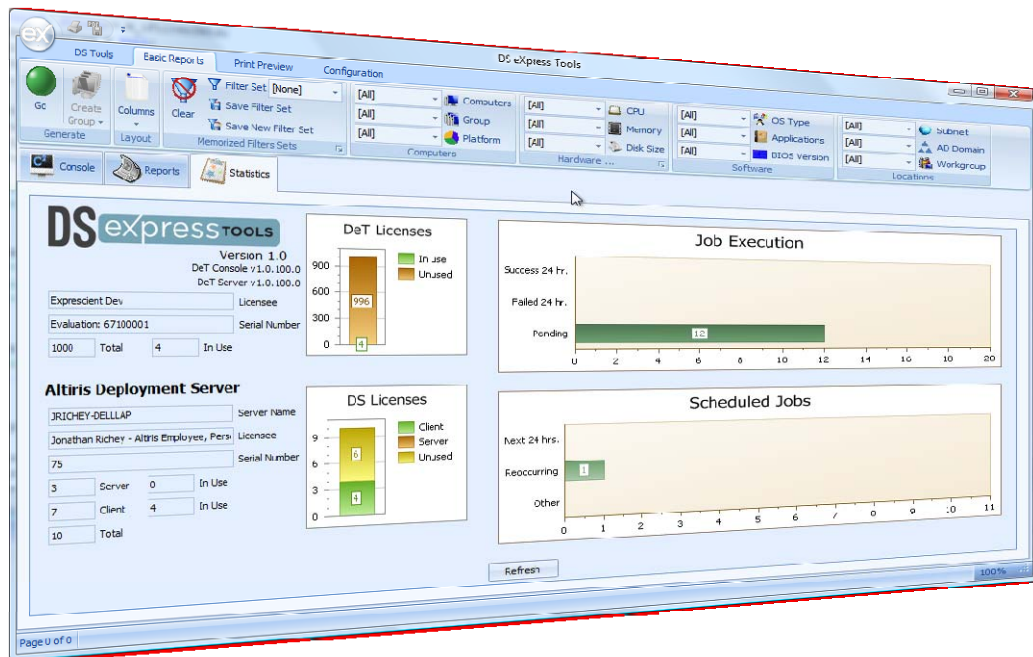


# DS **express** TOOLS

EXPRESIDENT,  
INC.

## DS EXPRESS TOOLS v1.5 USER GUIDE



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# Chapter 1: DS eXpress Tools™ Introduction

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## In this chapter:

- ✓ DS eXpress Tools and Altiris/Symantec Deployment Solution™ 6.9
- ✓ Installation Prerequisites and Quick Guide
- ✓ Architecture Overview
- ✓ Licensing – Modular, only buy what you need

## DS eXpress Tools™ and Altiris/Symantec Deployment Solution™ 6.9

DS eXpress Tools extends the capabilities and life of Altiris/Symantec Deployment Solution™ by providing Inventory and Status reports, Windows 7 Compatible Remote Control, Job Status E-mails and other customer requested features.

Through complementary client server architecture, DS eXpress Tools (DeT) interfaces directly with the Deployment Solution™ (DS) database, and DS program interfaces. DeT also creates and uses its own database to store extended information not available in the DS database.

DeT is developed by some of the original developers that created and worked on DS for over ten years, from the original design meeting through DS 6.9, to bring long requested customer features to extend the capabilities of a powerful deployment and management product.

## Installation Prerequisites and Quick Guide

Installation of DS eXpress Tools™ is easy and quick through a unified installer – DeTSetup.exe. DeTSetup will install any combination of the DeT console, or the DeT server in 32 bit mode on x86 systems, or true 64 bit mode on systems running 64 bit versions of Microsoft Windows™ operating systems.

### Installation Prerequisites

DS eXpress tools is an add-on to Altiris/Symantec Deployment Solution 6.9 and has similar installation requirements. The DeT specific requirements are:

- Deployment Solution™ 6.9 with latest service pack
- Microsoft SQL server 2005, or 2008
- License for DS eXpress Tools – either full or evaluation license
- Install user needs SQL sysadmin rights for creating the DeT database
- Logon account and password to run the DeT Server service
- The DeT console or DeT server can be installed on server or workstation OS
- DeT can function properly in a workgroup or Active Directory domain
- If DeT is not installed on the same system with DS, in a workgroup environment, SQL authentication is recommended.
- .NET 2.0 must be installed on the system where DeT is installed

### Installation Decisions

DeTSetup is powerful and flexible enough to allow for a simple or complex configuration. The primary decision is where to install DS eXpress Tools.

- Install DeT on the same server with DS, or on separate system
- Put DeT console and server on same system or on separate systems

### Quick Guide

The following is a quick reference for installation. For more in-depth information refer to chapter 2.

#### DS eXpress Tools™ License Key

You must have a DS eXpress Tools™ license key, which can either be a retail license, or an evaluation license. A retail license will enable only the features/modules that were purchased, while an evaluation license will enable all DeT features/modules for a limited time, typically 30 days.

The DeT license key does not contain any '0' or '1' digits, but it may contain capital 'O' or 'L' letters.

