

Universal Management Service 2011



UMS 2011 Help

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This document is a reference guide for administrators of UMS. An administrator of UMS is someone responsible for the creation and maintenance of the UMS solution not the person managing the customer's use of UMS. This person is referred to as a User of UMS. A User Guide is provided within the product using F1, with a copy provided on the installation media.

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Part



Installation

1 Installation

This chapter provides information on installing and licensing Universal Management Service.

1.1 Installation Requirements

UMS Hardware Requirements

UMS Server has no specific server hardware requirements. The server should be on a switched network, minimum 100Mbps and if using DirectPXE (a PXE server for 'zero touch' deployments) you should ensure that your network infrastructure is set up to support the PXE packet type.

UMS Software Requirements

The table below shows the operating system versions that are supported for use with UMS.

	UMS Server	UMSServer Manager	UMSClient	UMSAgent
Windows 2008 Server (any version)	■	■	■	■
Windows 2003 Server (any version)	■	■	■	■
Windows 2000 Server (any version)	■	■	■	■
Windows 7	□	■	■	■
Windows Vista	□	■	■	■
Windows XP Professional	□	■	■	■
Windows 2000 Professional	□	■	■	■

Key

- Supported
- Supported, however this is the Microsoft restrictions for these platforms, notably 10 concurrent file share connections.

Other Requirements

Other PXE server(s) on the network should be configured to ignore requests from the Clients to be managed. Using DirectPXE also requires a DHCP server on the network.

If the server is to run on the same server as DHCP please see the section 'Running DirectPXE on a DHCP server'

To complete this example installation to deploy Operating Systems and Applications, you will need:

- ✱ A License Key. Evaluation license keys are available. Contact info@modus-interactive.co.uk for more information.
- ✱ Microsoft Volume Licence installation media (typically Windows Vista, Windows XP or Windows Server 2003) in ISO format.
- ✱ Application Source media in Windows Installer (MSI) format.

UMS Security Considerations

The UMS server integrates with the Microsoft security model and a service account is created for the server at installation time. Therefore the decision to build the server as a workgroup server or a member of an Active Directory domain should be taken before the server is installed.

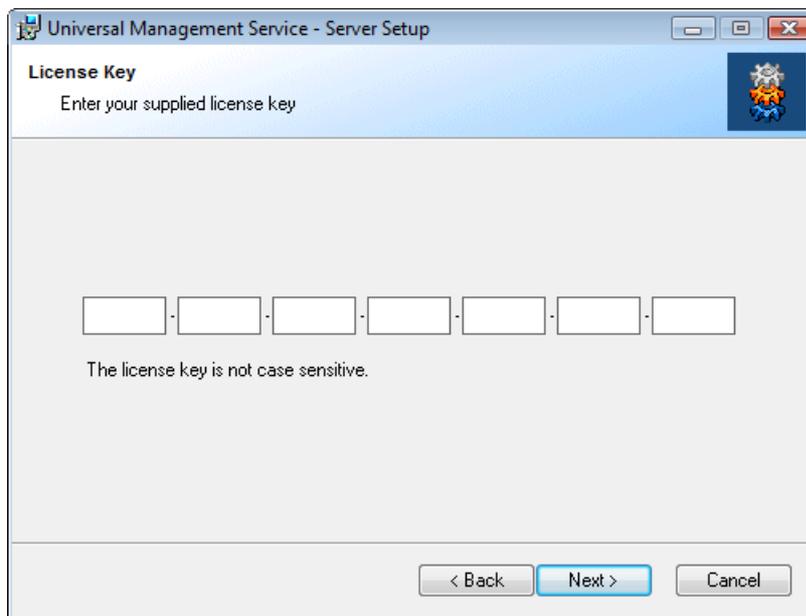
During installation an account will automatically be created depending on the status of the server platform, therefore if the server is a member of a domain you must be logged onto the server with privileges to create accounts within the domain. The account has the following format:

UUSR<computername>

Where <computername> is the name of the server platform at installation time.

