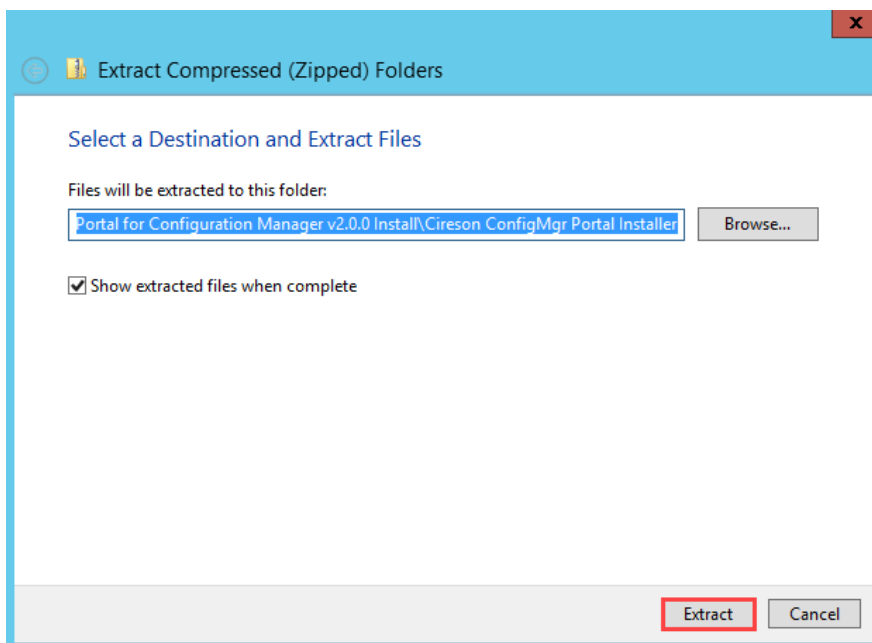
To extract the Portal Installation files:

1. Logon to the server that will host the Portal with an account that has local Administrator rights.
2. Navigate to the location containing the Portal installation files extracted in the [Extracting the Portal Installation Files](#) section.

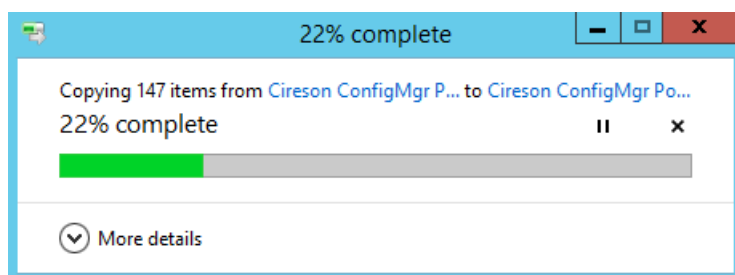
3. Right-click on the **Cireson ConfigMgr Portal Installer.zip** file and select **Extract All...**



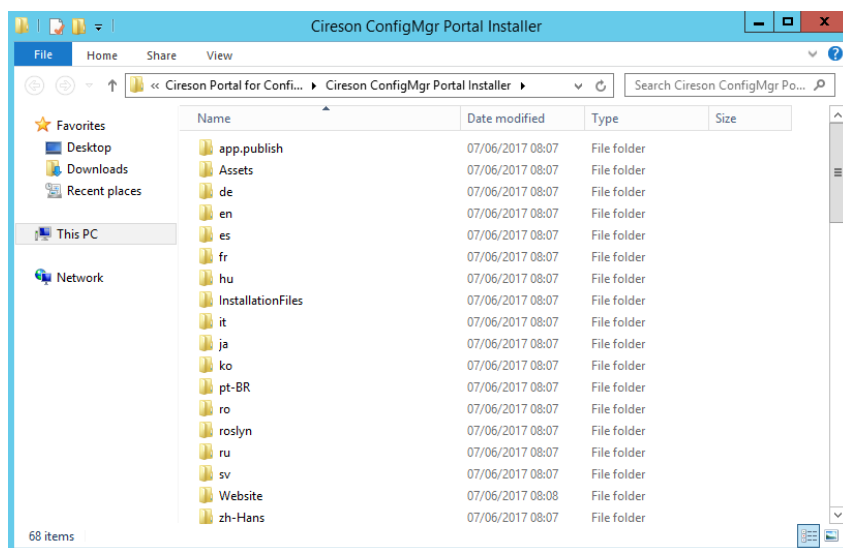
4. On the **Extract Compressed (Zipped) Folders** dialog box, click **Extract** to extract the files to specified location. If you wish to extract the files to a different location, either type the path in the **Files will be extracted to this folder:** field, or alternatively click **Browse** to browse to the required location.



The progress dialog box will be displayed as the files are extracted.



Once the extraction process has completed, the folder specified as the destination will be opened automatically showing the extracted files.



Providing access to SQL for the Cireson Portal for Configuration Manager

From a SQL perspective, if the Portal is to be installed using the Installer, the SQL login for the user account used by the Cireson Portal for Configuration Manager needs to initially have the **sysadmin** server role in order to be able to create the Portal database and run the SQL scripts to configure it.

Post installation, the **sysadmin** server role can be removed from the Portal's SQL login provided it is granted the **Public** Server Role and the following User Mapping database role memberships:

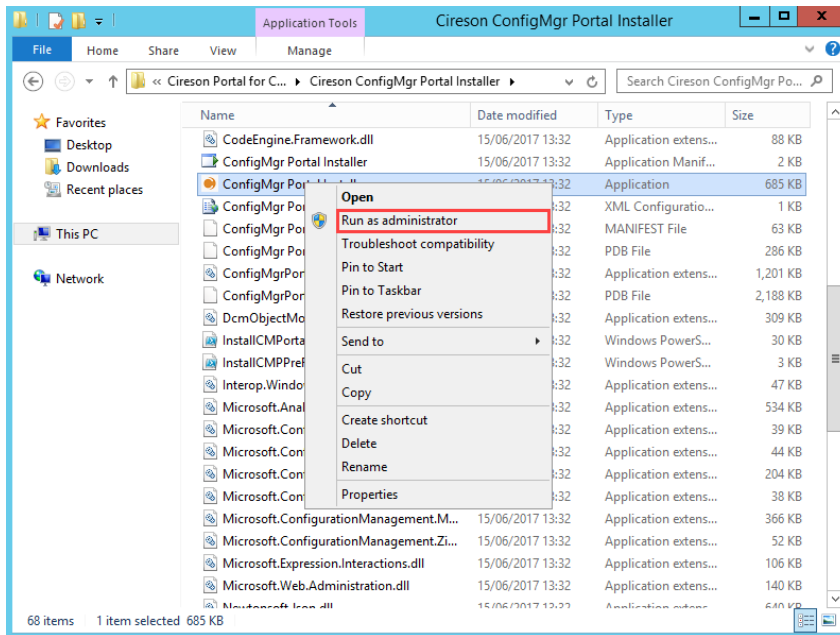
Database	Database role membership
ConfigMgr (CM_XXX)	db_datareader public
ConfigMgrPortal	db_owner public
MDT	db_datareader db_datawriter public
ReportServer	db_datareader public

NOTE: Details of how to perform this process can be found in the [Granting the Portal user access to the SQL Databases](#) section.

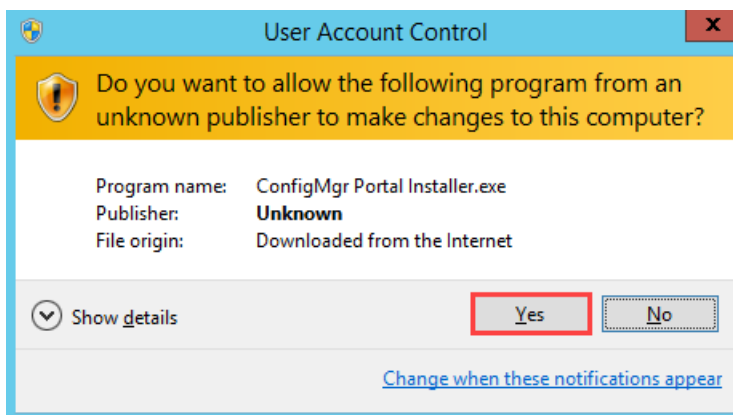
Installing the Portal using the Installer

To install the Portal using the Installer:

1. Logon to the server that will host the Portal with an account that has local Administrator rights.
2. Navigate to the location containing the Portal installation files extracted in the [Extracting the Portal Installer Installation files](#) section.
3. In the folder containing the extracted installation files, right-click **ConfigMgr Portal Installer.exe** and select **Run as administrator**



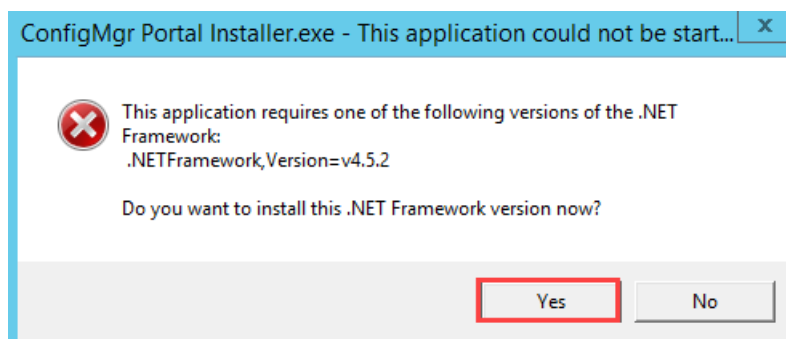
4. If the **User Account Control** dialog box is displayed, click **Yes**



As the Installer requires a minimum of Microsoft .NET Framework 4.5.2 to be installed, if this version has not been installed on the server you will be prompted to install it.

If you already have .NET 4.5.2 or later installed, you will not be prompted and should proceed to Step 7.

5. On the **ConfigMgr Portal Installer.exe** dialog box, click **Yes**

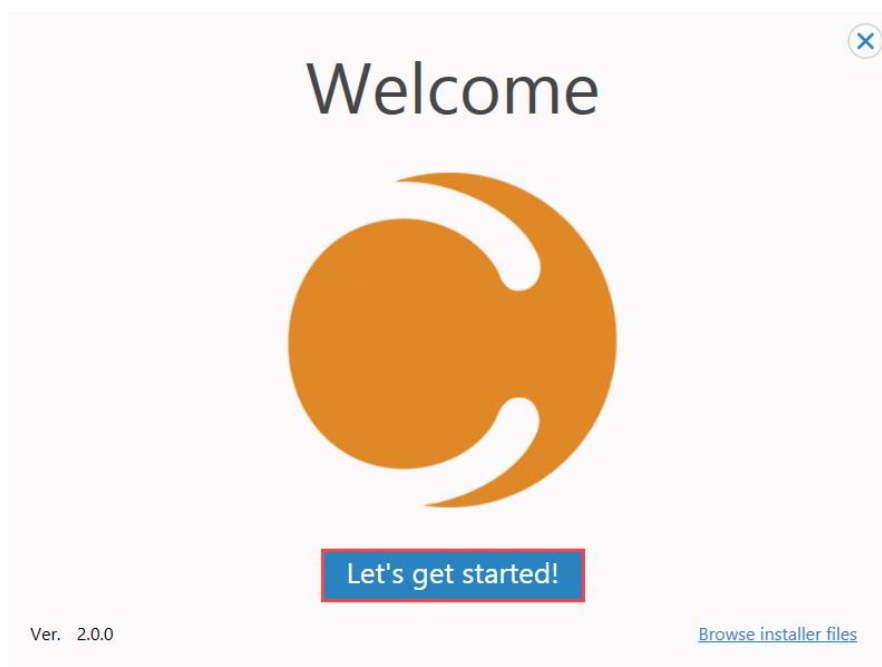


Your browser will then be loaded and you will be taken to the page on the Microsoft website where you can download .NET Framework 4.5.2. Once downloaded, you should install it (this process is detailed in [Appendix A – Manually Installing Microsoft.NET Framework 4.5.2](#), should you need it).

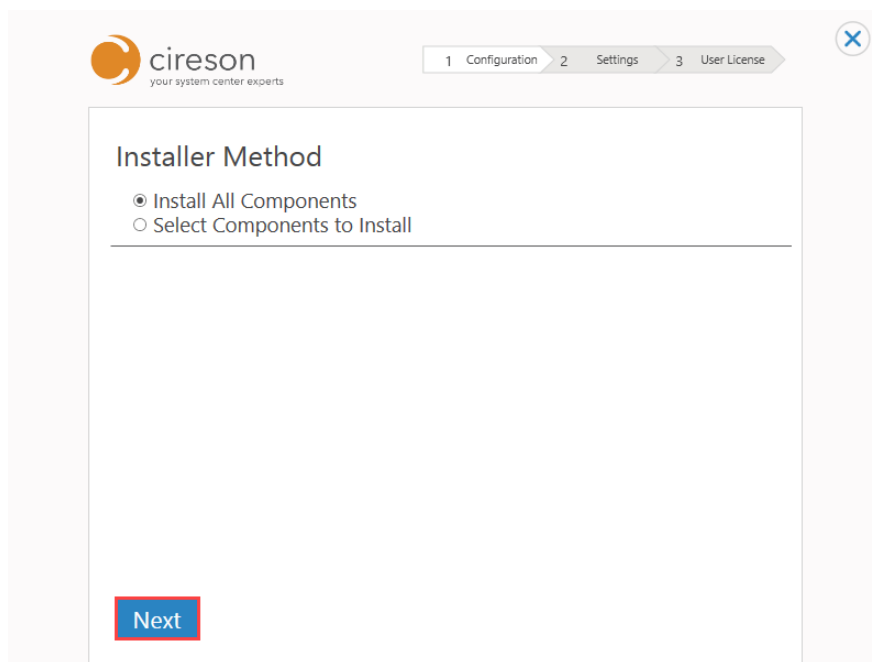
TIP: If your server does not have Internet connectivity, click **No** to cancel the Portal Installer. Then download .NET Framework 4.5.2 from the location below. Once you have downloaded and installed it (as detailed in [Appendix A – Manually Installing Microsoft.NET Framework 4.5.2](#)):

<https://www.microsoft.com/en-gb/download/details.aspx?id=42642>

6. Once you have installed .NET, start the Portal installer again.
7. On the **Welcome** screen, click **Let's get started**



8. On the **Installer Method** screen, click **Next** to accept the default option **Install All Components**



NOTE: Selecting the **Install All Components** installation method will install the following components required by the Portal:

- Database
- Website
- Services

It will also integrate with the Microsoft Deployment Toolkit (MDT).

If you do not want to install any of these components, then choose the **Select Components to Install** option from the **Installer Method** screen, then clear the checkboxes beside any components you do not want to install. Then click **Next**

The rest of this section assumes the default **Install All Components** option has been selected.

The screenshot displays the 'Installer Method' configuration screen in the Cireson Portal. At the top, the Cireson logo is on the left, and a breadcrumb trail shows '1 Configuration', '2 Settings', and '3 User License'. The main content area is titled 'Installer Method' and contains two radio button options: 'Install All Components' and 'Select Components to Install'. The 'Select Components to Install' option is selected and highlighted with a red rectangular box. Below this, under the heading 'Advanced Install Options', there are four checkboxes: 'Install Database', 'Install Website', 'Install Services', and 'MDT Integration'. All four checkboxes are checked and also highlighted with a red rectangular box. At the bottom left of the form is a blue 'Next' button.

9. Under the **Configuration Manager Database Settings** section of the **Configuration** page, in the **Configuration Manager Database Server Name** field, enter the name of the ConfigMgr database server.

NOTE: The values entered do not get validated until you move to another field. If there is an issue, either a red or yellow triangle with an exclamation mark will be shown:

- **Red triangle (▲)** – A required value has not been entered
- **Yellow triangle (▲)** – A value has been entered incorrectly (for example a password)

If you are not using the Default SQL instance for your ConfigMgr site database, you should enter the server name followed by the SQL Server instance name hosting the ConfigMgr site database. For example:

Server_Name\SQL_Instance_Name.

Also in a multi-site environment, this must be the Central Administration/Central Site and cannot be a Secondary Site.

10. In the **Configuration Manager Site Server (FQDN)** field, enter the Fully Qualified Domain Name (FQDN), of the ConfigMgr site server.

The screenshot shows the 'Configuration Manager Database Settings' page in the Cireson portal. The page has a breadcrumb trail: 1 Configuration, 2 Settings, 3 User License. The 'Configuration Manager Database Settings' section includes fields for 'Configuration Manager Database Server Name' (set to 'Primary'), 'Configuration Manager Site Server (FQDN)' (set to 'Primary.Cireson.com' and highlighted with a red box), 'Authentication Type' (set to 'Windows Authentication'), 'Configuration Manager Database Name', 'SQL Login', and 'SQL Password'. Below this is the 'CMP Database Settings' section with fields for 'CMP Database Server Name', 'CMP Database Name' (set to 'ConfigMgrPortal'), 'Authentication Type' (set to 'Windows Authentication'), 'SQL Login', and 'SQL Password'. At the bottom are 'Back' and 'Next' buttons.

11. If you are using SQL authentication, select **SQL Authentication** from the **Authentication Type** dropdown list.

NOTE: The **Authentication Type** configures the authentication method used by the Portal to access the ConfigMgr site database in order to read and write data. By default, **Windows Authentication** is selected. However, the **SQL Authentication** option is provided if you have a SQL login you would like to use.

This screenshot shows the same 'Configuration Manager Database Settings' page, but with the 'Authentication Type' dropdown menu open. The dropdown list shows 'Windows Authentication' at the top, 'SQL Authentication' in the middle (highlighted with a blue background), and 'Windows Authentication' at the bottom. The 'Configuration Manager Site Server (FQDN)' field is still highlighted with a red box and contains 'Primary.Cireson.com'. The 'CMP Database Settings' section remains visible below.

12. In the **Configuration Manager Database Name** field, enter the name of the ConfigMgr site database (e.g. **CM_<site_code>**).

The screenshot shows the 'Configuration Manager Database Settings' page in the Cireson Portal. The page has a breadcrumb trail: 1 Configuration > 2 Settings > 3 User License. The main section is titled 'Configuration Manager Database Settings'. It contains two columns of fields. The left column has: 'Configuration Manager Database Server Name' (text box with 'Primary'), 'Authentication Type' (dropdown menu with 'Windows Authentication'), 'SQL Login' (text box), and 'SQL Password' (text box). The right column has: 'Configuration Manager Site Server (FQDN)' (text box with 'Primary.Cireson.com') and 'Configuration Manager Database Name' (text box with 'CM_CIR'). The 'Configuration Manager Database Name' field is highlighted with a red box. Below this section is the 'CMP Database Settings' section, which has: 'CMP Database Server Name' (text box with a warning icon), 'Authentication Type' (dropdown menu with 'Windows Authentication'), 'SQL Password' (text box), and 'CMP Database Name' (text box with 'ConfigMgrPortal'). At the bottom are 'Back' and 'Next' buttons.

13. If you are using **SQL Authentication** complete the **SQL Login** and **SQL Password** fields with their respective values that will allow the Portal to access your ConfigMgr site database.

This screenshot is similar to the previous one, but with the 'SQL Login' and 'SQL Password' fields highlighted with a red box. The 'Configuration Manager Database Name' field still contains 'CM_CIR'. The 'CMP Database Settings' section remains the same.

14. Scroll down to the **CMP Database Settings** section.

15. In the **CMP Database Server Name** field, enter the name of the SQL Server that will host the Portal's database.

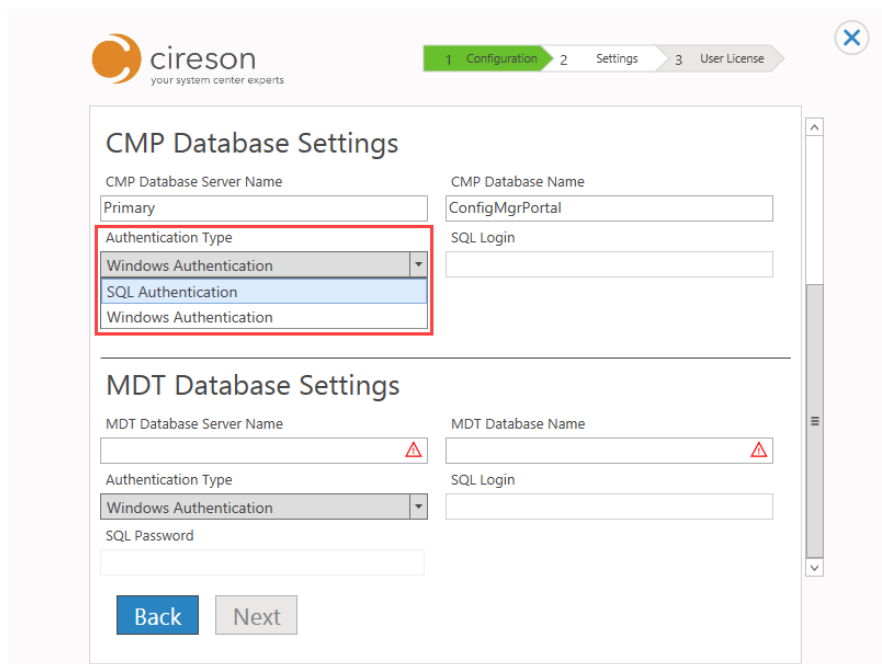
NOTE: If you are not planning to use the Default SQL instance for your Portal database, you should enter the server name followed by the SQL Server instance name that will host the Portal database. For example:
Server_Name\SQL_Instance_Name.

The screenshot shows the 'CMP Database Settings' window in the Cireson Portal. The 'CMP Database Server Name' field is highlighted with a red rectangle and contains the text 'Primary'. To its right, the 'CMP Database Name' field contains 'ConfigMgrPortal'. Below these, the 'Authentication Type' is set to 'Windows Authentication' via a dropdown menu, and the 'SQL Password' field is empty. The 'MDT Database Settings' section below has empty fields for 'MDT Database Server Name', 'MDT Database Name', 'Authentication Type' (set to 'Windows Authentication'), and 'SQL Password'. Red warning triangles are visible next to the empty 'MDT Database Server Name' and 'MDT Database Name' fields. At the bottom are 'Back' and 'Next' buttons. The top navigation bar shows '1 Configuration', '2 Settings', and '3 User License'.

16. In the **CMP Database Name** field, if necessary change the suggested name of the **ConfigMgrPortal** for the Portal database.

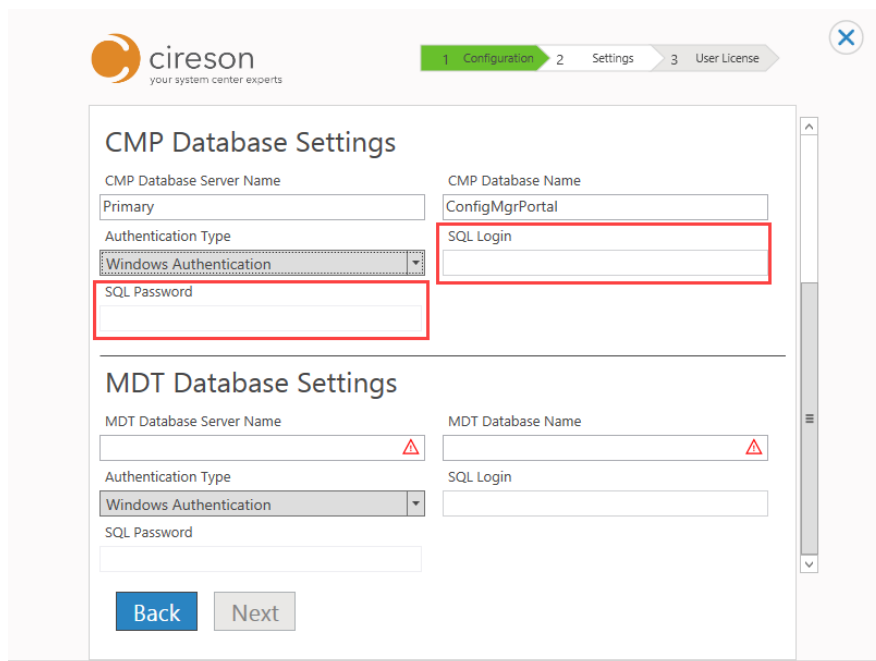
This screenshot is similar to the previous one, but the 'CMP Database Name' field is now highlighted with a red rectangle. It contains the text 'ConfigMgrPortal'. The 'CMP Database Server Name' field still contains 'Primary'. The 'Authentication Type' is 'Windows Authentication' and the 'SQL Password' field is empty. The 'MDT Database Settings' section remains the same with empty fields for 'MDT Database Server Name', 'MDT Database Name', 'Authentication Type' (set to 'Windows Authentication'), and 'SQL Password'. Red warning triangles are present next to the empty 'MDT Database Server Name' and 'MDT Database Name' fields. 'Back' and 'Next' buttons are at the bottom. The top navigation bar shows '1 Configuration', '2 Settings', and '3 User License'.

17. If you are using SQL authentication, select **SQL Authentication** from the **Authentication Type** dropdown list.



The screenshot shows the Cireson Portal interface for Configuration Manager. The top navigation bar includes the Cireson logo and three steps: 1 Configuration, 2 Settings, and 3 User License. The main content area is titled 'CMP Database Settings'. It contains two sections: 'CMP Database Settings' and 'MDT Database Settings'. In the 'CMP Database Settings' section, the 'Authentication Type' dropdown menu is highlighted with a red box, and 'SQL Authentication' is selected. Other fields include 'CMP Database Server Name' (Primary), 'CMP Database Name' (ConfigMgrPortal), and 'SQL Login'. The 'MDT Database Settings' section includes fields for 'MDT Database Server Name', 'MDT Database Name', 'Authentication Type' (Windows Authentication), 'SQL Login', and 'SQL Password'. At the bottom of the 'CMP Database Settings' section are 'Back' and 'Next' buttons.

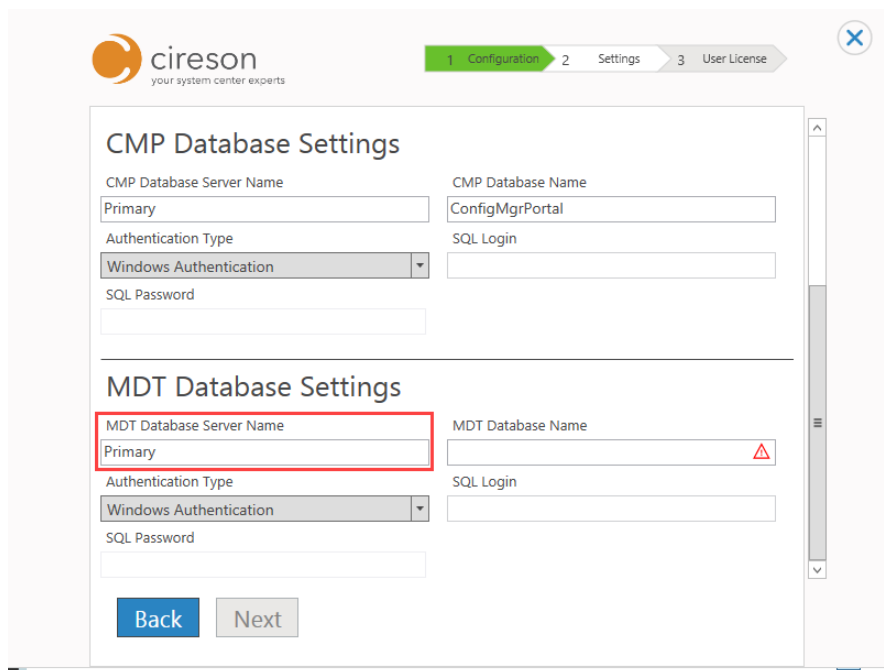
18. If you are using **SQL Authentication** complete the **SQL Login** and **SQL Password** fields with their respective values.



The screenshot shows the Cireson Portal interface for Configuration Manager. The top navigation bar includes the Cireson logo and three steps: 1 Configuration, 2 Settings, and 3 User License. The main content area is titled 'CMP Database Settings'. It contains two sections: 'CMP Database Settings' and 'MDT Database Settings'. In the 'CMP Database Settings' section, the 'SQL Login' and 'SQL Password' fields are highlighted with red boxes. Other fields include 'CMP Database Server Name' (Primary), 'CMP Database Name' (ConfigMgrPortal), and 'Authentication Type' (Windows Authentication). The 'MDT Database Settings' section includes fields for 'MDT Database Server Name', 'MDT Database Name', 'Authentication Type' (Windows Authentication), 'SQL Login', and 'SQL Password'. At the bottom of the 'CMP Database Settings' section are 'Back' and 'Next' buttons.

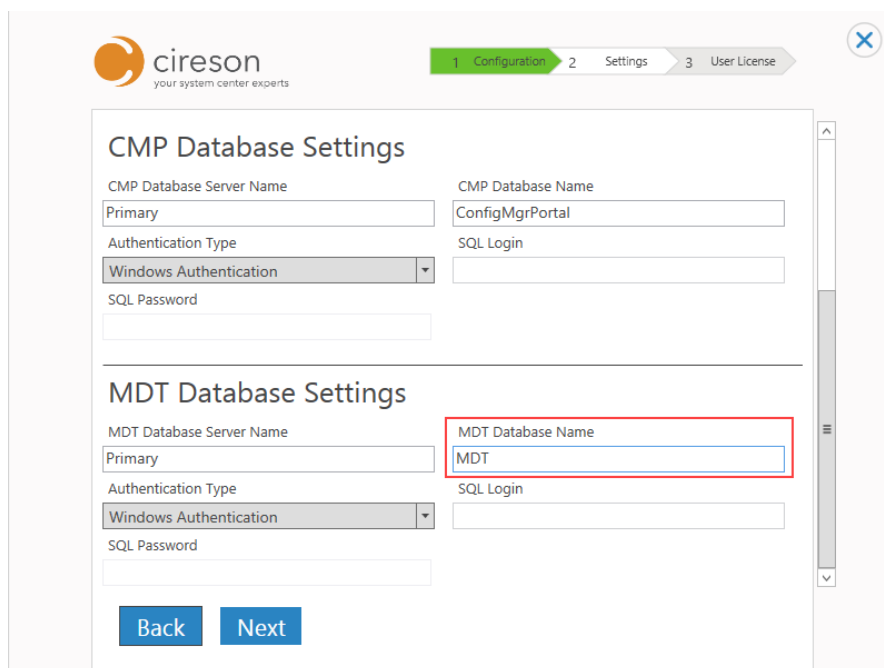
19. Scroll down to the **MDT Database Settings** section.

20. In the **MDT Database Server Name** field, enter the name of the SQL Server hosting the MDT database.



The screenshot shows the Cireson Portal interface for Configuration Manager. The top navigation bar includes the Cireson logo, the tagline "your system center experts", and three tabs: "1 Configuration" (active), "2 Settings", and "3 User License". The main content area is divided into two sections: "CMP Database Settings" and "MDT Database Settings". The "MDT Database Settings" section contains several fields: "MDT Database Server Name" (highlighted with a red box and containing the text "Primary"), "MDT Database Name" (containing a warning icon), "Authentication Type" (a dropdown menu set to "Windows Authentication"), "SQL Login", and "SQL Password". At the bottom of the section are "Back" and "Next" buttons.

21. In the **MDT Database Name** field, enter the name of the MDT database.



This screenshot is similar to the previous one, showing the same Cireson Portal interface. In this step, the "MDT Database Name" field in the "MDT Database Settings" section is highlighted with a red box and contains the text "MDT". The "MDT Database Server Name" field still contains "Primary". The "MDT Database Name" field now has a blue border, indicating it is the active field. The "Authentication Type" dropdown remains set to "Windows Authentication". The "Back" and "Next" buttons are still present at the bottom.

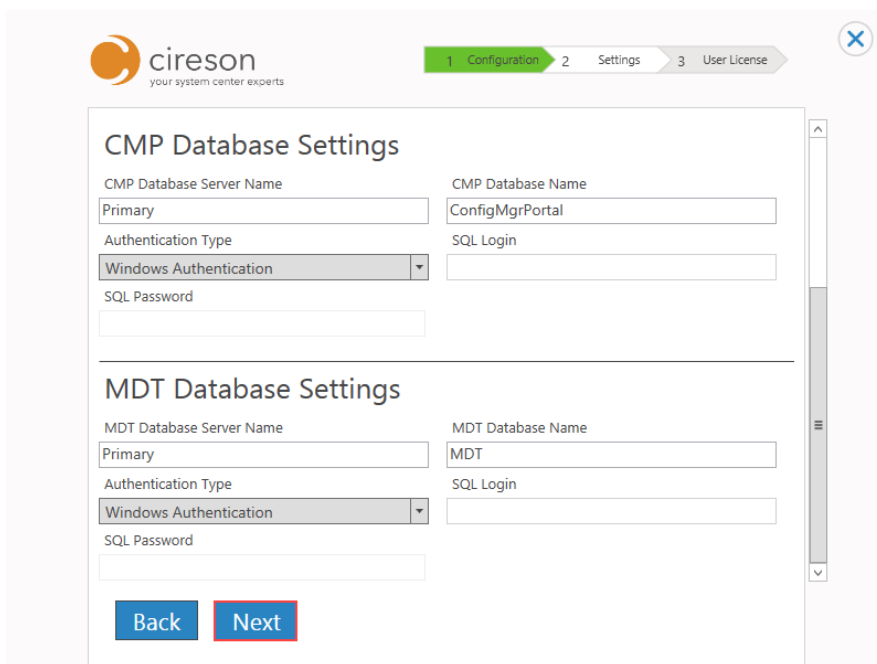
22. If you are using SQL authentication, select **SQL Authentication** from the **Authentication Type** dropdown list.

The screenshot shows the Cireson Portal Configuration Manager settings page. The page is divided into two main sections: 'CMP Database Settings' and 'MDT Database Settings'. In the 'MDT Database Settings' section, the 'Authentication Type' dropdown menu is open, showing 'Windows Authentication', 'SQL Authentication', and 'Windows Authentication'. The 'SQL Authentication' option is highlighted. The 'CMP Database Settings' section has 'Primary' for server name, 'ConfigMgrPortal' for database name, and 'Windows Authentication' for authentication type. The 'MDT Database Settings' section has 'Primary' for server name, 'MDT' for database name, and 'Windows Authentication' for authentication type. There are 'Back' and 'Next' buttons at the bottom.

23. If you are using **SQL Authentication** complete the **SQL Login** and **SQL Password** fields with their respective values.

The screenshot shows the Cireson Portal Configuration Manager settings page. The page is divided into two main sections: 'CMP Database Settings' and 'MDT Database Settings'. In the 'MDT Database Settings' section, the 'Authentication Type' dropdown menu is open, showing 'Windows Authentication', 'SQL Authentication', and 'Windows Authentication'. The 'SQL Authentication' option is highlighted. The 'SQL Login' and 'SQL Password' fields are highlighted with red boxes. The 'CMP Database Settings' section has 'Primary' for server name, 'ConfigMgrPortal' for database name, and 'Windows Authentication' for authentication type. The 'MDT Database Settings' section has 'Primary' for server name, 'MDT' for database name, and 'Windows Authentication' for authentication type. There are 'Back' and 'Next' buttons at the bottom.

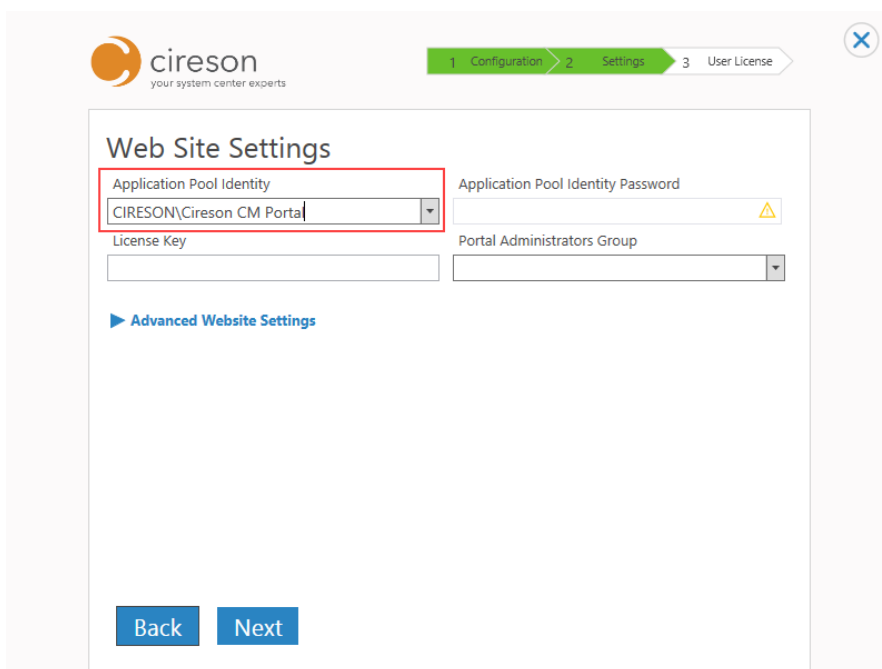
24. Click **Next**



The screenshot shows the 'CMP Database Settings' and 'MDT Database Settings' sections. In the 'CMP Database Settings' section, the 'CMP Database Server Name' is 'Primary', 'Authentication Type' is 'Windows Authentication', 'SQL Password' is empty, and 'CMP Database Name' is 'ConfigMgrPortal'. In the 'MDT Database Settings' section, the 'MDT Database Server Name' is 'Primary', 'Authentication Type' is 'Windows Authentication', 'SQL Password' is empty, and 'MDT Database Name' is 'MDT'. At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box.

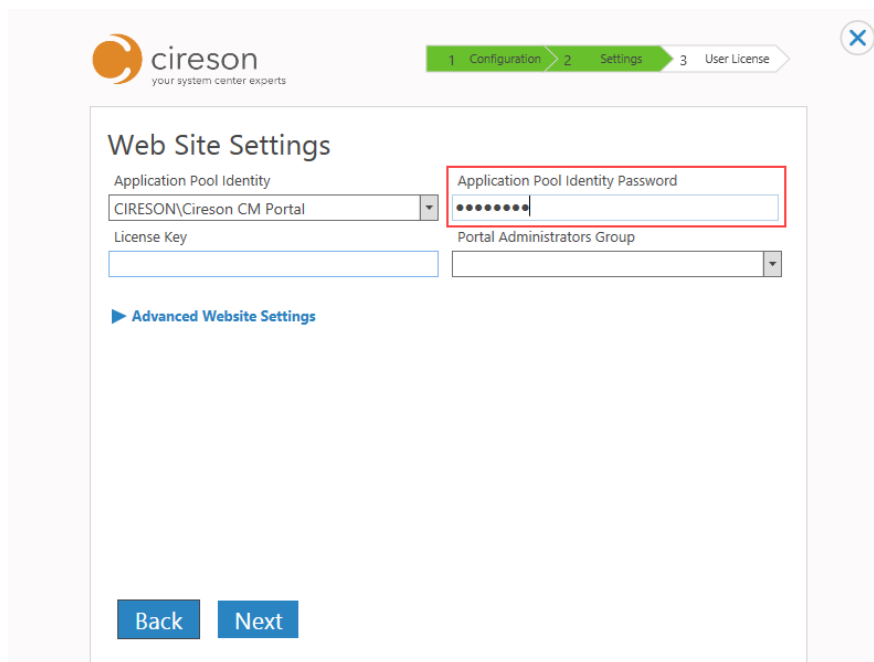
25. Under the **Web Site Settings** section of the **Settings** page, in the **Application Pool Identity** field, enter the user account name (prefixed with the domain name), that will be running the IIS Application Pool used by the Portal. For example, **Cireson\Cireson CM Portal**

NOTE: As you start typing in this field the Installer attempts to autocomplete it for you.



The screenshot shows the 'Web Site Settings' section. The 'Application Pool Identity' field is highlighted with a red box and contains the text 'CIRESON\Cireson CM Portal'. The 'Application Pool Identity Password' field is empty with a warning icon. The 'License Key' field is empty. The 'Portal Administrators Group' field is empty. At the bottom, there are 'Back' and 'Next' buttons. Below the fields, there is a link for 'Advanced Website Settings'.

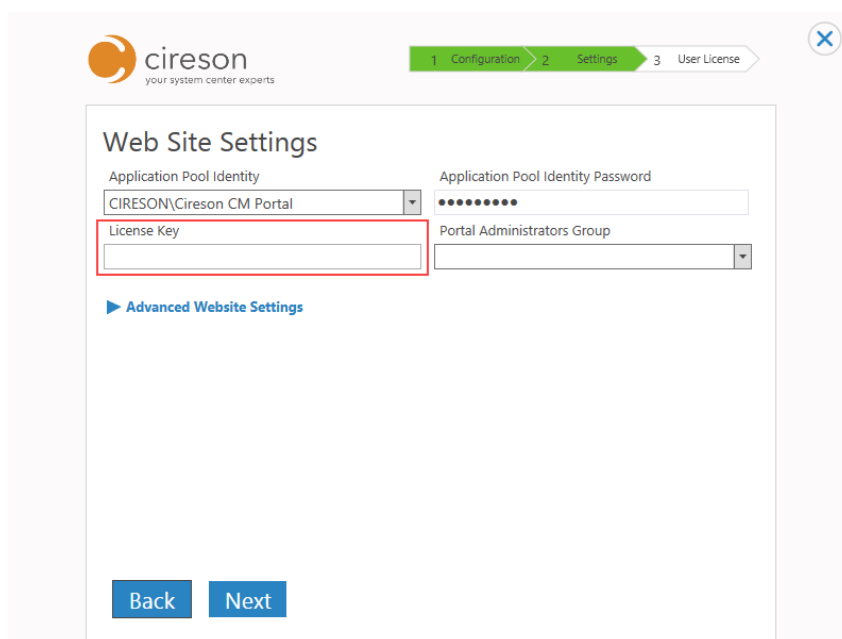
26. In the **Application Pool Identity Password** field, enter the password for the Portal service account created in the **Account and group requirements** section.



The screenshot shows the 'Web Site Settings' page in the Cireson Portal. The page has a breadcrumb trail at the top: 1 Configuration > 2 Settings > 3 User License. The 'Application Pool Identity' dropdown is set to 'CIRESON\Cireson CM Portal'. The 'Application Pool Identity Password' field is highlighted with a red box and contains a series of dots. The 'License Key' field is empty. The 'Portal Administrators Group' dropdown is also empty. There are 'Back' and 'Next' buttons at the bottom.

27. In the **License Key** field, enter your unique license key.

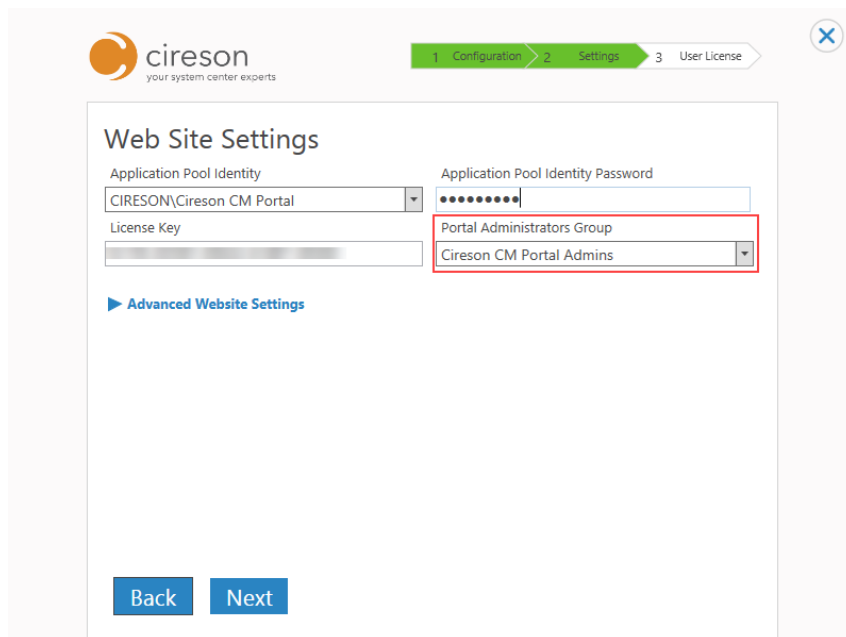
NOTE: If you do not enter a valid license key you will install the Community Edition of the Portal, a free version with limited functionality that allows you to evaluate the Portal. You can upgrade from the Community Edition to the Team Edition by entering a valid license key, as detailed in the **Converting from the Community Edition to the Team Edition of the Portal** section.