#### Installing DeT on the same system with DS

When installing DeT on a system that has DS installed, DeTSetup will obtain several configuration settings directly from the DS configuration and use those settings. This simplifies the installation procedures. In addition to the DS settings, the install wizard will require the following information:

- Acceptance of the license agreement
- Decision whether to install the console, the server or both
- Company name
- Valid license key
- Password for DeTServer service (the default DS service account can be changed)
- Server display name
- DeT database name
- DeT communication port
- Installation directory (default C:\Program Files\EXprescient)

### Installing DeT on a system separate from DS

When installing DeT on a system separate from DS, DeTSetup needs to obtain more information through the install wizard. The install wizard will require the following information:

- Acceptance of the license agreement
- Decision whether to install the console, the server or both
- Company name
- Valid license key
- Account and password for DeTServer service
- Server display name
- Server name or IP address of the DS server
- Server name or IP address of the SQL server
- DS database name
- SQL authentication type
- DeT database name
- DeT communication port
- Installation directory (default C:\Program Files\eXprescient)

Once all wizard information has been gathered, the installation will complete in 2-3 minutes. If an error occurs, the install will back out any changes made to the system.

Note: If the DeT database was created before the failure, or if one previously existed, it will be left on the SQL server.

### Architecture Overview

DS eXpress Tools is a client server application using TCP/IP v4 to communicate between the DeT console and the DeT server. These two components may reside on the same system or on different systems.

The DeT console only communicates with the DeT server and does not touch the DS database directly. The DeT server reads directly from the DS database, and will write to the database under certain circumstances. When scheduling jobs to run in DS, the DeT Server communicates with DS through DS API's.

Multiple DeT consoles can be installed to communicate with a single DeT server, while only one DeT server can be installed per DS server. If there are multiple DS servers installed in an organization, each should have a DeT server associated with it, and the DeT console can communicate with each of the DeT servers through a mechanism known as affiliation. This allows easy and convenient switching between servers and the ability to create integrated reports from multiple DS/DeT servers.



# Chapter 2: Installation Guide

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## In this chapter:

- ✓ Prerequisites
- ✓ Decisions
- ✓ DeTSetup.exe
- ✓ Install Wizard
- ✓ Optional sequences

"Deployment Solution is designed to meet deployment, management, and migration needs for small, medium and large organizations with diverse topologies and varying computer management requirements." (DS User Guide)

From this Altiris/Symantec statement, eXprescient with DS eXpress Tools has developed a tool set that exceeds the original design goals of DS, by adding to the capabilities of that product. This section provides steps for installing DS express Tools.

## Prerequisites

DS express Tools version 1.5 that you are about to install works in conjunction with (Symantec) Altiris Deployment Solution version 6.9. This makes the list of prerequisites to the installation very simple. Here are a few questions that will be asked through the installation wizard.

- Where is Altiris Deployment Solution (DS) installed?
- What is the name and password of the user controlling the Database for DS?
- What is the name of the organization assigned to the DeT license?
- What is the DeT license Key?

Also, it is very important that the user that is running the DeTSetup program is an administrative user that has SQL Server sysadmin rights. DeTSetup creates a database for use by the DeT Server and grants appropriate rights on that new database (as well as on the existing DS database) to the service account specified in the installation process.

## Firewall Considerations

Before installing, you will need to examine your firewall configurations on network routers and on the various machines that house your databases, DS, and the machine where you will be installing the DeT server. Make sure that appropriate firewall settings are in place to allow the DeT Server to communicate with the database server, with DS, and with the DeT Console. The only additional port that is required above the standard DS ports is the DeT Console to DeT Server communication port (default is 9050), and can be changed in the install process to any port you prefer.

### Decisions

DS express Tools (DeT) has a very simple install process but some decisions need to be made before you start. DeT has two components that will be installed. One is the DeT Server and the other is the DeT Console. The DeT Server is a Microsoft Windows Managed Service and is installed in the Windows OS as an active service providing access to the information contained in the DS Database. The DeT Console is the user interface that contacts one or more DeT Servers to display and organize the DS information in the form of reports that can be saved, e-mailed or printed. It can run DS jobs and honors DS security roles and access scopes. The DeT console can be a replacement for your DS console, or can be launched as an extension to the DS console from the DS console tools menu.

### On/Off DS box

The first decision to be made is whether to install DeT on the same computer that hosts DS or to install on a different computer or do a split install. From the introductory information the DeT Server communicates with DS, so you might want to install the DeT Server on the same computer as DS. Or because of separation of functionality policies you may need to do an interdependent install of DeT on a separate box. A split configuration might also be beneficial if you want to avoid installing any applications on a live DS server.

DeT has a concept of primary and secondary or affiliated connections and the console is always installed to communicate with a primary DeT/DS server, with configurable affiliations to other DeT/DS servers. In a simple one DS environment the DeT Console will communicate only with the primary DeT Server. In a multiple DeT/DS environment, the DeT Console will communicate with the primary DeT/DS server first to verify configuration information before communicating with the affiliated set of DeT/DS servers.

The DeT Console can be installed on the same computer as DS and the DeT Server, but it can also be installed on a remote computer. This split configuration will increase network traffic, but with multiple DeT/DS servers installed and affiliated together this extra traffic to the primary DeT Server will not be noticed.

### NT or SQL authentication

With the current installation of DS you were required to choose whether to use NT authentication or SQL authentication. The choice you made was likely based on how the Microsoft SQL server was configured, and whether your server is functioning in a Workgroup or an NT Active Directory domain.

If SQL authentication was used you provided a SQL user account and password that was independent of the service account and password which the DS services used. You also had to provide a SQL server name, and the name for the DS database. provide a Database user name and an authentication method. By choosing the defaults DeT will use the DS authentication for access to the database. But you can choose either the Windows NT authentication or the SQL user authentication credentials.

### Service Account

DeT Server is installed as a Windows Service and is managed by the server OS. Each service must have a logged on user account that can start the service and communicate across the network to

other DS installations. In some cases this service account must be a domain administrator to allow access to all of the remote computer that the DeT Console will try to connect to.