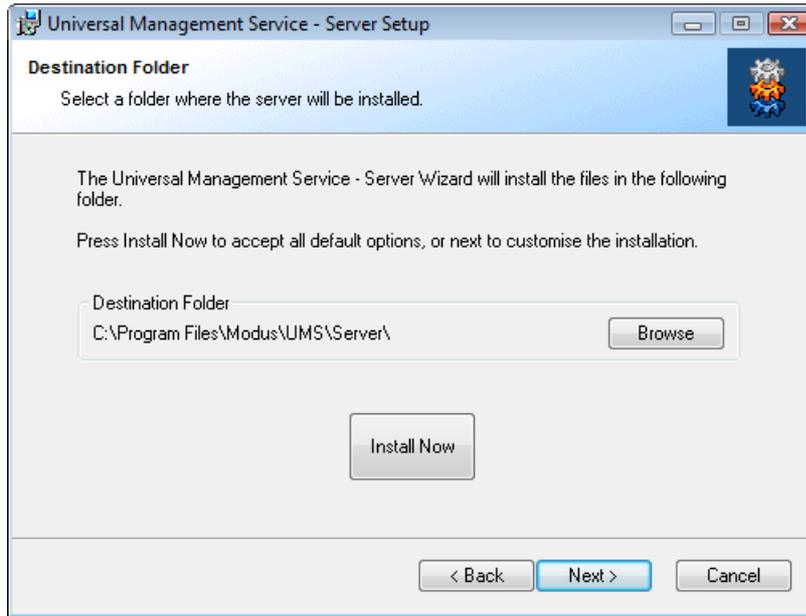
1.2 Installing UMS Server

1. Insert the CD or locate the directory where you have the UMS source expanded. Click on Autorun if you are not using a CD.
2. Click on Install UMS Server at Splash screen
3. On the Installation Wizard click Next>
4. Read and accept the license and then click Next>
5. Now enter the license key that was provided. By default, the license will be activated at the end of the installation procedure.

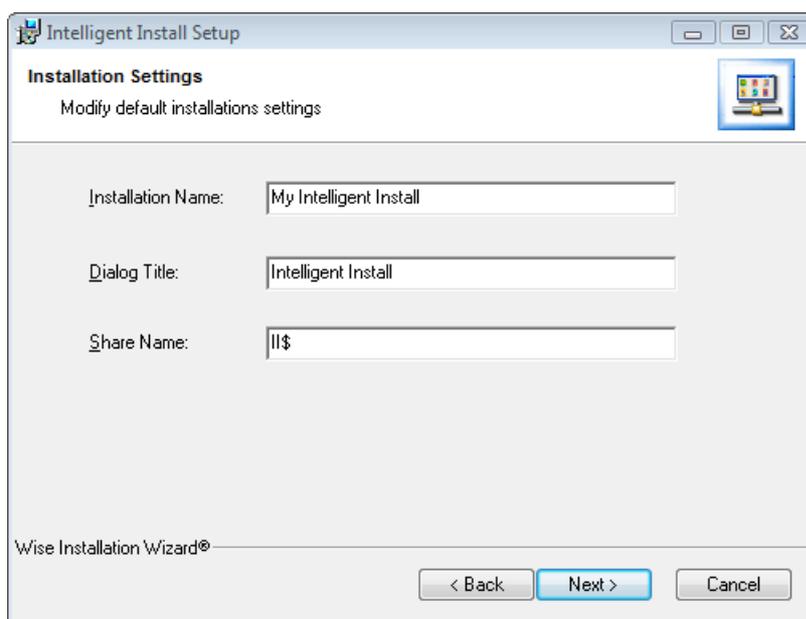


The screenshot shows a Windows-style dialog box titled "Universal Management Service - Server Setup". The main heading is "License Key" with a sub-instruction "Enter your supplied license key". Below this is a text input field divided into seven segments by hyphens. Underneath the input field, it states "The license key is not case sensitive." At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted in blue), and "Cancel".