The screenshot shows the 'Web Site Settings' page in the Cireson Portal. The 'Application Pool Identity' dropdown is set to 'CIRESON\Cireson CM Portal'. The 'Application Pool Identity Password' field contains a series of dots. The 'License Key' field is highlighted with a red box and is empty. The 'Portal Administrators Group' dropdown is also empty. There are 'Back' and 'Next' buttons at the bottom.

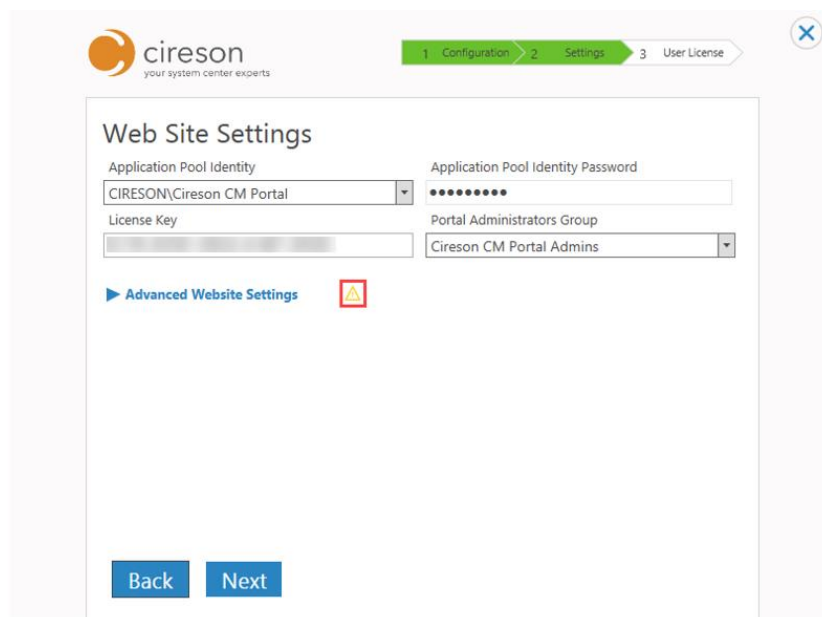
28. In the **Portal Administrators Group** field, enter the name of the Active Directory group/user that will have full access to the Portal. For example, **Cireson CM Portal Admins**

NOTE: As you start typing in this field the Installer attempts to autocomplete it for you.



The screenshot shows the 'Web Site Settings' configuration window for Cireson Portal. The window has a breadcrumb trail at the top: 1 Configuration > 2 Settings > 3 User License. The 'Application Pool Identity' is set to 'CIRESON\Cireson CM Portal'. The 'Application Pool Identity Password' is masked with dots. The 'License Key' field is empty. The 'Portal Administrators Group' dropdown is highlighted with a red box, showing 'Cireson CM Portal Admins' as the selected option. Below the dropdown is a link for 'Advanced Website Settings'. At the bottom are 'Back' and 'Next' buttons.

NOTE: If the Portal Installer detects that the server is already running IIS and the **Default Web Site** is running on port 80, you will see the yellow triangle containing an exclamation mark as shown below.



This screenshot is similar to the previous one, showing the 'Web Site Settings' configuration window. However, a yellow warning triangle icon with an exclamation mark is visible next to the 'Advanced Website Settings' link, indicating a potential conflict with an existing IIS site on port 80.

If you expand **Advanced Website Settings** and hover over the triangle it will inform you:

The site 'Default Web Site' is already using port 80. If you continue, 'Default Web Site' will be stopped.

The screenshot shows the 'Web Site Settings' window in the Cireson configuration tool. The 'Web Site Port' field is set to 80, which triggers a warning message: 'The site 'Default Web Site' is already using port 80. If you continue, 'Default Web Site' will be stopped.' The window includes fields for Application Pool Identity, License Key, and Portal Administrators Group. The 'Advanced Website Settings' section is expanded, showing the Installation Directory, Web Site Name, and Web Site Port.

You should either:

- Specify a different port for the ConfigMgr Portal website
- OR
- Reconfigure the default website to use a different port other than port 80.

29. If you do not wish to configure any advanced website settings go to Step 32.

30. Click **Advanced Website Settings**

The screenshot shows the 'Web Site Settings' window with the 'Advanced Website Settings' section highlighted by a red box. The 'Advanced Website Settings' section is currently collapsed, and the 'Next' button is visible at the bottom right.

31. Make any required changes (such as the directory the Portal should be installed to, or the website name/port).

The screenshot shows the 'Web Site Settings' page in the Cireson Portal. The page has a breadcrumb trail at the top: '1 Configuration > 2 Settings > 3 User License'. The main section is titled 'Web Site Settings' and contains several input fields. A red box highlights the 'Advanced Website Settings' section, which includes three fields: 'Installation Directory' (C:\inetpub\), 'Web Site Name' (ConfigMgrPortal), and 'Web Site Port' (80). Below the highlighted section are 'Back' and 'Next' buttons.

Web Site Settings

Application Pool Identity: CIRESON\Cireson CM Portal

Application Pool Identity Password: [Masked]

License Key: [Masked]

Portal Administrators Group: Cireson CM Portal Admins

▼ **Advanced Website Settings**

Installation Directory	Web Site Name	Web Site Port
C:\inetpub\	ConfigMgrPortal	80

Back **Next**

32. Click **Next**

Web Site Settings

Application Pool Identity: CIRESON\Cireson CM Portal

Application Pool Identity Password: [Masked]

License Key: [Masked]

Portal Administrators Group: Cireson CM Portal Admins

Advanced Website Settings

Installation Directory: C:\inetpub\

Web Site Name: ConfigMgrPortal

Web Site Port: 80

Back **Next**

33. Under the **Hosting Service Settings** section of the **Settings** page, either:

- Check the **Use LocalSystem** checkbox to run the Hosting Server under the context of the Local System account (the recommended option)

OR

- In the **Service Identity** and **Service Identity Password** fields, enter the account name (including the domain name), and password of the account you wish to run the Hosting Service.

Hosting Service Settings

☐ Use LocalSystem

Service Identity: [Empty]

Service Identity Password: [Empty]

Deployment Service Port: 8081

Cache Service Port: 8081

Back **Next**

NOTE: The Portal installs a Windows service called **Cireson ConfigMgr Portal Hosting Service** which in turn is used to run both the Caching and Deployment services (and potentially others in the future). The hosting service can either be run under the context of the **Local System** account, or if you prefer, under the context of a specific user account.

If you are using SQL authentication for the Portal and decide to run the Hosting service under a specific account, the Hosting service does not require any additional permissions. However, if you are using Windows authentication for the Portal and decide to run the Hosting service under a specific account, the account will need the same permissions as the Application Pool Identity account.

If you plan to run the Hosting Service on another server other than the SQL server, you will need to grant the computer account of the server running the Hosting Service the same permissions as the Application Pool account.

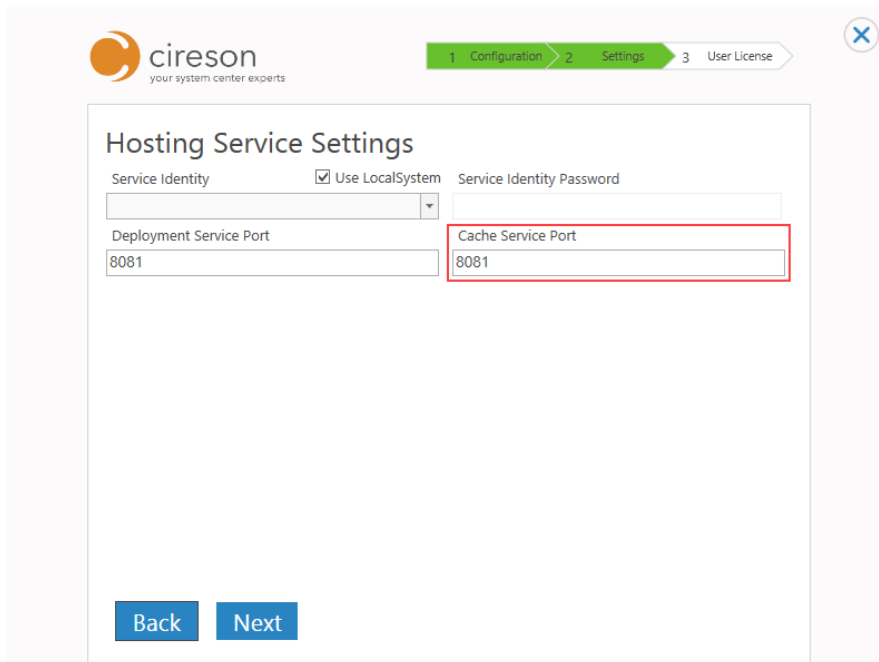
34. If required, set the required port in the **Deployment Service Port** field.

The screenshot displays the 'Hosting Service Settings' configuration page in the Cireson Portal. The page header includes the Cireson logo and a breadcrumb trail: 1 Configuration > 2 Settings > 3 User License. The main content area contains the following fields and controls:

- Service Identity:** A dropdown menu with a small arrow icon.
- Use LocalSystem:** A checked checkbox.
- Service Identity Password:** A text input field.
- Deployment Service Port:** A text input field containing the value '8081', which is highlighted with a red rectangular border.
- Cache Service Port:** A text input field containing the value '8081'.

At the bottom of the form, there are two blue buttons: 'Back' and 'Next'.

35. If required, set the required port in the **Cache Service Port** field. By default, this will match the **Deployment Service Port**, but it can be any open port.

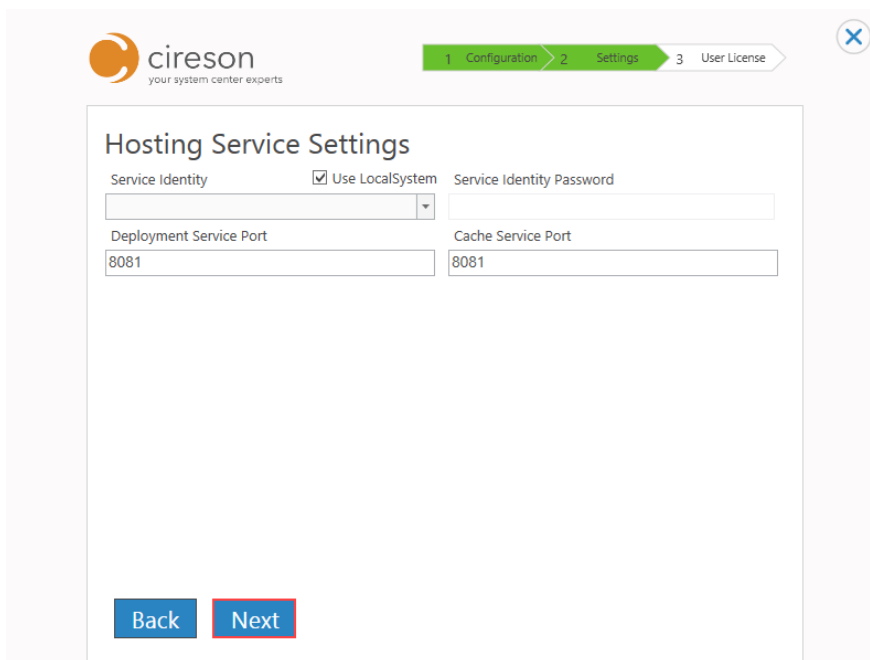


The screenshot shows the 'Hosting Service Settings' page in the Cireson Portal. The page has a header with the Cireson logo and a progress bar indicating three steps: 1. Configuration, 2. Settings (current), and 3. User License. The main content area contains the following fields:

- Service Identity:** A dropdown menu.
- Use LocalSystem:** A checked checkbox.
- Service Identity Password:** A text input field.
- Deployment Service Port:** A text input field containing '8081'.
- Cache Service Port:** A text input field containing '8081', which is highlighted with a red rectangular box.

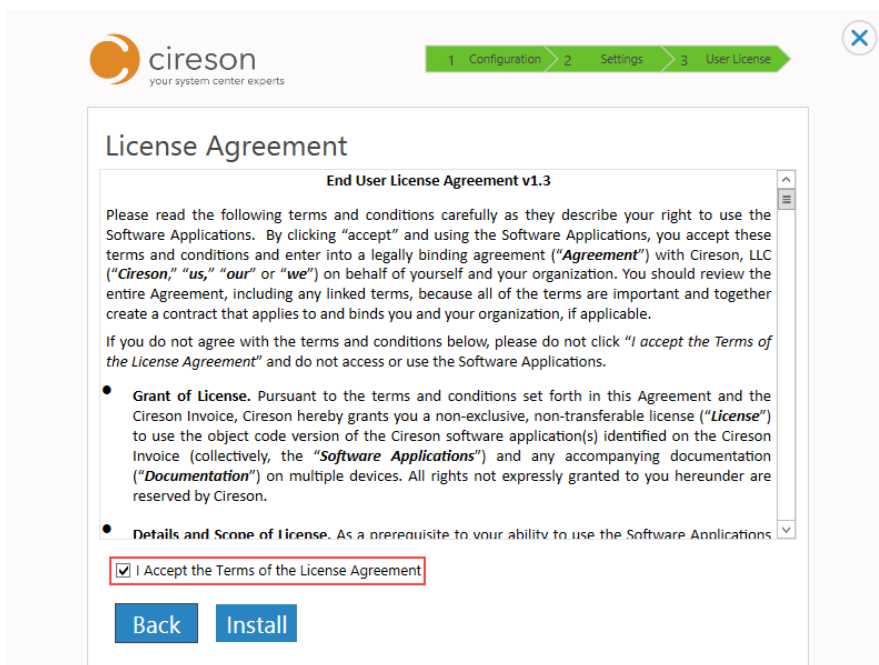
At the bottom of the form, there are two buttons: 'Back' and 'Next'.

36. Click **Next**



This screenshot shows the same 'Hosting Service Settings' page as the previous one. The 'Cache Service Port' field still contains '8081'. In this view, the 'Next' button at the bottom right is highlighted with a red rectangular box, indicating the next step in the process.

37. On the **License Agreement** page, you will need to check the **I Accept the Terms of the License Agreement** checkbox in order to indicate your acceptance of the agreement and to be able to proceed with the installation.



cireson
your system center experts

1 Configuration > 2 Settings > 3 User License

License Agreement

End User License Agreement v1.3

Please read the following terms and conditions carefully as they describe your right to use the Software Applications. By clicking "accept" and using the Software Applications, you accept these terms and conditions and enter into a legally binding agreement ("**Agreement**") with Cireson, LLC ("**Cireson**," "**us**," "**our**" or "**we**") on behalf of yourself and your organization. You should review the entire Agreement, including any linked terms, because all of the terms are important and together create a contract that applies to and binds you and your organization, if applicable.

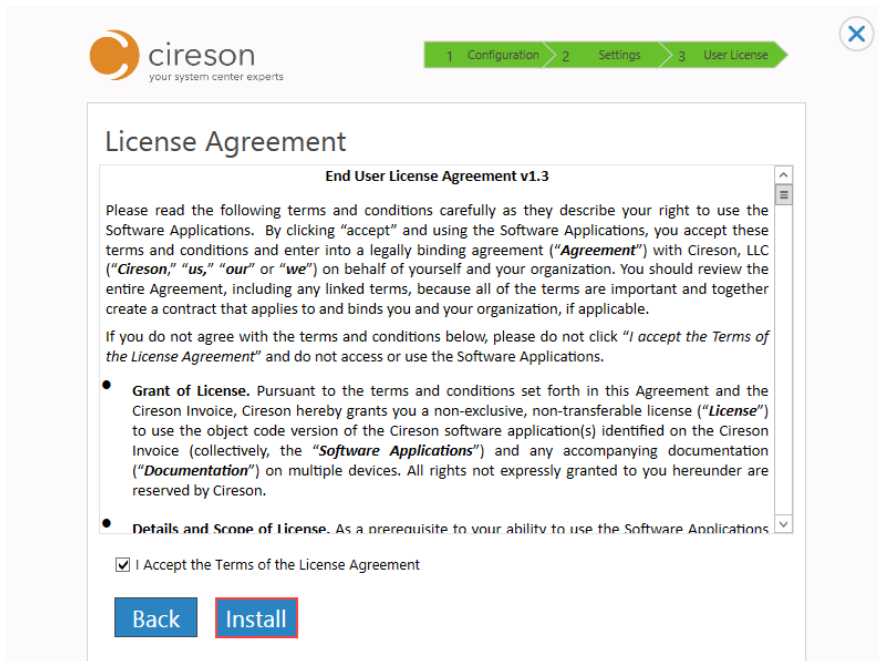
If you do not agree with the terms and conditions below, please do not click "*I accept the Terms of the License Agreement*" and do not access or use the Software Applications.

- **Grant of License.** Pursuant to the terms and conditions set forth in this Agreement and the Cireson Invoice, Cireson hereby grants you a non-exclusive, non-transferable license ("**License**") to use the object code version of the Cireson software application(s) identified on the Cireson Invoice (collectively, the "**Software Applications**") and any accompanying documentation ("**Documentation**") on multiple devices. All rights not expressly granted to you hereunder are reserved by Cireson.
- **Details and Scope of License.** As a prerequisite to your ability to use the Software Applications

☒ I Accept the Terms of the License Agreement

[Back](#) [Install](#)

38. Click **Install**



cireson
your system center experts

1 Configuration > 2 Settings > 3 User License

License Agreement

End User License Agreement v1.3

Please read the following terms and conditions carefully as they describe your right to use the Software Applications. By clicking "accept" and using the Software Applications, you accept these terms and conditions and enter into a legally binding agreement ("**Agreement**") with Cireson, LLC ("**Cireson**," "**us**," "**our**" or "**we**") on behalf of yourself and your organization. You should review the entire Agreement, including any linked terms, because all of the terms are important and together create a contract that applies to and binds you and your organization, if applicable.

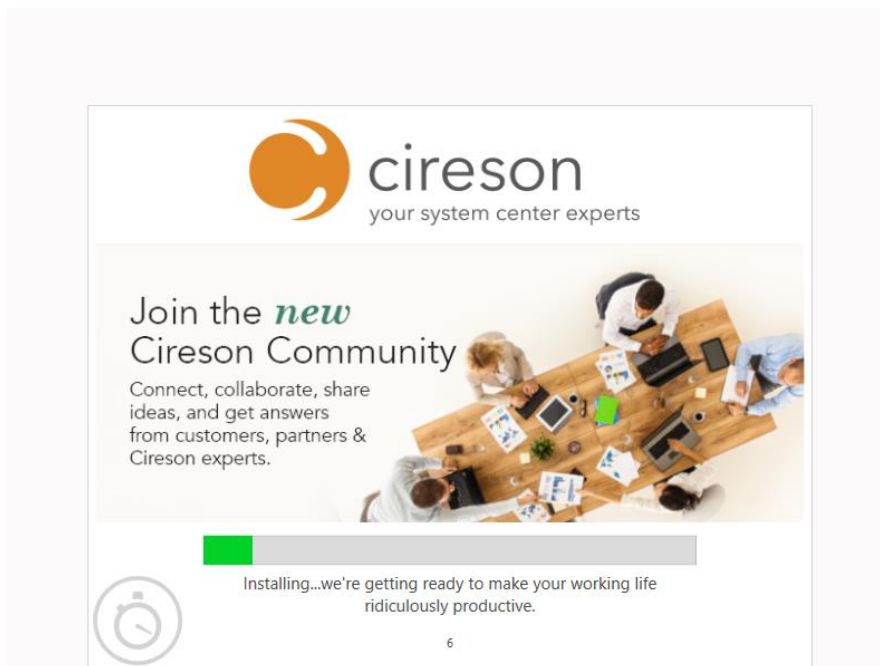
If you do not agree with the terms and conditions below, please do not click "*I accept the Terms of the License Agreement*" and do not access or use the Software Applications.

- **Grant of License.** Pursuant to the terms and conditions set forth in this Agreement and the Cireson Invoice, Cireson hereby grants you a non-exclusive, non-transferable license ("**License**") to use the object code version of the Cireson software application(s) identified on the Cireson Invoice (collectively, the "**Software Applications**") and any accompanying documentation ("**Documentation**") on multiple devices. All rights not expressly granted to you hereunder are reserved by Cireson.
- **Details and Scope of License.** As a prerequisite to your ability to use the Software Applications

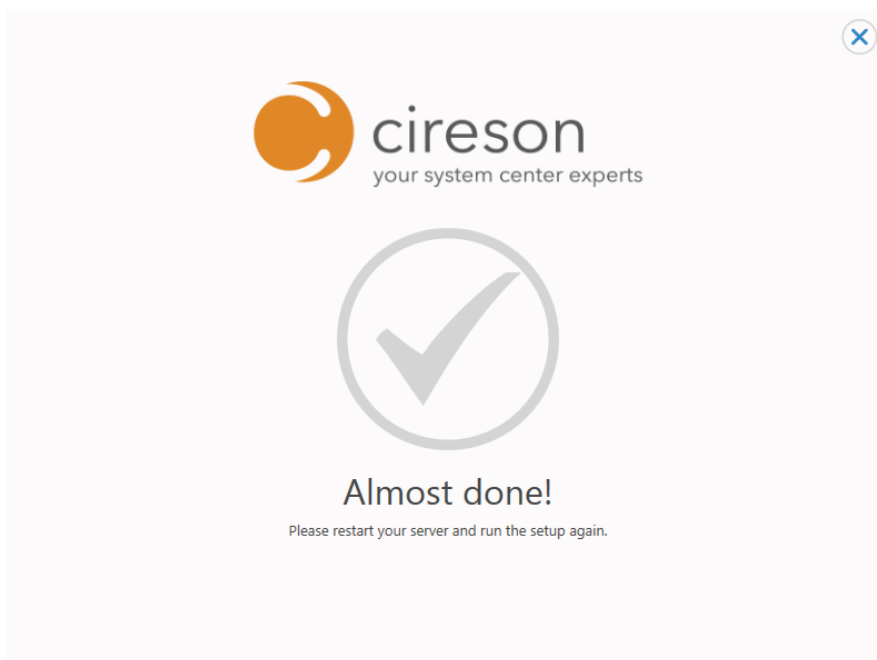
☒ I Accept the Terms of the License Agreement

[Back](#) [Install](#)

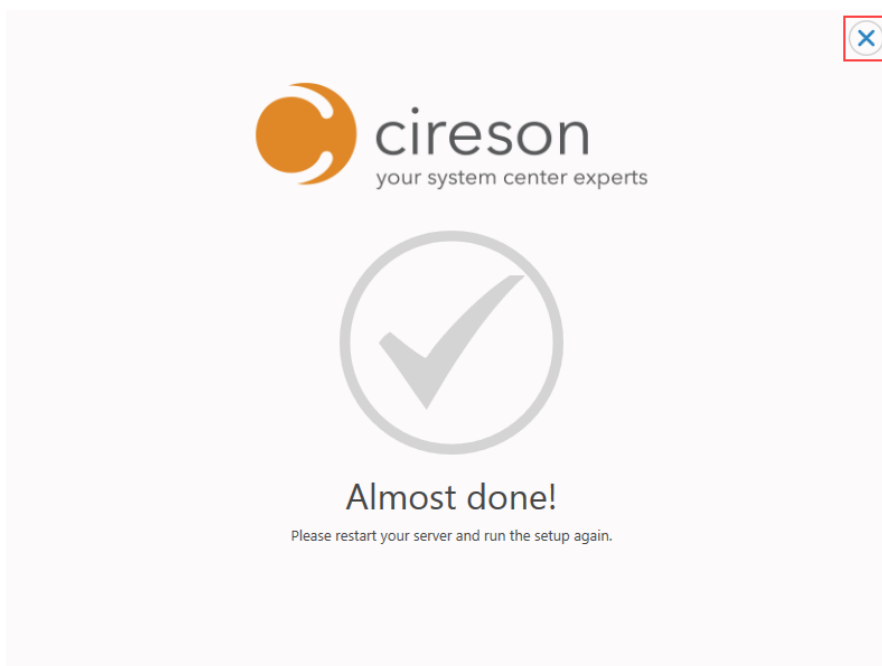
The installation will begin, showing progress on the progress bar.



Once the Installer has installed of the prerequisites, the **Almost done** message will be displayed prompting for a reboot.

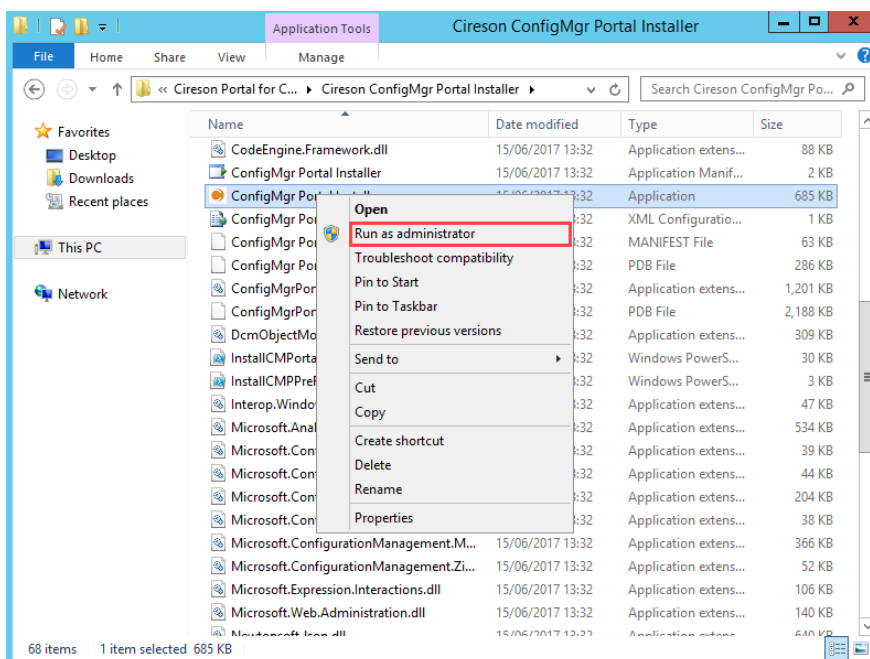


39. Click the **X** in the top right-hand corner to close the Installer.

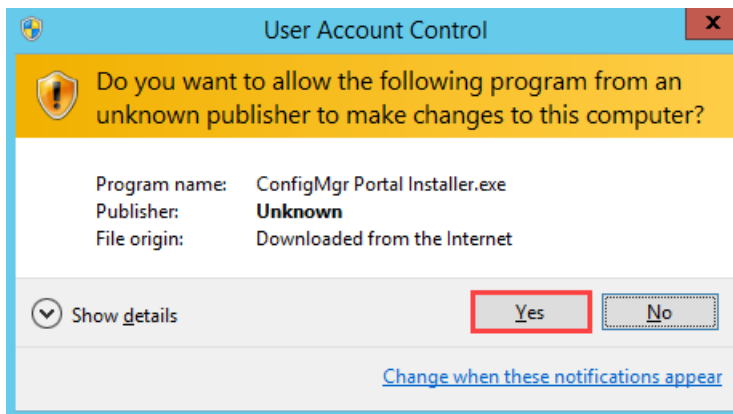


40. Reboot the server.

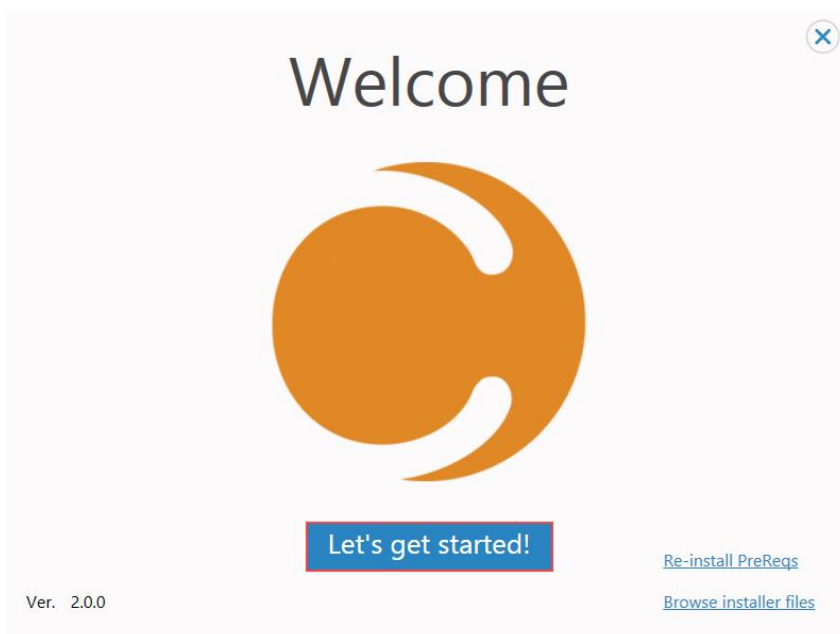
41. Navigate to the folder containing the Portal installation files and right-click **ConfigMgr Portal Installer.exe** and select **Run as administrator**



42. If the **User Account Control** dialog box is displayed, click **Yes**

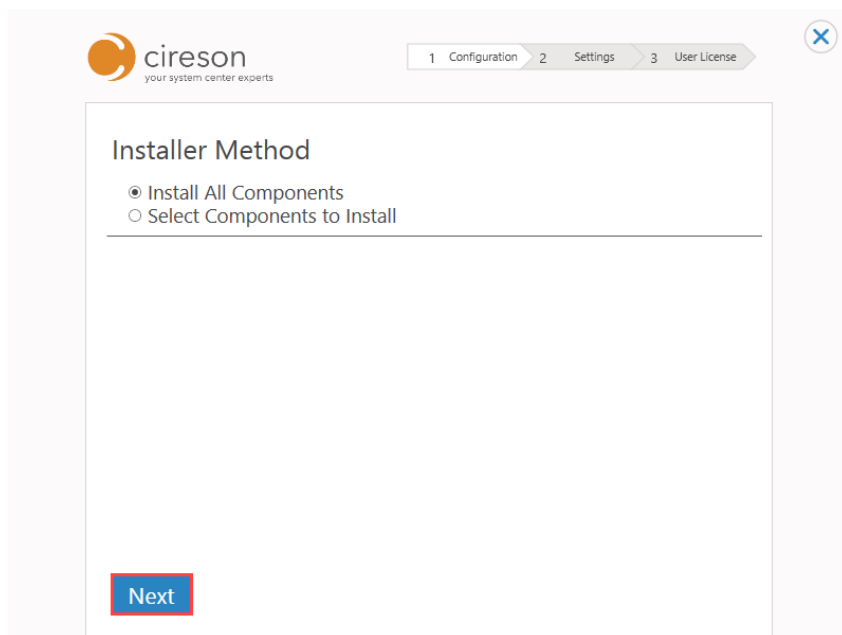


43. On the **Welcome** screen, click **Let's get started**



44. On the **Installer Method** screen, select the relevant installation option then click **Next**

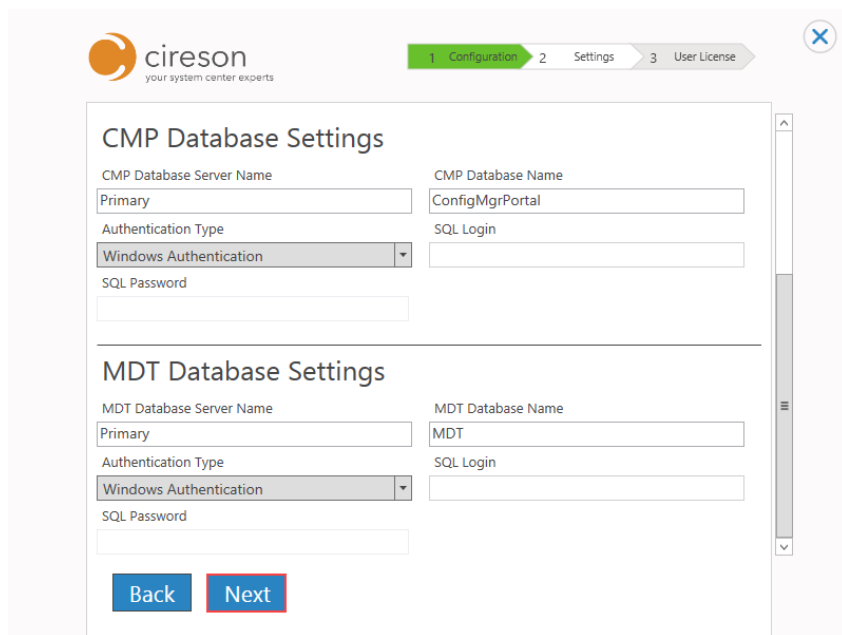
NOTE: This section assumes you have selected the default **Install All Components** option.



The screenshot shows the Cireson Portal interface for the 'Installer Method' screen. At the top, the Cireson logo is on the left, and a progress bar shows three steps: '1 Configuration' (active), '2 Settings', and '3 User License'. Below the progress bar, the title 'Installer Method' is displayed. Underneath, there are two radio button options: 'Install All Components' (which is selected) and 'Select Components to Install'. At the bottom left of the main content area, there is a blue 'Next' button with a red border.

45. On the **Configuration** page, verify all the settings then click **Next**

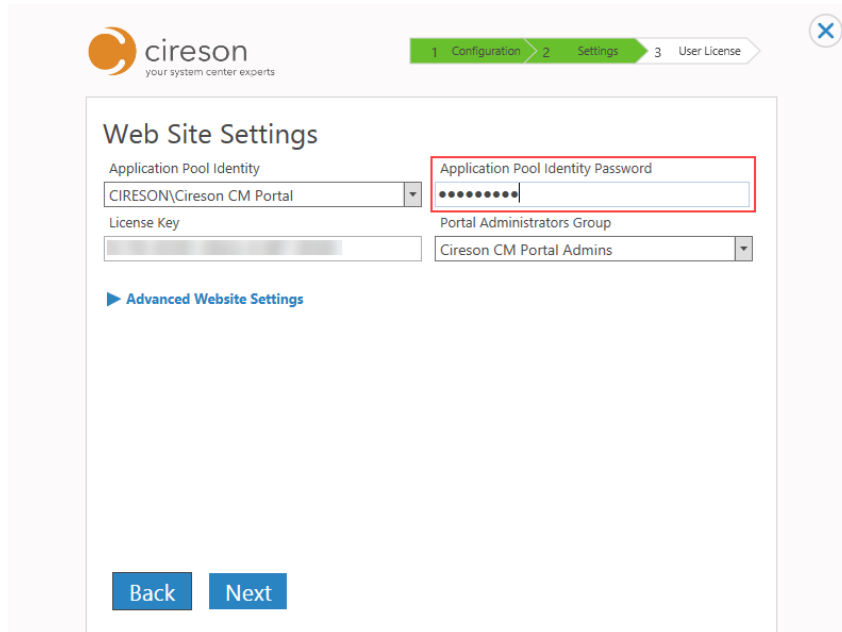
NOTE: The Portal Installer auto-populates the Installer screens with the values you entered the last time you ran the Installer (with the exception of password fields), to save you having to re-enter them.



The screenshot shows the Cireson Portal interface for the 'Configuration' page. The progress bar at the top shows '1 Configuration' (active), '2 Settings', and '3 User License'. The main content area is titled 'CMP Database Settings' and 'MDT Database Settings'. Each section has four input fields: 'Database Server Name' (set to 'Primary'), 'Database Name' (set to 'ConfigMgrPortal' for CMP and 'MDT' for MDT), 'Authentication Type' (a dropdown menu set to 'Windows Authentication'), and 'SQL Password' (an empty field). At the bottom left, there are two buttons: a blue 'Back' button and a blue 'Next' button with a red border.

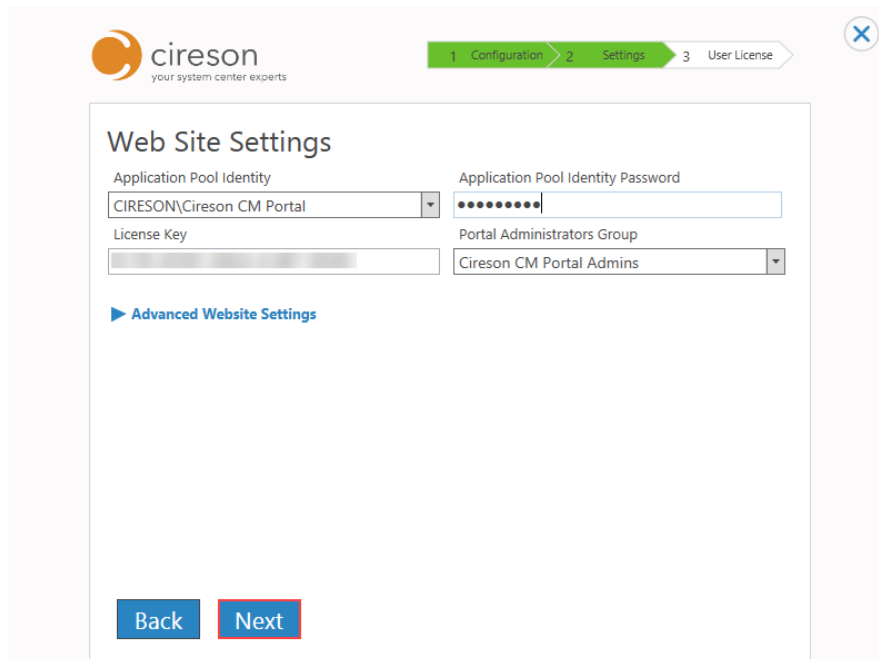
46. In the **Application Pool Identity Password** field of the **Settings** page, re-enter the password for the Portal service account created in the **Account and group requirements** section.

NOTE: The password for the Application Pool Identity account is not stored anywhere for security reasons.



The screenshot shows the 'Web Site Settings' page in the Cireson Portal. The page is part of a three-step configuration process: 1. Configuration, 2. Settings (current), and 3. User License. The 'Application Pool Identity' dropdown is set to 'CIRESON\Cireson CM Portal'. The 'Application Pool Identity Password' field is highlighted with a red box and contains a masked password. The 'License Key' field is empty. The 'Portal Administrators Group' dropdown is set to 'Cireson CM Portal Admins'. There are 'Back' and 'Next' buttons at the bottom.

47. Verify the other values on this page, changing as required then click **Next**



This screenshot is identical to the previous one, showing the 'Web Site Settings' page. The 'Next' button at the bottom right is highlighted with a red box, indicating the next step in the configuration process.

48. Verify the values under the **Hosting Service Settings** section of the **Settings** page, changing as required, then click **Next**

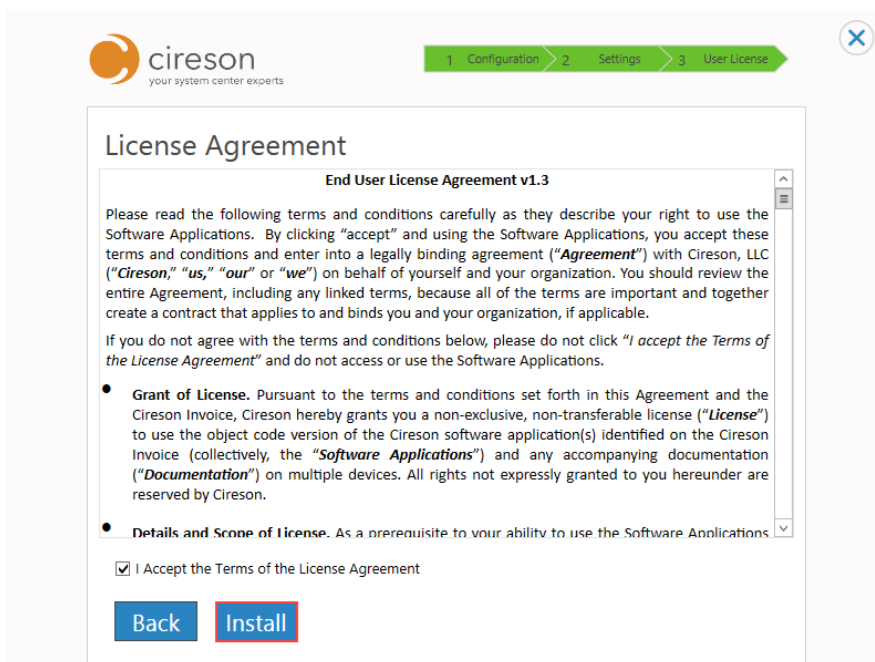
The screenshot shows the Cireson Portal interface. At the top, there's a breadcrumb trail: 1 Configuration > 2 Settings > 3 User License. The main heading is "Hosting Service Settings". Below it, there are several input fields and a checkbox:

- Service Identity:** A dropdown menu.
- Use LocalSystem:** A checked checkbox.
- Service Identity Password:** A text input field.
- Deployment Service Port:** A text input field containing "8081".
- Cache Service Port:** A text input field containing "8081".

At the bottom of the form, there are two buttons: "Back" and "Next". The "Next" button is highlighted with a red border.

49. On the **License Agreement** page, check the **I Accept the Terms of the License Agreement** checkbox.

The screenshot shows the Cireson Portal interface for the License Agreement. At the top, there's a breadcrumb trail: 1 Configuration > 2 Settings > 3 User License. The main heading is "License Agreement". Below it, the text "End User License Agreement v1.3" is displayed. The agreement text is scrollable. At the bottom of the agreement text, there is a checkbox labeled "I Accept the Terms of the License Agreement" which is checked. Below the checkbox, there are two buttons: "Back" and "Install".

50. Click **Install**

cireson
your system center experts

1 Configuration > 2 Settings > 3 User License

License Agreement

End User License Agreement v1.3

Please read the following terms and conditions carefully as they describe your right to use the Software Applications. By clicking "accept" and using the Software Applications, you accept these terms and conditions and enter into a legally binding agreement ("**Agreement**") with Cireson, LLC ("**Cireson**," "**us**," "**our**" or "**we**") on behalf of yourself and your organization. You should review the entire Agreement, including any linked terms, because all of the terms are important and together create a contract that applies to and binds you and your organization, if applicable.

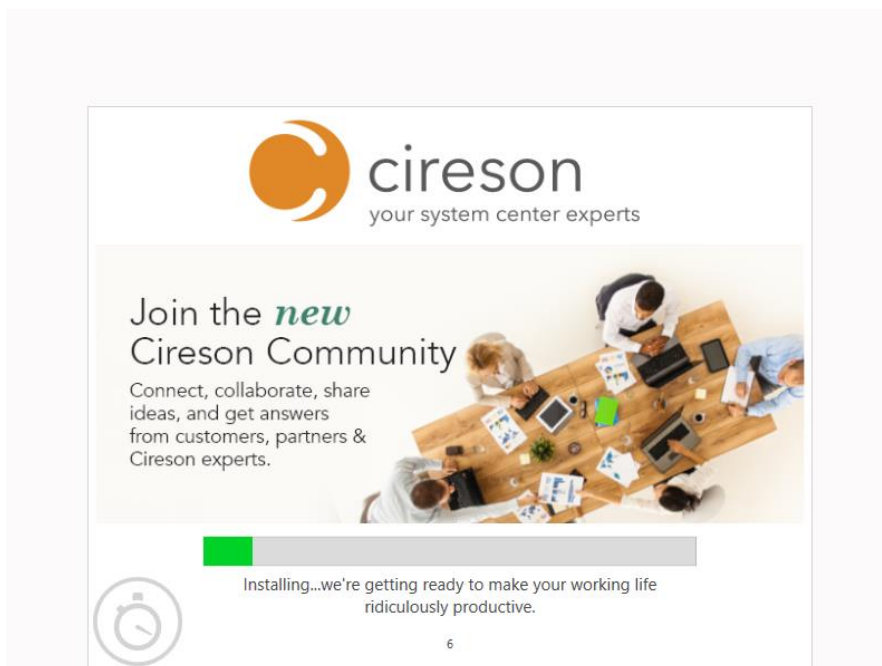
If you do not agree with the terms and conditions below, please do not click "*I accept the Terms of the License Agreement*" and do not access or use the Software Applications.