## **DeTSetup.exe**

This is the only file that is needed to install DS express Tools. This install application has been constructed to install on both 32 bit and 64 bit Windows OS installed computers. On 64 bit OS systems it installs as a native 64 bit application and not as a 32 bit application.

All necessary files and registry information are installed and set when this file is run and finishes successfully. It can be launched from a network share and will determine whether or not you have the required version of .NET installed on the machine. However, it will not install .NET if it is not already installed.

## **Install Wizard**

When DeTSetup.exe is launched the install wizard will start. Follow the wizard step by step to install DS eXpress Tools. Prior to starting the actual install, you are presented a summary page that identifies all the settings that you have entered in the wizard. Examine it carefully and return to previous wizard pages to change any incorrect setting.

All wizard fields are validated, and some like the service user account and SQL server address are verified fully to ensure a successful install.

## **Optional Sequences**

The sequencing of wizard pages is dynamic based on the type of install and the environment where it is installed. The following decision points will affect the wizard sequence.

- Whether the DeT Console, the DeT Server or both are to be installed
- Whether DS is on the same system where the DeT Server is installed
- Whether NT or SQL authentication is used
- Most installation failures (see exception below)

Proper consideration of the prerequisites and decision points previously mentioned before starting DeTSetup will improve the likelihood of a satisfactory and successful installation

The single non-fatal installation failure occurs when DeT is installed on a box separate from DS. There are tools that DeT needs DS to include in some of the DeT specific jobs. These tools are copied to the DS installation tree (typically the DS "express" share) by the installer. Occasionally, because of firewall or other restrictions this operation is not successful. When this occurs DeTSetup will report this failure, but complete the remainder of the install successfully. It is important to follow the remediation steps outlined by the error message, or DeT Remote Control services will not be available.



# Chapter 3: DeT Console Basics

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**In this chapter:**

- ✓ Configuration & Licensing
- ✓ Console Squared™
- ✓ Security & Permissions
- ✓ Inventory Reports
- ✓ Status Reports
- ✓ Quick Charts™

## Configuration & Licensing

When selecting the configuration tab from the main console there are four different areas that can be configured.

- Affiliated Servers
- Properties
- Licensing
- Skins

### Affiliated Servers

See “Affiliating multiple DS/DeT servers with one DeT Console” in the next chapter.

### Properties

This configuration area has three different areas.

- Database Access
- Security Settings
- Options

### Database Access

When this is selected a pop up dialog is displayed that will make it possible to change the DS/DeT server database authentication.

When using NT authentication no account or password modifications are necessary and changing the name of the SQL server or the database name should only be done very carefully and sequenced as described by the warning message that is displayed.

## Chapter 3:DeT Console Basics

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Changing from NT authentication to SQL authentication is both unusual and not recommended. However, if circumstances dictate that this must be done, again follow the directions provided very carefully.

DS/DeT Server: A drop down list that shows all of the affiliated DS/DeT Servers. Select the DS/DeT server to modify or view the authentication parameters in use for that server.

Database Server Name: If the SQL server is local, remote or you just want to change the SQL server being used. Make sure you include both the SQL server name and the instance name if being used.

DS Database Name: The default is 'eXpress', but whatever name is used by DS on the selected server will be displayed. If changed or if the SQL server is changed, ensure that the SQL server selected has the DS database by the name given.

DeT Database Name: The default is 'DSeXpressTools', but whatever name was provided at install time by DeT on the selected server will be displayed. If changed or if the SQL server is changed, ensure that the SQL server selected has the DeT database by the name given.

Use SQL Authentication: Checked when SQL authentication is used for accessing the SQL server identified by Database Server Name. The Database Access Account and Password fields are unavailable until the check box is checked. When checked the Database Access Account and Password must be supplied.

After any modifications have been made the 'Apply' button becomes active. At this time you can select to apply the changes or just use the 'Close' button to exit.

**When 'Apply' is selected a warning dialog is displayed with additional information that must be followed. Failure to do so may leave DeT or DS unable to communicate with the SQL server and the necessary databases.**

## Security Settings

DeT is fully aware of and enforces DS security settings for both DS users and Active Directory users. The dialog presented here is similar to the one in DS where security rights are managed. The primary difference is that DeT does not allow DS security to be enabled or disabled; it does not allow users to be added or removed, but it does show the current DS security state and allows security rights to be administered.

Additionally DeT extends the DS security rights with DeT specific rights for such things as permission to run reports, or use DeT Remote Control. A user/group with DS Administrator rights has all DeT rights.

DS Security Enabled: Checked if DS security is currently enabled. It must be changed from the DS console.

Manage Users: This panel shows the users that are defined in DS, or have been imported from Active Directory. To view or modify the rights for a given user select the user and then press 'DeT Rights' or 'DS Rights'.

Manage Groups: This panel shows the user groups that are defined in DS, or have been imported from Active Directory. To view or modify the rights for a given group, select the group and then press 'DeT Rights' or 'DS Rights'.

**DeT Rights:** Displays a dialog showing the rights that are currently assigned to the user or group selected. The rights may be modified by checking or unchecking the appropriate boxes. If the selected user or group has DS Administrator rights, this is also shown, but cannot be modified in this dialog. All changes are applied when the dialog is closed with 'OK'.

**DS Rights:** Displays a dialog showing the rights that are currently assigned to the user or group selected. The rights may be modified by checking or unchecking the appropriate boxes. All changes to DS security rights are reflected in DS, and the next time the user runs the DS console they will be in force. All changes are applied when the dialog is closed with 'OK'.