6. You can now amend the destination folder if you wish.



7. After clicking Install Now the installation wizard will install the UMS components and start the Server. You will see the UMS Server start and the Component elements available to the Client start to be listed as each component is started by the Server. You can minimise the Client at this time.
8. Now go back to the CD splash screen and click on Install Intelligent Install
9. Welcome to II Installation Wizard Next >
10. You now have the option to amend the Destination Folder. If you changed the destination folder of UMS we recommend you do the same for II and keep it at the same path relative to the change you made for UMS
11. Unless it is absolutely necessary we would recommend you leave the Share Name as is in the default Installation Settings, however if you wish to change the Installation Name and/or the Dialog Title, change it now.



12. Click Next > and then Next > again and Intelligent Install will complete its installation

13. The wizard will now inform you of a successful installation and you can click on Finish> to complete the installation. You will now need to add a license key for Intelligent Install.

1.3 Licensing and Activation

A default installation requires a license key, and will be activated at the end installation. This activation requires internet access. If this process fails during installation you complete the activation process manually.

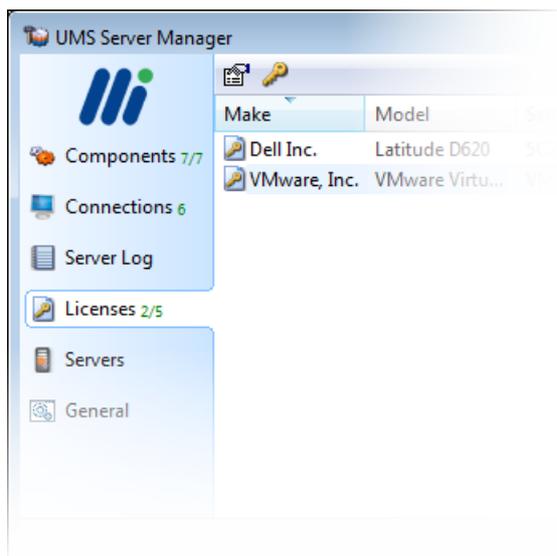
Universal Management Service

You will have a 28 character license key for UMS, that was entered during the installation. If activation was disabled or failed, you will need to activate the key. You have three days to activate the key. After activation, the license is tied to the server you installed UMS on.

To move this installation to another server you will need to contact support (enter value) to activate the license key for a different server.

To activate the UMS license:

Run the UMS Server Manager on a workstation with internet access.



Ensure that Server Manager is connected to UMS and click the Licenses tab. Click the Product key  in the toolbar to open the license key properties page.

Click "Activate..."

If further registration details are required you will be prompted to complete the fields.

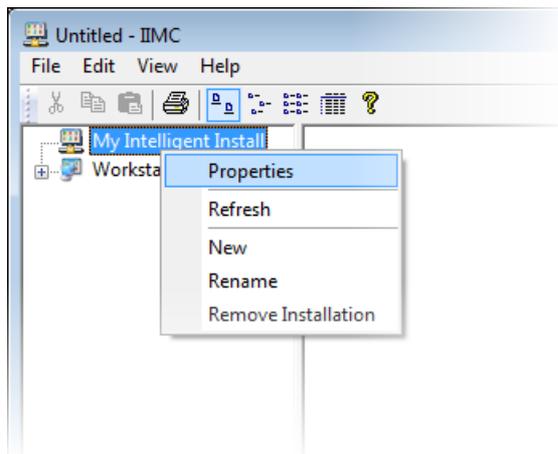
See License for more information on License status.