- **Grant of License.** Pursuant to the terms and conditions set forth in this Agreement and the Cireson Invoice, Cireson hereby grants you a non-exclusive, non-transferable license ("**License**") to use the object code version of the Cireson software application(s) identified on the Cireson Invoice (collectively, the "**Software Applications**") and any accompanying documentation ("**Documentation**") on multiple devices. All rights not expressly granted to you hereunder are reserved by Cireson.
- **Details and Scope of License.** As a prerequisite to your ability to use the Software Applications

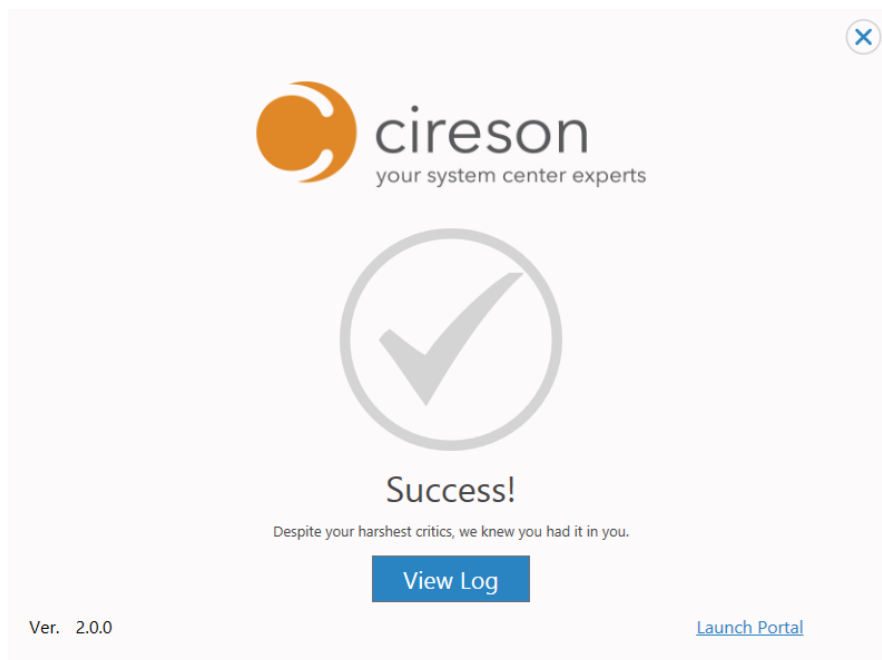
☒ I Accept the Terms of the License Agreement

[Back](#) [Install](#)

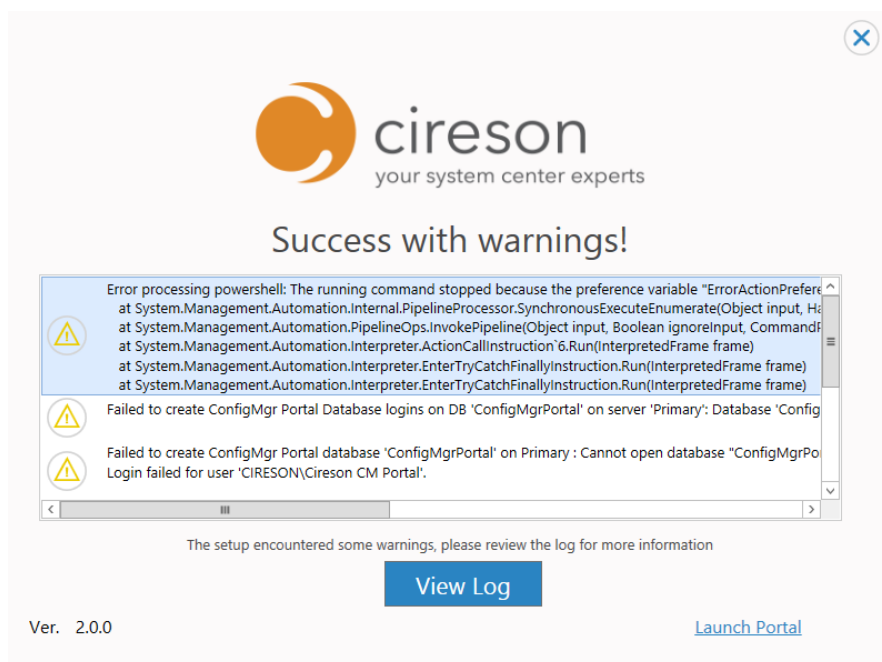
The installation will continue, showing progress on the progress bar.



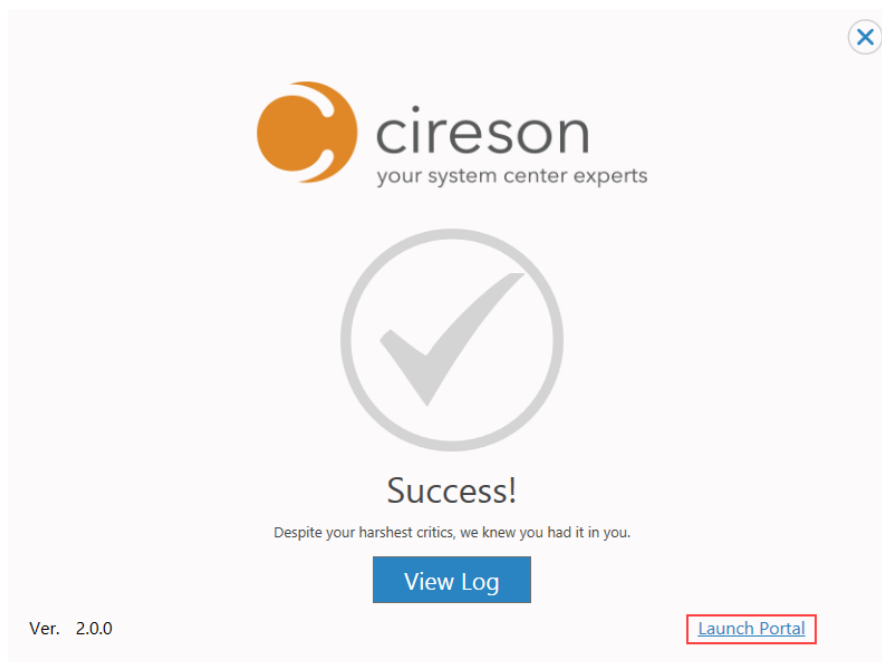
Once the Installer has completed successfully without any errors or warnings, the **Success** message will be displayed.



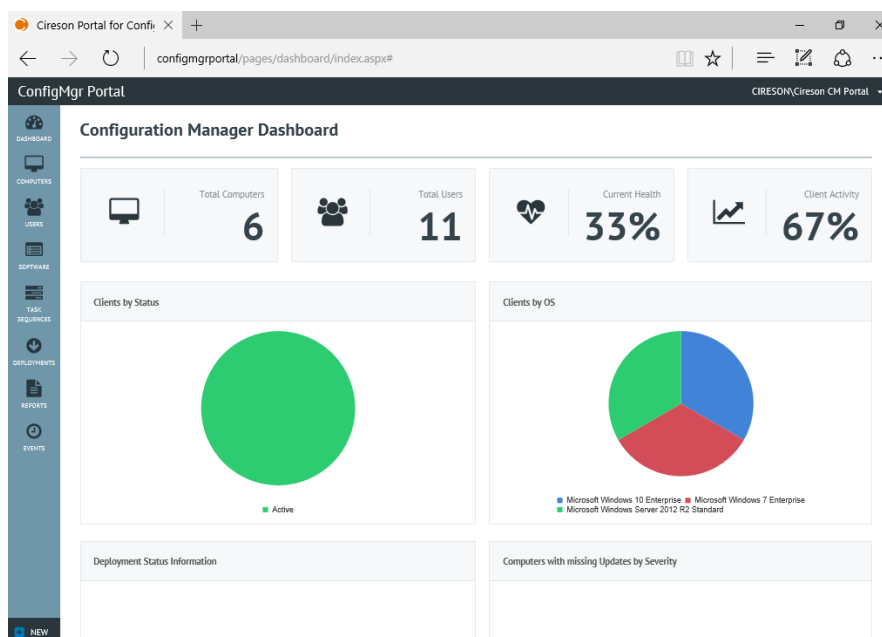
If the **Success with warnings** screen is displayed, review each warning consulting the Portal installation log as necessary, until the issue is resolved. Then retry the installation.



51. Click **Launch Portal** to launch the Portal (you can also click **View Log** to review the installation log).



The Portal will be opened in your browser.



This completes the installation of the Cireson ConfigMgr Portal using the installer. Complete the tasks in the **Post Installation Configuration** section to complete the installation of the Portal.

Manually Installing the Cireson Portal for Configuration Manager

This section details how to manually install the Portal. See the [Installing the Cireson Portal for Configuration Manager using the Installer](#) section if you prefer to install the Portal using the Installer.

The following processes need to be followed in order to install the Portal manually:

- [Extracting the Portal Installation files for a Manual Installation](#)
- [Providing access to ConfigMgr for the Cireson Portal for Configuration Manager User Account](#)
- [Create and configure a new Website](#)
- [Configuring the IIS Application Pool](#)
- [Configuring file security](#)
- [Create and configuring the new SQL Database](#)
- [Granting the Portal user access to the SQL Databases](#)
- [Running the SQL Scripts](#)
- [Run the Portal Configuration Wizard](#)
- [Installing the Caching Service](#)

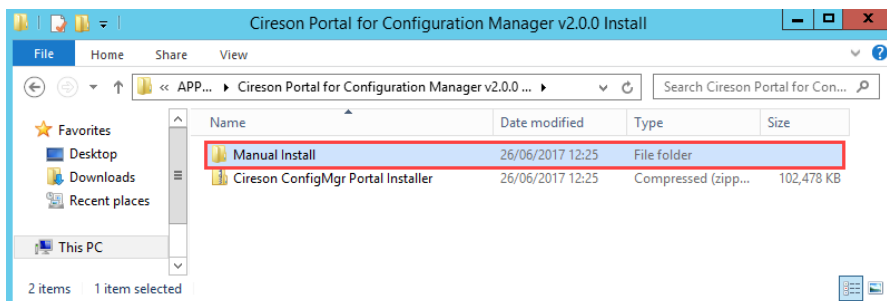
NOTE: You do not need to install Microsoft .NET Framework 4.5.2 in order to perform a manual installation of the Portal. This version is only required by the Portal Installer. Provided your server is running a minimum of .NET version 4 or later, you don't need to worry about installing a later version of .NET.

Extracting the Portal Installation files for a Manual Installation

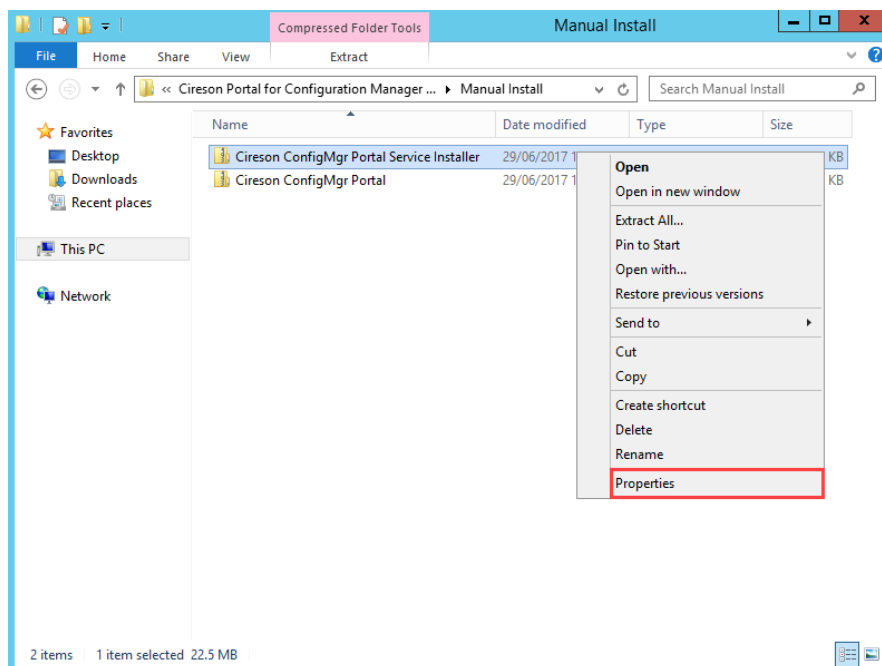
To save download time and disk space, the Portal download files contain compressed versions of all of the files required to perform a manual installation. These files need to be extracted before running a manual installation.

To extract the files required for a manual installation of the Portal:

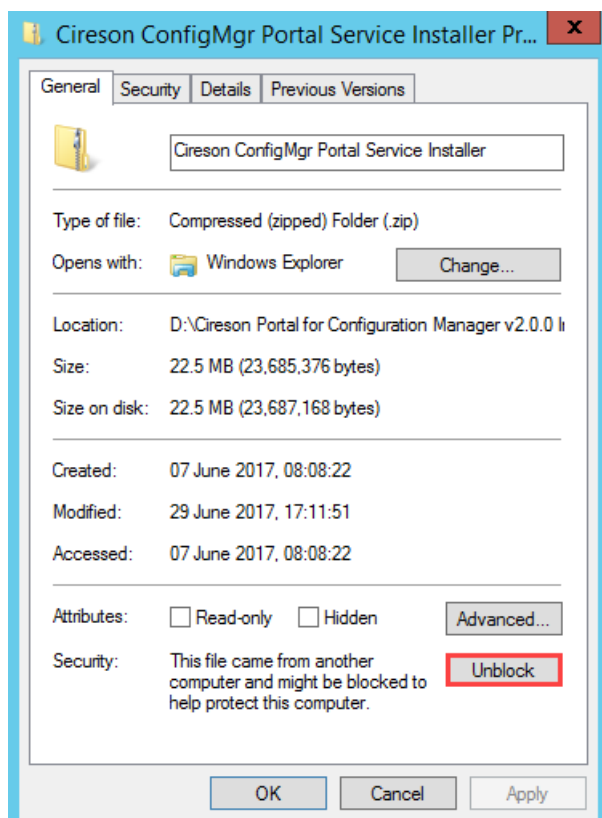
1. Logon to the server that will host the Portal with an account that has local Administrator rights.
2. Navigate to the location containing the extracted files created in [Extracting the Portal Installation Files](#) section.
3. Open the **Manual Install** folder.



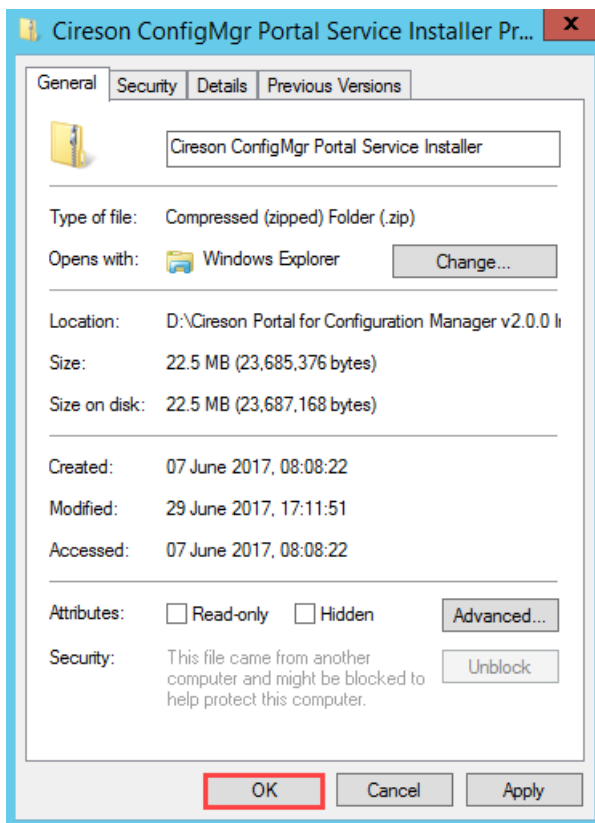
4. Right click the **Cireson ConfigMgr Portal Service Installer.zip** and select **Properties**



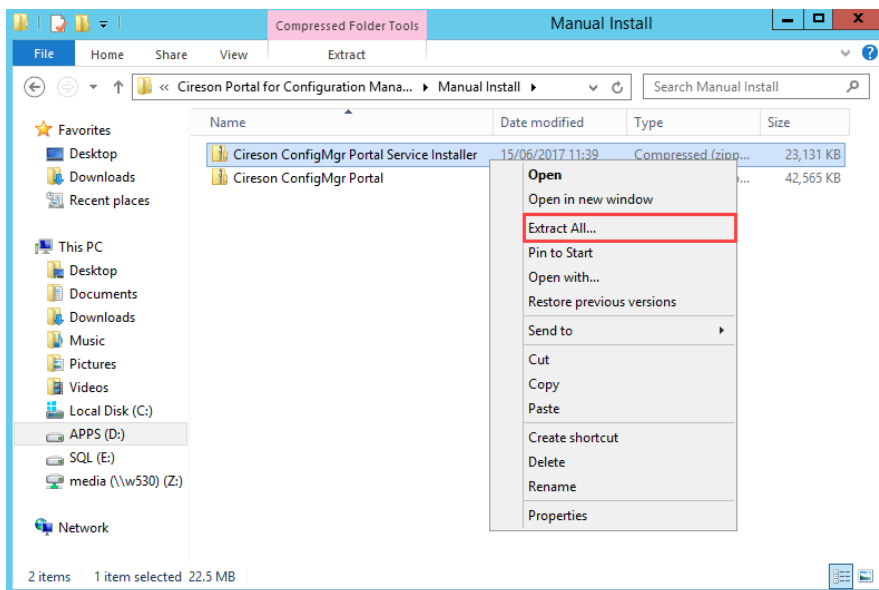
5. On the **Cireson Portal Service Installer Properties** dialog box, click **Unblock**



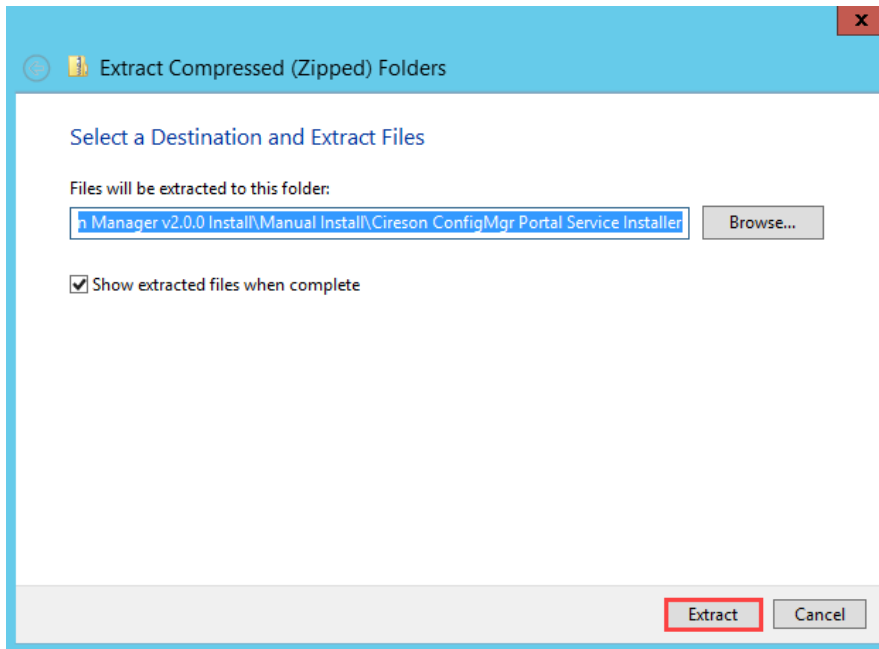
- Click **OK** to close the **Cireson Portal for Configuration Manager vx.x.x Install.zip Properties** dialog box.



- Right click the **Cireson ConfigMgr Portal Service Installer.zip** and select **Extract All**

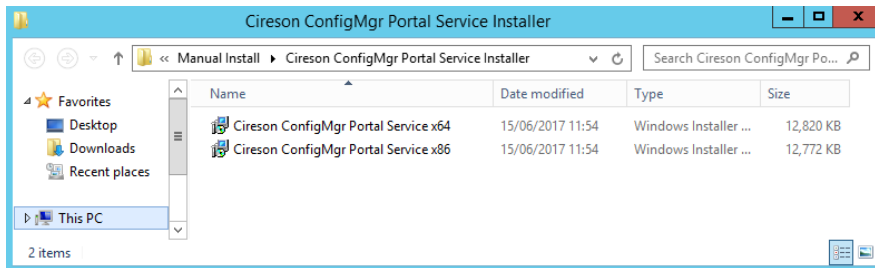


8. On the **Extract Compressed (Zipped) Folders** dialog box, click **Extract** to extract the files to specified location. If you wish to extract the files to a different location, either type the path in the **Files will be extracted to this folder** field, or alternatively click **Browse** to browse to the required location.



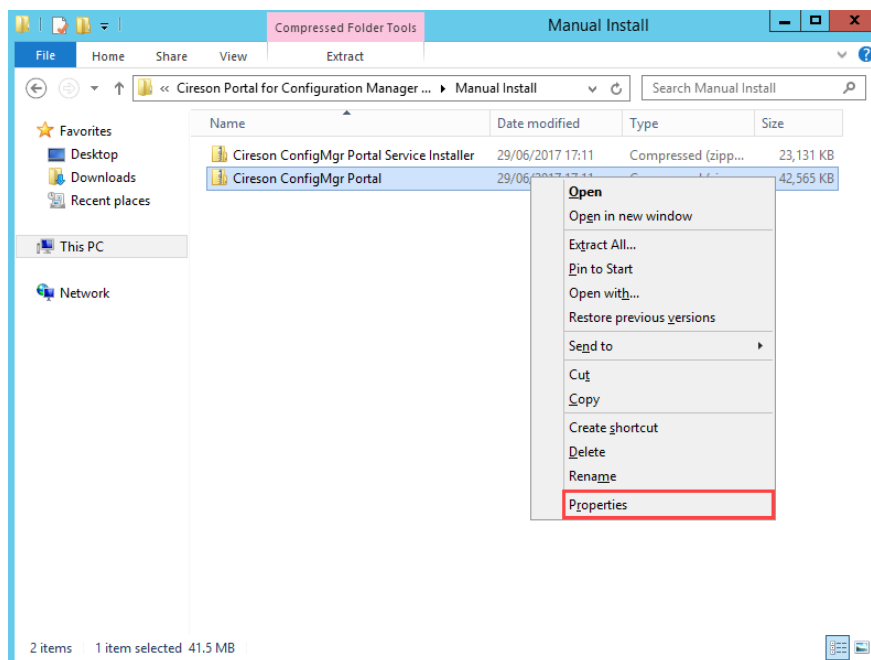
The progress dialog box will be displayed as the files are extracted.

Once the extraction process has completed, the folder specified as the destination will be opened automatically showing the extracted files.

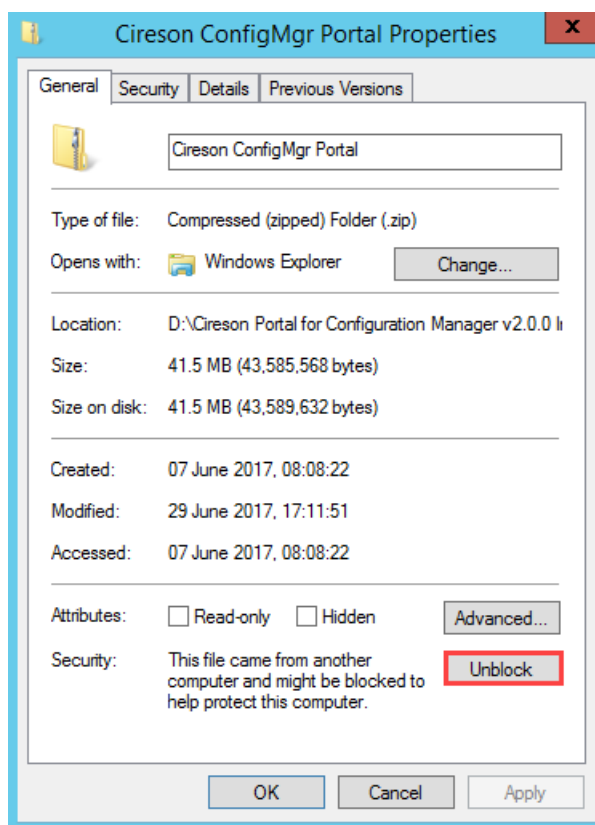


9. Close this folder to return to the folder containing the manual installation ZIP files.

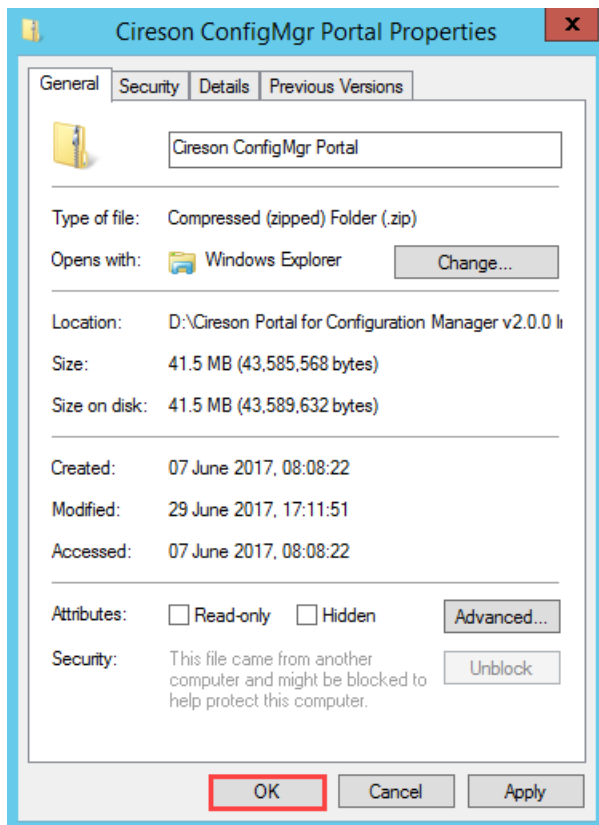
10. Right click the **Cireson ConfigMgr Portal.zip** and select **Properties**



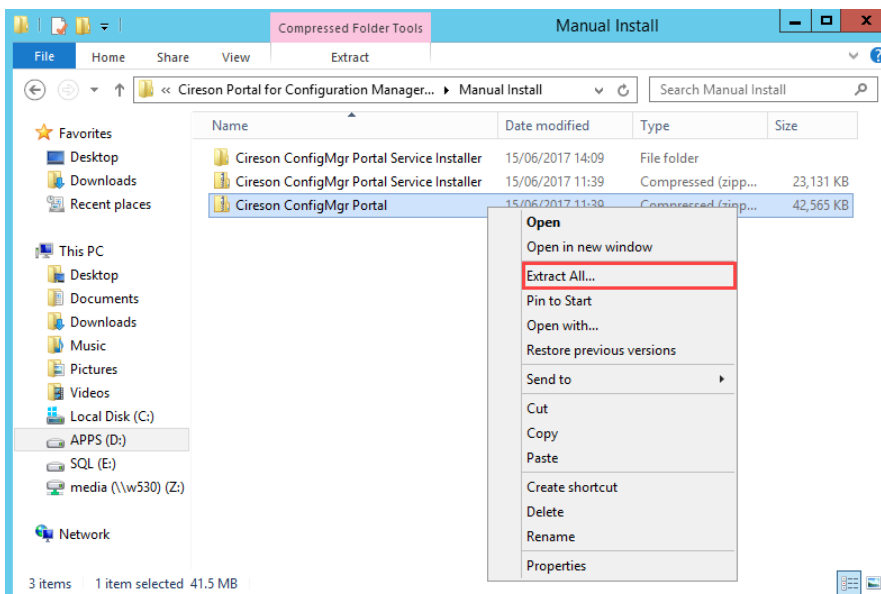
11. On the **Cireson ConfigMgr Portal Properties** dialog box, click **Unblock**



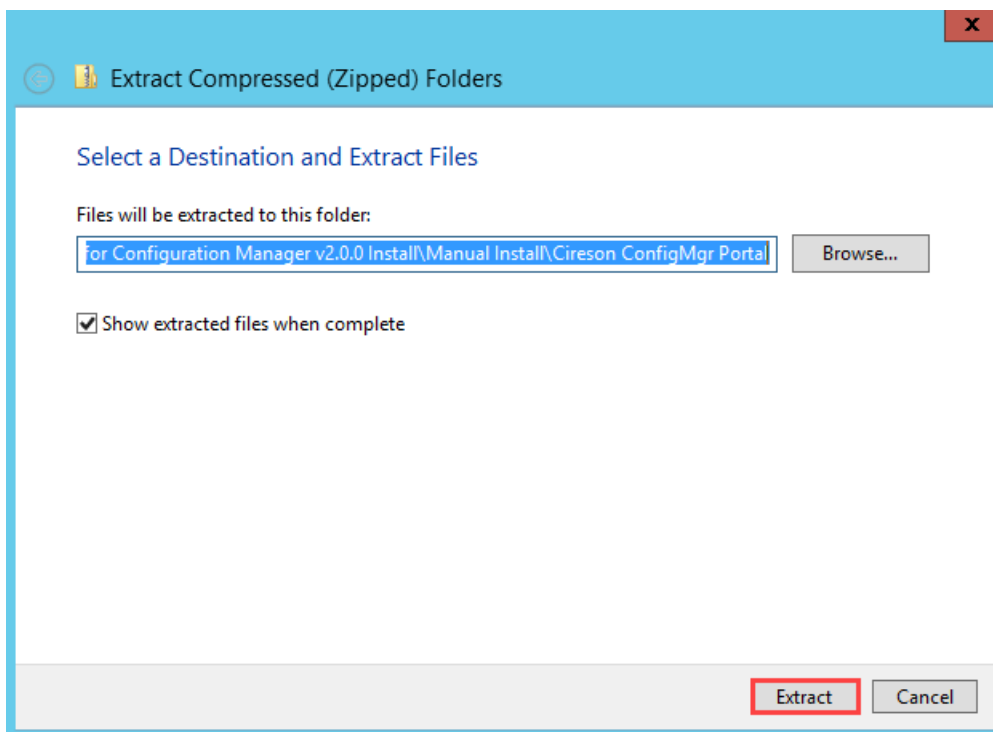
12. Click **OK** to close the **Cireson ConfigMgr Portal Properties** dialog box.



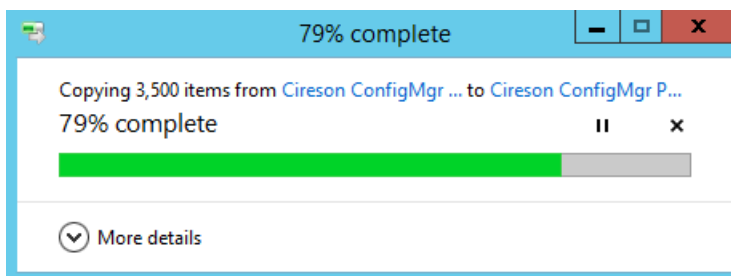
13. Right-click on the **Cireson ConfigMgr Portal.zip** file and select **Extract All**



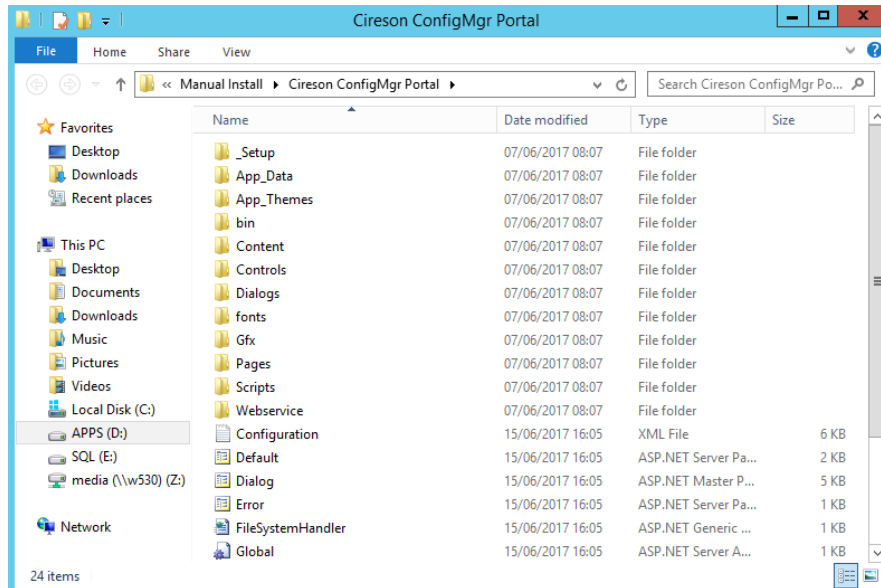
14. On the **Extract Compressed (Zipped) Folders** dialog box, click **Extract** to extract the files to specified location. If you wish to extract the files to a different location, either type the path in the **Files will be extracted to this folder** field, or alternatively click **Browse** to browse to the required location.



The progress dialog box will be displayed as the files are extracted.



Once the extraction process has completed, the folder specified as the destination will be opened automatically showing the extracted files.



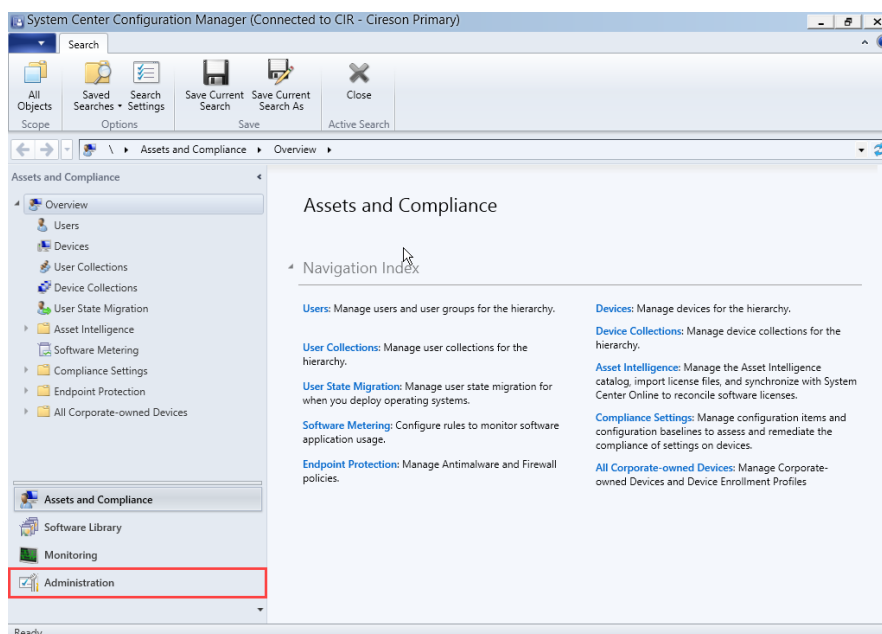
Providing access to ConfigMgr for the Cireson Portal for Configuration Manager User Account

The user account that is to be used to run the Internet Information Services (IIS) Application Pool used by the Portal should be configured as a **Full Administrator** in the ConfigMgr Console. Configuring the Portal account in this way also creates a SQL Login for the account automatically easing the installation process.

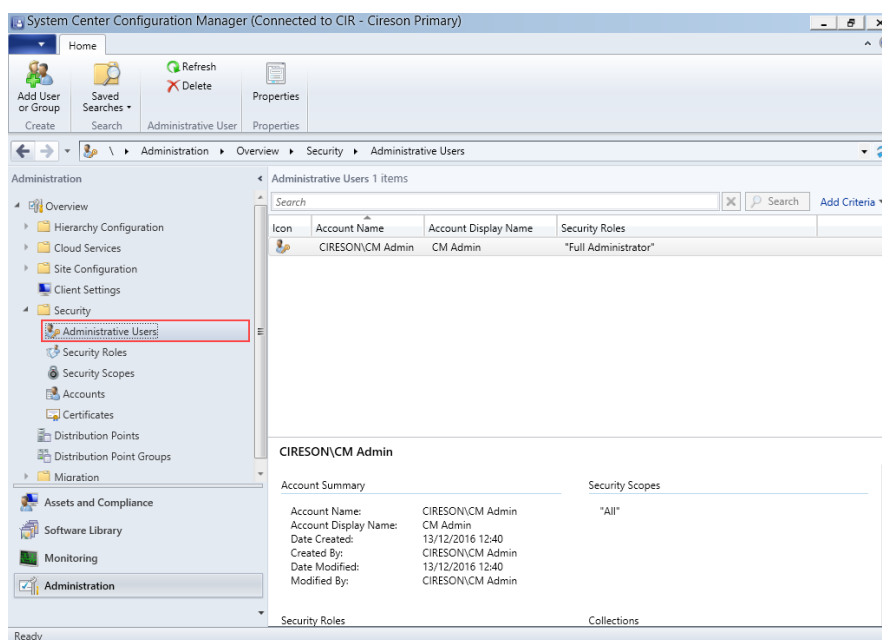
To configure the Portal user account as a **Full Administrator** in ConfigMgr:

1. Load the **Configuration Manager Console**

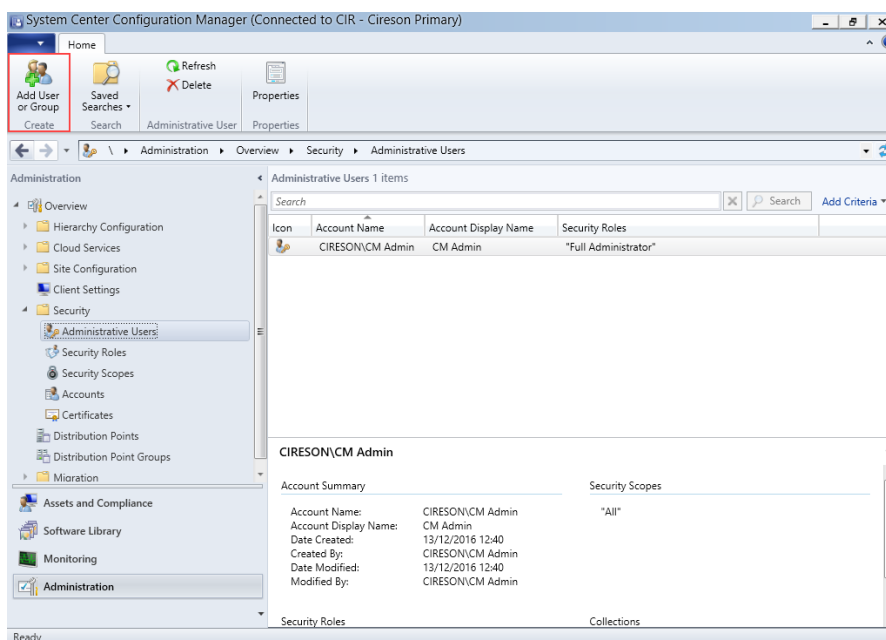
2. Click the **Administration** workspace.



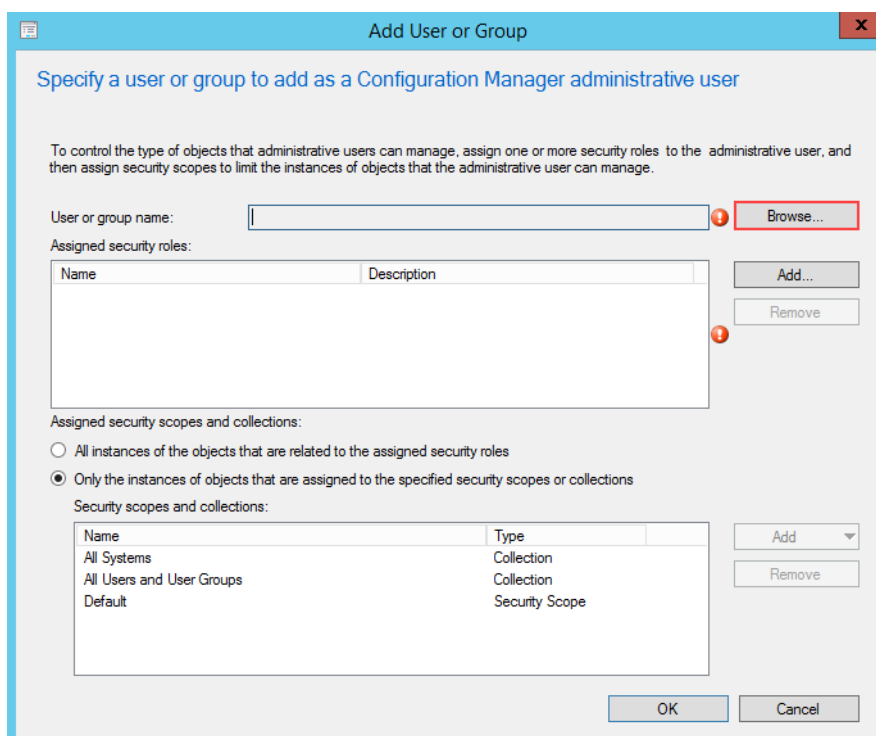
3. Navigate to **Security | Administrative Users**



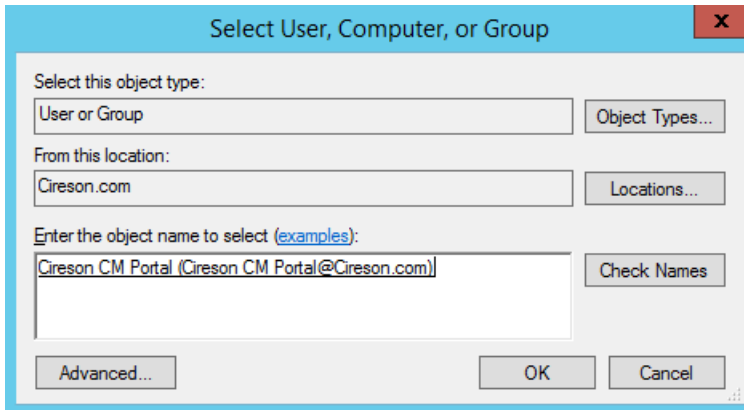
4. On the Ribbon, click **Add User or Group**



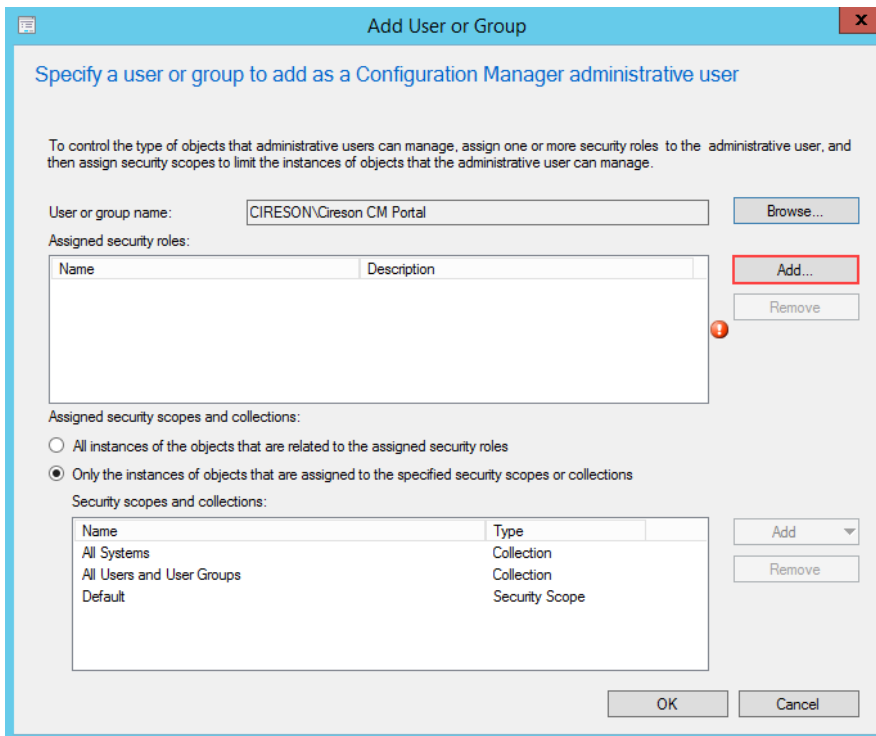
5. Click **Browse** on the **Add User or Group** dialog box.