**Close:** Press this to close the dialog

Any changes to the currently logged in user take effect immediately.

## Options

This selection brings up the main configuration dialog. The options are adjusted for the current 'Active Affiliation' server.

There are six different areas that can be modified. Use the expandable tree view on the left to select the desired option that will be viewed and/or modified. When done select the 'OK' button at the bottom to apply or the 'Cancel' button to exit without saving any changes.

### Column Defaults

Each report type, inventory and status, can be configured with a set of report column defaults. These can be changed as needed for a given report. When the report is cleared, the report column selection is reset to the defaults specified here.

There are two separate set of defaults: The Inventory Report and the Status Report. Use the configuration area on the right and check the desired columns that will make up your custom defaults.

If this section is not available, then you may add this feature/module by contacting sales@exprescient.com.

### Custom Branding

By selecting the Enable Report Branding check box custom report branding will be enabled: Add your company or organization name, choose the desired font and the graphic you want in the header of your custom reports. This custom branding will be applied to all reports.

If this section is not available, then you may add this feature/module by contacting sales@exprescient.com.

### Email

When a DS job is scheduled through the DeT Console, a series of job status e-mail notifications can be sent to identify the completion status of the job. There are two sets of parameters that must be configured to enable these e-mail messages.

#### Notification Defaults:

'Enable Job Status email notifications' when checked allows e-mail notifications to be sent and allows the remaining fields to be configured.

## Chapter 3:DeT Console Basics

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'Send email notifications by default' when checked ensures the status e-mails will be sent when any job is scheduled, unless it is turned off when the job is scheduled.

'Send email notifications for "live events"' when checked will send the status e-mails on right click power operations.

'From' must be an account on the SMTP server configured on the second page.

'To' is the default target e-mail address unless changed when the job is scheduled, and is the recipient of "live event" notifications.

'Delay in minutes before first email' specifies the time delay before DeT will send the first status email. This is a default value and can be changed when the job is scheduled.

'Delay in minutes between subsequent emails' specifies the time between the first and second e-mails and all subsequent e-mails *if the job is not finished when the email is sent*. This is a default value and can be changed when the job is scheduled.

'Max number of emails' specifies the maximum number of messages sent. All messages indicate whether another email will be sent or not. This is a default value and can be changed when the job is scheduled.

### SMTP server:

'Enable Job Status email notifications' when checked allows e-mail notifications to be sent and allows the remaining fields to be configured. This is the exact same check box as the previous page, changing one changes the other.

'SMTP server name or IP' is the address of the SMTP server used to send the job status e-mail messages.

'Port' is the port on the SMTP server where job status e-mail messages are sent. Port 25 is the traditional default.

'Use SSL' when checked uses SSL to connect to the SMTP server.

'SMTP server requires authentication' when checked allows entering an account name and password that provides access to the SMTP server.

'Account name' is the user account used to access the SMTP server, it does not have to be the same as the 'From' e-mail address.

'Account password' is the user account password. This value is stored encrypted within DeT, but is sent in the clear to the SMTP server unless SSL is used.

'Verify password' must match the 'Account password' when changed.

'Test Account Settings' causes a test e-mail message to be sent 'From' the address specified, though the SMTP server 'To' the address specified via the DeT Server. When checking to see if the test message has arrived, be sure to check junk mail and spam filter folders.

## Logging

To help in the process of solving internal software unexplained events, a logging sub system is made available. There are two different logs that can be enabled by using the supplied check boxes.

When the enable check box is selected the log file name and verbose level can be modified. There are defaults for both the log name and logging level. When the DeT server log is enabled the service associated with the DeT server must be restarted. This applies to both enable and disable of the logging on the server.

### **Remote Control**

DS eXpress Tools provides two built-in Remote Control tools (DeT Remote Control and Windows Remote Desktop), but also allows adding third party tools. DeT uses DS jobs to distribute, update and remove the tools from managed systems.

'Name' is a drop down list of all currently configured Remote Control tools.

'Password' is a tool specific password that the 'viewer' passes to the 'agent' (some tools call this the 'server') component on the managed system, to protect against unauthorized remote control use. This password is encrypted within DeT, but it is up to the specific tool as to whether this password is secure when it is stored on the managed system, or passed between the 'viewer' and the 'agent'. DeT Remote Control uses a unique password for each managed system, thus it is not configurable. Windows Remote Desktop requires an interactive user account and password, thus it also is not configurable.

'Viewer executable location' is the location of the viewer that DeT Console will launch when the currently selected remote control tool is requested via the right click menu.

'Viewer command line' is the command line that is passed to the viewer. The 'Macros' button will allow the selection and insertion of a predefined macro into the command line that represents either the 'Password' specified in the password field, or the IP address of the target managed machine.

'Run once job' is the DS job that is used to copy the remote control 'agent' to the target system and cause it to run only one time. The agent is removed when the 'viewer' is terminated for that target system. This job is defined using the DS console, and then selected by pressing 'Select Job'.

'Install job' is used by DeT to install the remote control 'agent' to the target system. This also sets a flag internal to DeT indicating that a given remote control agent is installed. This job is defined using the DS console, and then selected by pressing 'Select Job'.

'Update job' is used by DeT to update either the password or the 'agent' executable on the target system or both. This is defined using the DS console, and then selected by pressing 'Select Job'.

'Remove job' is used by DeT to remove the 'agent' from the target system. This job is defined using the DS console, and then selected by pressing 'Select Job'.