Intelligent Install

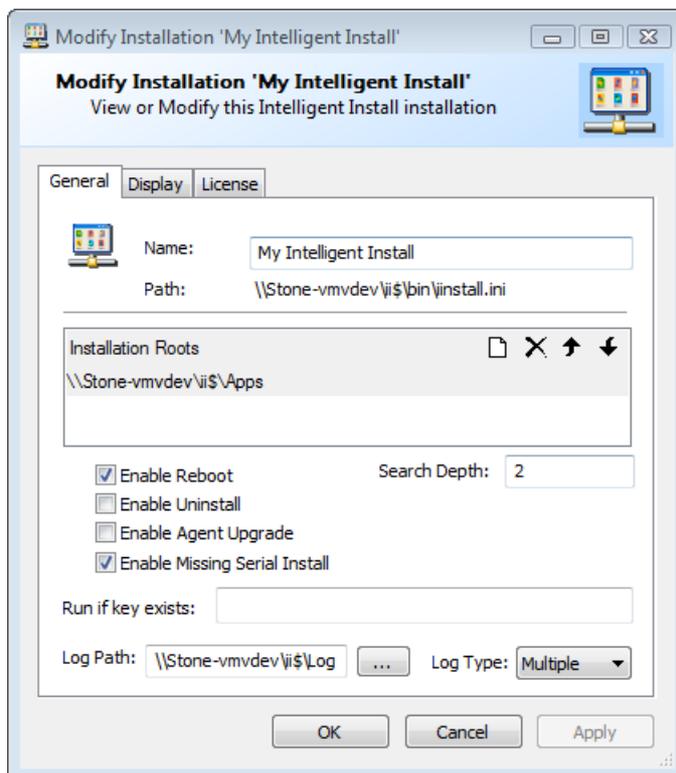
You also need to add a license key for Intelligent Install, and this is done via the Intelligent Install Management Console (IIMC).

1. Load the IIMC from the Start Menu. You should see a clean empty IIMC console load like the one

below.



2. Now right click on My Intelligent Install in the left hand pane and select Properties from the context menu. This will load the Properties window similar to the one below.



3. Click on the License tab and input the Intelligent Install license that you have.

1.4 Installing UMS Agent and Client

By default, the server installation will also install the Client on the same computer as the server. However, it is normal to install the Client on an administrator's computer. The Agent will need to be installed on all computers to be managed by UMS.

Installation Technique	Recommended use
Add Computer Wizard	For small numbers of devices within an Active Directory domain where there is

	no automated deployment tool.
Web page	Ad hoc installation onto small numbers of devices, where getting access to the device is simple.
MSI windows installer package	For medium to large deployments where the software distribution tool can reliably roll out the Agent, minimising the need for technical staff involvement.

➔ We recommend deploying the UMS Agent via a software distribution system using an installer package (MSI). It provides a reliable method for ensuring the Agent is installed on all computers including when new machines are added, or when existing machines are rebuilt.

Install the Agent using the Add Computer Wizard

If the network meets the following criteria, the 'Add Computer Wizard' can be used to remotely install the Agent.

- File sharing enabled at target computer, and 'Simple File Sharing' disabled
- No firewall, or firewall that allows remote file sharing
- Target computers are member of Active Directory domain, or the local Administrator password is known

See Add Computer Wizard for more information.

Install the Client or Agent locally

The UMS Client or Agent can be installed from the UMS Server web page. On the machine you want to install the UMS Client or Agent, open Internet Explorer and type in the following URL:

`http://<servername>:2248`

If the UMS server is set to respond on HTTP port (80) (see Server Properties for details on setting this parameter) then the following URL can be used instead:

`http://<servername>`

This will load the web page or web console from which you can install, or Quick Run both the UMS Client and UMS Server admin programs. The Quick Run option allows you to run the program without installing it on the current machine. The facility to quick run the UMS Client without installing it can be extremely useful, especially when it is either not possible (e.g. insufficient permissions) or not necessary to install the software locally. There is no loss of functionality by running the Client without installing it.

Install the Agent using Software Distribution

Software Distribution systems automatically install software for a group of computers. As the Agent is provided as an industry standard Windows Installer package, it can easily be configured and deployed by all leading software distribution systems.