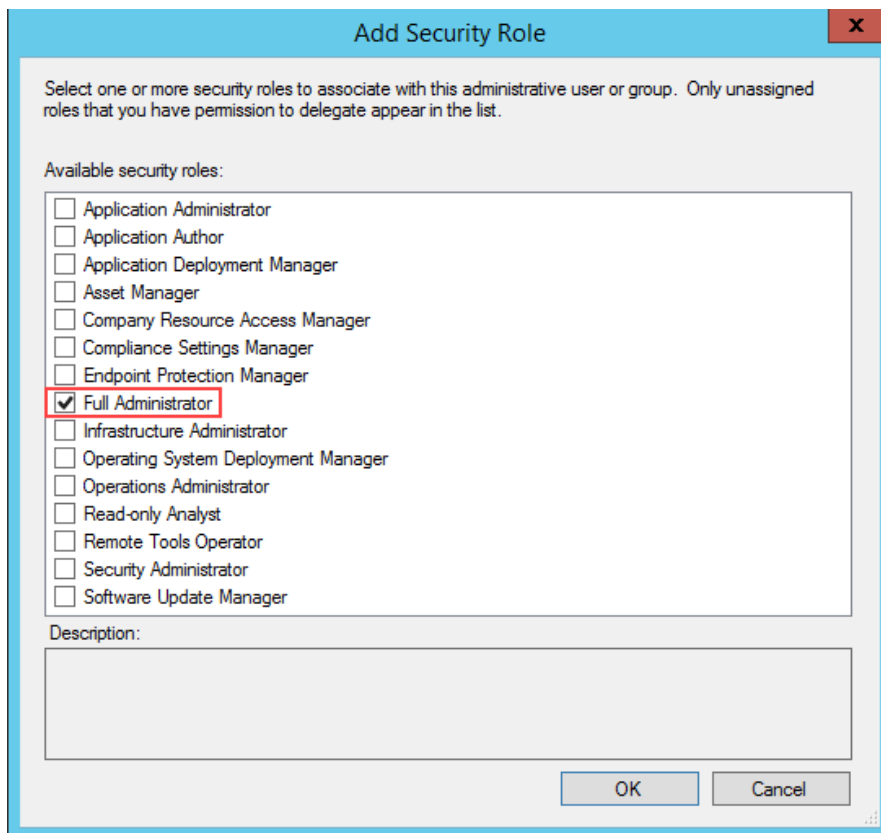
6. In the **Enter the object name to select** field of the **Select User, Computer, or Group** dialog box, enter the name of the Portal user account.



7. Click **Check Names** to verify the name has been entered correctly, then click **OK**
8. On the **Add User or Group** dialog box, click **Add**

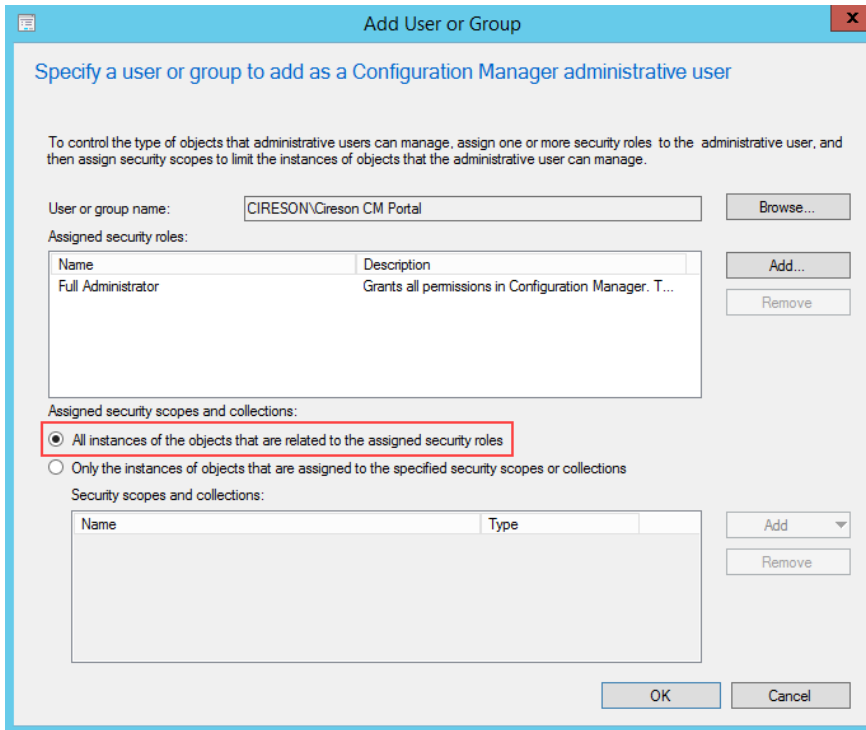


9. On the **Add Security Role** dialog box, select the checkbox beside **Full Administrator** then click **OK**

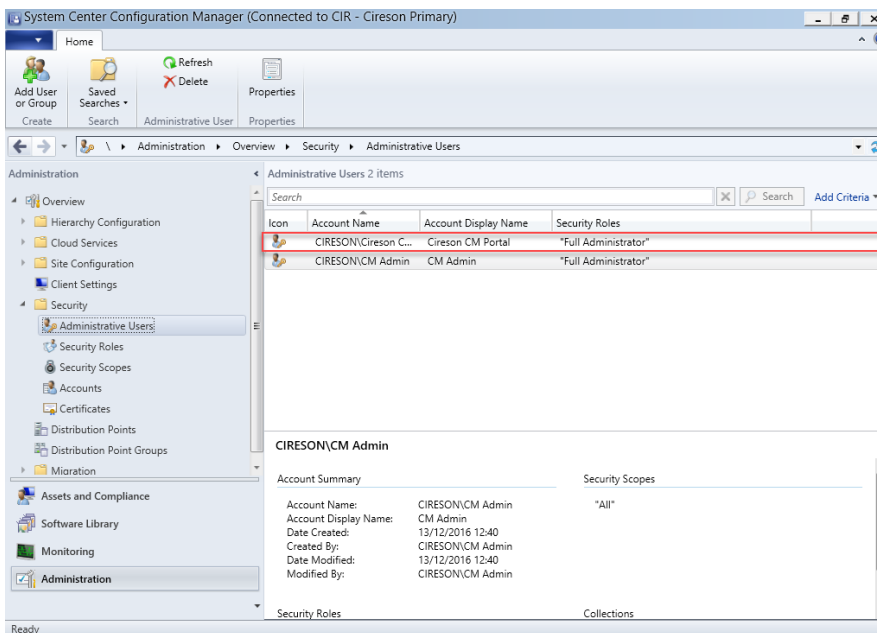


10. On the **Add User or Group** dialog box, select the **All instances of the objects that are related to the assigned security roles** option then click **OK**

NOTE: If you wish to greater restrict access of the user account used to run the IIS Application Pool used by the Portal to ConfigMgr, consider restricting it to only be able to create new and modify existing objects.



The newly added user will appear in the console.

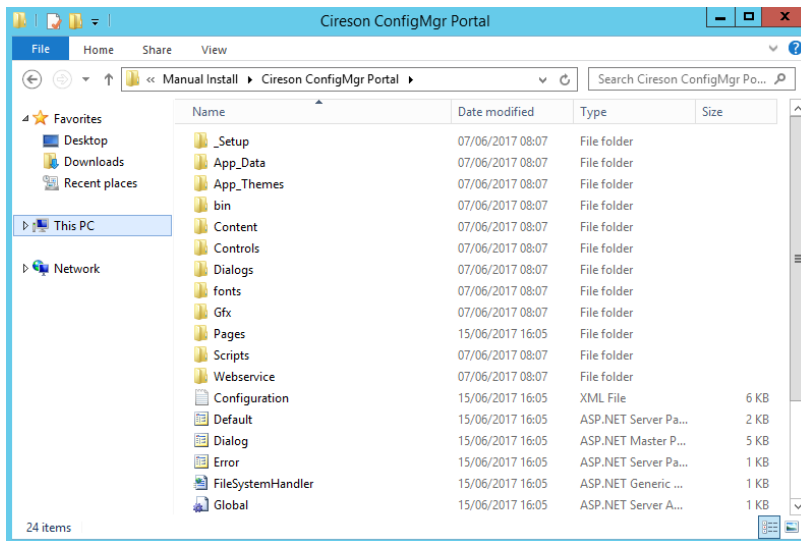


Create and configure a new Website

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

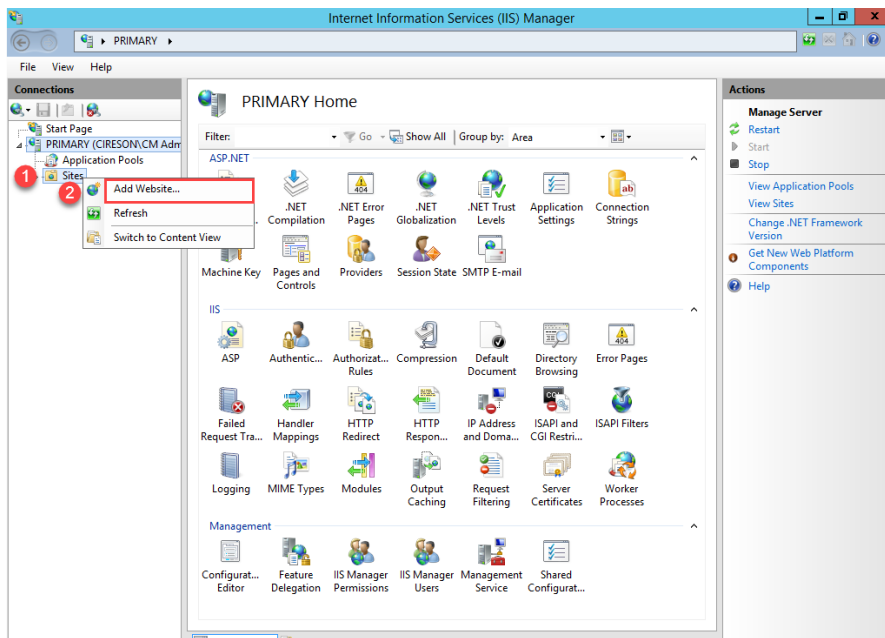
To create and configure a new Website for the Portal:

1. Logon to the server that will host the Portal with an account that has local Administrator rights.
2. Create a new folder under **C:\inetpub** to host the new Website, for example **ConfigMgr Portal**
3. Navigate to the folder containing the extracted manual installation files for the Portal, for example **<drive>:\<directory>\Manual Install\Cireson ConfigMgr Portal**

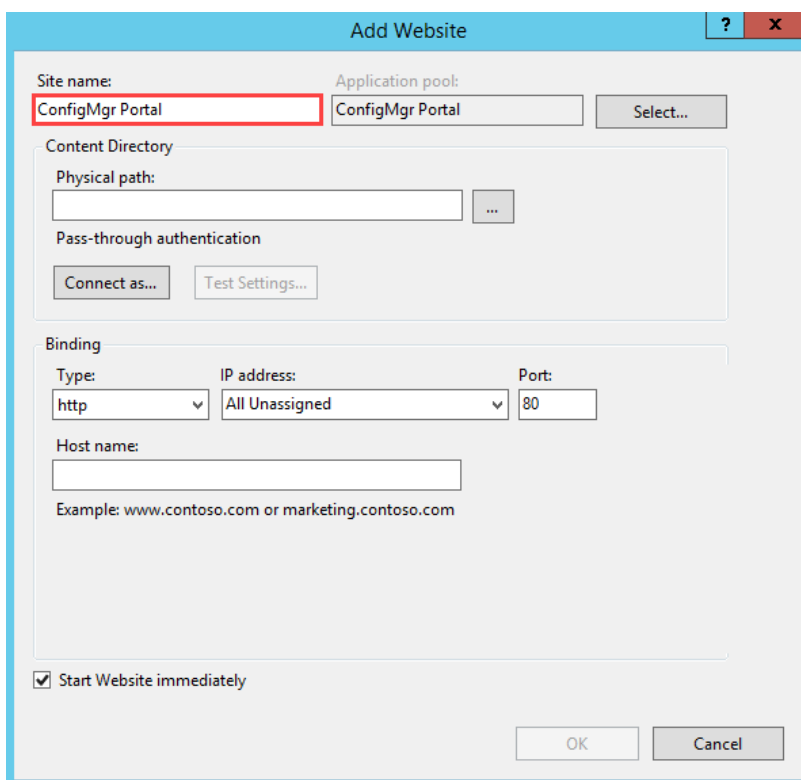


4. Copy the contents of this folder to the new folder created in Step 2.
5. Start **Internet Information Services (IIS) Manager**.
6. Expand the server object in the left hand pane, then right-click **Sites** and select **Add Website**.

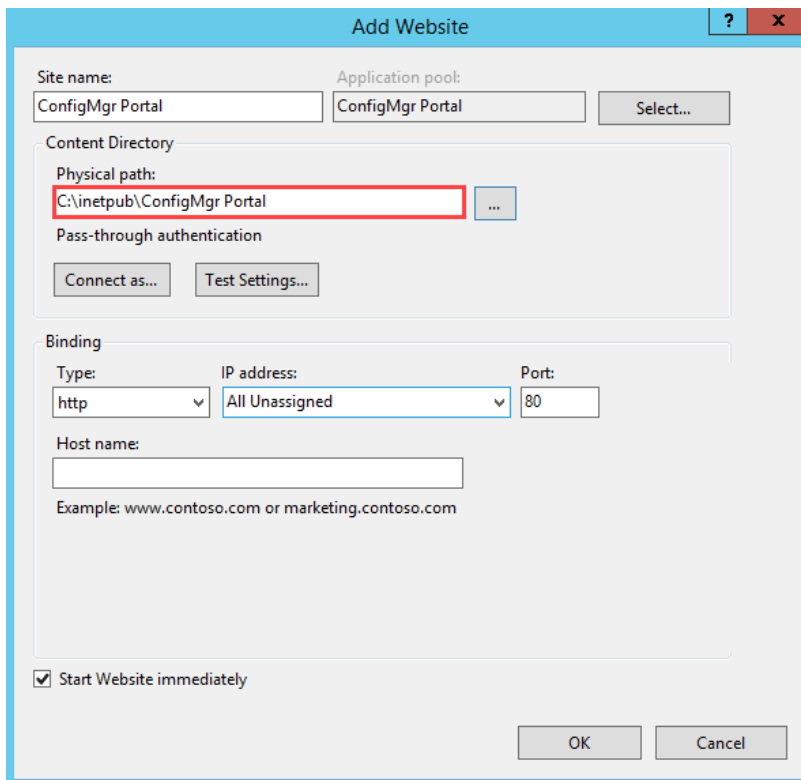
Cireson Portal for Configuration Manager



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

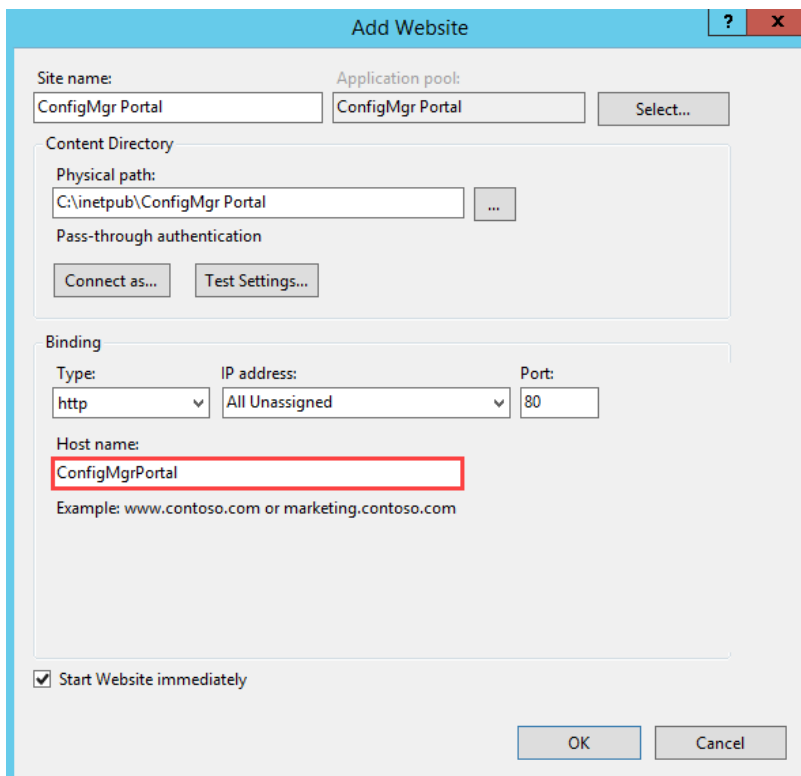


8. In the **Physical path** field, either type the path or browse to the folder created in Step 2.



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.

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

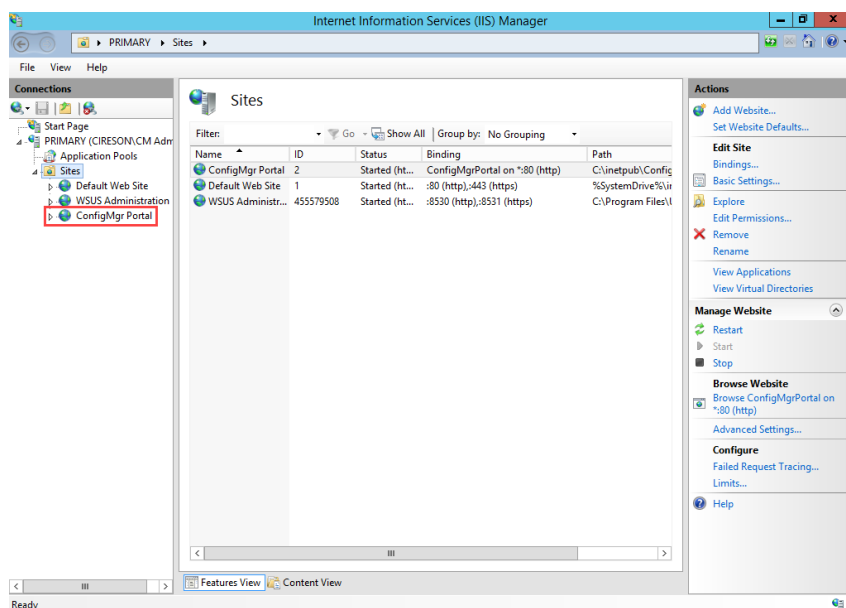


The screenshot shows the 'Add Website' dialog box. The 'Site name' field contains 'ConfigMgr Portal'. The 'Application pool' dropdown is set to 'ConfigMgr Portal'. In the 'Content Directory' section, the 'Physical path' field contains 'C:\inetpub\ConfigMgr Portal'. Below this, there are buttons for 'Connect 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:

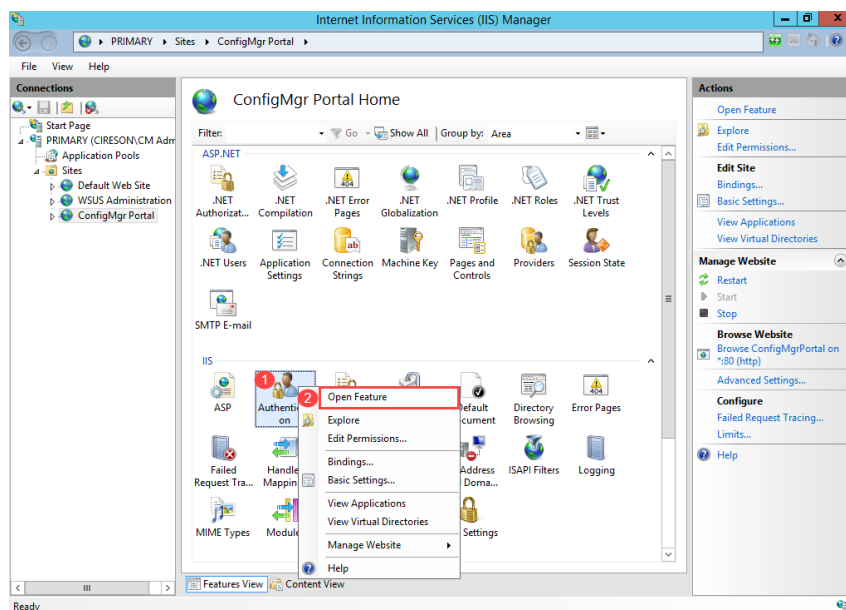
MP Control Manager detected management point is not responding to HTTP requests. The HTTP status code and text is 401, Unauthorized

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

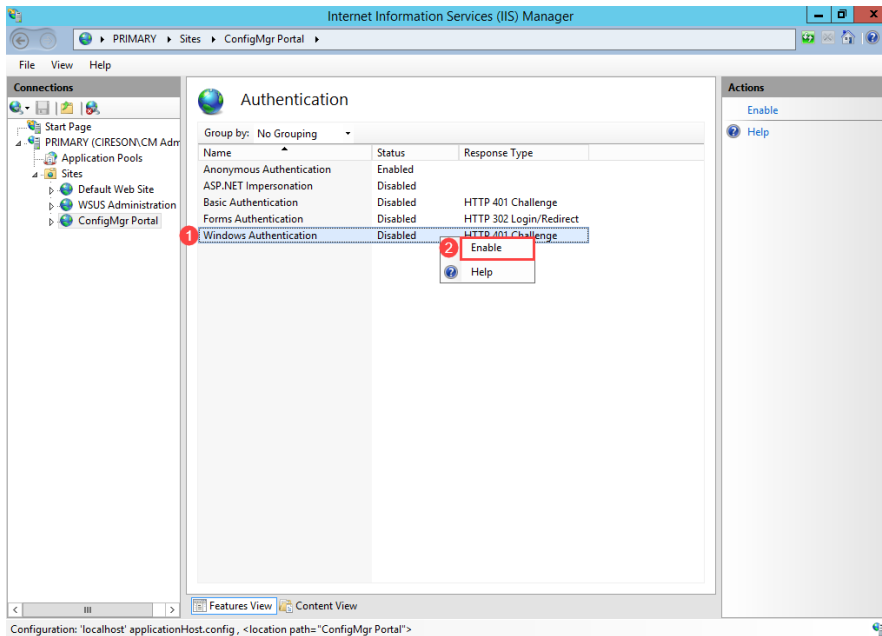


10. Click the newly created Website.

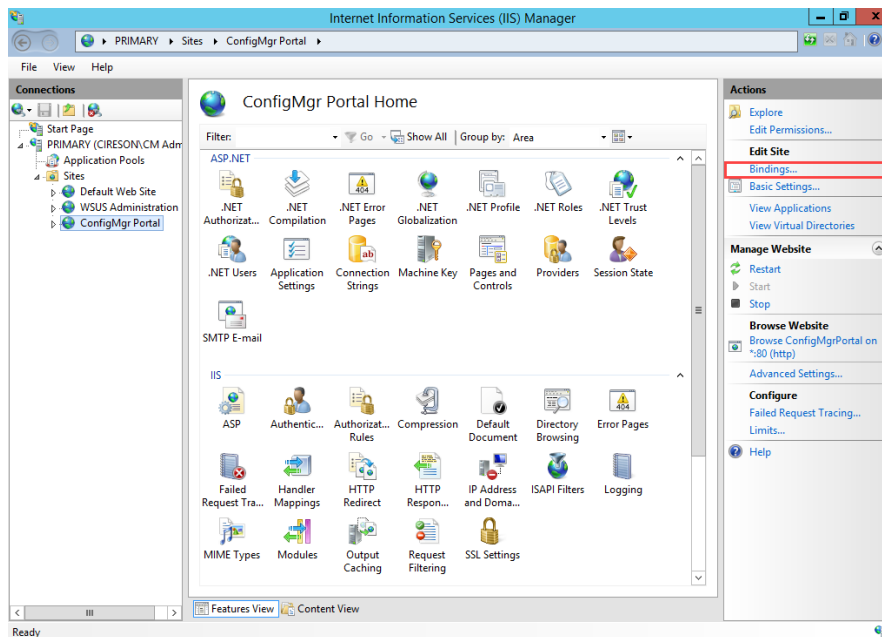
11. Under the IIS section of the **ConfigMgr Portal Home** page, right-click **Authentication** and select **Open Feature**.



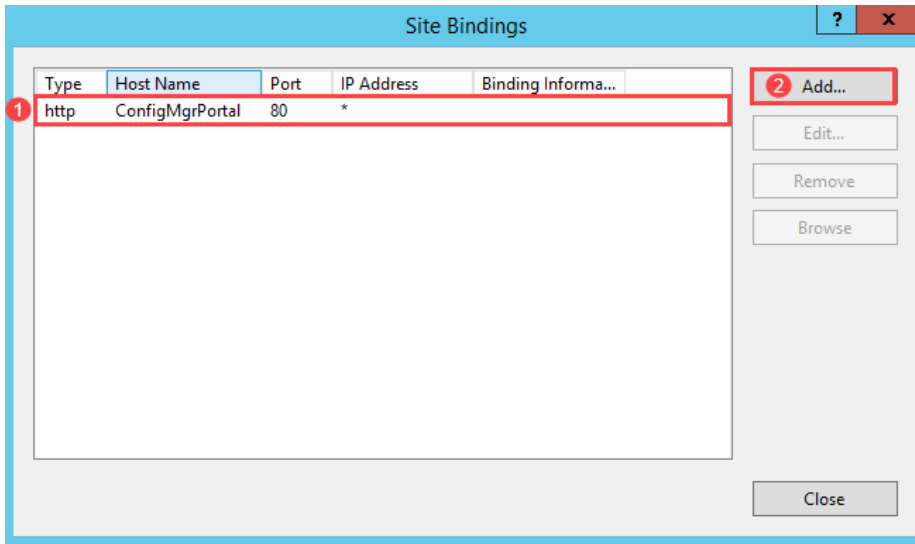
12. On the **Authentication** screen, right-click **Windows Authentication** and select **Enable**.



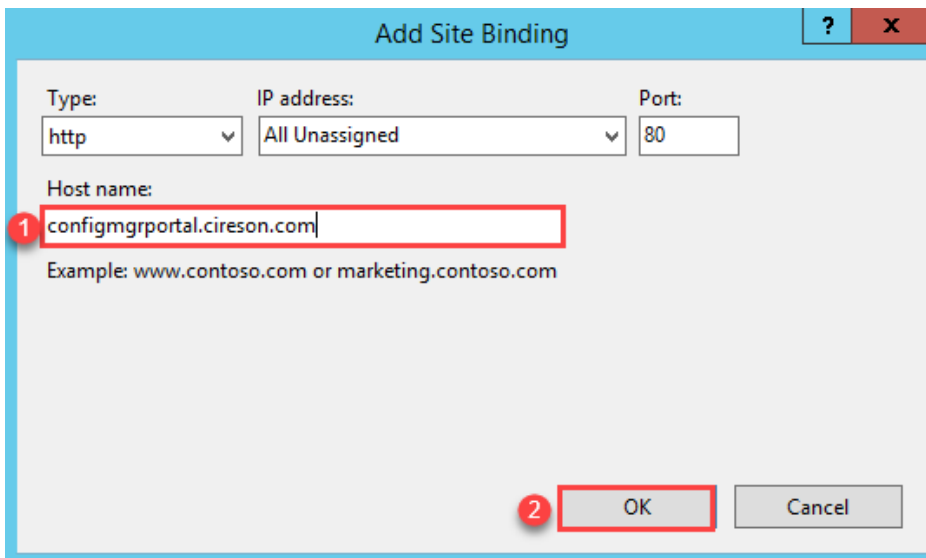
13. Right-click **Anonymous Authentication** and select **Disable**
14. Ensure all other authentication methods are disabled (if any are enabled simply right-click on them and select **Disable**).
15. Click the **ConfigMgr Portal** site under **Sites** to return to the **ConfigMgr Portal Home** page.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



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



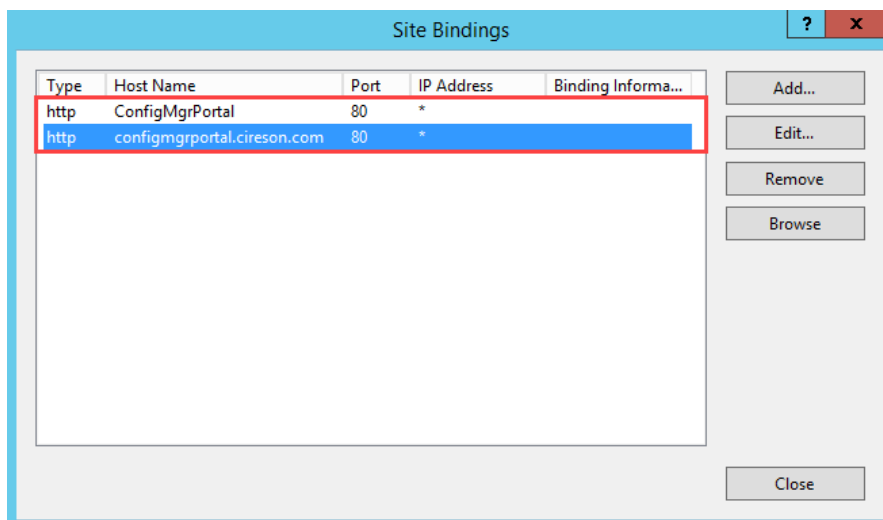
18. On the **Add Site Binding** dialog box type the FQDN of the Portal Website in the **Host name** field then click **OK**.



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.



19. Click **Close**.

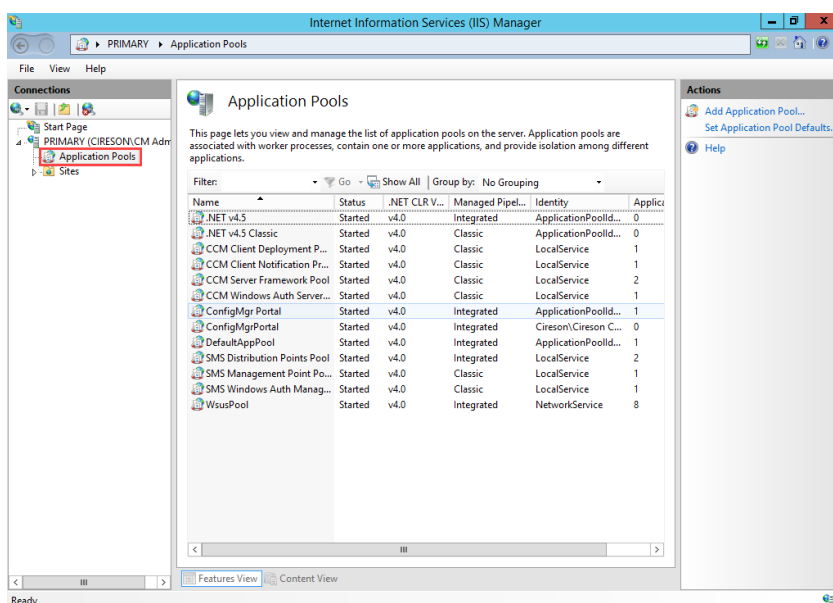
NOTE: Leave **Internet Information Services (IIS) Manager** open as it is required in the next section.

Configuring the IIS Application Pool

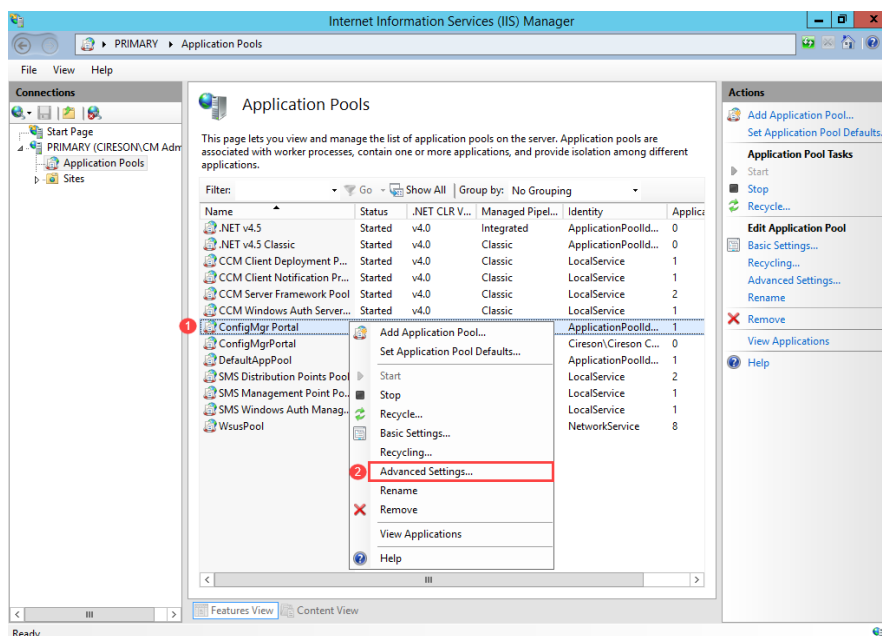
The next stage of the installation process involves configuring the Internet Information Services (IIS) Application Pool.

To configure the IIS Application Pool:

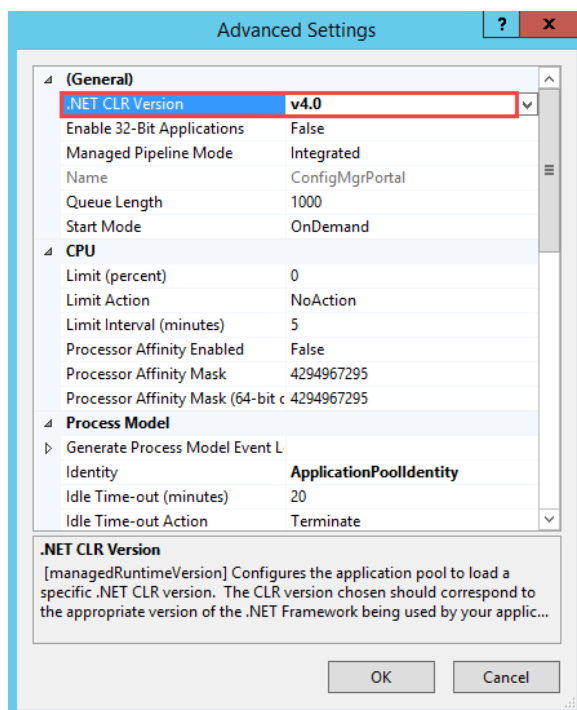
1. Logon to the server that will host the Portal with an account that has local Administrator rights.
2. Start **Internet Information Services (IIS) Manager** (if it isn't already).
3. Navigate to **<server_name> | Application Pools**.



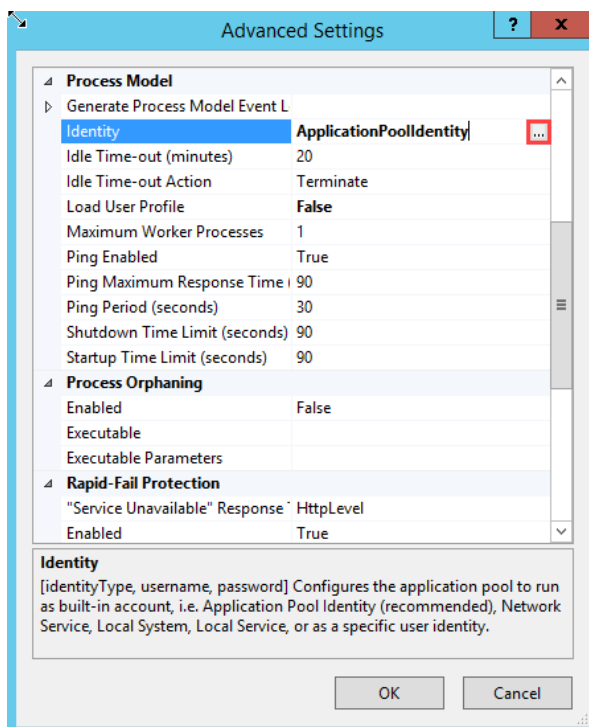
- Right-click the **ConfigMgr Portal** Application Pool and select **Advanced Settings**.



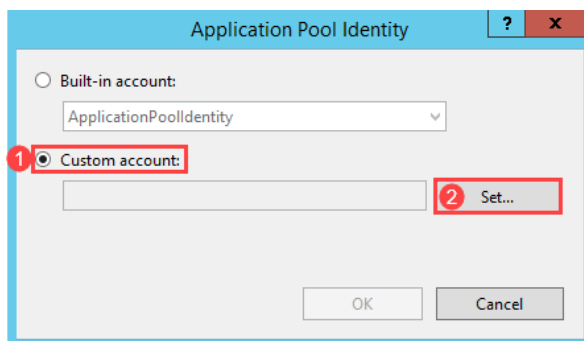
- On the **Advanced Settings** dialog box verify that the **.NET CLR Version** under the **(General)** section is set to **v4.0**



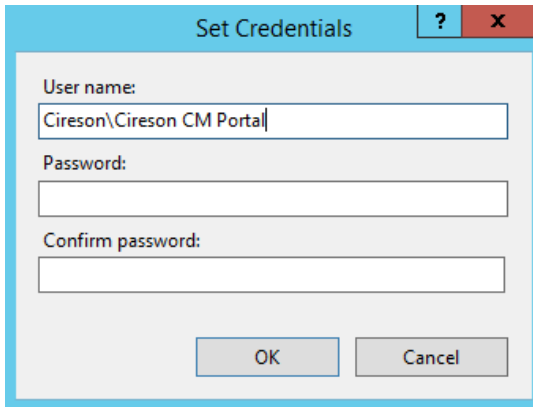
6. Under the **Process Model** section click the ellipses (...) after the **Identity** field.



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

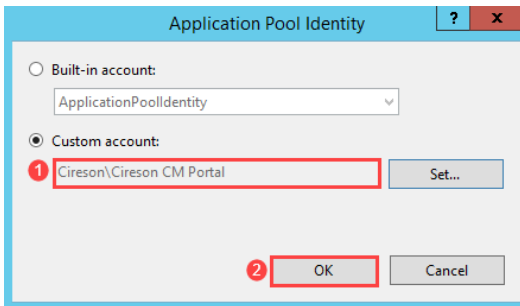


8. On the **Set Credentials** dialog box enter the credentials (including the domain name), for the Portal service account created in the **Account and group requirements** section then click **OK**. For example **Cireson\Cireson CM Portal**.



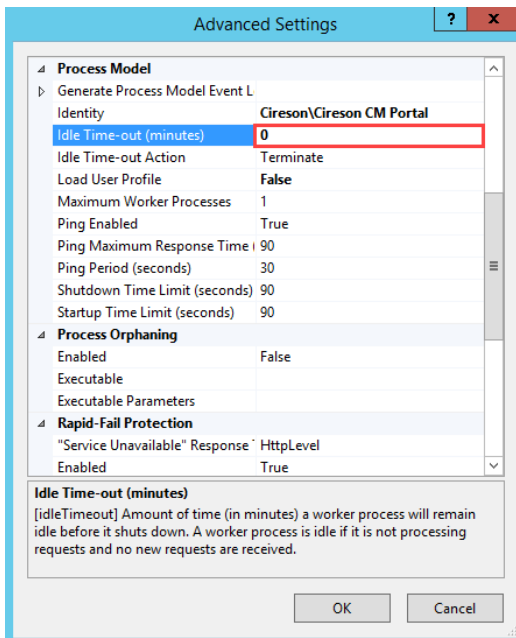
The 'Set Credentials' dialog box has a title bar with a question mark and a close button. It contains three text input fields: 'User name:', 'Password:', and 'Confirm password:'. The 'User name' field is pre-filled with 'Cireson\Cireson CM Portal'. At the bottom are 'OK' and 'Cancel' buttons.

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 on the left with the following items: 'Process Model', 'Generate Process Model Event L', 'Identity', 'Idle Time-out (minutes)', 'Idle Time-out Action', 'Load User Profile', 'Maximum Worker Processes', 'Ping Enabled', 'Ping Maximum Response Time', 'Ping Period (seconds)', 'Shutdown Time Limit (seconds)', 'Startup Time Limit (seconds)', 'Process Orphaning', 'Rapid-Fail Protection', and 'Idle Time-out (minutes)'. The 'Idle Time-out (minutes)' item is selected, and its value is '0', which is highlighted with a red box. Below the tree view is a text area 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.

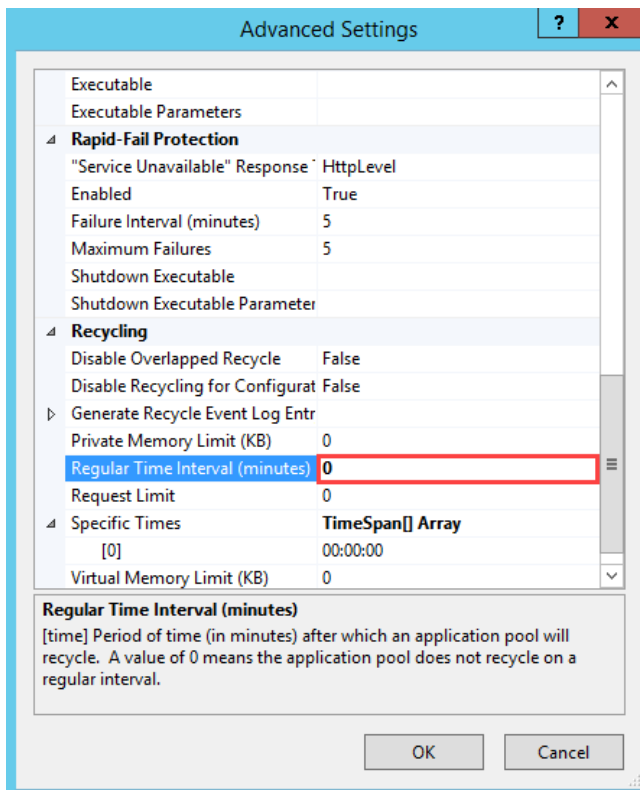
NOTE: We recommend you configure IIS Recycling to occur at a specific time when the system usually has the lightest load, rather than the default of occurring every 1,740 minutes to avoid unexpected errors in the Portal event log similar to:

Thread was being aborted

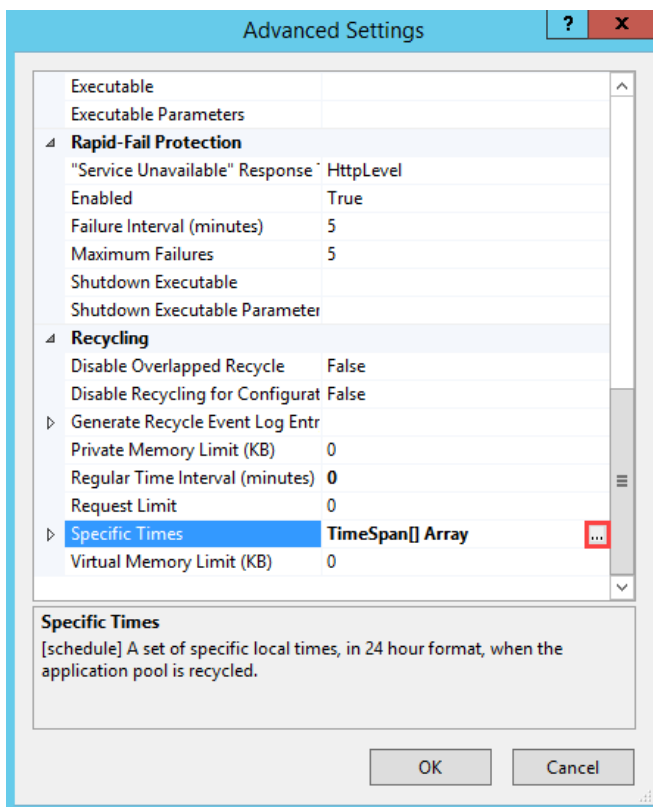
General recommendations are provided in the following section but you should configure this setting (or even disable it), depending on your own environment.