### **Other**

At the present time only the Miscellaneous category is available. Here the licensed organization name, the console refresh rate and two configuration check boxes can be changed.

'Licensed Organization' is the name associated with the license keys. This is for information purposes only, but should be kept in sync across all affiliated servers.

## Chapter 3:DeT Console Basics

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'Refresh console every N seconds' provides control over how frequently the console is refreshed; smaller numbers improve display changes, but also may slow the console down in large environments.

'Show all applications in reports' controls how the application column is treated in inventory reports. When this is checked, all applications that DS has detected will be included in the application column for a given managed system. When not checked (the default) only the applications selected in the inventory application filter will be displayed. This aids in clearly seeing which systems have the expected applications. It also helps with performance. It is strongly recommended that this be left off.

'Show DeT System Jobs in console view' controls whether the DS jobs that have been added to facilitate DeT specific functionality should be shown in the Jobs panel. Since these jobs should not be edited, and often require dynamic data that is placed in the DeT database, it is recommended that this remain unchecked. However, the DeT jobs are visible in the DS console.

### Console Squared™

DS eXpress Tools (DeT) provides a console to manage your computers and jobs much like the Deployment Solution (DS) console. The DeT console has a very similar layout to the DS console with computers, jobs, and history detail provided in the same exact location as you would find them within the DS console.

### Computers

Schedule a computer or computer group for a job by dragging and dropping a computer or computer group onto a job or drag and drop a job onto a computer or computer group. Immediately following the drop operation, a scheduling dialog will be displayed allowing the job to be run immediately, run in the future, or run as a recurring job. The scheduling dialog also features email notification to notify you when your job has run.

Organize computers and computer groups within the tree hierarchy by dragging and dropping them into other computer groups. Move a computer or computer group from another computer group, by dragging and dropping it onto the 'All Computers' group.

Rename a computer or computer group by selecting the node you wish to rename followed by pressing the F2 key or by right clicking on the node and selecting "Rename" from the context menu.

Delete a computer or computer group by right clicking on the node and selecting "Delete" from the context menu.

Remote Control a computer by right clicking on an active computer node and selecting "Remote Control" from the context menu. A menu list of all available remote control tools will appear. Take care to open only one remote control session at a time for a given computer as multiple sessions on that computer could cause a file lock on that client's remote control agent. Note: Remote Control can only be executed on an active computer. For more information on remote control, see the detailed Remote Control section in the next chapter.

Power Control a computer or group of computers by right clicking on the appropriate node and selecting "Power Control" from the context menu. The Power Control menu option contains

additional sub menu items called "Wake up", "Shutdown", "Restart", and "Logoff". In order to wake up a computer, the computer must have a Wake-on-LAN enabled network card

## **Jobs**

Schedule a job by dragging and dropping a job onto a computer or computer group or drag and drop a computer or computer group onto a job. Immediately following the drop operation, a scheduling dialog will be displayed allowing the job to be run immediately, run in the future, or run as a recurring job. The scheduling dialog also features email notification to notify you when your job has run.

Organize jobs and job folders within the tree hierarchy by dragging and dropping them into other job folders. Move a computer or computer group from another computer group to the root, by dragging and dropping it onto the 'Jobs' label at the top of the window.

Rename a job or job folder by selecting the node you wish to rename followed by pressing the F2 key or by right clicking on the node and selecting "Rename" from the context menu.

Delete a job or job folder by right clicking on the node and selecting "Delete" from the context menu.

Creating or editing a job is not supported in this version of the DeT console.

## **History Detail**

Like the DS console, the DeT console also shows history detail for any job or computer that you select such as start time, elapsed time, and current status of the job. The history detail is refreshed automatically every 15 seconds by default to guarantee that what you are seeing is the most recent data. The refresh rate can be changed through: Configuration > Options > Other > Miscellaneous.

## **Inventory Reports**

In order to run inventory reports, launch the DeT Console and select the "Inventory Reports" tab of the ribbon menu bar. This will automatically select the "Reports" panel and you are now ready to run inventory reports. Inventory reports contain information that is specific to computer, hardware, software, or location.

## **Ribbon Bar**

The ribbon bar for inventory reporting is divided into several different control groups. Listed from left to right you will find the "Report Servers", "Generate", "Report", "Memorized Filter Sets", "Computers", "Hardware", "Software", and "Locations" control groups.

## **Report Servers**

The "Report Servers" group consists of all the currently affiliated DeT/DS Servers that you want to query for reporting. Click on the drop-down combo box and you will see all of the DS Servers that DeT knows about. You can select multiple DeT/DS Servers by checking each associated checkbox. You must select at least one DS Server as your report server in order to generate and report data. By default '[All]' is selected. The more servers selected, the more complete your report will be, but also the longer it will take to generate, however, in most cases, even complex ones the report will return in only a few seconds.

**Most filter drop down controls are populated with data directly from the DS databases associated with the currently selected report servers.**

### Generate

The "Generate" group contains a single button called "Create Group". Its purpose is to create a new computer group based off the results of a report that has been generated. Note that by creating a new group, existing computers will be removed from their original group into the new group that you are creating. The button is in a disabled state unless a report has been generated and is currently visible.

### Report

The "Report" group contains three buttons, "Go", "Columns", and "Clear". The "Go" button is used to execute the report. The "Columns" button is used to define what column data you want to show up in your report. The "Clear" button will clear any existing report.

### Memorized Filter Sets

The "Memorized Filter Sets" group contains three controls, "Clear Filters", "Filter Sets", and "Filter Set Administration".