Example compatible software distribution systems:

- Modus Interactive Intelligent Install

- Microsoft Active Directory Group Policies
- Microsoft System Center Configuration Manager

The Agent packages can be generated and placed in a temporary folder of your choosing. See Client Package within the server advanced settings. This technique allows you to configure default Agent installation properties without requiring installer properties to be set via the command line.

Alternatively, the Agent package can be found in a sub folder of the server installation. By default this is located at the following path:

```
C:\Program Files\modus\UMS\Server\Default\Clients\x86
```

The files required to install the Agent are:

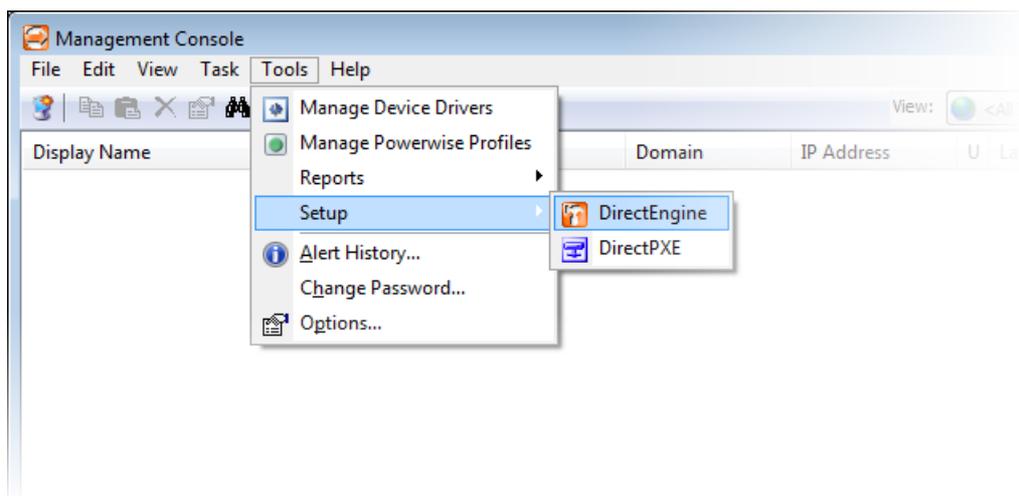
```
UMSAgent.MSI
```

The default installation options can be modified using Windows Installer properties. The method for modifying these depends on the distribution tool chosen. These properties are detailed under Advanced Client Installation Options.

→ When used in an Active Directory managed network, connection parameters can be set via Group Policy using an administrative template. See Managing Connections via group policy.