To configure IIS Recycling to occur at a specific time:

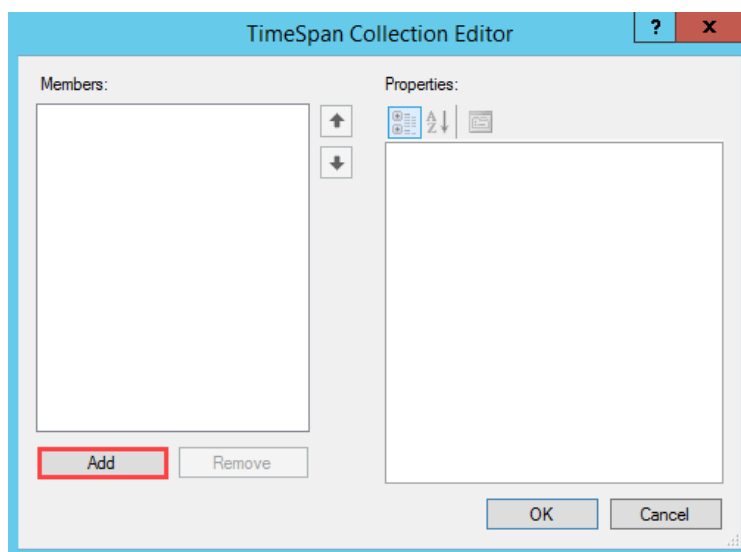
1. Under the **Recycling** section, change the value of the **Regular Time Interval (minutes)** setting from **1740** to **0** otherwise you will be performing IIS recycling both every 1740 minutes and at the specific time specified later in this procedure.



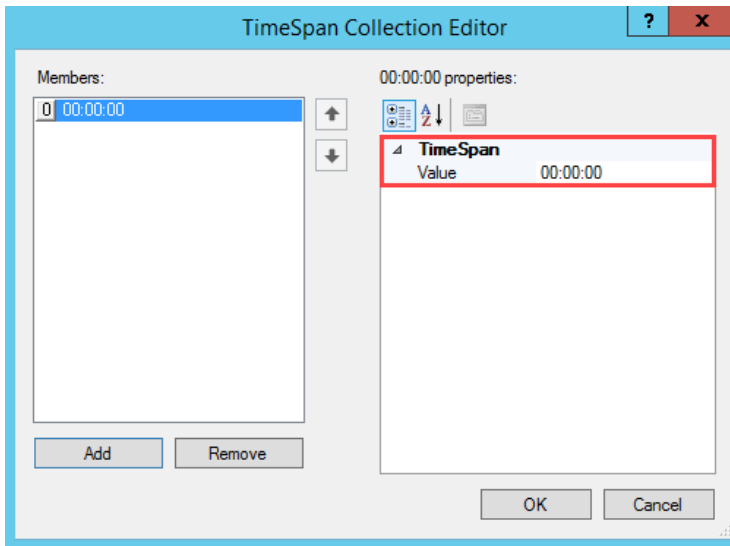
- Next click the ellipses (...) after the **Specific Times** field.



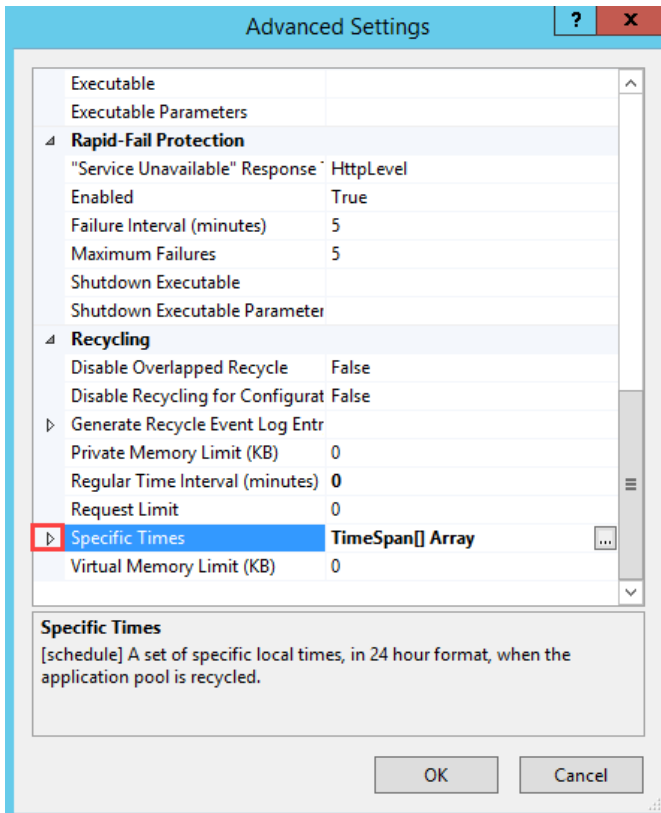
- On the **TimeSpan Collection Editor** dialog box click **Add**.



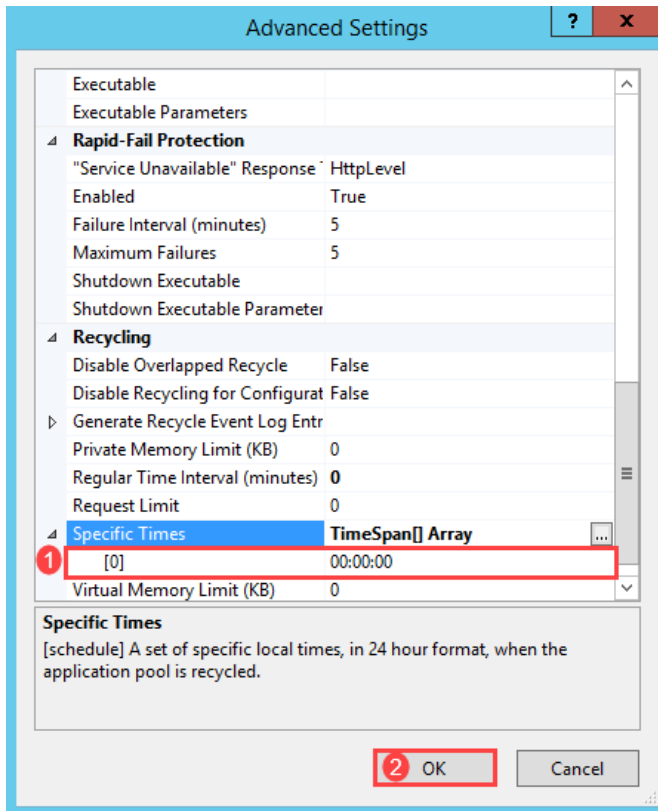
By default, midnight (00:00:00) is added as the default time.



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



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



- Close **Internet Information Services (IIS) Manager**

Configuring file security

To configure file security for the Portal:

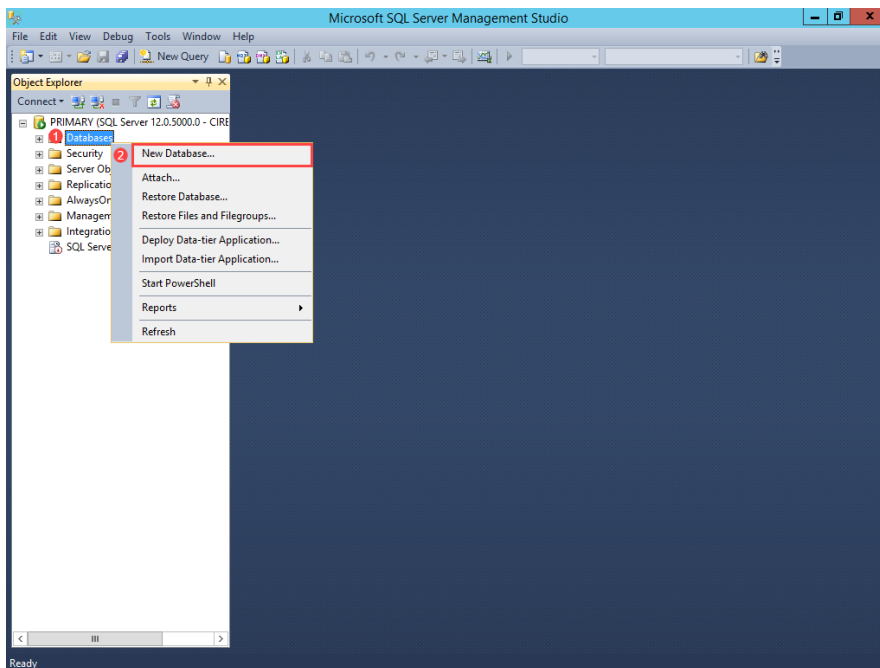
- Logon to the server that will host the Portal with an account that has local Administrator rights
- Grant the user account that will be used to run the Portal (for example **Cireson CM Portal**), **Modify** permissions to the **C:\Inetpub\ConfigMgr Portal** folder, and all subfolders and files.

Create and configuring the new SQL Database

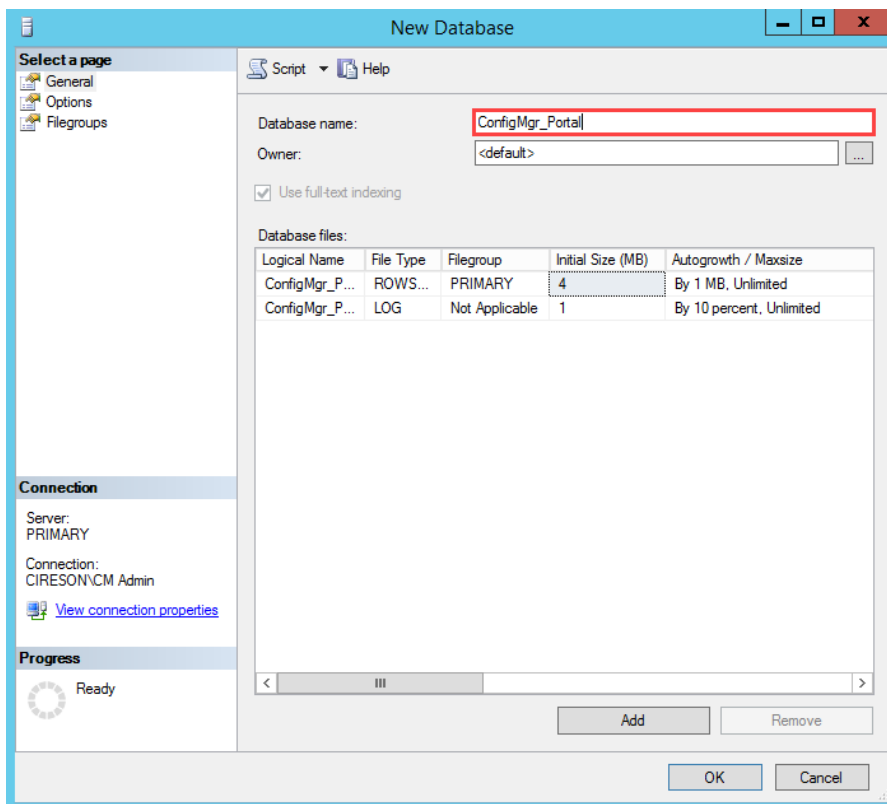
To create the new SQL database for the Portal:

- Logon to the server that will host the Portal either with an account that has local Administrator rights, or which has rights to create and modify SQL databases and settings.
- 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.

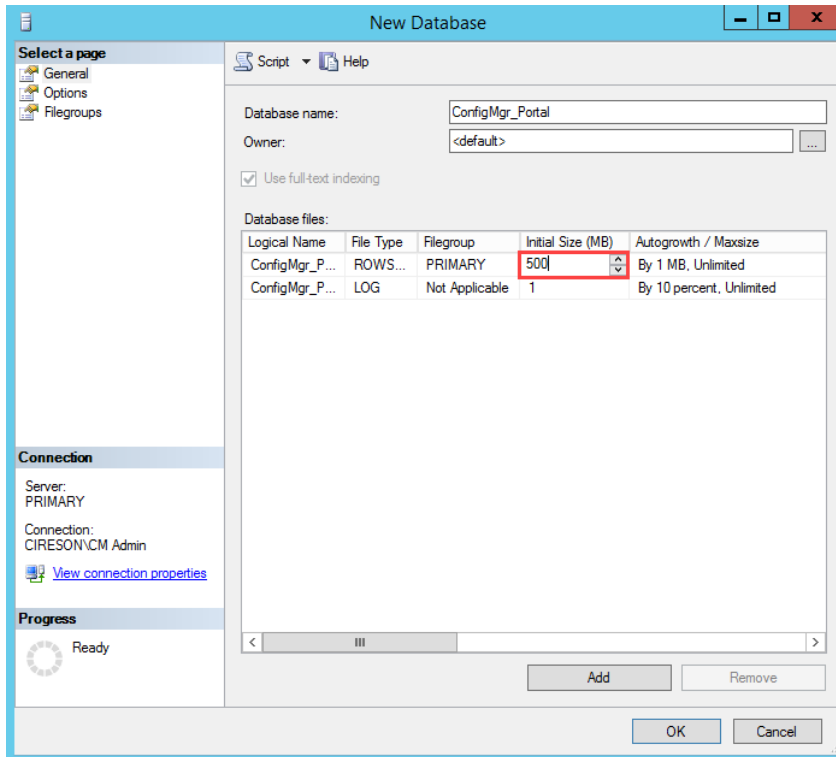
3. Right-click **Databases** and select **New Database**.



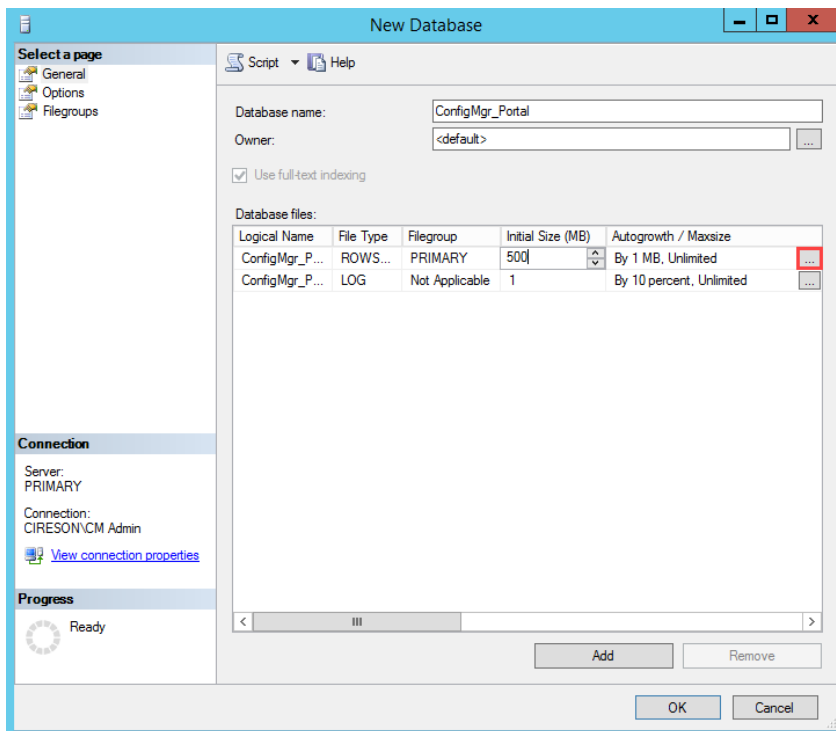
4. On the **New Database** screen, type **ConfigMgr_Portal** in the **Database name** field.



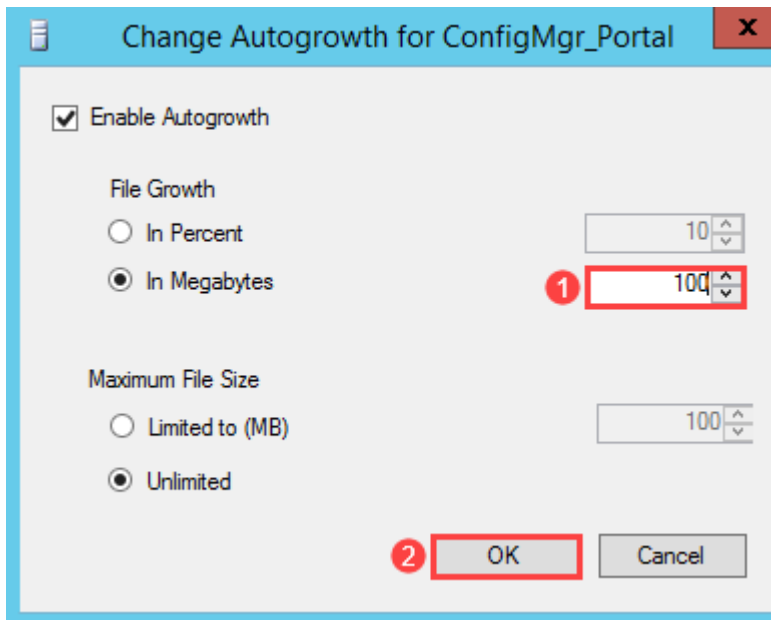
- For the **ConfigMgr_Portal** database, set the **Initial Size (MB)** value to be whichever is the greater of either ten percent of the size of the ConfigMgr site database or **500 MB**.



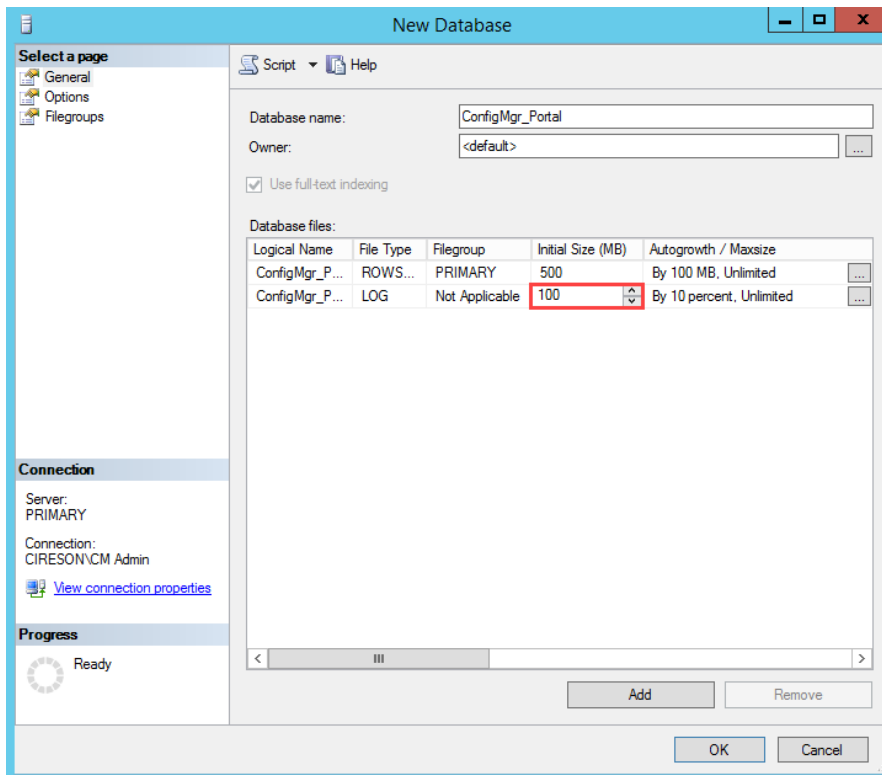
- Click the ellipses (...) after the **Autogrowth / Maxsize** value for the **ConfigMgr_Portal** database (you may need to make the **New Database** dialog box bigger to see these).



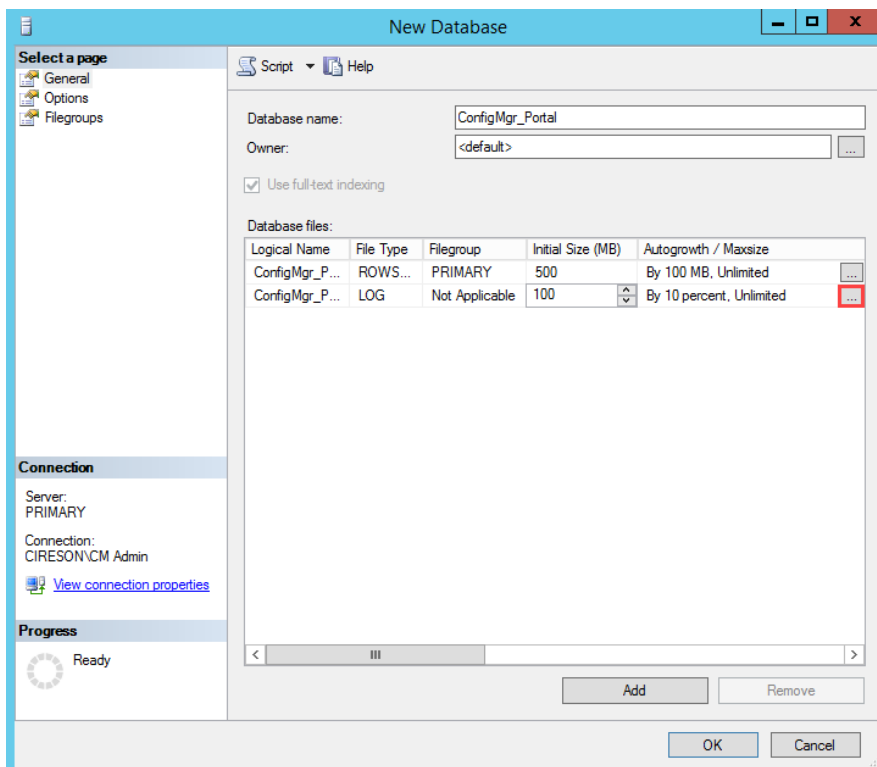
7. In the **Change Autogrowth for ConfigMgr_Portal** dialog box change the **In Megabytes** value to **100** then click **OK**.



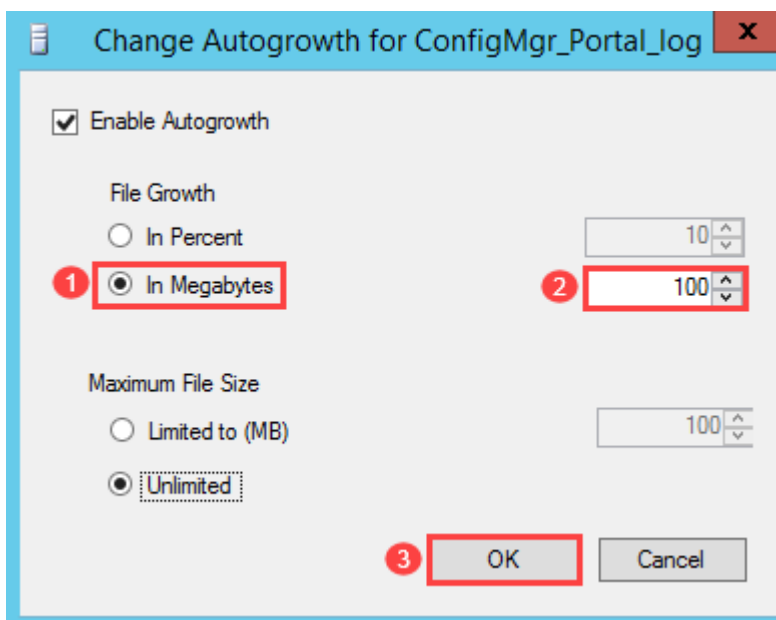
8. For the **ConfigMgr_Portal** SQL Log, set the **Initial Size (MB)** value to be whichever is the greater of either ten percent of the size of the ConfigMgr site database log or **100 MB**.

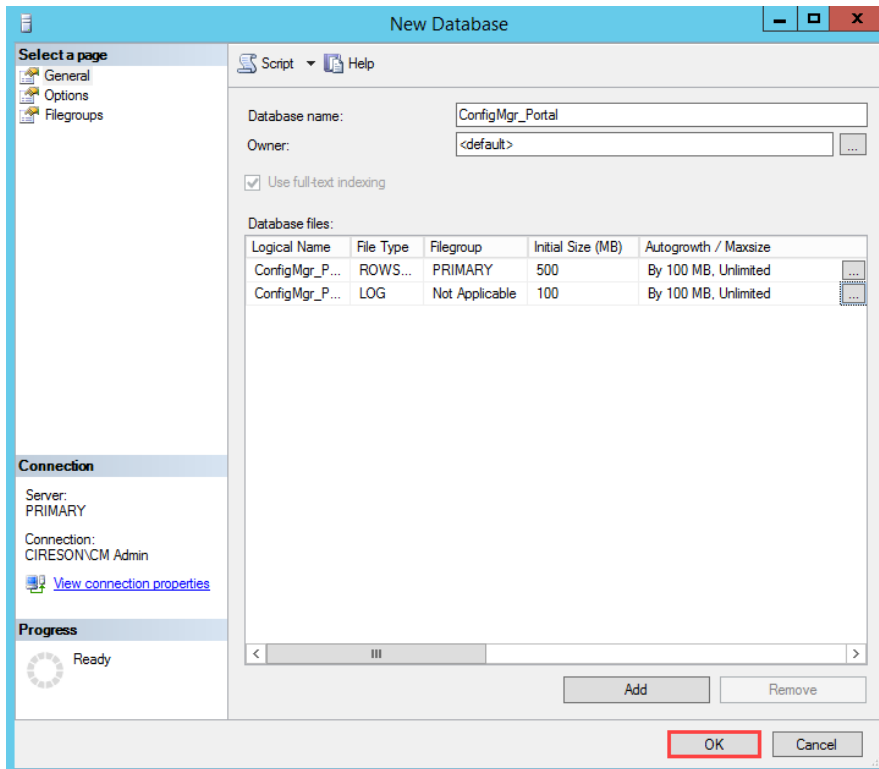


9. Click the ellipses (...) after the **Autogrowth / Maxsize** value for the **ConfigMgr_Portal_log** SQL log.



10. 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 process.

Granting the Portal user access to the SQL Databases

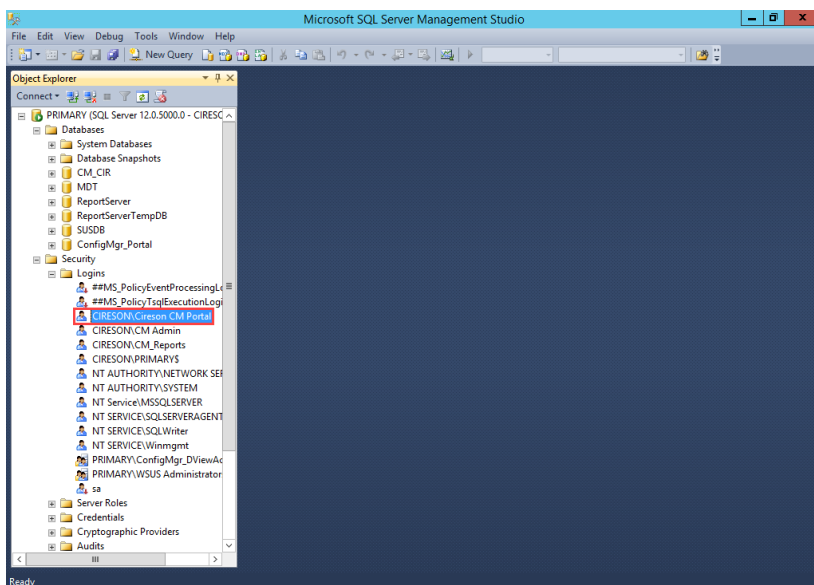
The next part of the process is to grant the Portal user access to the various SQL databases it requires access to.

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

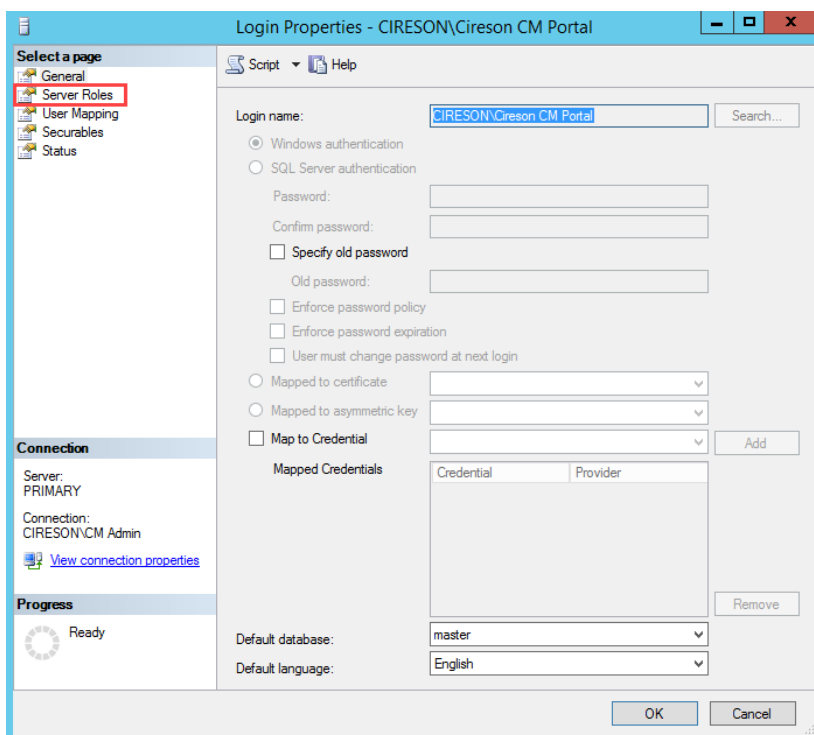
1. Logon to the server that will host the Portal either with an account that has local Administrator rights, or which has rights to create and modify SQL databases and settings.
2. Start **SQL Server Management Studio**.
3. Navigate to **<server_name> | Security | Logins**.

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.

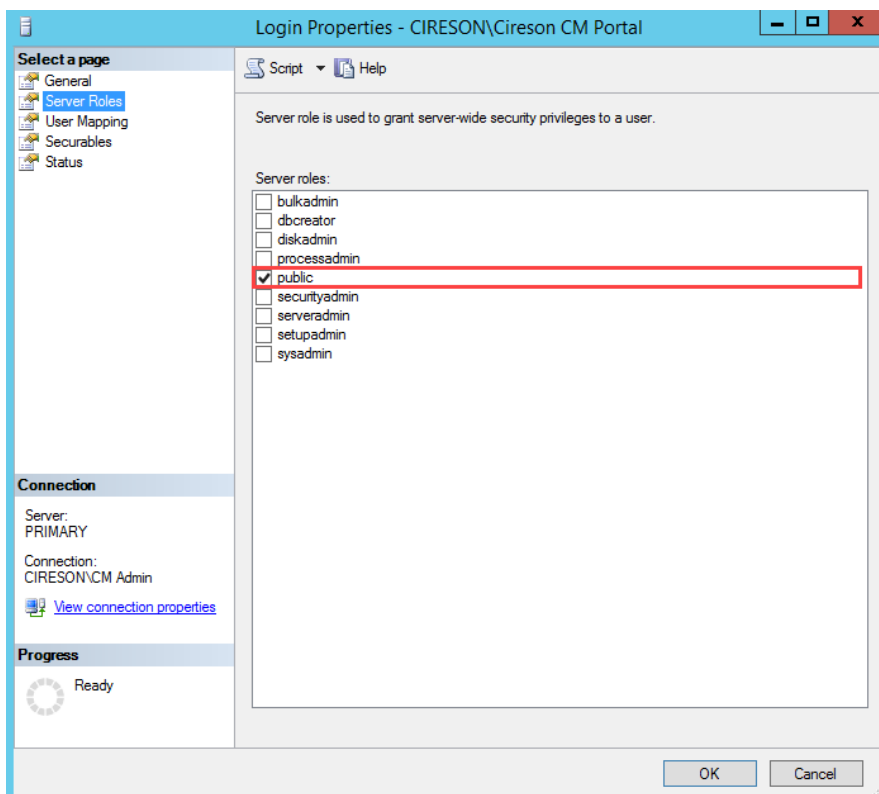
4. Double-click the Login for the Portal user account (for example **Cireson\Cireson CM Portal**).



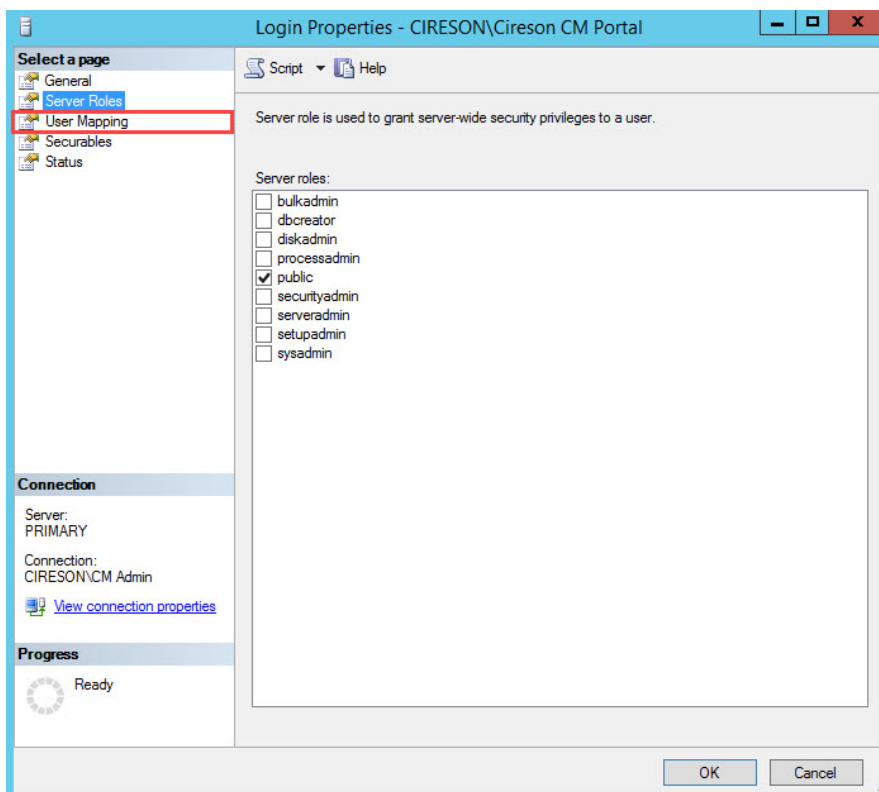
5. Under the **Select a page** section select the **Server Roles** page.



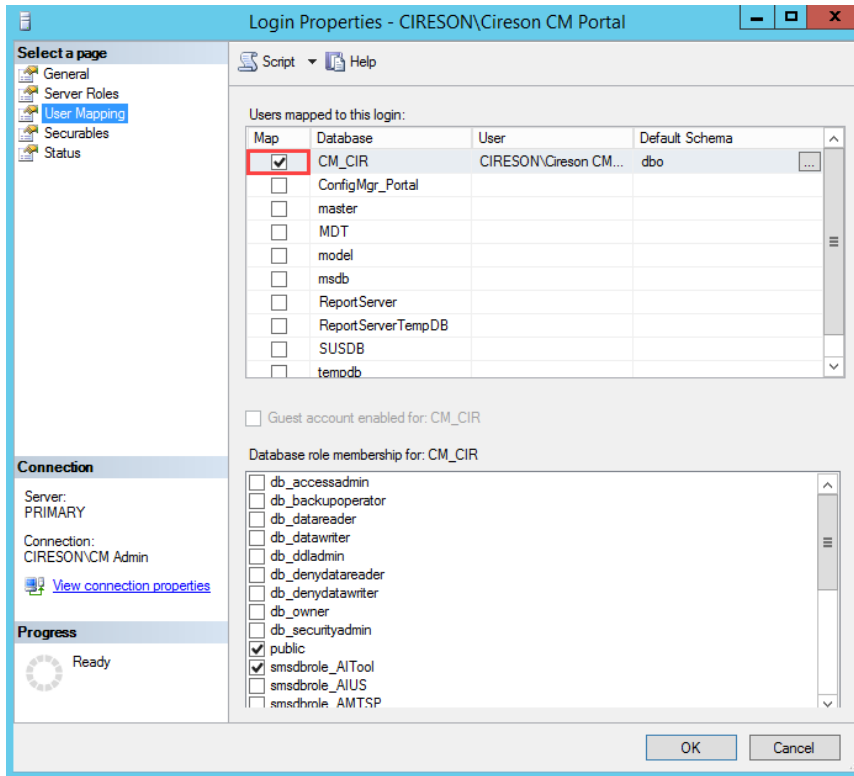
6. Verify that **public** is selected.



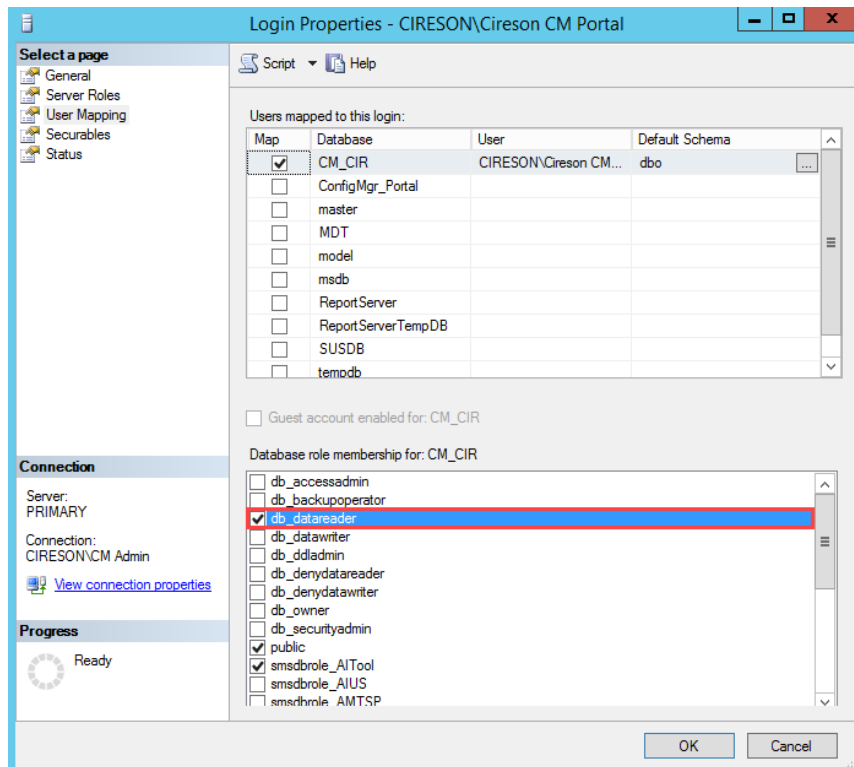
7. Under the **Select a page** section select the **User Mapping** page.



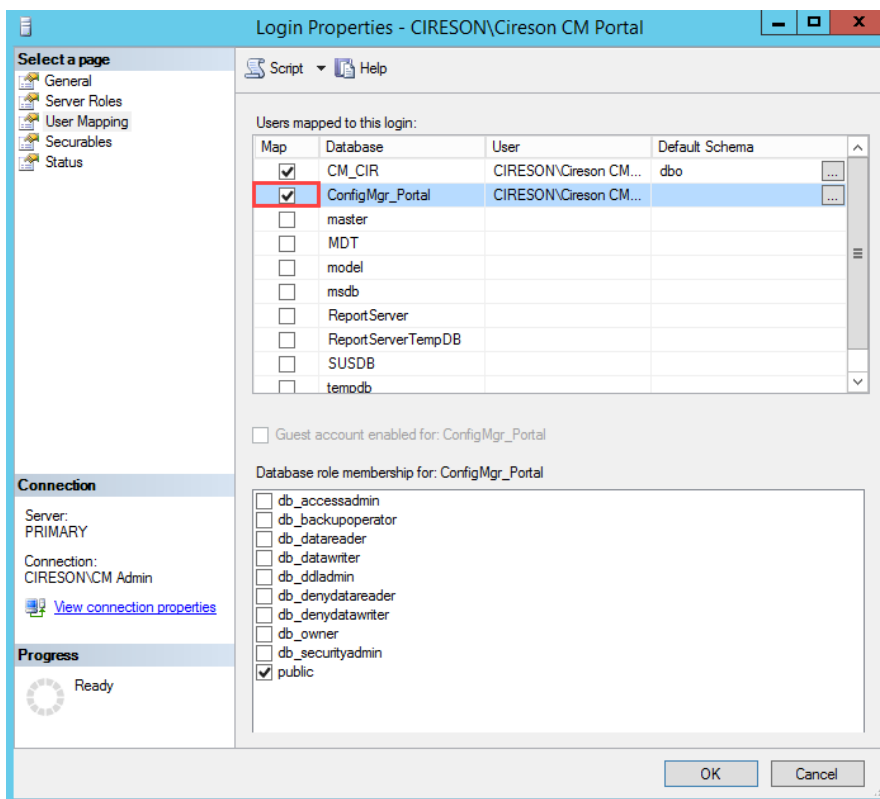
8. Verify that the checkbox in the **Map** column beside the ConfigMgr database (**CM_XXX** by default where **XXX** is your site code) has been checked.



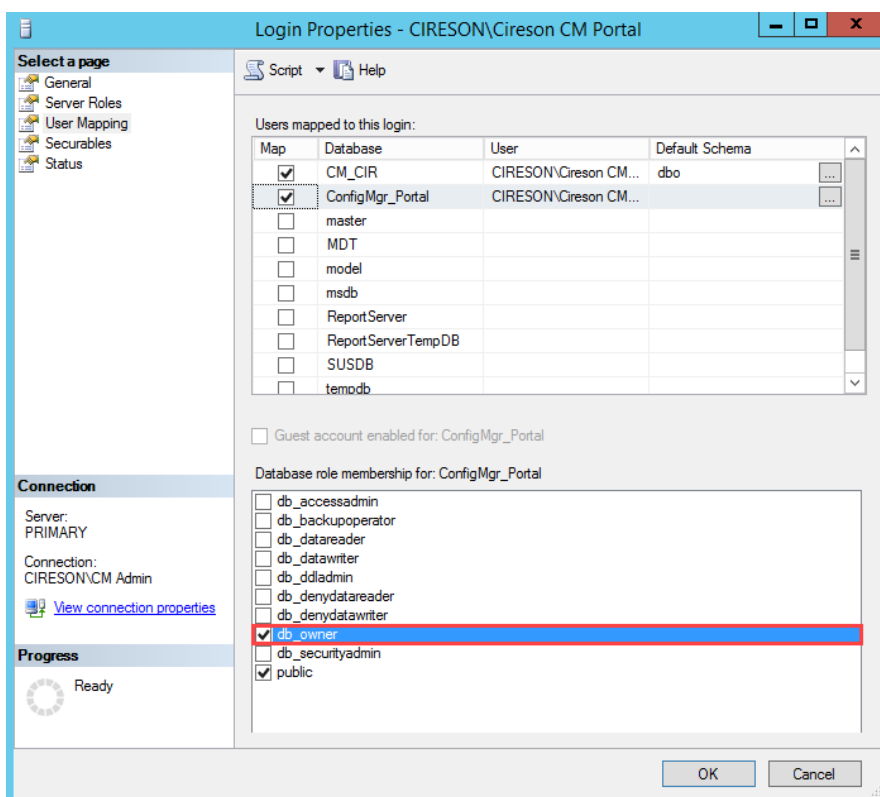
9. Select the checkbox beside **db_datareader**.