Clear Filters is used to clear out any filters that you have defined within the "Computers", "Hardware", "Software", and "Locations" groups. It also clears out the entry in the "Filter Set" control.

Filter Sets is used to select any predefined filter sets or filter sets that have been user defined.

Filter Set Administration is used to save, save new, delete, export, import or delete any filter set that has been created, including the default built-in filter sets. To create a user defined filter set, simply select the criteria you want to query in your report from the "Computers", "Hardware", "Software", and "Locations" groups. Then click the "Filter Set Administration" button, then 'Save' or 'Save As'.

### Computers

The "Computers" group is used to select filter information that is computer specific

### Hardware

The "Hardware" group is used to select filter information that is hardware specific. The extended hardware group is accessible by clicking on the small arrow in the lower right hand corner of the hardware group.

### Software

The "Software" group is used to select filter information that is software specific. The 'Application' filter is unique from all other filters, in that it is also a display filter – only the applications selected will be displayed in the report if the applications column is selected. To change this behavior go to Configuration > Options > Other > Miscellaneous > Show all applications in reports.

### Location

The "Location" group is used to select filter information that is location specific. The subnet filter is very powerful.

## Status Reports

In order to run status reports, launch the DeT Console and select the "Status Reports" tab of the ribbon menu bar. This will automatically select the "Reports" panel and you are now ready to run status reports. Status reports contain information that is specific to jobs that have been run on a computer.

### Ribbon Bar

The ribbon bar for inventory reporting is divided into several different control groups. Listed from left to right you will find the "Report Servers", "Generate", "Report", "Memorized Filter Sets", "Computers/DS Users", "Jobs", and "Date Range" control groups.

### Report Servers

The "Report Servers" group consists of all the currently affiliated DeT/DS Servers that you want to query for reporting. Click on the drop-down combo box and you will see all of the DS Servers that DeT knows about. You can select multiple DeT/DS Servers by checking each associated checkbox. You must select at least one DS Server as your report server in order to generate and report data. By default '[All]' is selected. The more servers selected, the more complete your report will be, but also the longer it will take to generate, however, in most cases, even complex ones the report will return in only a few seconds.

**Most filter drop down controls are populated with data directly from the DS databases associated with the currently selected report servers.**

### Generate

The "Generate" group contains a single button called "Create Group". Its purpose is to create a new computer group based off the results of a report that has been generated. Note that by creating a new group, existing computers will be removed from their original group into the new group that you are creating. The button is in a disabled state unless a report has been generated and is currently visible.

### Report

The "Report" group contains three buttons, "Go", "Columns", and "Clear". The "Go" button is used to execute the report. The "Columns" button is used to define what column data you want to show up in your report. The "Clear" button will clear any existing report.

### Memorized Filter Sets

The "Memorized Filter Sets" group contains three controls, "Clear Filters", "Filter Sets", and "Filter Set Administration".

Clear Filters is used to clear out any filters that you have defined within the "Computers", "Hardware", "Software", and "Locations" groups. It also clears out the entry in the "Filter Set" control.

Filter Sets is used to select any predefined filter sets or filter sets that have been user defined.

Filter Set Administration is used to save, save new, delete, export, import or delete any filter set that has been created, including the default built-in filter sets. To create a user defined filter set, simply

## Chapter 3:DeT Console Basics

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select the criteria you want to query in your report from the "Computers/DS Users", "Jobs", and "Date Range" groups. Then click the "Filter Set Administration" button, then 'Save' or 'Save As'.

The Date Range value in a saved report set depends on its Date Preset type. All Date Preset types, except 'Other' are relative to the date the report is run, regardless of the 'Start Date' and 'End Date' that are displayed when the filter set is saved. Date Preset type 'Other' uses absolute dates, and the 'Start Date' and 'End Date' values are saved with the filter set.

### Computers/DS Users

The "Computers/DS Users" group is used to select filter information that is computer or user specific.

### Jobs

The "Jobs" group is used to select filter information that is job specific.

### Date Range

The "Date Range" group is used to select filter information that is also job specific. 'Date Preset' provides a quick date range selection. When a date preset is selected the Start and End dates for the preset are automatically shown. Date preset types include:

- No Date
- Other – Manually set the Start and End dates
- Today
- This week – starts with Sunday of the current week
- Last week – starts with Sunday of the previous week
- Past 30 days – ends with today
- Past 60 days – ends with today
- Past 90 days – ends with today
- Next week
- Next 30 days – starts with today
- Next 60 days – starts with today
- Next 90 days – starts with today

# Chapter 4: DeT Console Advanced

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**In this chapter:**

- ✓ Affiliating multiple DS/DeT servers with one DeT console
- ✓ Report Servers and Affiliation
- ✓ DS Security
- ✓ Remote Control
- ✓ Network Failures

## Affiliating multiple DS/DeT servers with one DeT console

In order to gather data from a DS installation an active DS database affiliation must be established. This is accomplished from the Configuration tab on the ribbon menu bar and has three actions that can be used to manage affiliating a DeT console with one or more DeT/DS servers.

Affiliations are managed independently for each DeT Server, and once an affiliation is established it is available to all users whose DeT consoles were installed to that DeT Server. DeT Consoles installed to other DeT Servers may require affiliations to be independently set (see Bi-directional affiliation in Add Affiliation for additional information).

### Active Affiliation

This is a drop down list that shows all of the currently affiliated DeT/DS servers. This list also identifies the DeT/DS servers that are available for selection as Report Servers (see Report Servers and Affiliation in next section). When the drop down list is selected it shows the name given to the DeT/DS server when it was added, and may or may not be the network server name of the affiliated server.