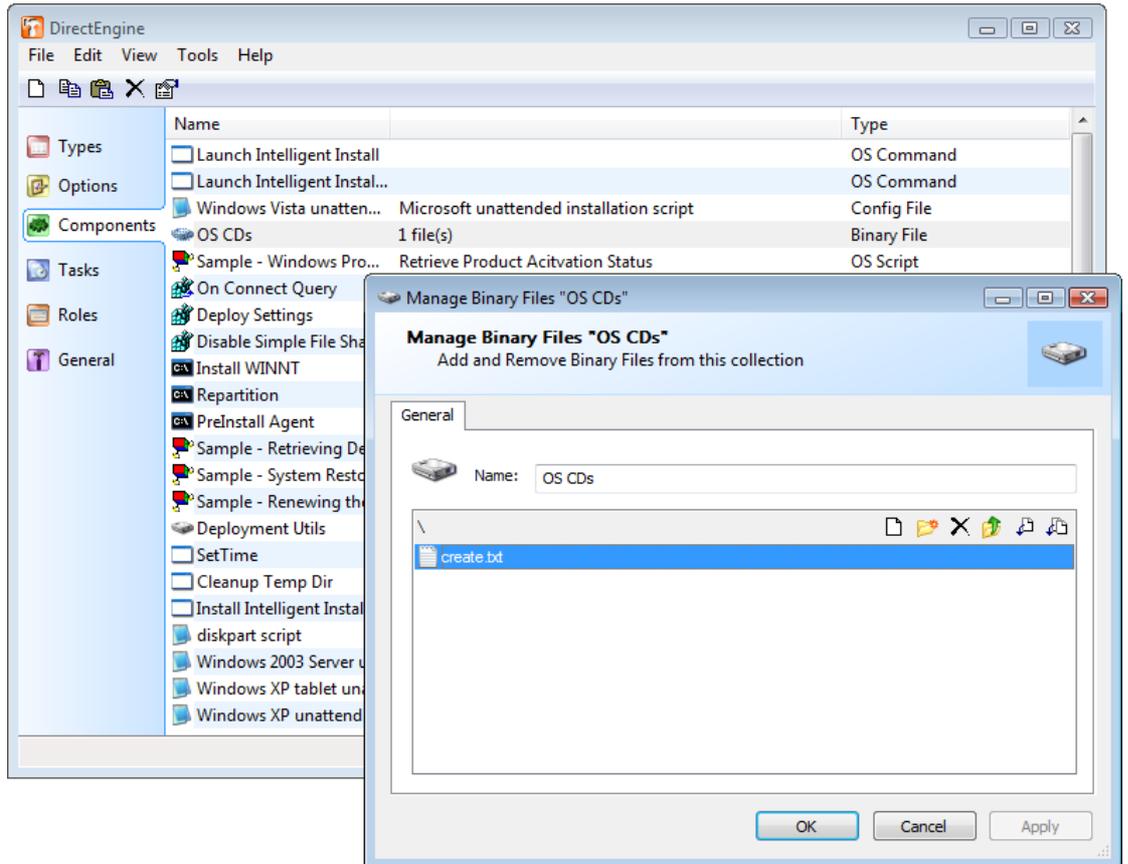
1.5 Adding an Operating System to Direct Engine

The template scripts require Operating System images to be imported before the system can deploy computers.



Select DirectEngine Setup from the Management Console.

Adding the Operating System ISO



Select the Components tab. Locate the 'OS CDs' BinaryFiles component.

Double click to open the properties page for the component.

Locate your Operating System CD, is ISO format.