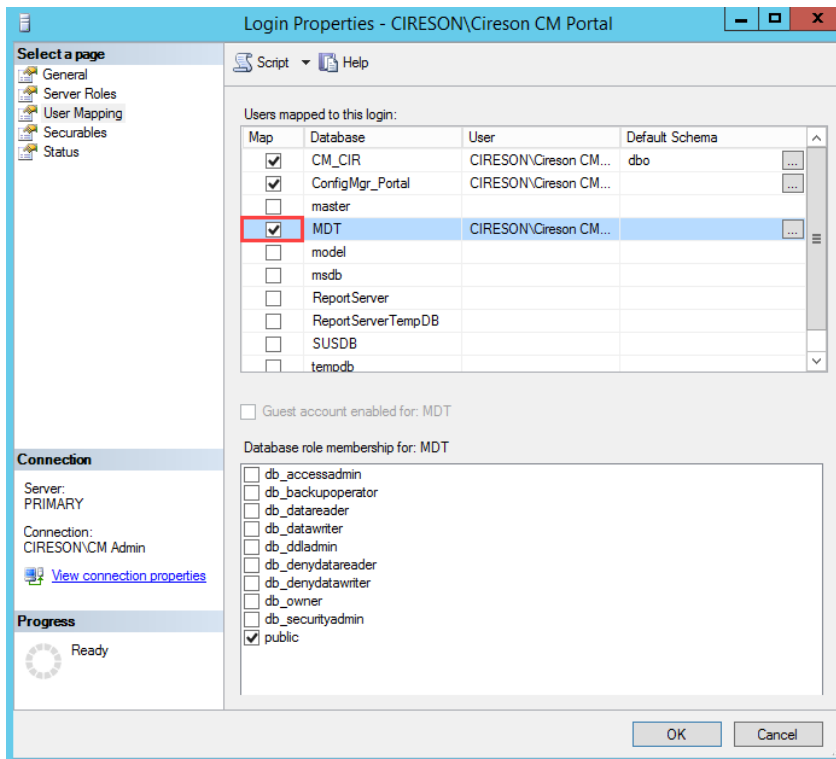
10. Select the checkbox in the **Map** column beside the **ConfigMgr_Portal** database.



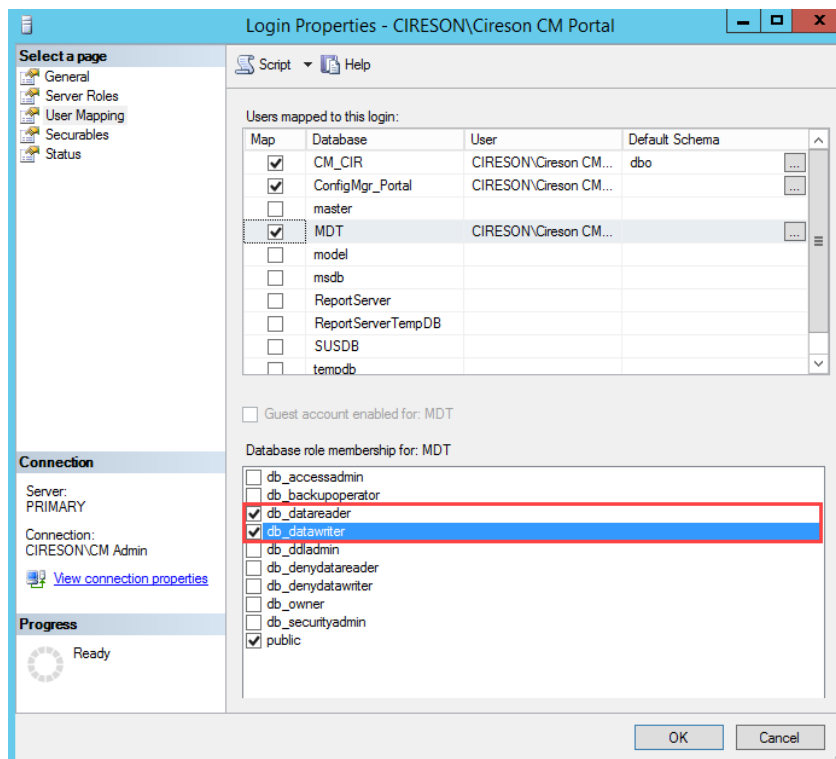
11. Select the checkbox beside **db_owner**.



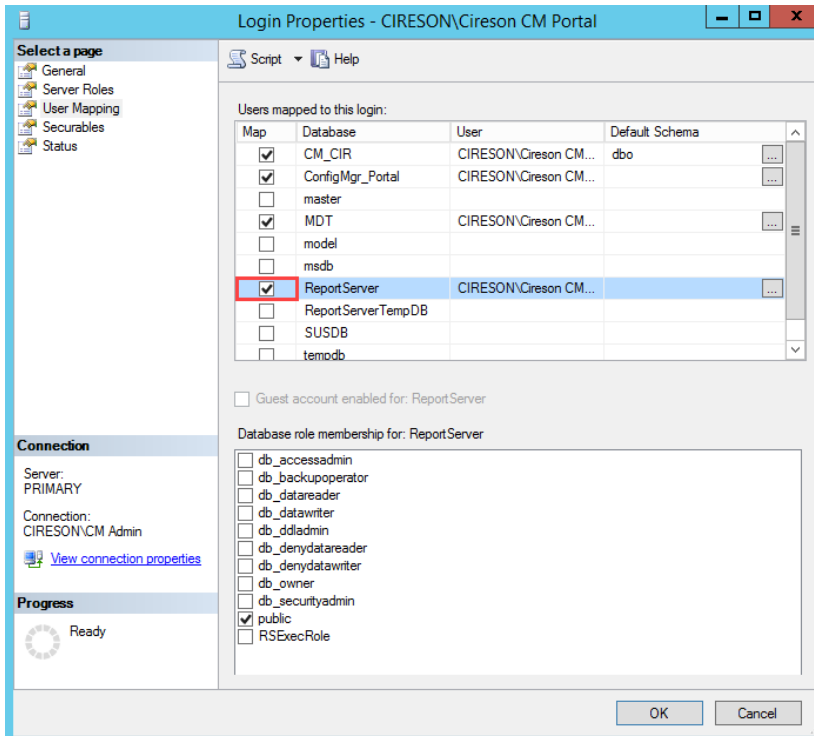
12. If MDT has been installed and you want the Portal to integrate with it, select the checkbox in the **Map** column beside the **MDT** database.



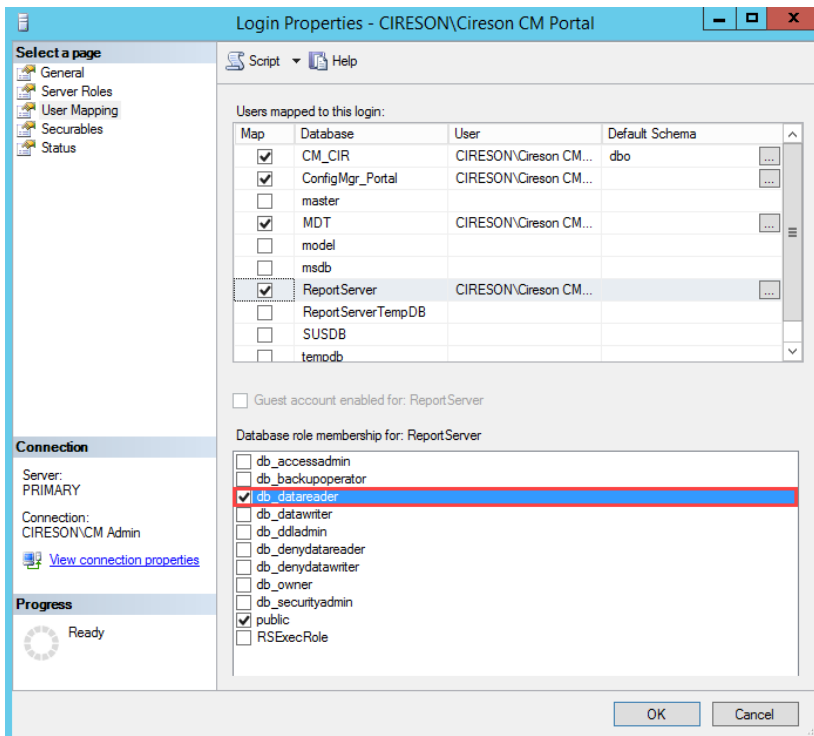
13. Select both the **db_datareader** and **db_datawriter** checkboxes.



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.

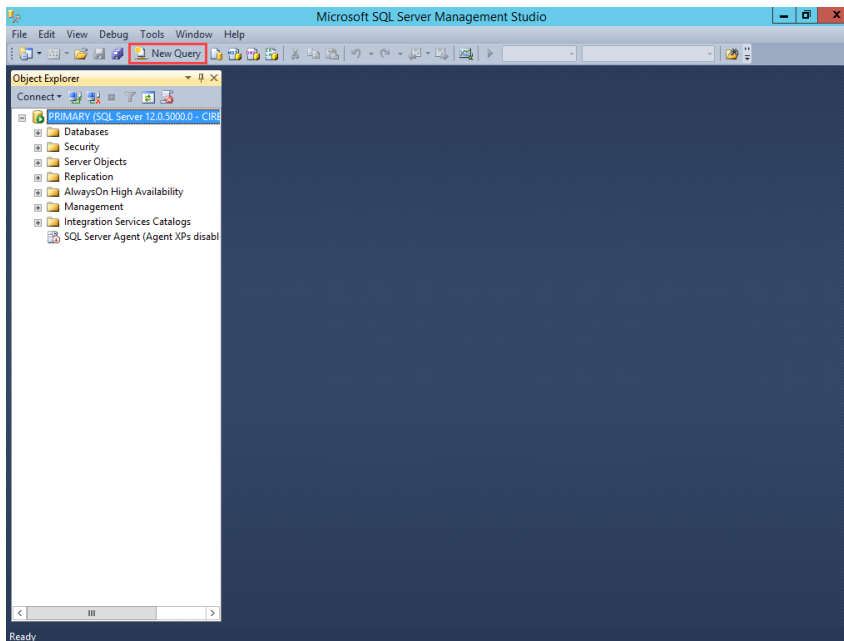
Our recommendation is you grant the **VIEW SERVER STATE** permission as detailed below.

To run the SQL scripts:

1. Logon to the server that will host the Portal either with an account that has local Administrator rights, or which has rights to create and modify SQL databases and settings.

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>]

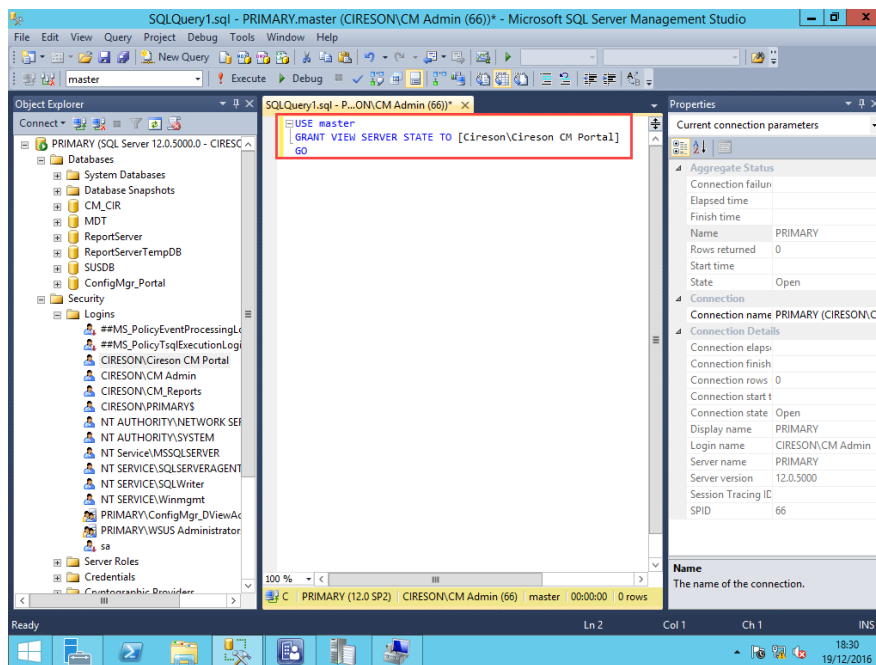
GO

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

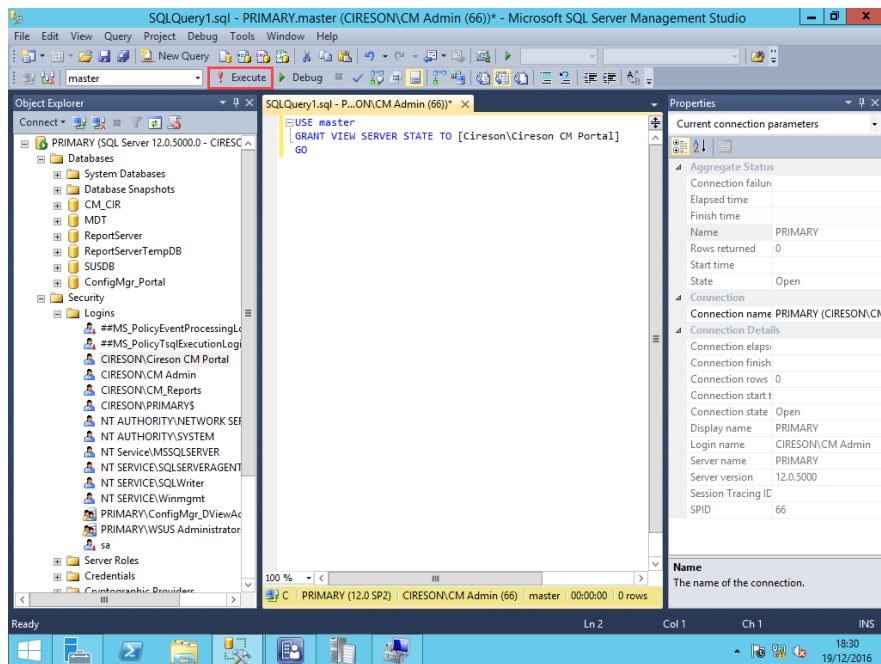
USE master

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

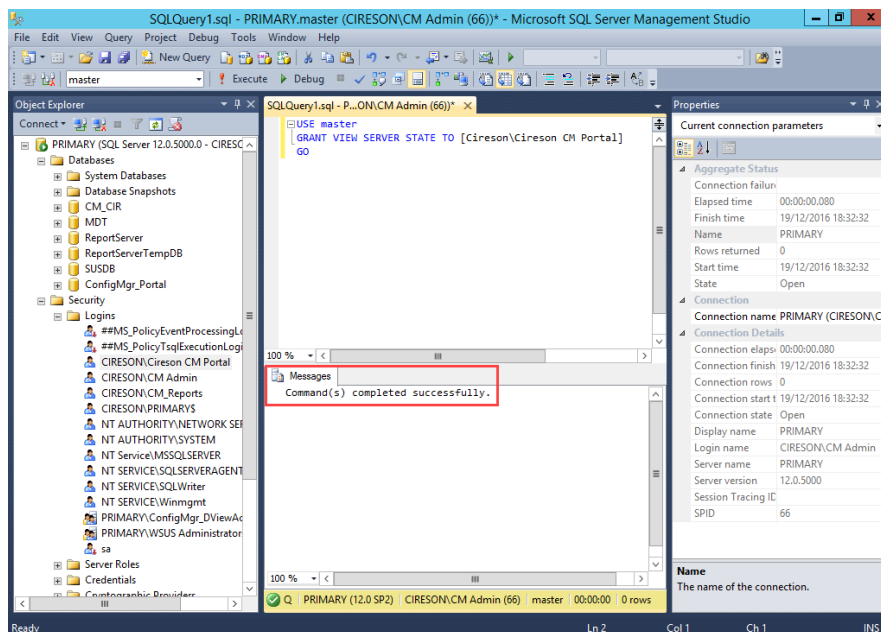
GO



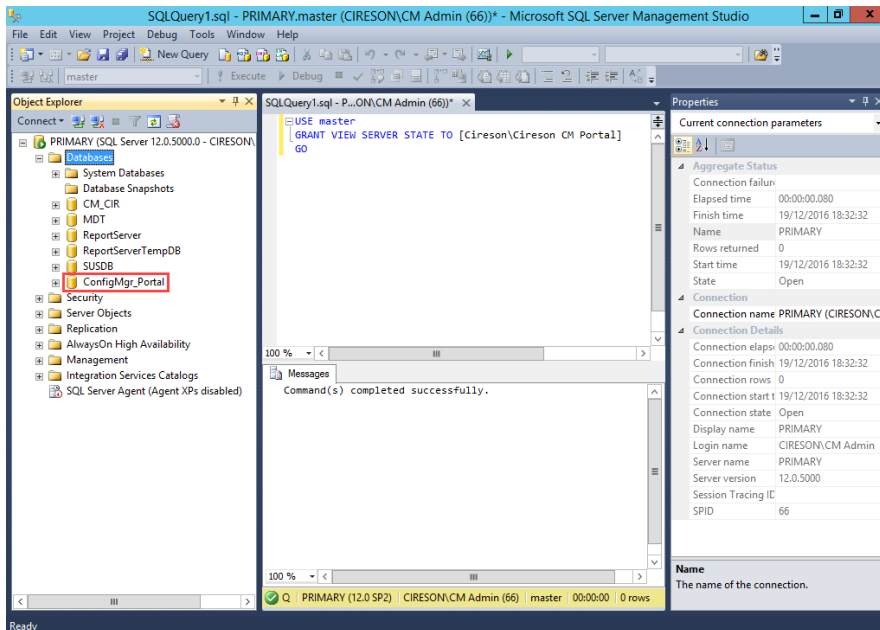
5. Click **Execute** on the toolbar.



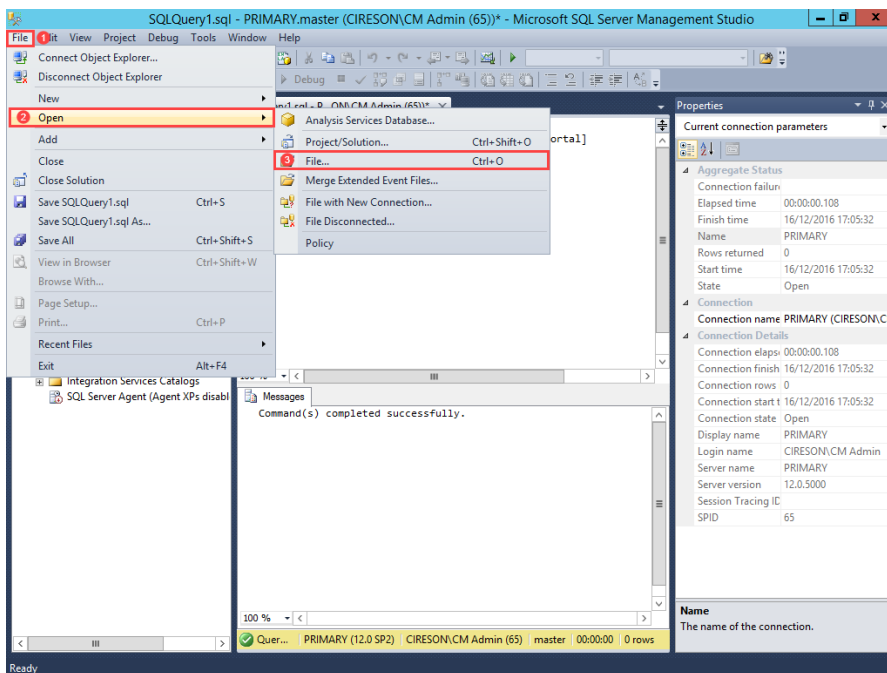
The message **Command(s) completed successfully** will be displayed in the **Messages** pane.



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

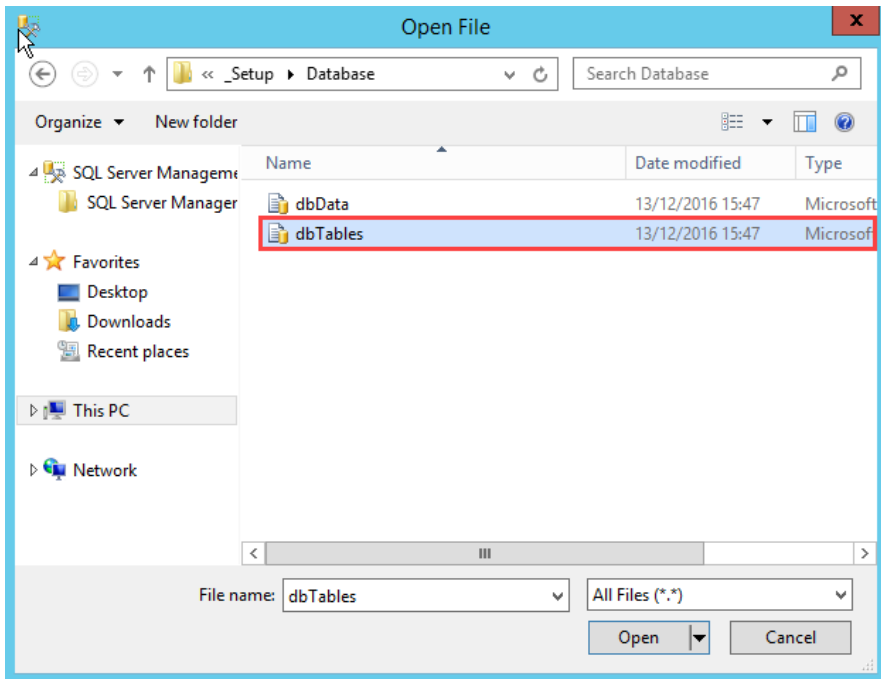


- In SQL Management Studio on the **File** menu select **Open | File**.

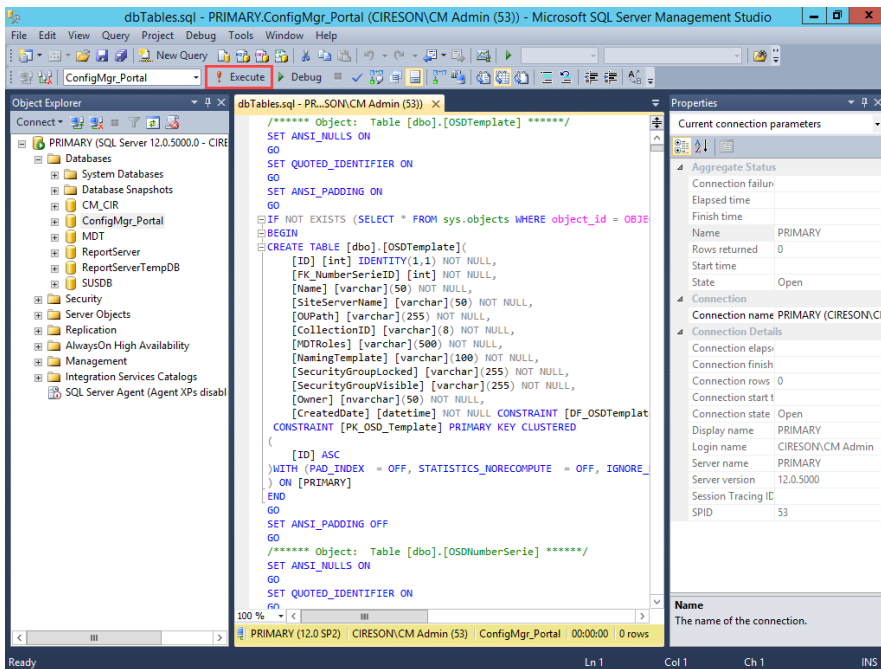


- Browse to the **C:\Inetpub\ConfigMgr Portal_Setup\Database** folder.

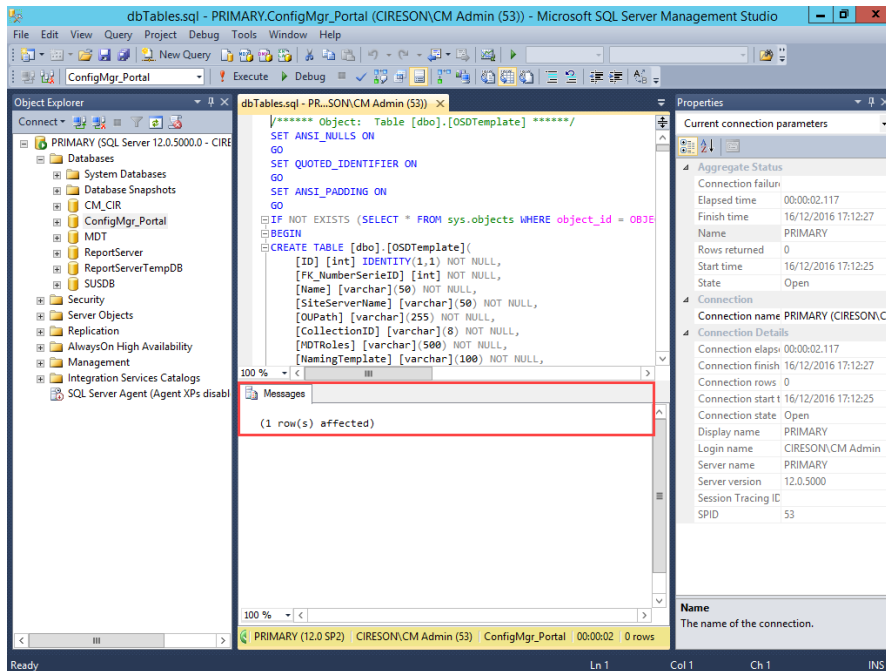
9. Double-click **dbTables.sql** which will open it as a query in SQL Management Studio.



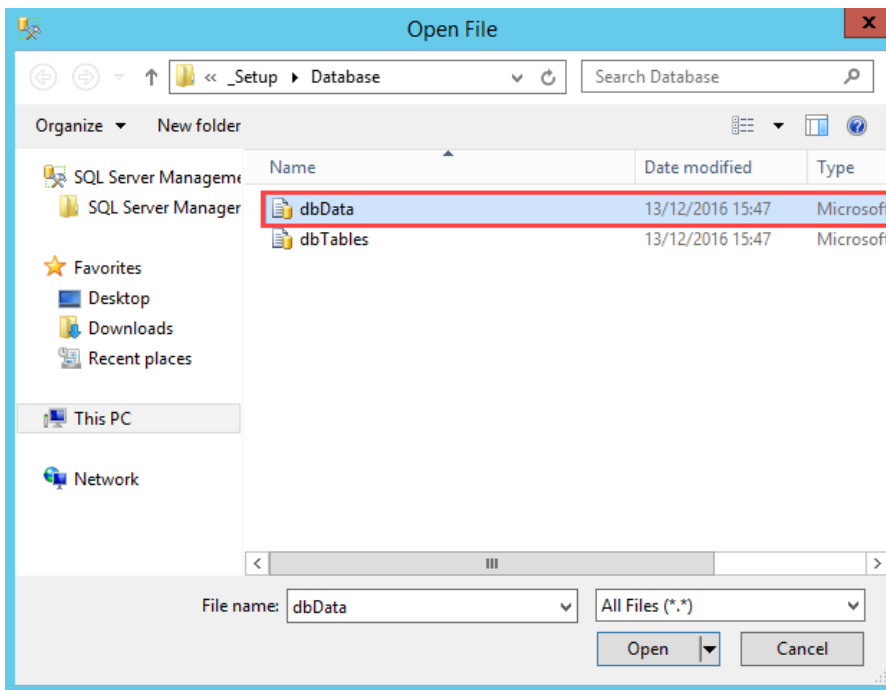
10. Click **Execute** on the toolbar.

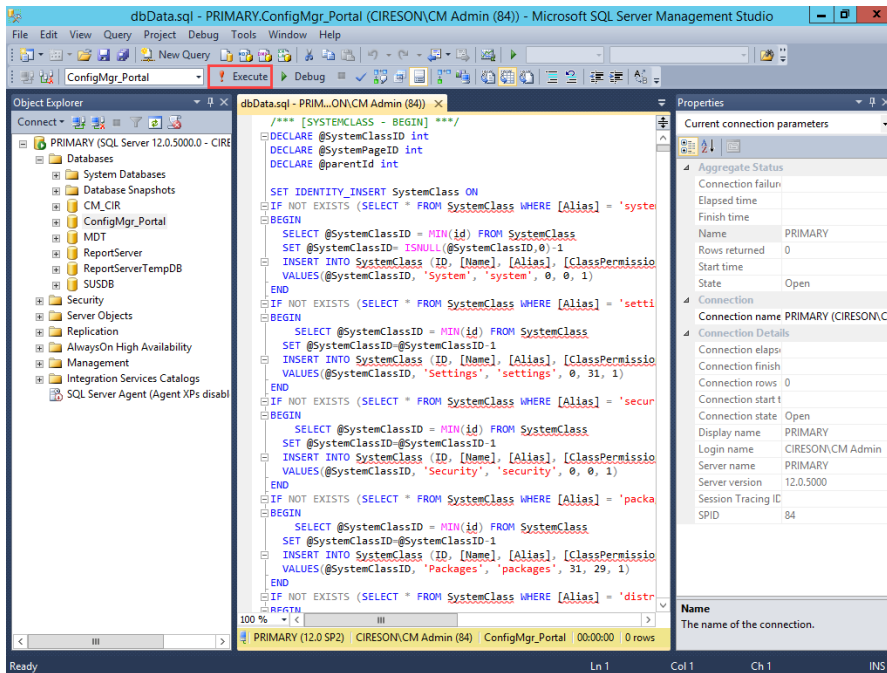


The message **(1 row(s) affected)** will be displayed in the **Messages** pane.

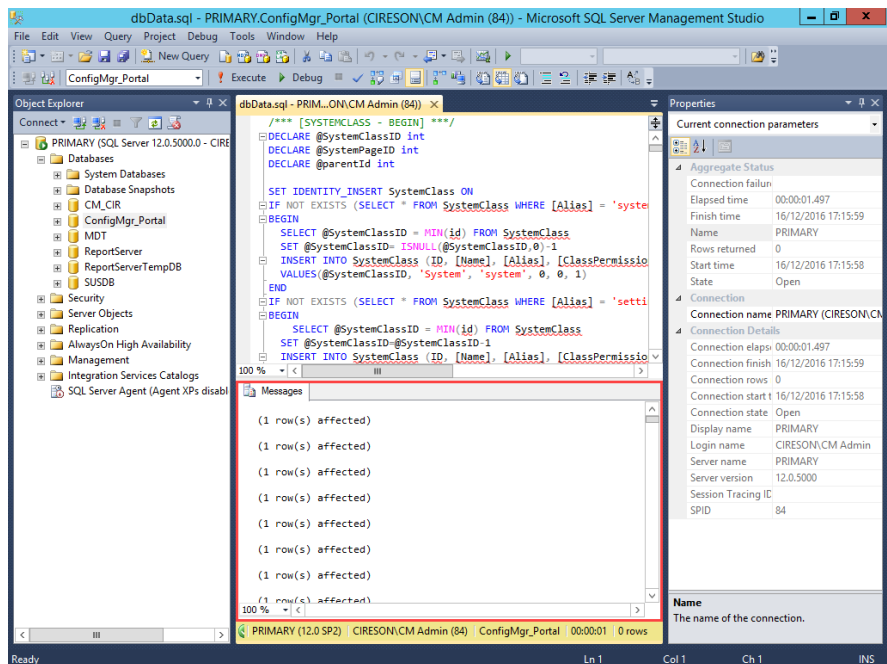


11. In SQL Management Studio on the **File** menu select **Open | File**.
12. Browse to the **C:\Inetpub\ConfigMgr Portal_Setup\Database** folder.
13. Double-click **dbData.sql** which will open it as a query in SQL Management Studio.



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.

Run the Portal Configuration Wizard

The Portal is installed by running 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.

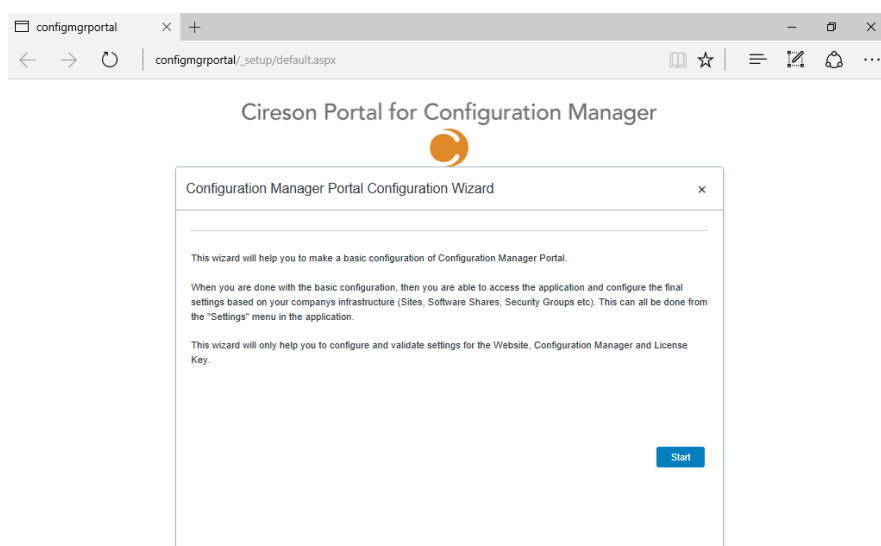
For example:

http://configmgrportal/_setup/default.aspx

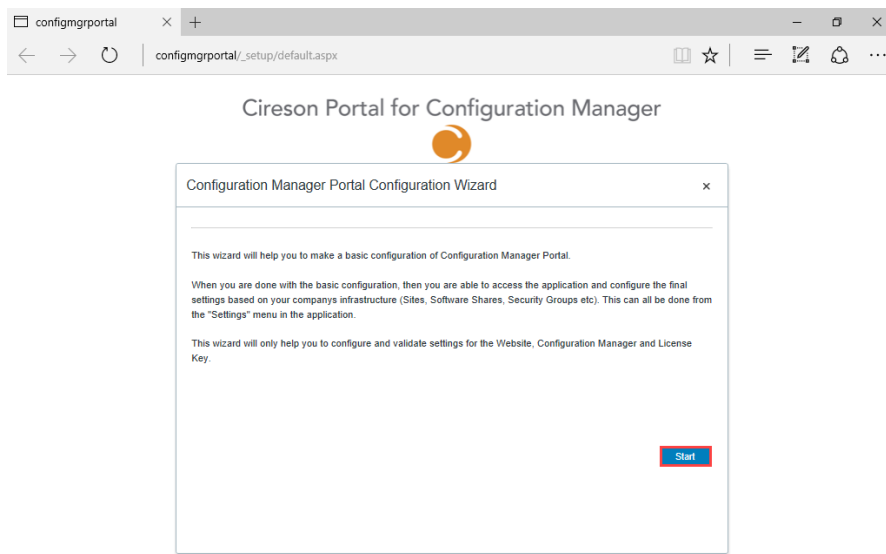
NOTE: The character before the word **Setup** is an underscore (“_”) not a space i.e.
_setup

2. Enter your credentials if prompted.

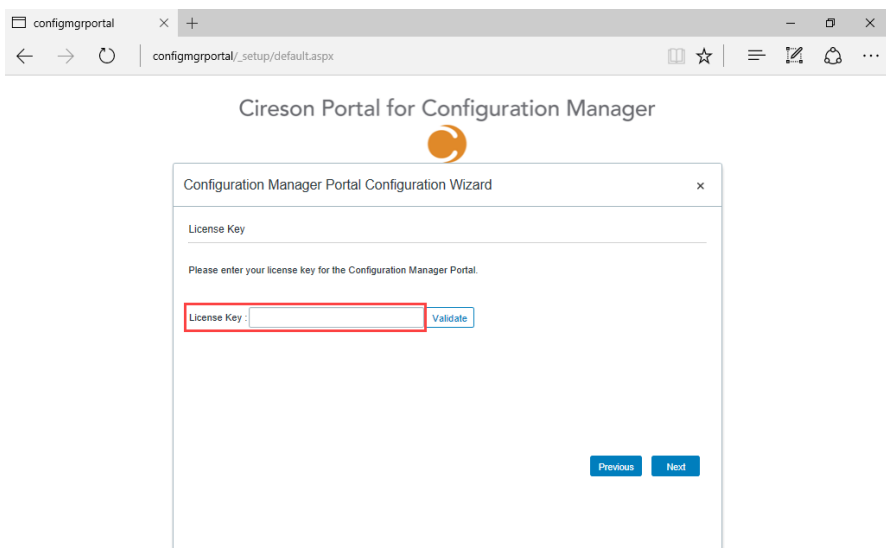
The **Configuration Manager Portal Configuration Wizard** screen will be displayed.



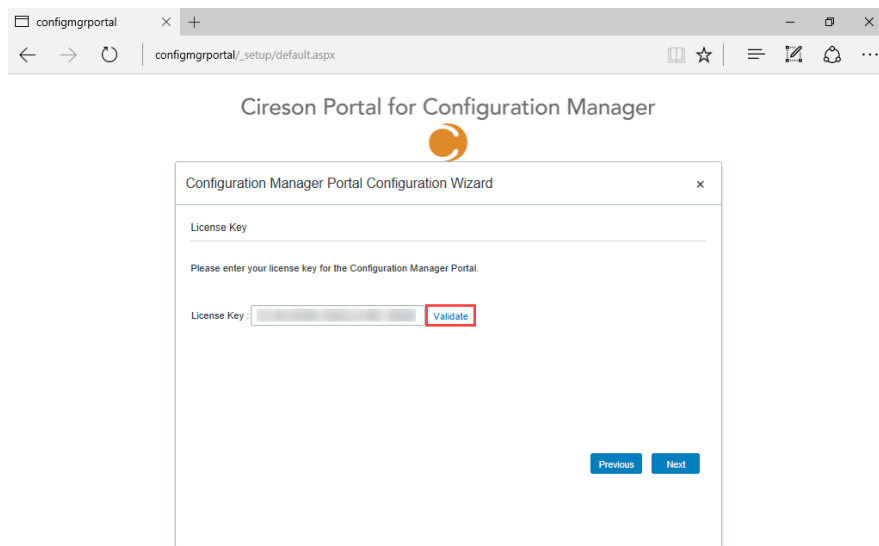
3. Click **Start**



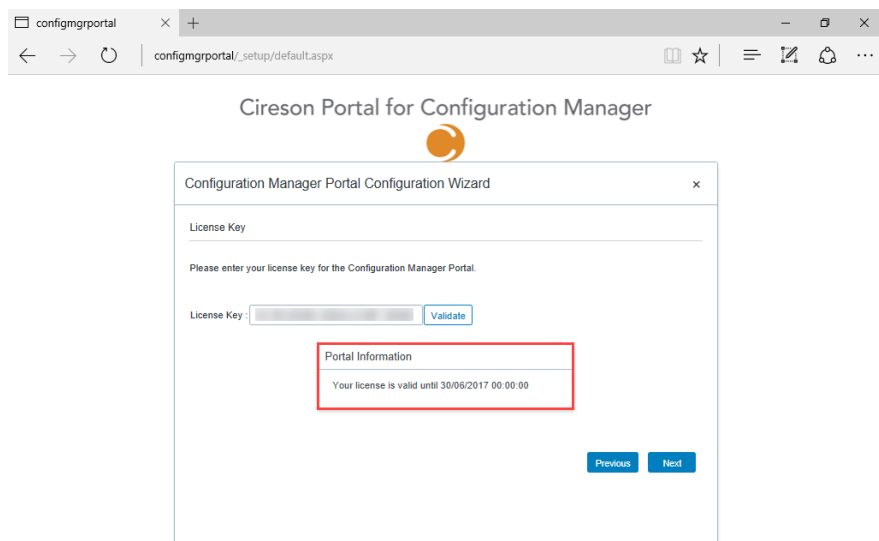
4. On the **License Key** page, enter your License Key in the **License Key** field.



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



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



6. Click **Next**

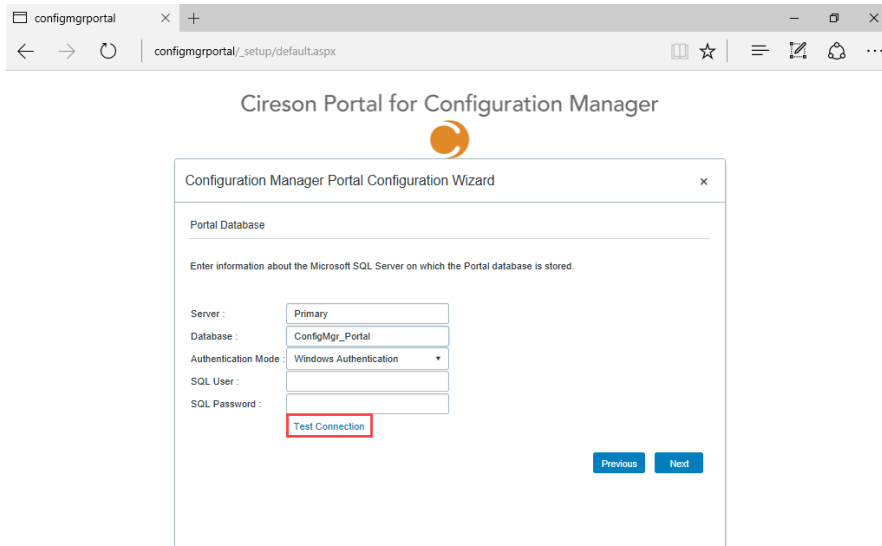
The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. Below the title is a logo and a window titled 'Configuration Manager Portal Configuration Wizard'. The main section is 'License 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.

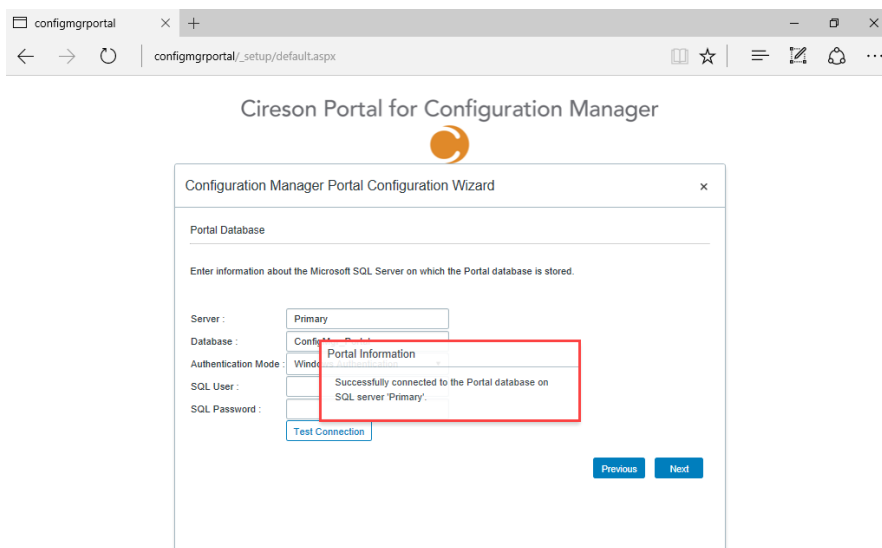
The screenshot shows the same web browser window, but the page title is 'Cireson Portal for Configuration Manager' and the window title is 'Configuration Manager Portal Configuration Wizard'. The main section is 'Portal Database'. It contains a text input field for the database name and a 'Test Connection' 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 the 'Configuration Manager Portal Configuration Wizard' dialog box. The 'Portal Database' section contains the following fields: 'Server' (Primary), 'Database' (ConfigMgr_Portal), 'Authentication Mode' (Windows Authentication), 'SQL User' (empty), and 'SQL Password' (empty). There is a 'Test Connection' button below the password field. At the bottom right of the dialog are 'Previous' and 'Next' buttons. The 'Next' button is highlighted with a red border.