Selecting any server from the list will make it the 'Active Affiliation'. The active affiliated server defines which server is configured through the other operations available on the Configuration tab of the ribbon menu bar, it also defines which server is accessed for Console Squared operations, such as scheduling DS jobs.

'Active Affiliation' may also be selected from the DS Tools tab of the ribbon menu bar.

### Add Affiliation

When this action is selected a pop up dialog will be displayed to allow affiliation of any existing DeT/DS Server. This dual configuration of DS and DeT Server constitute an existing possible affiliation. The dialog requires the 'Server Name', 'DNS Name or IP Address' and the 'IP Port'. When the correct information is added to the dialog then select the 'Add' button to make the Affiliation or select the 'Cancel' button to exit the dialog.

### Bi-directional Affiliation

When adding a new affiliation checking the Bi-directional affiliation check box will cause the current local DeT server to also be added to the affiliations on the remote DeT server. This can eliminate the need to configure all DeT servers independently with all possible affiliations. However, it will not eliminate the need to perform any affiliations for the other DeT Servers. For example:

In a three DS server environment, assuming DeT servers have been installed on or in coordination with all three DS servers the following affiliation steps will need to be performed.

- Run DeT Console on DeT/DS server A
- Affiliate with DeT/DS server B and check bi-directional affiliation.
- Affiliate with DeT/DS server C and check bi-directional affiliation.

At this point DeT/DS server A knows about both servers B & C, and servers B & C know about server A, however, servers B & C do not yet know about each other. Therefore an additional operation is required.

- Run DeT Console on DeT/DS server B (or on server C)
- Affiliate with DeT/DS server C and check the bi-directional affiliation

By effectively using the bi-directional affiliation check box this process has saved four steps, and when more DeT/DS servers exist the savings can be even greater.

### Remove Affiliation

When this action is selected a pop up dialog will be displayed that has a drop down list and a 'Remove' and 'Cancel' buttons. When the drop down list is displayed it will list the affiliated DS/DeT servers only. The default primary cannot be removed from the list. To remove a server select the check box next to the affiliated DS/DeT server or servers and then select 'OK' to continue or 'Cancel' to return. If you selected an affiliated server to remove and clicked on the 'OK' button you will be returned to the Remove DS/DeT Server Affiliation dialog and the drop down list box will show how many DS/DeT Servers were selected to be removed. Select the 'Remove' button to finish the removal or the 'Cancel' button to exit.

There is no Bi-directional affiliation remove operation.

### Affiliation at DeT Console Startup

When the DeT Console is first launched, it connects to the primary DeT Server where it obtains additional information about affiliated servers. The DeT Console then attempts to connect to each of the affiliated servers. If there are connectivity problems with one or more affiliated servers, an information dialog will indicate which servers cannot be currently affiliated and why. The user can retry after taking any corrective action, ignore the error and proceed with any successful affiliations, or terminate the DeT Console.

If the user ignores the error and proceeds, the offending or failed affiliations can be removed as described above, and the next time the DeT console is launched it will no longer attempt to affiliate with removed affiliations.

## Report Servers and Affiliation

Once an affiliation has been established and successfully connected when DeT Console is launched, it can be used to gather data that will be displayed in a report. Unlike the console squared and configuration operations which can only be performed against the current 'Active Affiliation', reports can operate on one or more affiliated servers simultaneously.

When multiple DeT/DS servers are selected as Report Servers the data from all selected servers are combined into the report filters for selection, and the report results from each server are appended together to form a single report.

**It is highly recommended that the 'Parent DS' report column be selected to help identify from which DS the report entry comes. And that it be set as a default column in Configuration > Options > Report Columns > ...**

## DS Security

When DS Security is enabled DS eXpress Tools enforces the security rights and permissions in the same manner that DS does. Additionally it also enforces security across affiliated connections. There are four fundamental security enforcement points.

- Rights
- Permissions
- Affiliation
- Reports

### Rights

DeT enforces the actions a user can take according to the rights given, either directly or through membership in a group. For example: If a user attempts to schedule a job against all computers, DeT like DS only allows this to occur if the user has the 'Allow scheduling on All Computers' right.

Some DS rights do not yet have meaning in the DeT Console, but for all operations that DeT can perform if there is a DS right to control that operation it is enforced.

### Permissions

DeT also enforces permissions and permission restrictions. DeT also allows permission management if the logged in user has DS Admin rights.

Permission management is performed through the right click or context menu on a computer, computer group, job or job group and selecting the permissions option. The dialog presented is nearly identical to the one available in the DS console.

### Affiliation

When multiple DeT/DS servers are affiliated the logged in user must have rights on all the affiliated servers. This allows an administrative user to access all affiliated servers, while a departmental or limited admin may only administer and access a more restricted set of DeT/DS servers.

After a user has "logged in" either explicitly through the login dialog, or implicitly because of being an Active Director user with DS group membership, and before any other operation is allowed the currently affiliated servers are allowed to authenticate the user, and if the user does not have

permissions on a given DeT/DS server an information dialog is presented and the user may either 'Ignore' and proceed with authenticated affiliations only, or 'Cancel' to terminate the DeT Console.

### Reports

DeT has extended the DS rights model. One of these rights is the ability to run a report. This is managed on a server by server basis, thus a given user may have rights to run reports on a subset of the currently affiliated servers. When a report is run a security check is made to ensure the user has the right to run a report on all the currently selected report servers, and an information dialog is presented if the user does not have the report right on one or more of the selected report servers. The server or servers where the report right is not granted, it identified in the dialog so the user can unselect that server and re-run the report.