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 wizard is now on the 'Configuration Manager' step. The 'Site Server' field is highlighted with a red border and contains the value 'Primary'. Below it is a 'Test Connection' button. Other fields include 'SQL Server' (empty), 'SQL Database' (empty), 'Authentication Mode' (Windows Authentication), 'SQL User' (empty), and 'SQL Password' (empty). There is another 'Test Connection' button below the password field. At the bottom right of the dialog are 'Previous' and 'Next' buttons.

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 the text 'Configuration Manager Portal Configuration Wizard'. The wizard is titled 'Configuration Manager' and contains the following 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.' The form has the following fields: 'Site Server' (Primary), 'SQL Server' (empty), 'SQL Database' (empty), 'Authentication Mode' (Windows Authentication), 'SQL User' (empty), and 'SQL Password' (empty). A 'Test Connection' button is located below the 'SQL Password' field. A red box highlights the 'Test Connection' button. 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 Configuration Wizard as the previous image. The 'Test Connection' button is now highlighted with a red box. A message box is displayed over the form, titled 'Portal Information', with the text 'Successfully connected to 'Primary''. The message box also contains a 'Close' button. The 'Test Connection' button is still highlighted with a red box. The 'Previous' and 'Next' buttons are still visible at the bottom right.

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

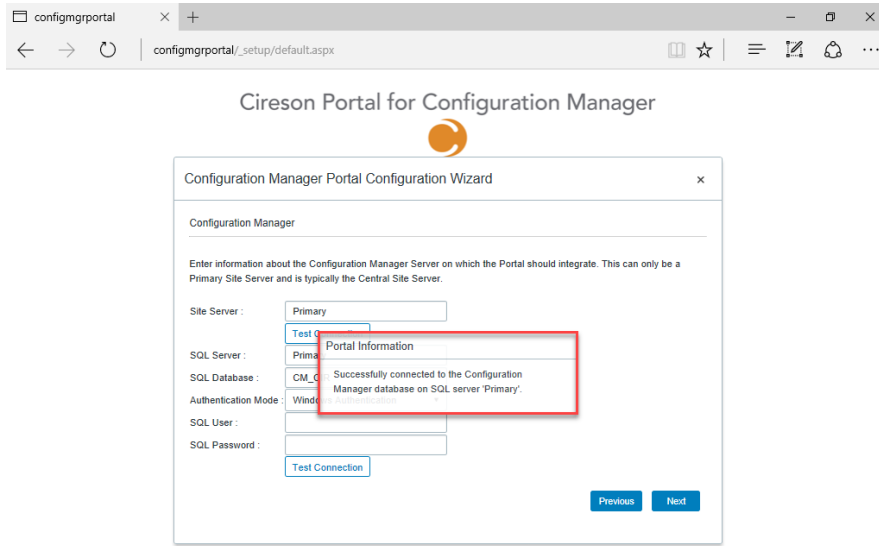
SQL User :
SQL Password :

Test Connection

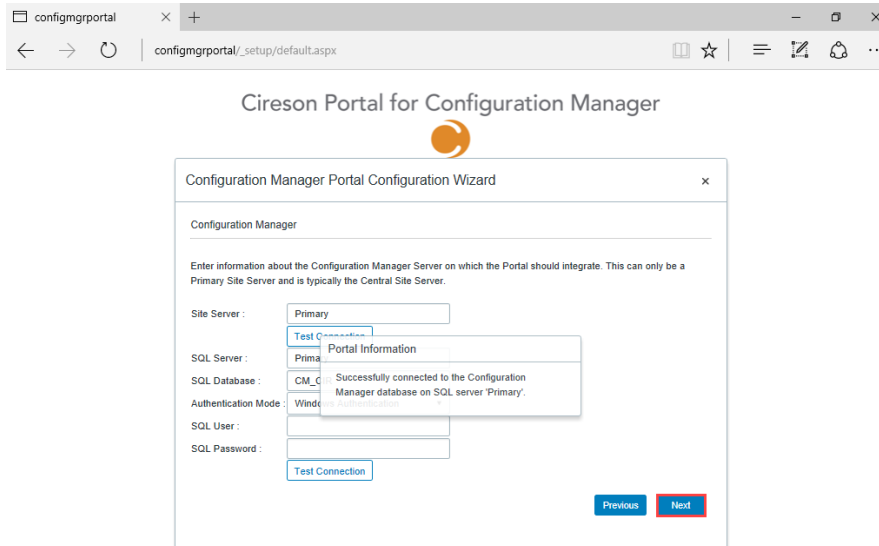
Previous Next

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.

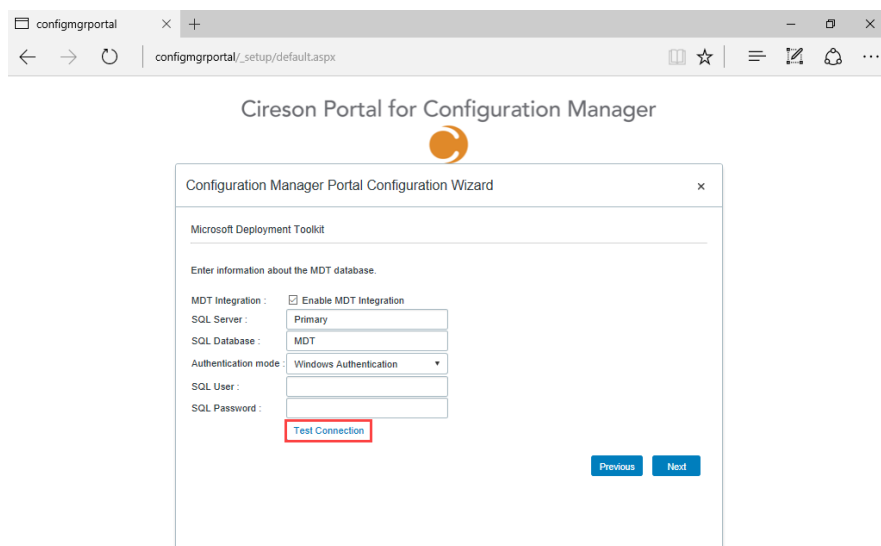
The screenshot shows a web browser window with the address bar displaying 'configmgrportal/_setup/default.aspx'. The page title is 'Cireson Portal for Configuration Manager'. Below the title is a logo and a window titled 'Configuration Manager Portal Configuration Wizard'. Inside the wizard, the 'Microsoft Deployment Toolkit' section is active. It contains the instruction 'Enter information about the MDT database.' and several input 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.

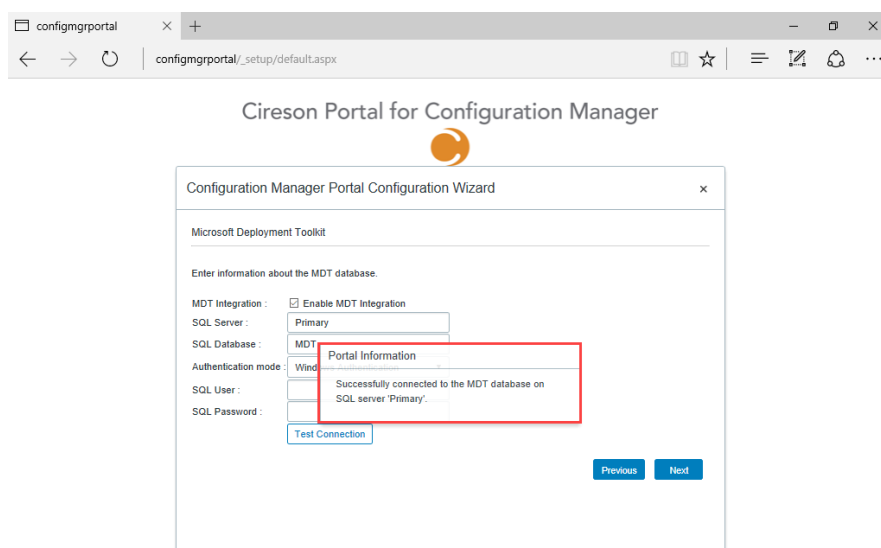
This screenshot is identical to the previous one, but with a red rectangular box highlighting the 'SQL Server' and 'SQL Database' input fields. The 'SQL Server' field contains the text 'Primary' and the 'SQL Database' field contains the text 'MDT'. All other elements, including the checked 'Enable MDT 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.

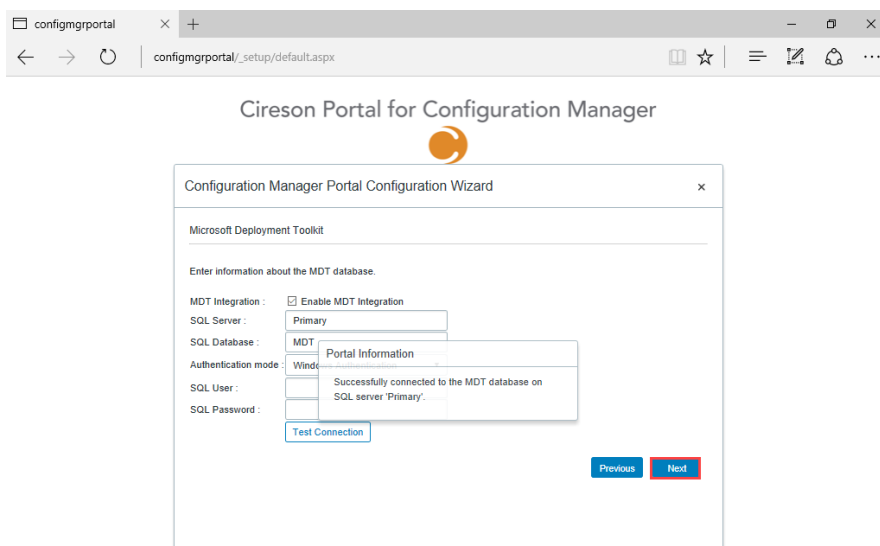
NOTE: If you are using Windows Authentication, the IIS Application Pool identity configured in the [Configuring the IIS Application Pool](#) section is used to access the database.



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



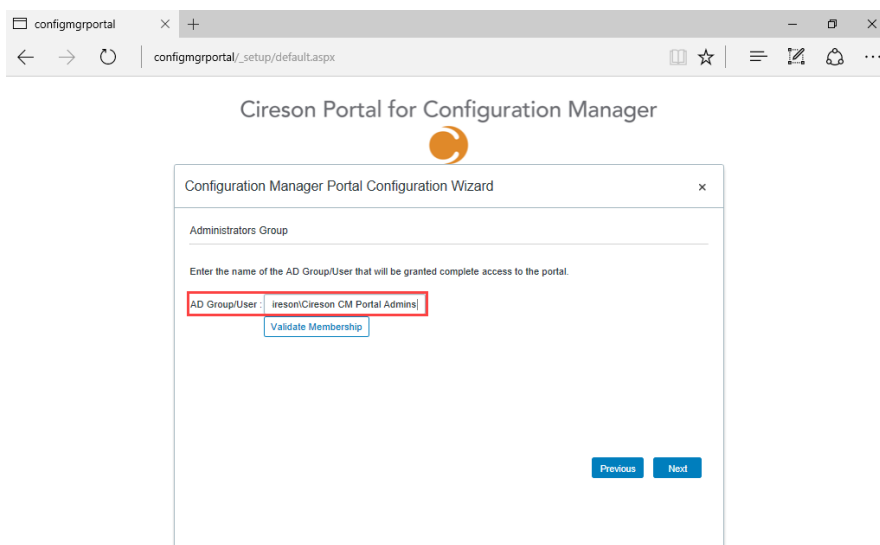
18. Click **Next**



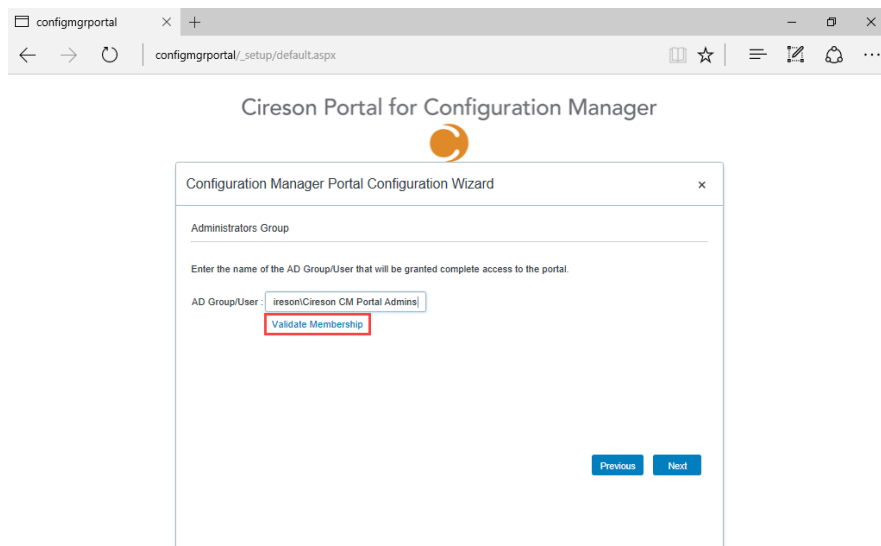
19. On the **Administrators Group** page, in the **AD Group/User** field enter the name of the Active Directory group/user that will have full access to the Portal in the format **<domain>\<name>** or **<server_name>\<name>**

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

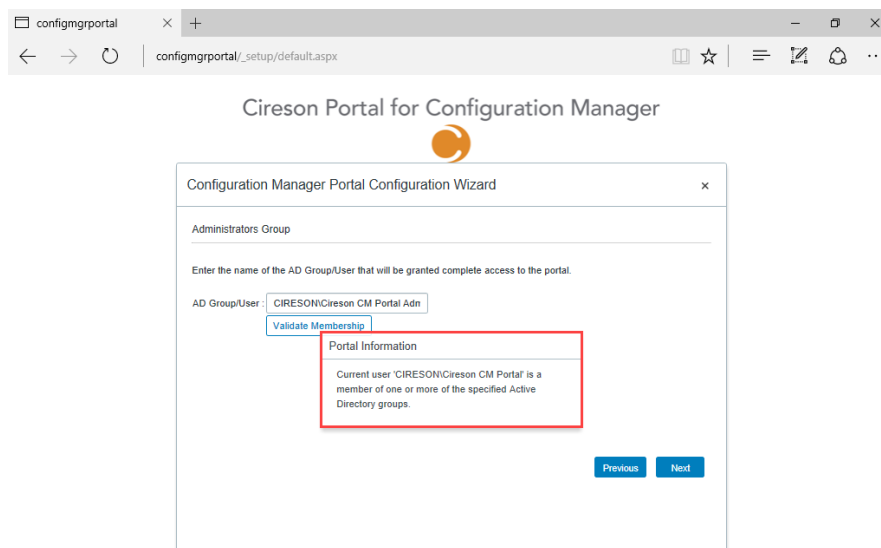
It is recommended that the user running the Portal Configuration Wizard is a member of this group.



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**

Configuration Manager Portal Configuration Wizard

Administrators Group

Enter the name of the AD Group/User that will be granted complete access to the portal.

AD Group/User:

[Validate Membership](#)

Portal Information

Current user 'CIRESON\Cireson CM Portal' is a member of one or more of the specified Active Directory groups.

[Previous](#) [Next](#)

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

Configuration Manager Portal Configuration Wizard

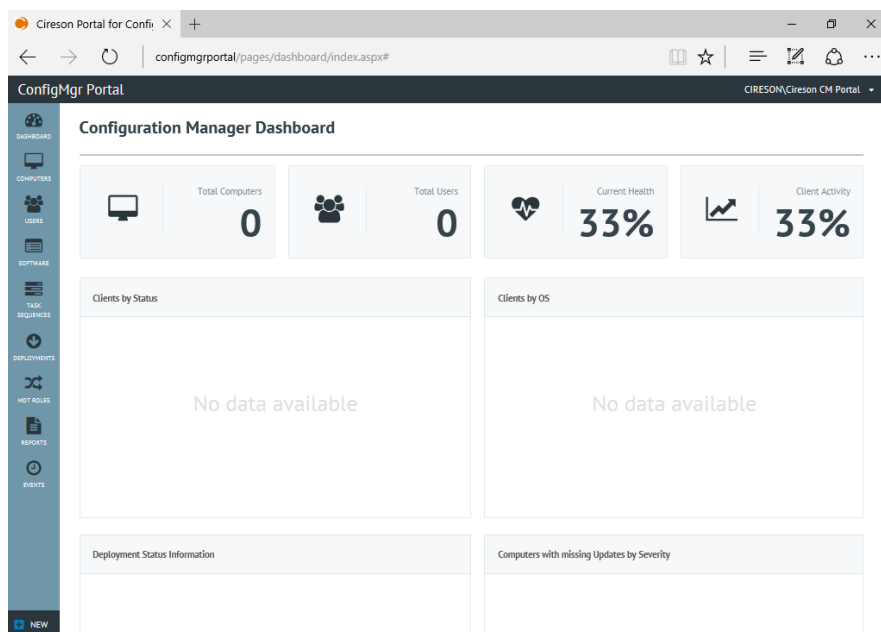
Wizard Complete

This completes the configuration wizard. Click "Finish" to save your settings and close this wizard.

Note that all settings in this wizard can be changed directly in the application if desired.

[Previous](#) [Finish](#)

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



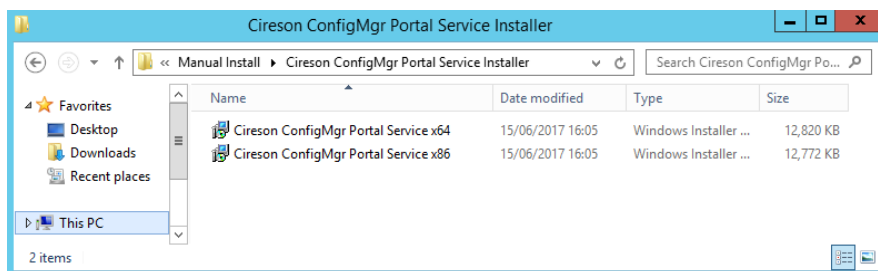
NOTE: It is normal for the values shown in the Dashboard to be incorrect at this point as the Portal caching service has not been installed. It is the Portal caching service that reads the relevant data from the ConfigMgr database in order to populate the dashboard. Installation of the caching service is covered in the next section.

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**.

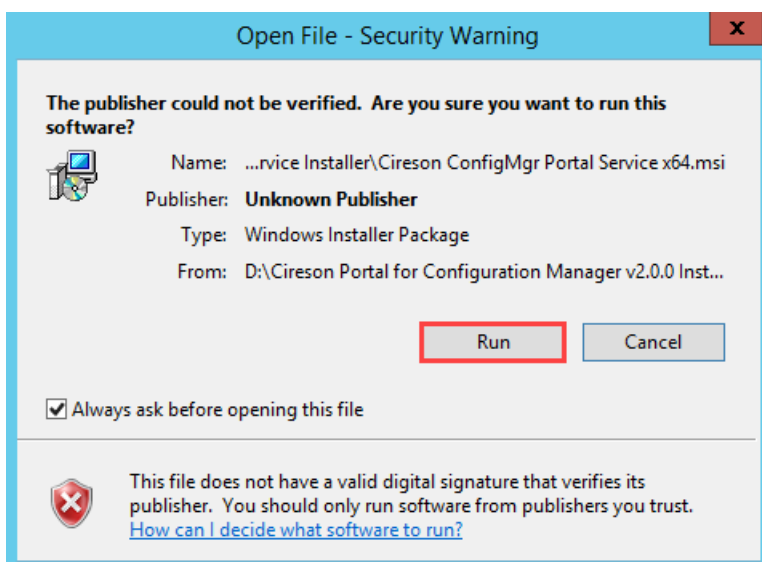
To install the Portal Caching Service:

1. Logon to the server that is hosting the Portal with an account that has local Administrator rights.
2. Navigate to the folder containing the extracted Portal service installers, for example:
<drive>:\Cireson Portal for Configuration Manager vx.x.x Install\Manual Install\Cireson ConfigMgr Portal Service Installer (where x.x.x is the version number).

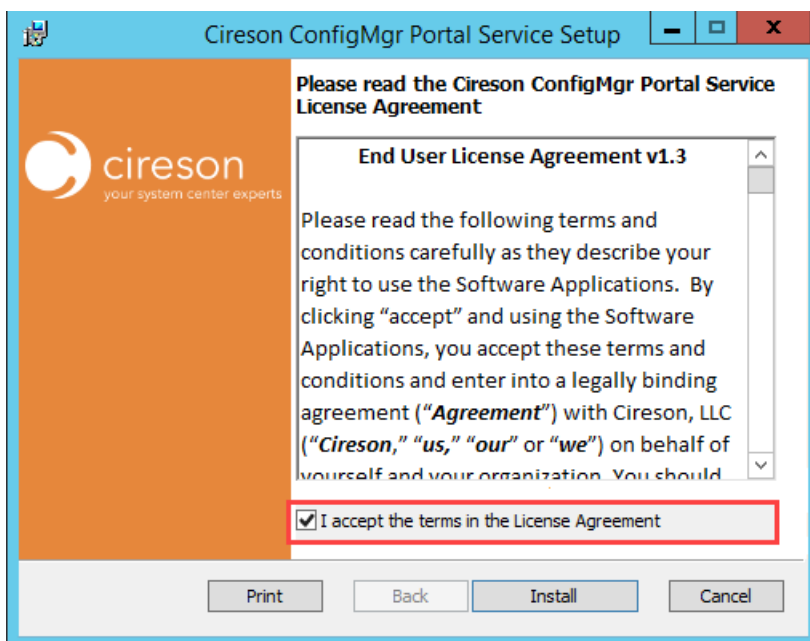


3. Run either **Cireson ConfigMgr Portal Service x64.msi** or **Cireson ConfigMgr Portal Service x86.msi** depending on the architecture of the machine you are running which will start the **Cireson ConfigMgr Portal Service Setup** installation.

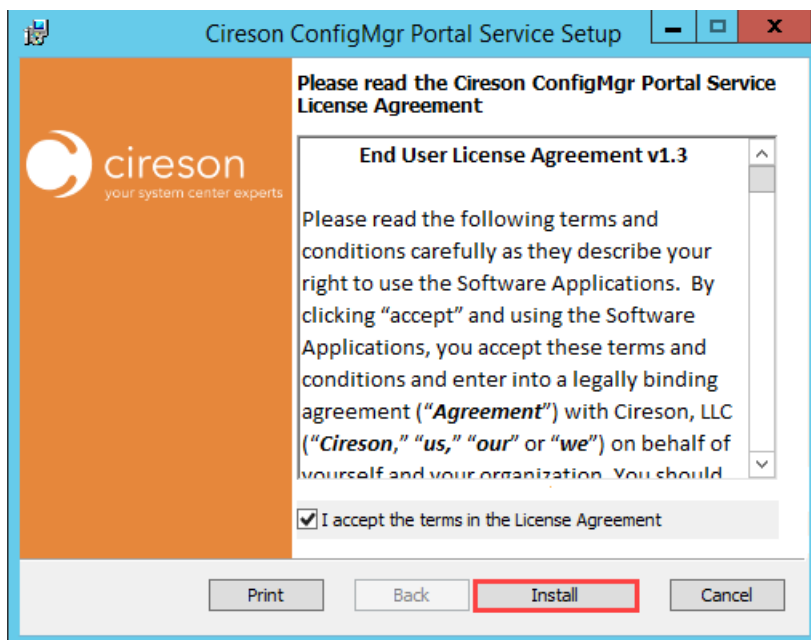
4. On the **Open File – Security Warning** dialog box, click **Run**



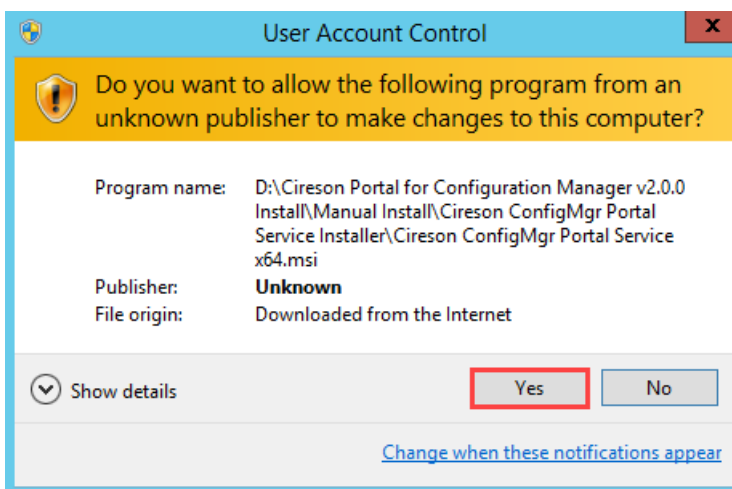
5. Select the **I accept the terms in the License Agreement** checkbox.



6. Click **Install**

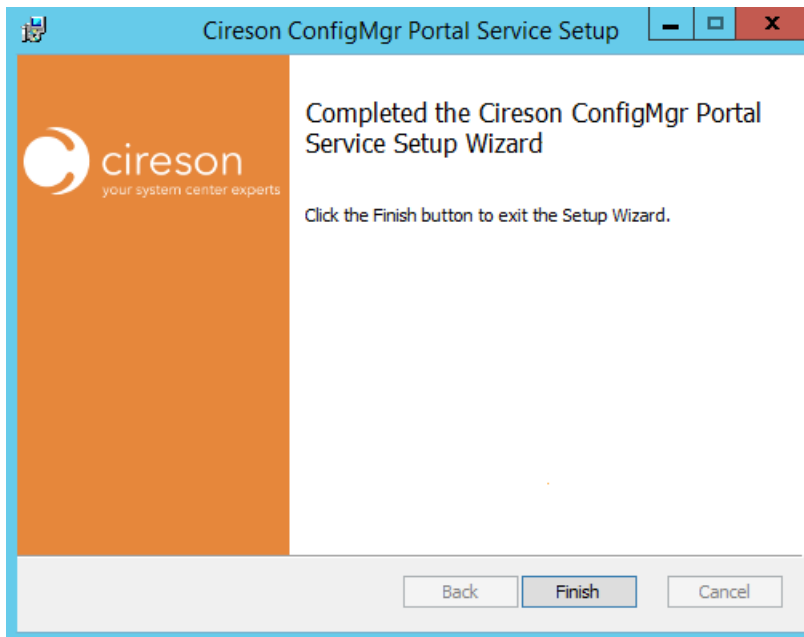


7. Click **Yes** on the **User Account Control** dialog box if it is displayed.

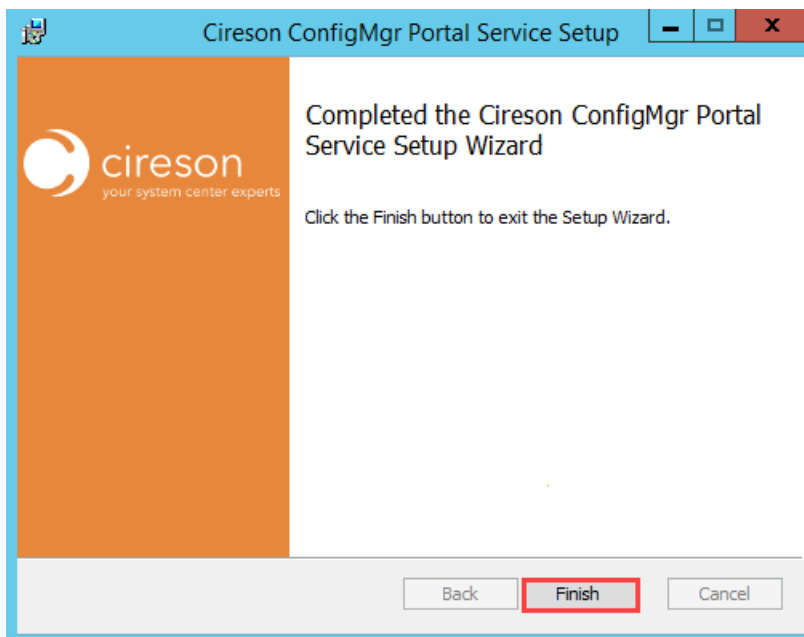


Setup will then install the Cireson ConfigMgr Portal Service.

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

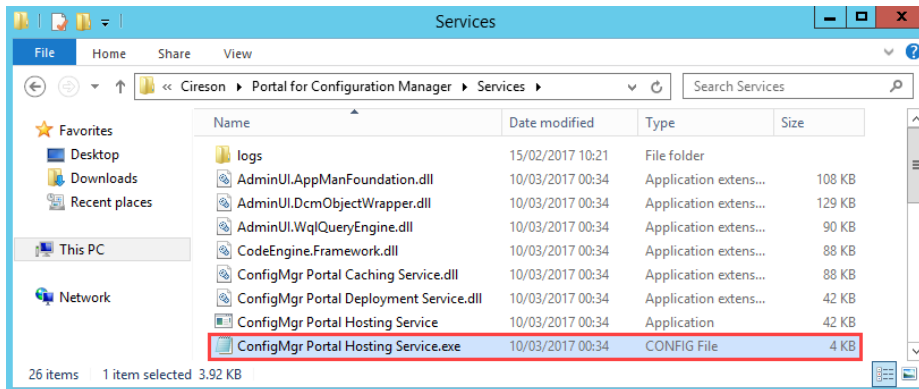


8. Click **Finish** to close setup wizard.

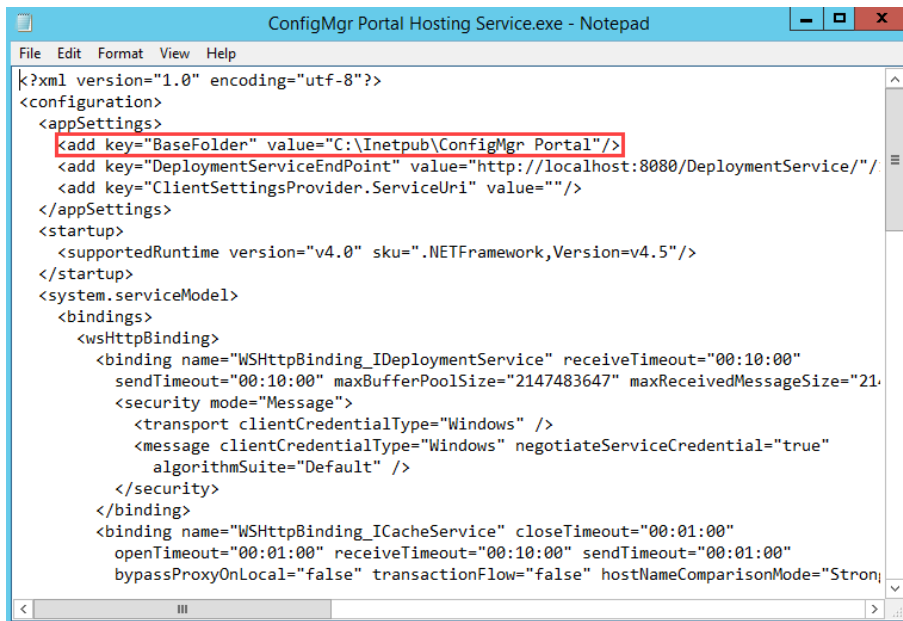


9. Navigate to the location where the Caching Service was installed (by default **C:\Program Files\Cireson\Portal for Configuration Manager\Services**).

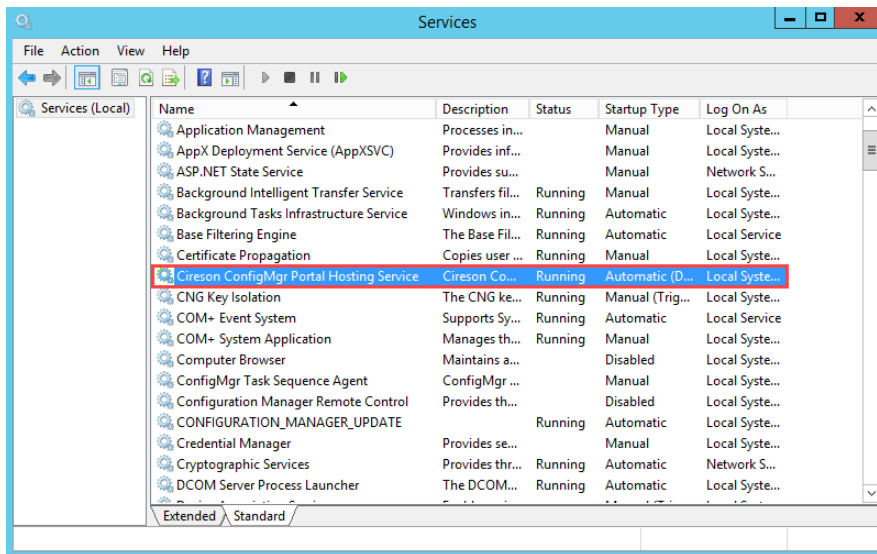
10. Open the XML Configuration file called **ConfigMgr Portal Hosting Service.exe.config** in Notepad.



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



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



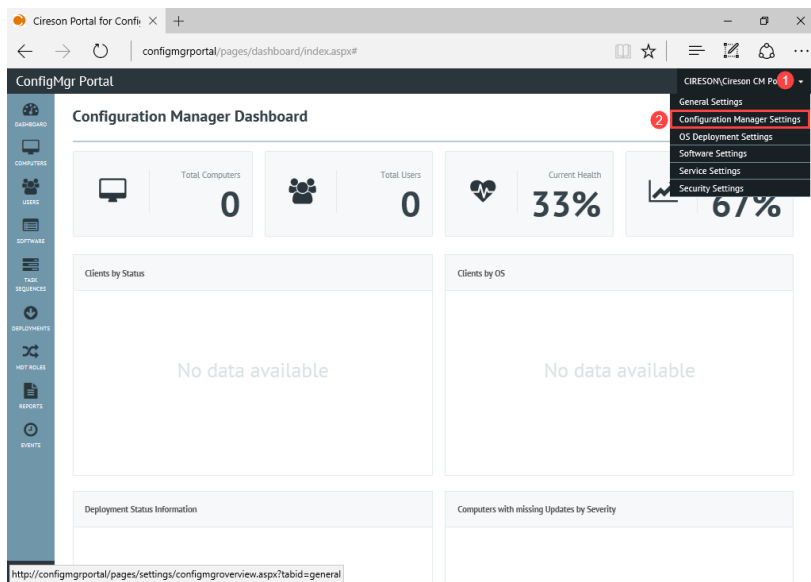
This completes the installation of the Cireson ConfigMgr Portal. Complete the tasks in the **Post Installation Configuration** section to complete the installation of the Portal.

Post Installation Configuration

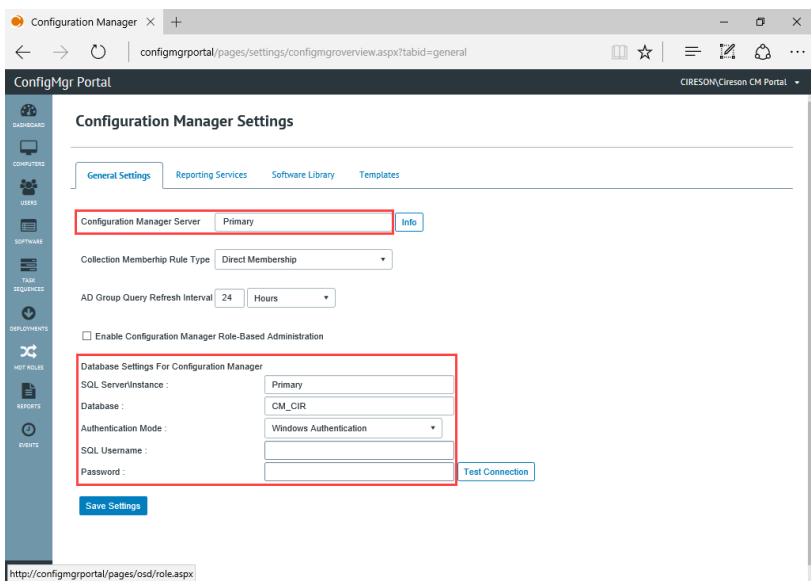
Now that the Portal has been installed, there are a few post installation configuration steps that need to be completed as detailed in this section.

To complete the Portal post installation configuration steps:

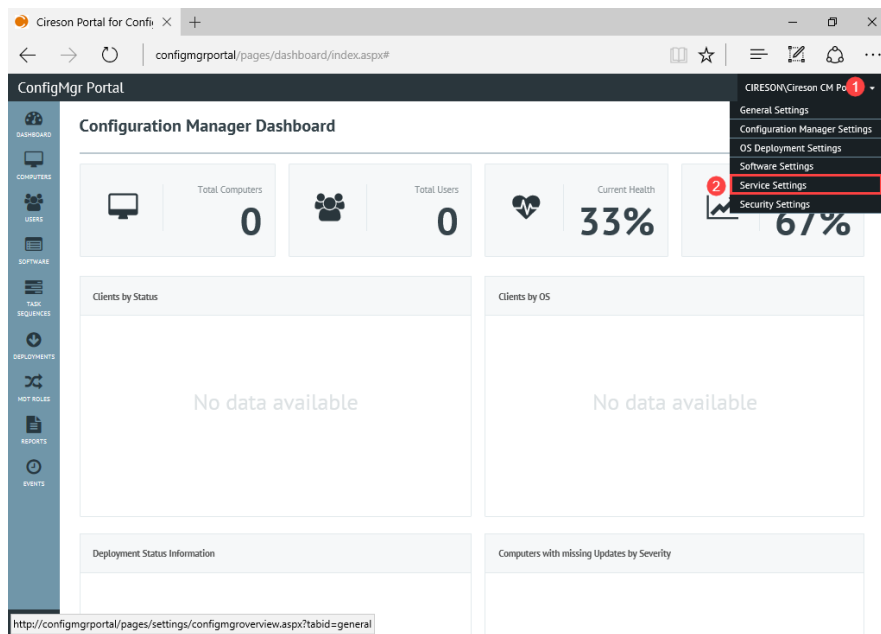
1. Start a browser and connect to the Portal (<http://configmgrportal>).
2. Using the dropdown beside the logged-on username, navigate to **Configuration Manager Settings**



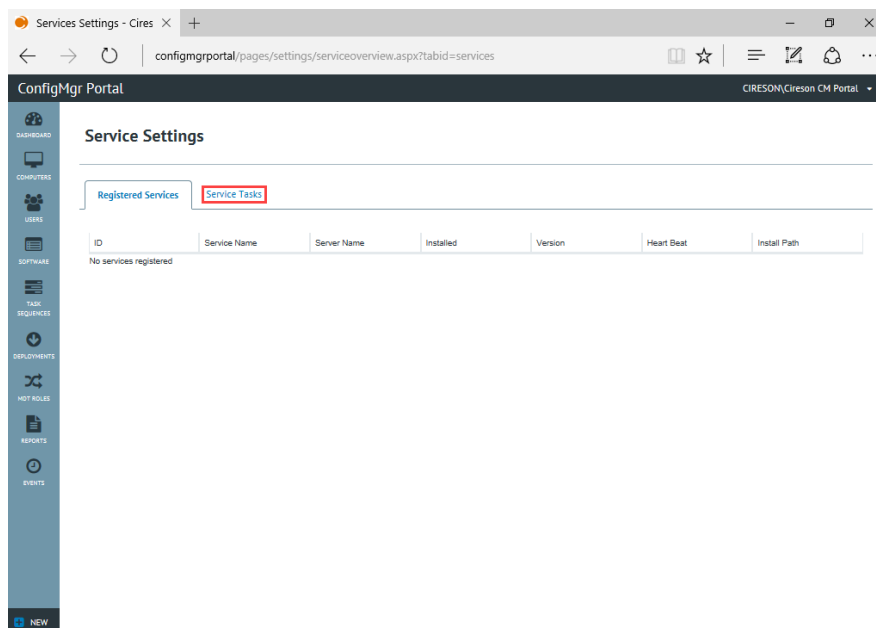
3. Verify that the settings under both the **Configuration Manager Server** and **Database Settings For Configuration Manager** sections are configured correctly, correcting then saving them if required.



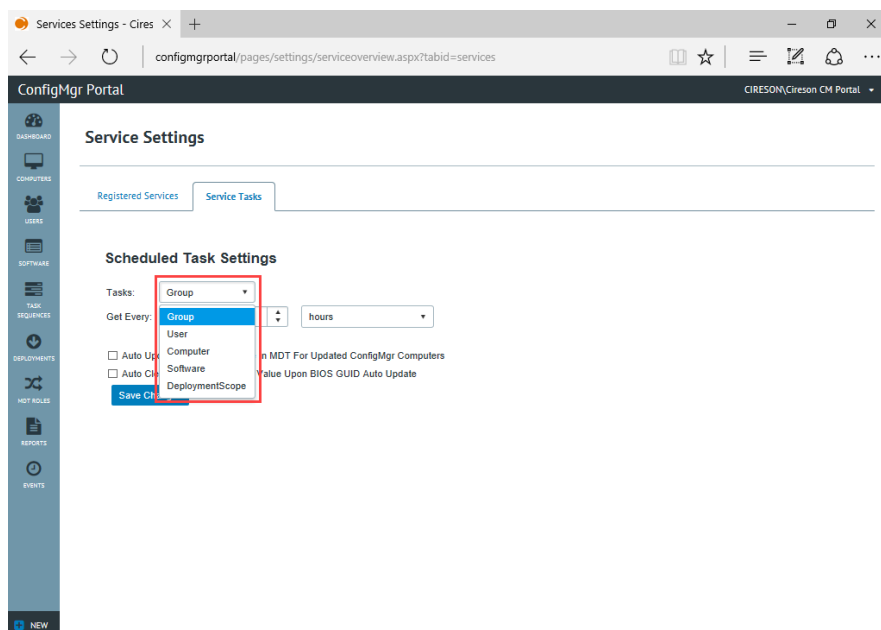
4. Using the dropdown beside the logged-on username, navigate to **Service Settings**



5. 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

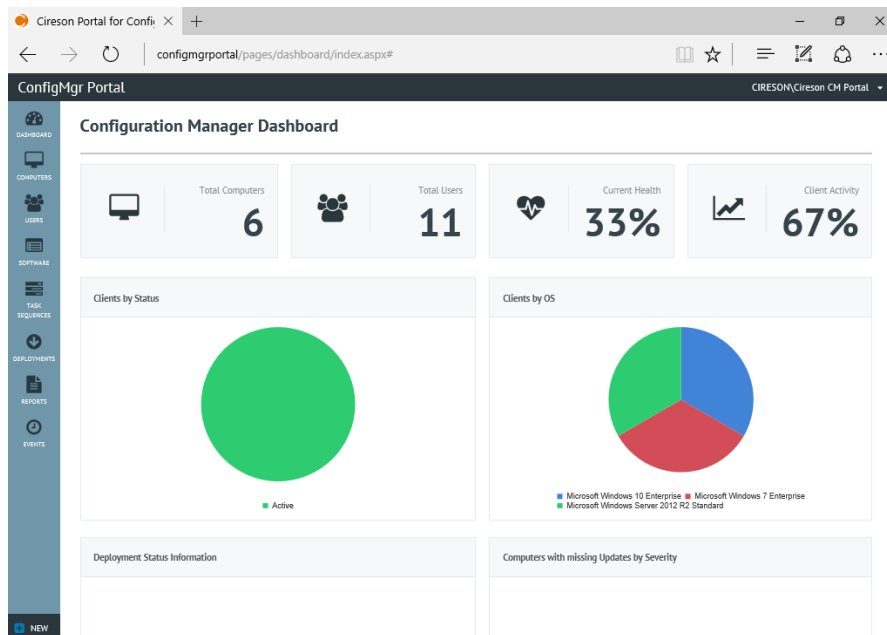
8. Repeat Steps 6 and 7 as required for the other objects you wish to configure.

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.

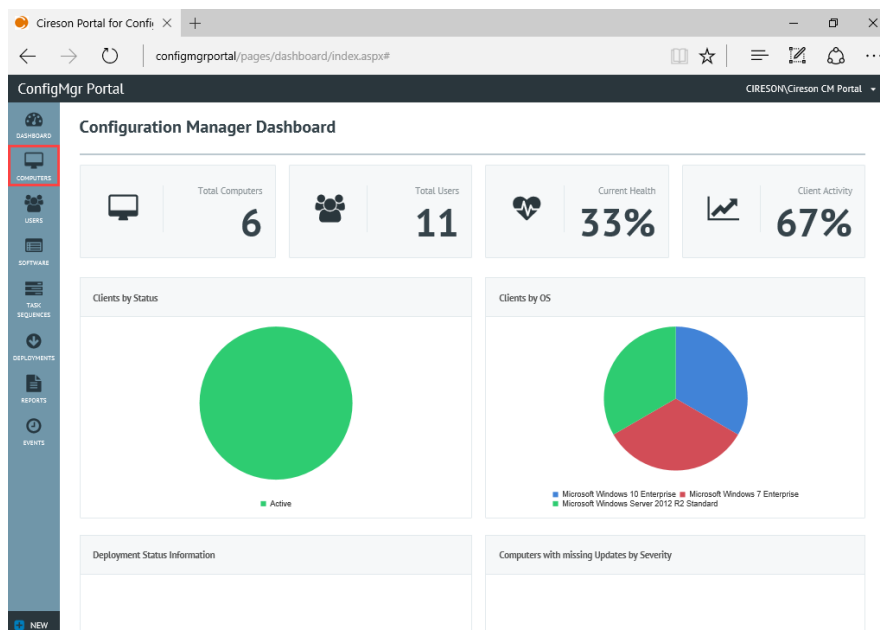
To verify the Portal can successfully retrieve data from the ConfigMgr database:

1. Start a browser and connect to the Portal (<http://configmgrportal>). The **Configuration Manager Dashboard** node of the Portal will be displayed.



NOTE: If when you load the Portal the **Total Computers** field shows **0** and/or numerous dashboard fields show **No data available**, verify that on the server hosting the Portal, that the **Cireson ConfigMgr Portal Hosting Service** is running. If the service isn't running, start it then refresh the Portal.

- 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**



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

Manage Computers - C

Find Computer by: User Name

Page Size: 100

3 items in 1 pages

Name	State	Domain	Operating System	MAC Address	Is Virtual	Present in CM	Client	Client Healthy
PRI-MARY	Active	CIRESON	Microsoft Windows Server 2012 R2 Standard	00:15:5D:00:03:B4	True	True	True	True
WIN7	Active	CIRESON	Microsoft Windows 7 Enterprise	00:15:5D:00:03:B7	True	True	True	False
WIN10	Active	CIRESON	Microsoft Windows 10 Enterprise	00:15:5D:00:03:B6	True	True	True	False

Overview | Configuration Manager | Primary Users | OSD Readiness | Deployments | Add/Remove Programs

Computer Name : N/A
 Operating System : N/A
 Domain : N/A
 Creation Date : N/A
 ConfigMgr Resource ID : N/A
 Client Health State : N/A
 Last Policy Update : N/A
 Last Discovery Update : N/A

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 Administration Guide [1].

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 Portal**³

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.

³ At a minimum, the **Configuration.xml** and **Web.config** files needs to be backed up.

Converting from the Community Edition to the Team Edition of the Portal

This section details how to upgrade from the Community Edition of the Cireson Portal for Configuration Manager to the Team Edition (fully featured).

Upgrade Procedure

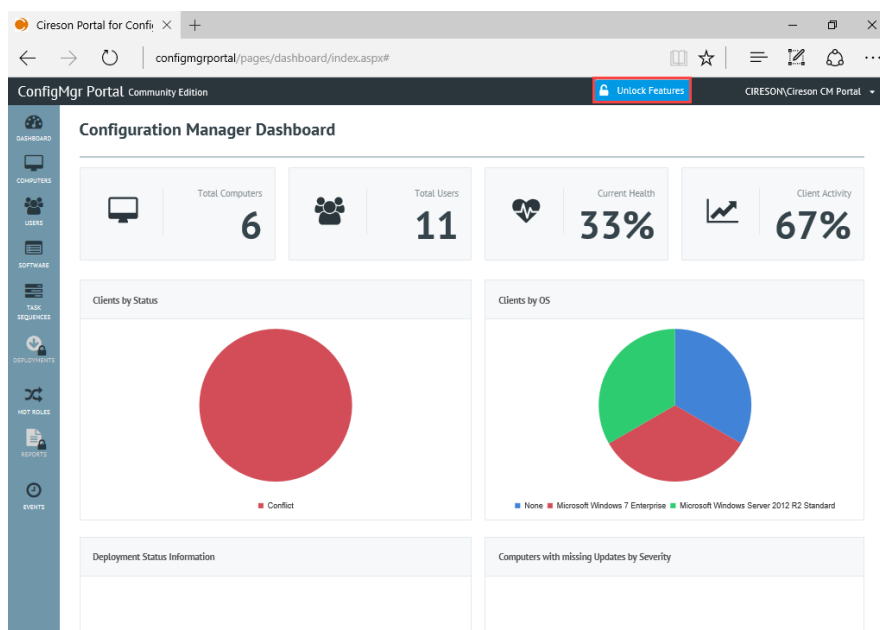
The upgrade procedure consists of the following two phases:

- **Requesting a License Key**
- **Entering the License Key to convert the Portal from the Community Edition to the Team Edition**

Requesting a License Key

To request a License Key:

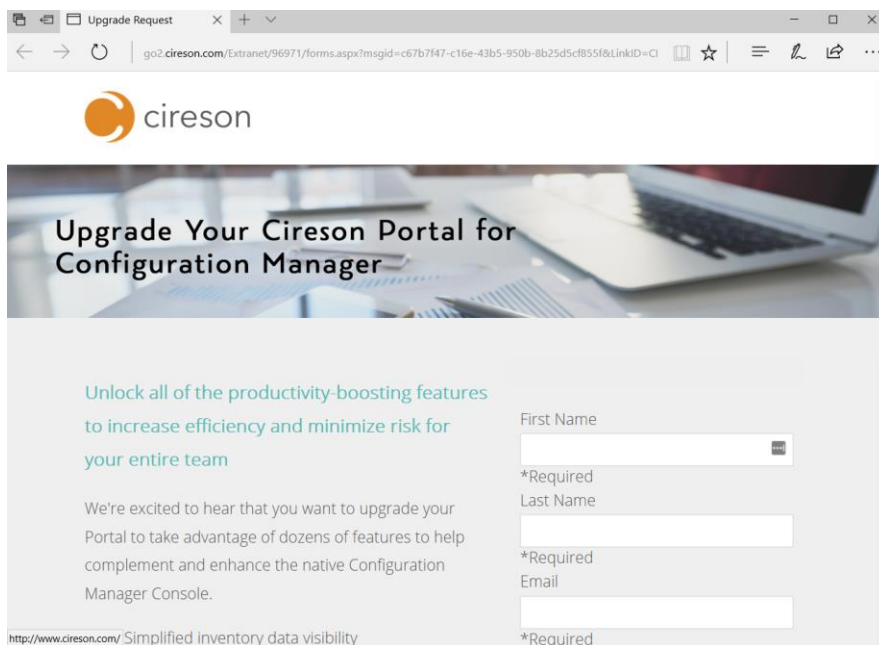
1. Start a browser on a computer that has Internet connectivity and access the Portal (e.g. <http://configmgrportal>)
2. In the Portal Header Bar, click **Unlock Features**



You will be taken to the **Upgrade Your Cireson Portal for Configuration Manager** page on the Cireson website.

TIP: If the computer you are using does not have Internet connectivity, you can access the **Upgrade Your Cireson Portal for Configuration Manager** page using the following URL:

<http://go2.cireson.com/Extranet/96971/forms.aspx?msgid=c67b7f47-c16e-43b5-950b-8b25d5cf855f>



Upgrade Request

go2.cireson.com/Extranet/96971/forms.aspx?msgid=c67b7f47-c16e-43b5-950b-8b25d5cf855f&LinkId=Ci

cireson

Upgrade Your Cireson Portal for Configuration Manager

Unlock all of the productivity-boosting features to increase efficiency and minimize risk for your entire team

We're excited to hear that you want to upgrade your Portal to take advantage of dozens of features to help complement and enhance the native Configuration Manager Console.

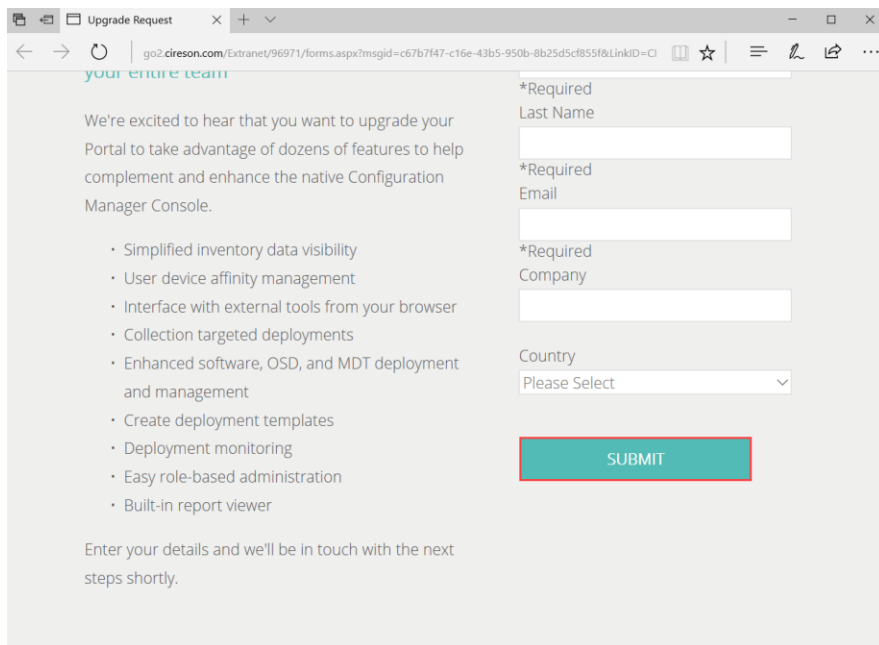
<http://www.cireson.com/> Simplified inventory data visibility

First Name *Required

Last Name *Required

Email *Required

3. Complete the requested details then click **SUBMIT**



your entire team

We're excited to hear that you want to upgrade your Portal to take advantage of dozens of features to help complement and enhance the native Configuration Manager Console.

- Simplified inventory data visibility
- User device affinity management
- Interface with external tools from your browser
- Collection targeted deployments
- Enhanced software, OSD, and MDT deployment and management
- Create deployment templates
- Deployment monitoring
- Easy role-based administration
- Built-in report viewer

Enter your details and we'll be in touch with the next steps shortly.

*Required

Last Name

*Required

Email

*Required

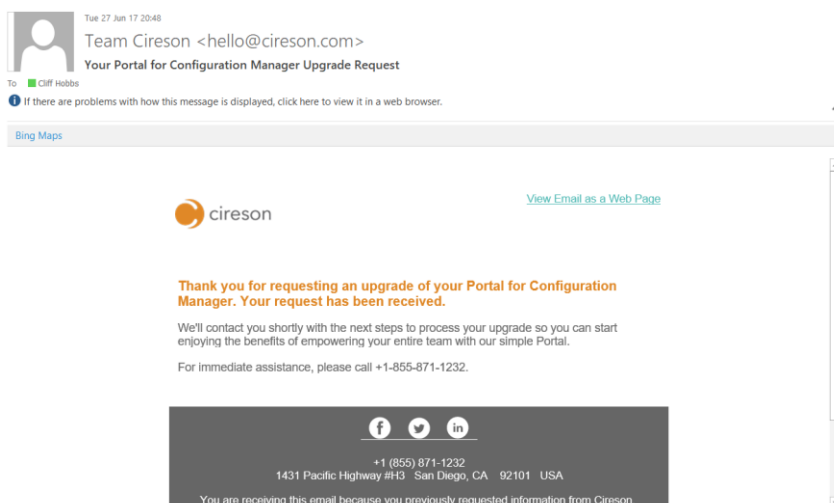
Company

Country
Please Select

SUBMIT

You will soon receive an email from the **Team Cireson** mailbox titled **Your Portal For Configuration Manager Upgrade Request** and a member of the Cireson team will contact you to discuss your licensing requirements and to gather your payment details.

TIP: If you do not receive the email, check your Spam/Junk Mail folders in the event it has been misfiled.

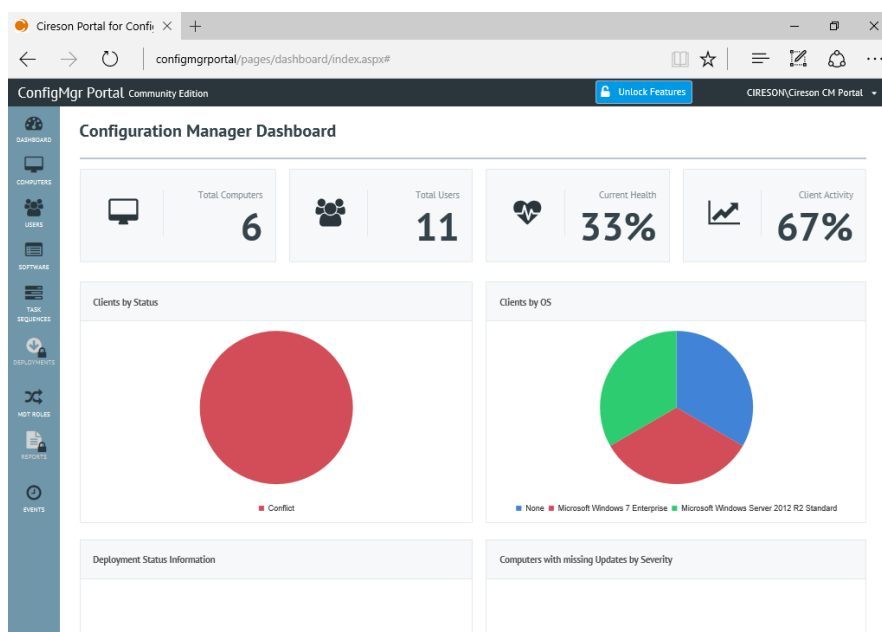


Entering the License Key to convert the Portal from the Community Edition to the Team Edition

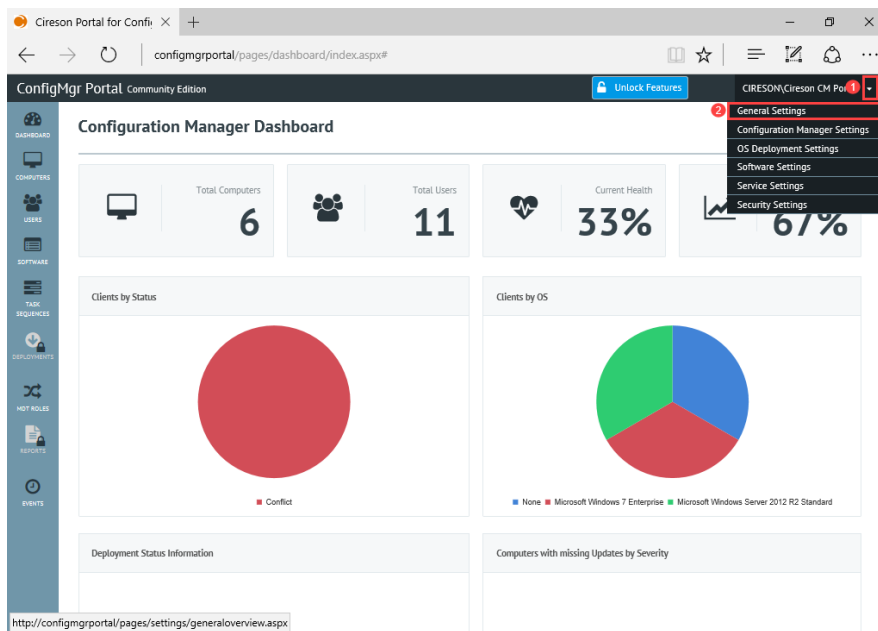
Once you have received your unique license key, the next step is to configure the Portal to use it which will convert your installation from the Community Edition to the Team Edition without requiring any re-installation.

To enter your License Key:

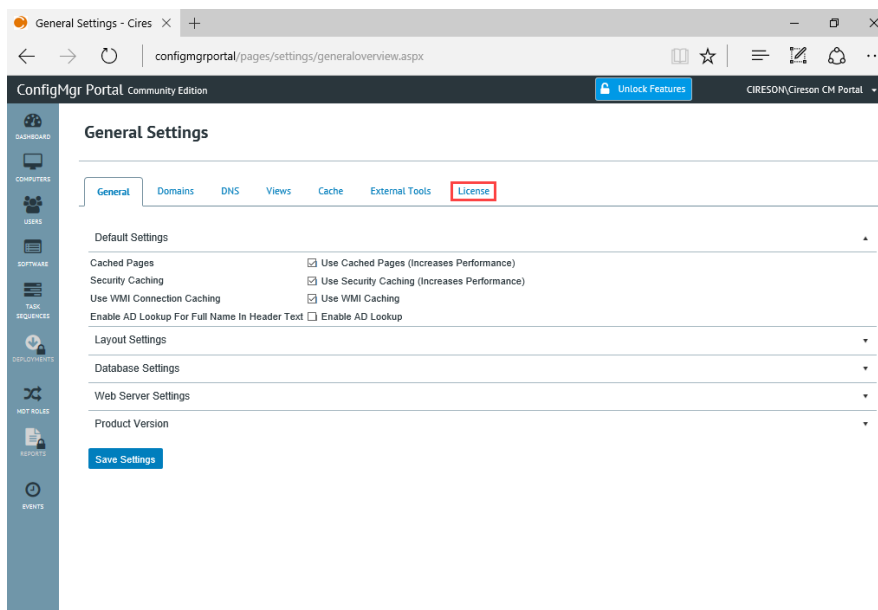
1. Start a browser and access the Portal (<http://configmgrportal>). The **Configuration Manager Dashboard** will be displayed.



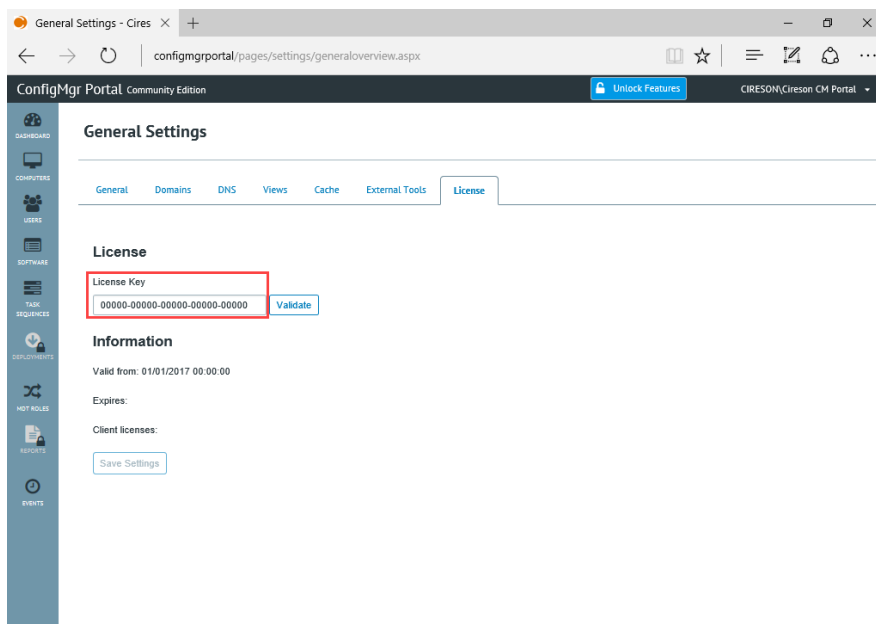
- Click the down arrow (▼) after the username in the **Portal Header Bar** and select **General Settings**



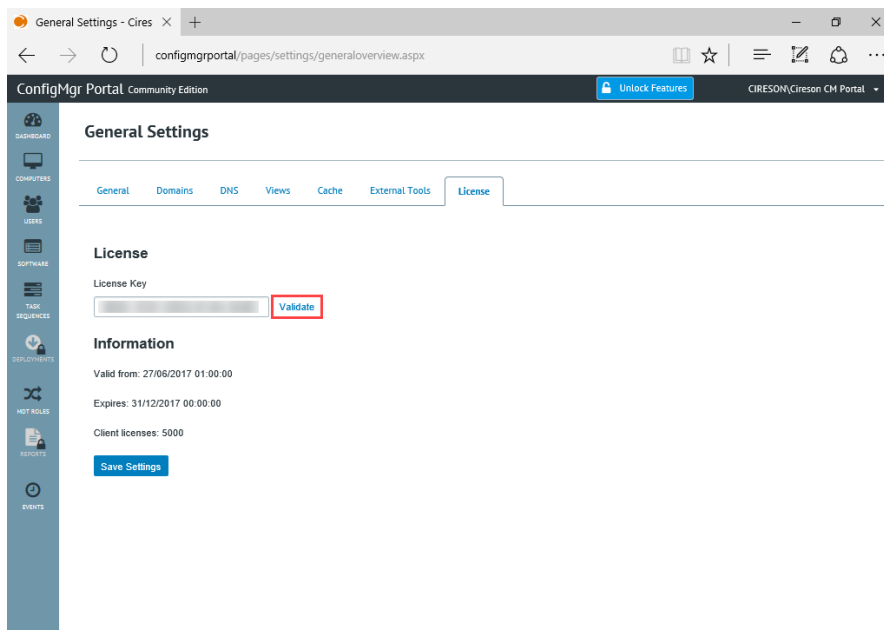
- On the **General Settings** page, click the **License** tab.



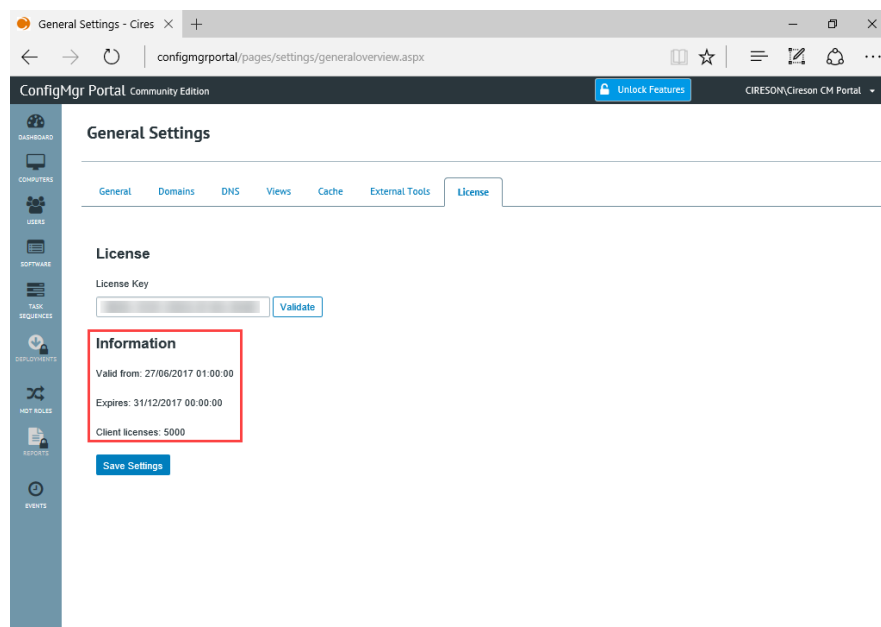
4. In the **License Key** field, replace the existing Community Edition license key with your unique license key.



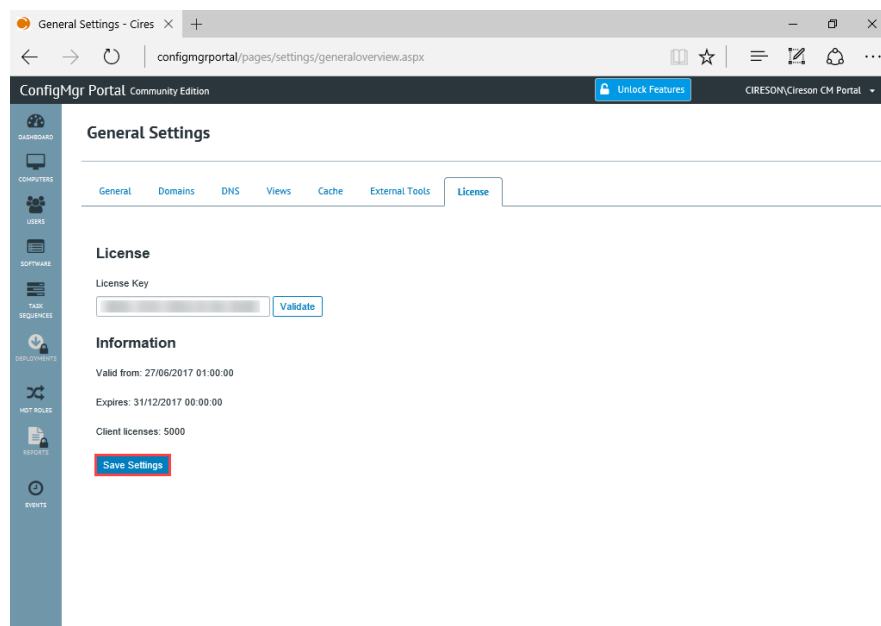
5. Click **Validate**



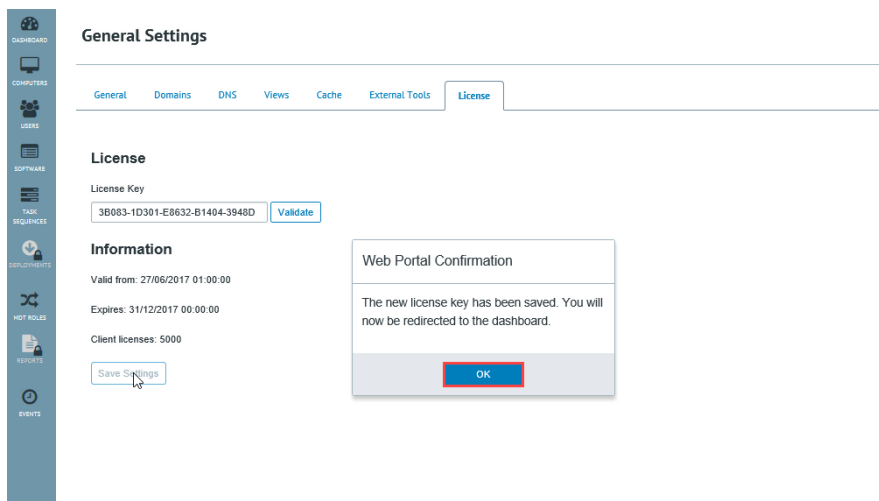
The **Information** section will then update showing the date of when the license is valid and it's expiration date. The **Client licenses** field will also update with the total number of ConfigMgr clients supported by this license.



6. Verify the values for the fields in the **Information** section are as expected.
7. Click **Save Settings** to update the Portal with the new license key.

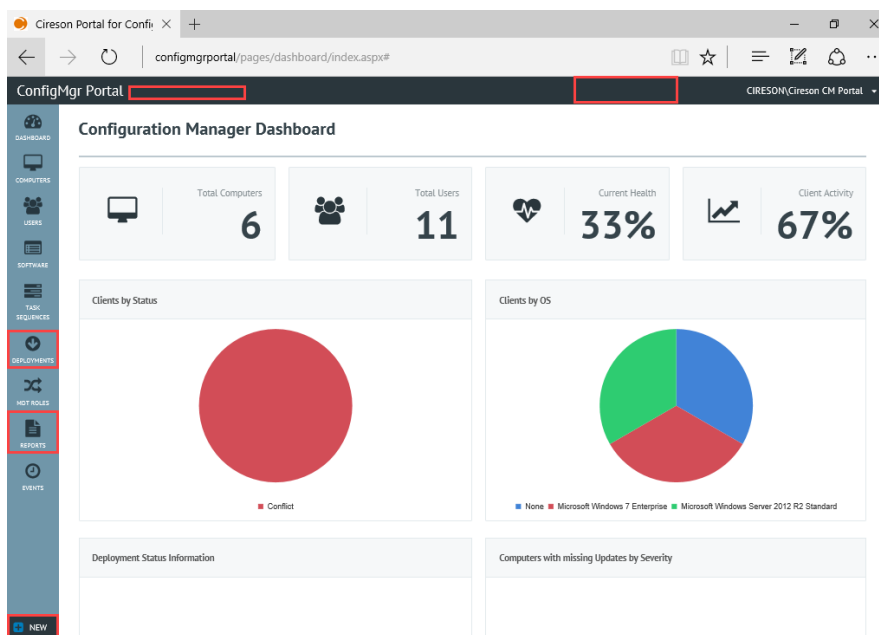


- Click **OK** on the **Web Portal Confirmation** dialog box stating **The new license key has been saved. You will now be redirected to the dashboard.**



The Portal will automatically refresh showing that you are no longer running the Community Edition as:

- The **Community Edition** text has disappeared from the left-hand side of the Portal Header Bar
- The **Unlock Features** button has disappeared from the right-hand side of the Portal Header Bar
- The padlocks on the **Deployments** and **Reports** items in the Navigation Menu have been removed.
- The **New** menu is now visible in the Navigation Menu.



Upgrading from Previous Versions of the Portal

This section details how to upgrade from the previous versions of the Cireson Portal for Configuration Manager.

NOTE: If you are running a previous 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, you should start at the [Installing the Prerequisites and Cireson Portal for Configuration Manager](#) section of this document.

Upgrade Procedure

This section details the upgrade procedure.

NOTE: At present the Portal Installer does not support upgrades from a previous version (this is planned for a future release).

Only a summary of the steps required are provided here. Where relevant, cross references to the relevant sections of this document containing the full details for performing a process (including screenshots) are included.

To upgrade from a previous version of the Portal to the current version:

1. Download the latest version of the Portal as detailed in the [Downloading the Cireson Portal for Configuration Manager](#) section.
2. Extract the Portal installation files as detailed in the [Extracting the Portal Installation Files](#) section.
3. Ensure Microsoft .NET 4.5.2 is installed on the server. If it isn't follow the process in [Appendix A – Manually Installing Microsoft.NET Framework 4.5.2](#).
4. Extract the Portal installation files as detailed in the [Extracting the Portal Installation files for a Manual Installation](#) section.
5. 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.
6. 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.

7. Copy the contents of the **Cireson ConfigMgr Portal** folder containing the new version of the Portal files to your existing web site installation folder (such as **C:\Inetpub\ConfigMgr Portal**).

For example, if you followed the process in the [Extracting the Portal Installation files for a Manual Installation](#) section and extracted the files to their default location, it is the files in the **<drive>:\Cireson Portal for Configuration Manager vx.x.x Install\Manual Install\Cireson ConfigMgr Portal** folder that you want to copy to your existing web site installation folder (such as **C:\Inetpub\ConfigMgr Portal**).

- a. You will be prompted to replace a large number of files (around 1,700), which you should allow to complete.
8. Copy your original **Configuration.xml** file copied in Step 5 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.
9. Ensure that your IIS application pool account has **Modify** rights to the web site installation folder (such as **C:\Inetpub\ConfigMgr Portal**).
10. 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 Version 2 release that are in your **C:\Inetpub\ConfigMgr Portal_Setup\Database** folder:
 - i. **dbTables.sql**
 - ii. **dbData.sql**
 - NOTE:** This process is detailed in the [Running the SQL Scripts](#) section.
 - b. Executing these two scripts is necessary due to database schema changes from the previous version.
11. Navigate to the folder containing the new version of Portal service installer.

For example, if you followed the process in the [Extracting the Portal Installation files for a Manual Installation](#) section and extracted the files to their default location, these files are located in the **<drive>:\Cireson Portal for Configuration Manager vx.x.x Install\Manual Install\Cireson ConfigMgr Portal Service Installers** folder.

12. Run the appropriate Windows Installer file to install either the 64-bit or 32-bit service (this process is detailed in the [Installing the Caching Service](#) section).
 - a. The Cireson ConfigMgr Portal Service has changed from the previous version so needs to be reinstalled.

13. 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
14. 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)
15. 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 displayed **Version** should be newer than your previous version.

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.

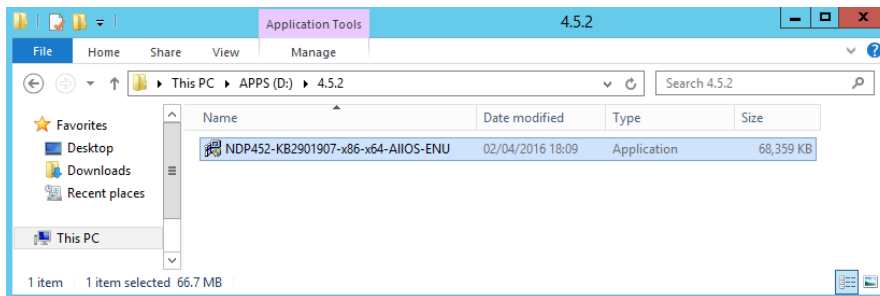
Appendix A – Manually Installing Microsoft.NET Framework 4.5.2

As mentioned in the [Minimum Requirements](#) section, the Installer introduced in version 2.0 of the Portal requires a minimum of Microsoft .NET Framework version 4.5.2 to be installed before the Portal can be installed. If you are installing the Portal using the new Installer (as detailed in the [Installing the Cireson Portal for Configuration Manager using the Installer](#) section), you will be prompted to install .NET 4.5.2 if it isn't installed already before the Installer can proceed.

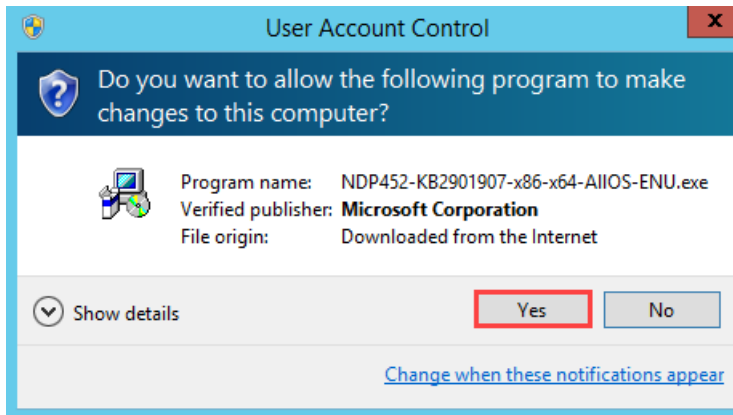
If .NET 4.5.2 or later, is not already installed on the target server and you are installing the Portal manually, you will need to install .NET 4.5.2 as detailed in this section.

To manually install .NET 4.5.2:

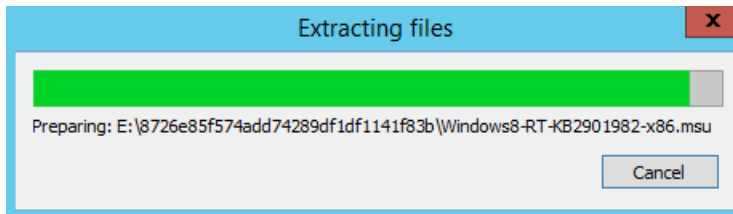
1. Download .NET 4.5.2 from:
<https://www.microsoft.com/en-gb/download/details.aspx?id=42642>
2. Logon to the server that will host the Portal with an account that has local Administrator rights.
3. Navigate to the location containing .NET 4.5.2.
4. Double-click on the **NDP452-KB2901907-x86-x64-AllOS-ENU.exe**



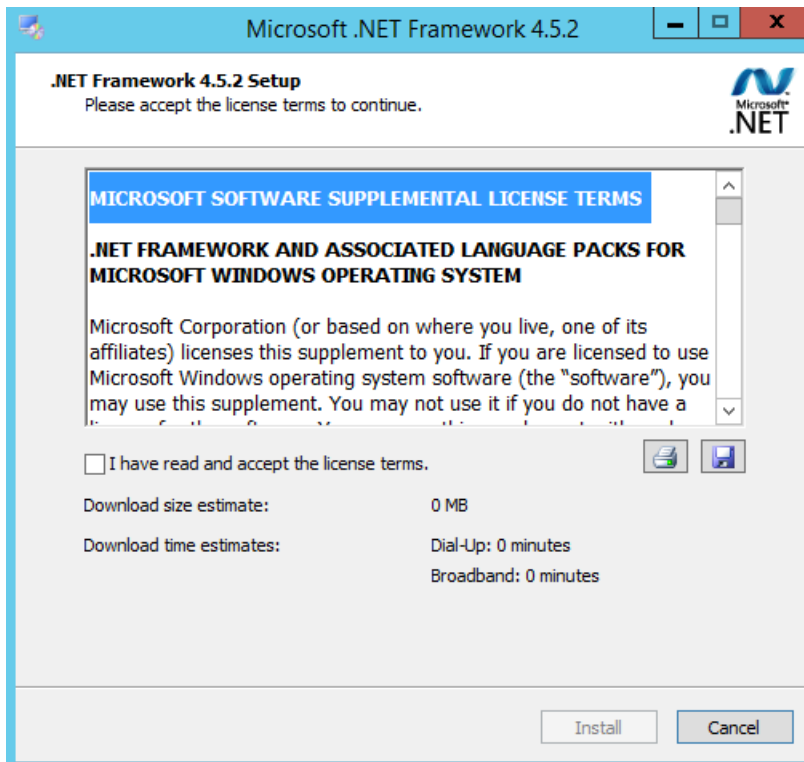
5. Click **Yes** on the **User Account Control** dialog box if it is displayed.



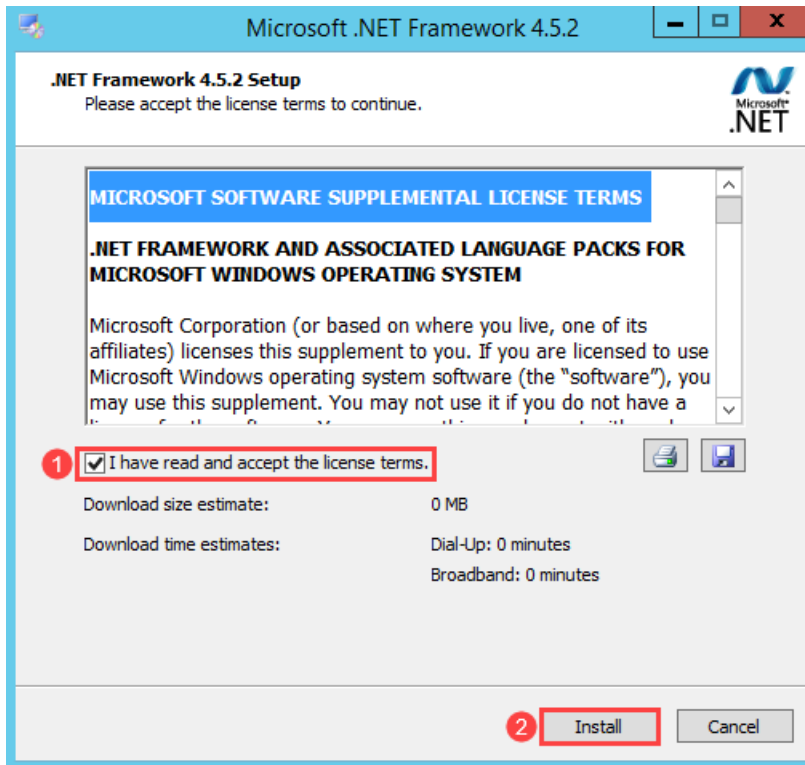
The **Extracting files** dialog box will be displayed whilst the installation files are being extracted.



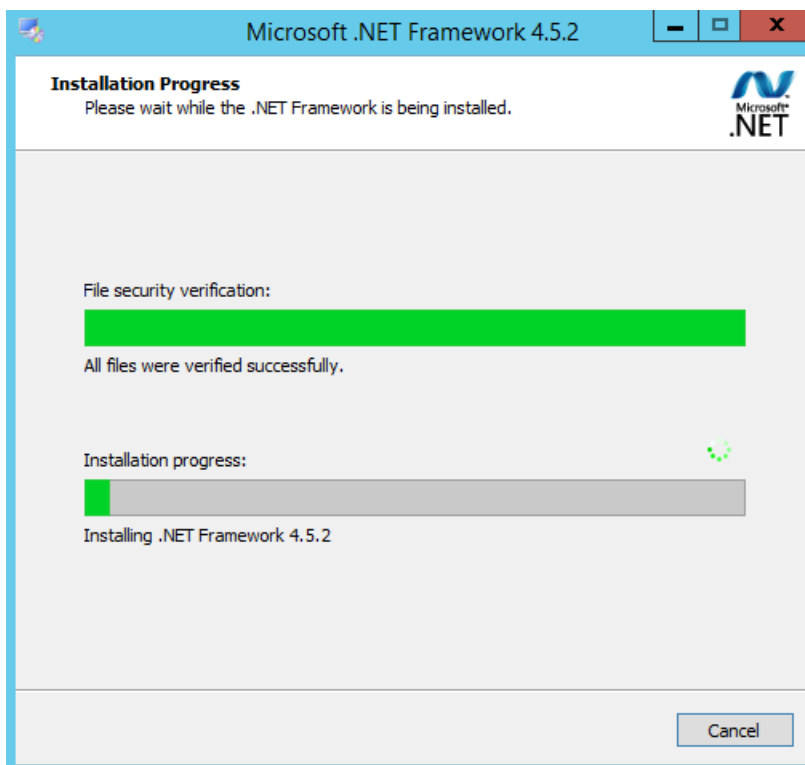
Once the files have been successfully extracted, the .NET 4.5.2 setup process will be started automatically.



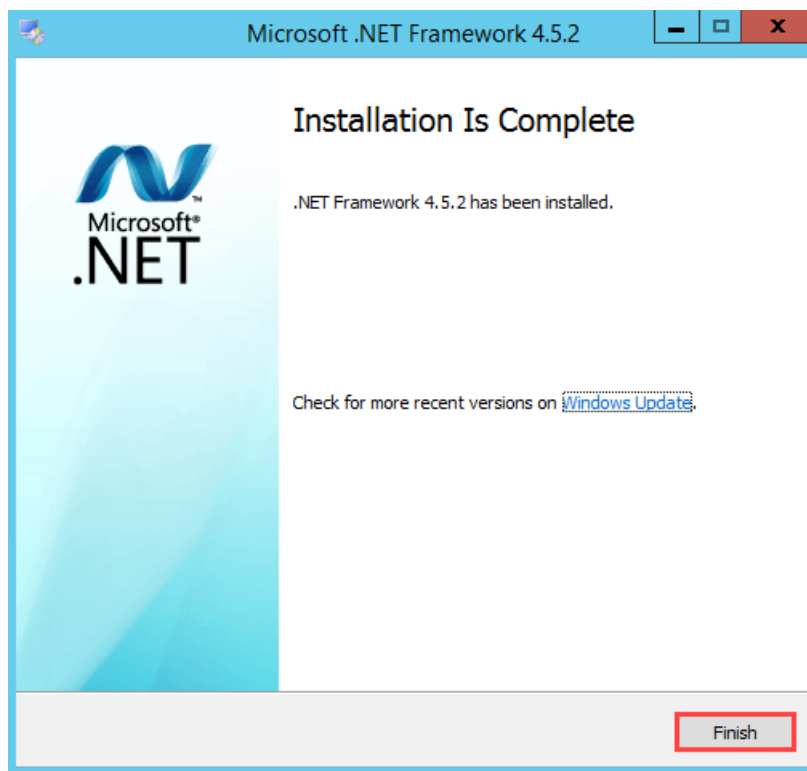
- Click to select the **I have read and accept the license terms** checkbox, then click **Install**



The setup process will then perform the file security verification process, and once this has completed the actual installation process will start.



7. On the **Installation Is Complete** dialog box, click **Finish**



8. Reboot the server if prompted, at a convenient time before continuing with the Portal installation.