### Remote Control

DS express Tools (DeT) has the ability to create a communication channel from the DeT Console to a remote managed computer. Depending on the version of remote control that you use, you should be able to view, manage, and modify the behavior of the remote computer that is under your control.

#### Built-in DeTRemote that supports XP, Vista and Windows 7

The version of DeT Remote Control that is included with DS eXpress Tools is derived from UltraVNC version 1.5.2. This version has been modified to allow DeT specific password and management methods. Once the viewer is launched and the connection is complete then the viewing and use documentation used by UltraVNC applies. This version is capable of viewing other computer with the Windows OS installed. Windows XP, Vista and Windows 7 can be managed using the built-in DeT Remote Control service. Support for Linux will be available in future versions of DS eXpress Tools.

When remote controlling a Windows Vista or Windows 7 system configured to use the "Aero" display there are some systems that show the background as black. This is a feature to allow for more video information to be passed in a timely fashion.

#### Run Once or Always Installed

There are two modes that the supplied remote control application: Run Once and Always Installed.

The run once method uses the ability of DS to send a Job to the client computer and download the DeT remote control agent. This agent is then launched using the supplied password created by DeT that was sent with the Job to the client computer. DeT Console then launches a viewer instance to connect and validate the password with the client agent. At this point the client computer is under DeT remote control. When the DeT viewer is closed and the session terminated the DeT Agent on the client computer will also terminate and a cleanup job is sent by DS to the client to remove any remote control files or information.

The always installed method also uses the ability of DS to send a Job to the client computer and download the DeT remote control agent. In the DS job the agent is launched using the supplied password created by DeT that was sent with the job to the client computer. The DeT Agent application is registered with the client computer to remain active at all times. When the client reboots the DeT Agent will restart and be ready for a connection to be established by the DeT

Console. After the DeT Console launches the viewer and the viewer is terminated and the connection is closed the DeT Agent will remain active.

### **Built-in Windows Remote Desktop**

There is a second registered remote control application that can be used with the DeT Console under the Right Click Menu. This is the Windows Remote Desktop application. This application is only used in the 'run once' mode with some differences. Since the Windows Remote Desktop connection service resides on the client computer it will not be removed from the computer when the viewing session ends. The remote control operations that are used with the Right Click Menu selection will be to launch the Windows Remote Desktop application and establish a connection with the client computer. You will have to supply the proper Windows authentication needed to validate the connection. At this point the client computer is under DeT remote control via the Windows Remote Desktop. When the remote control session is closed control is returned back to DeT.

### **Adding a Third Party remote control tool**

DeT Console allows other remote control application to be added, such as PC Anywhere, DameWare, Radmin or others. To add a third party remote control tool go to: Configuration > Options > Remote Control > Tools & Jobs. This Remote Control dialog is where you Add, Edit or Delete registered remote control applications. The default screen displays the DeT Remote Control application. This includes the console viewer, client Agent, Run Once job, Always Installed job, Update job, Remove job, password, name, etc. If you use the drop down box for the name and you select the Windows Remote Desktop the display will change with the needed values for the Windows Remote Desktop as the DeT remote control application.

In both examples you can see the information needed to register a remote control application. The simplest is to supply a Name, Viewer application and the View Command Line options but for the full support you will have to copy, modify and rename the default DeT jobs and supply the other fields with the correct information to register your remote control application. See Remote Control in the configuration section of the previous chapter.

# Chapter 5: DeT Server

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## In this chapter:

- ✓ Accessing DS Data and Services
- ✓ Changing Service Account or Password
- ✓ Changing SQL Account or Password
- ✓ Using Log Files

### Accessing DS Data and Services

DS eXpress Tools is an add-on to Altiris/Symantec Deployment Solution and utilizes a client server model similar to DS to access the data in the DS database. The DeTServer is written to understand the SQL database tables, stored procedures and configuration parameters in a similar but uniquely useful way.

Additionally for some operations DeT utilizes DS API's, dynamic link libraries and communication services, thus DeT is intimately integrated with DS. Because of the intimate knowledge that DeT has about the DS environment, it is possible that changes to DS, although unlikely at this point, could render certain DeT operations un-functional. When this occurs, eXprescient and our development team are committed to correcting the problem as soon as possible.

### Changing Service Account or Password

Although DeT is integrated tightly with DS, it is an independent program and the DeT Server functions as a Windows OS service. During install this service was installed using a specific account and password. On occasion or regularly depending on security policies this account and/or password may be required to change.

When DeT is installed on the same box with DS, the simplest operation is to use the DS control panel applet to change the user or password, then with the service control manager, change them for the 'DS eXpress Tools Server'.

When DeT is installed on a box independent of DS, you must first change the account password, and then using the service control manager, change them for the 'DS eXpress Tools Server'.

### Changing SQL Account or Password

See the 'Database Access' section in the *DeT Console Basics* chapter.

### Using Log Files

See the 'Logging' sub-section of the 'Configuration & Licensing' section in the *DeT Console Basics* chapter.

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# Appendix

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## This section contains:

- ✓ Copyright notices
- ✓ Trademark notices
- ✓ Third Party Licenses

## Copyright notices

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DeT Remote Control is derived from UltraVNC v1.5.2 and as such is provided under the terms of GPL v2 as specified at <http://www.uvnc.com/general/license.html>

For access to the source send an e-mail message to [support@expresscient.com](mailto:support@expresscient.com) with the subject line: DeTRemoteControl source. You will receive an e-mail response containing a download link.