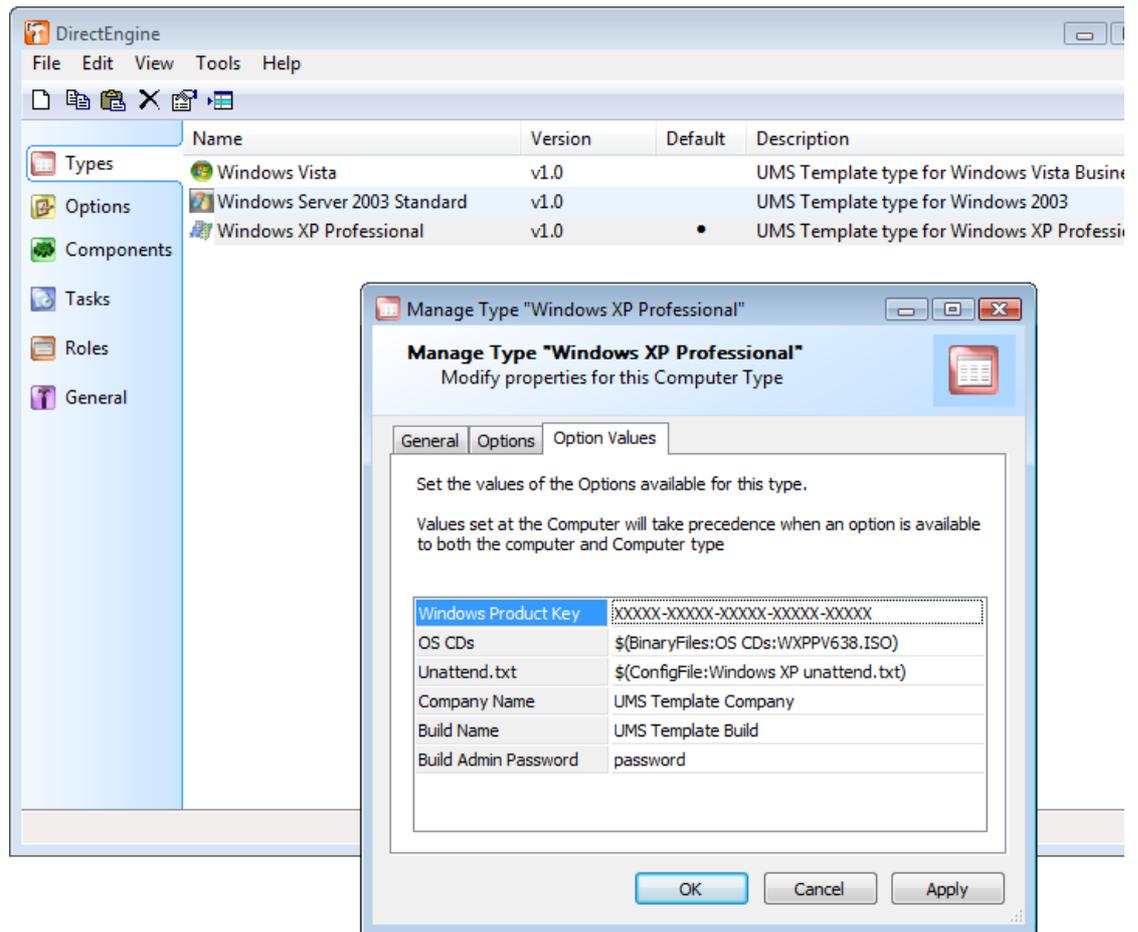
Note: This CD image can be a direct copy of the Microsoft CD, or it can be modified with Microsoft hotfixes and Service Packs already applied.

Click the 'New File' button, browse to your ISO image and select OK.

Press OK to close and save the windows.

the image will now be uploaded to DirectEngine, and a dialog will be displayed to show you the upload progress.

Setting the Operating System values



Select the Types tab. Locate the Operating System type for the OS ISO you have uploaded, for example 'Windows XP Professional'.

Double Click to open the properties page for the type.

Select the 'Option Values' tab.

Select the 'Windows Product Key' field, and enter your corresponding Windows XP Volume License Key in the format XXXXX-YYYYY-ZZZZZ-AAAAA-BBBBB.

Select the OS CDs value. Clear any default values and press the Options button  to select a new value.

Select the ISO image uploaded in the previous step.

Optionally you may also want to change the values for the following Options:

- Unattend.txt
- Company Name
- Build Name
- Build Admin Password (password for the local administrator account)

Click OK to save and close the dialog.

1.6 Adding applications to Intelligent Install

Follow this procedure for each application to be deployed by UMS.

In the IIMC console, select the Installation named "My Intelligent Install" and select **New** from the context menu.

Select **Add a Microsoft Windows Installer script (MSI)** from the Add Application wizard



Click **Next** to continue.

Press **Browse...** and select the MSI file for the application to import.

Adobe Acrobat Reader can be found on the installation media (D:\Docs\Acrobat Reader\Adobe Reader 8.0.1.msi) and can be used as a sample installation application.

Click **Next** to continue.

Leave Installation Roots as default.

Click **Next** to continue.

Leave Application Defaults as default.

Click **Next** to continue.

Press **Finish** to complete the wizard. The application will not be imported into Intelligent Install.

The application will be imported as a disabled application. Highlight the application icon in the management console and **right-click**. Select **"Enable"** from the context menu,

This completes adding an application to Intelligent Install. This process can be repeated for each application to be imported.

1.7 Testing your Installation

Now that the server and components are installed and configured you can carry out a test build. You will need a test workstation, that will have all data wiped.

Starting a build

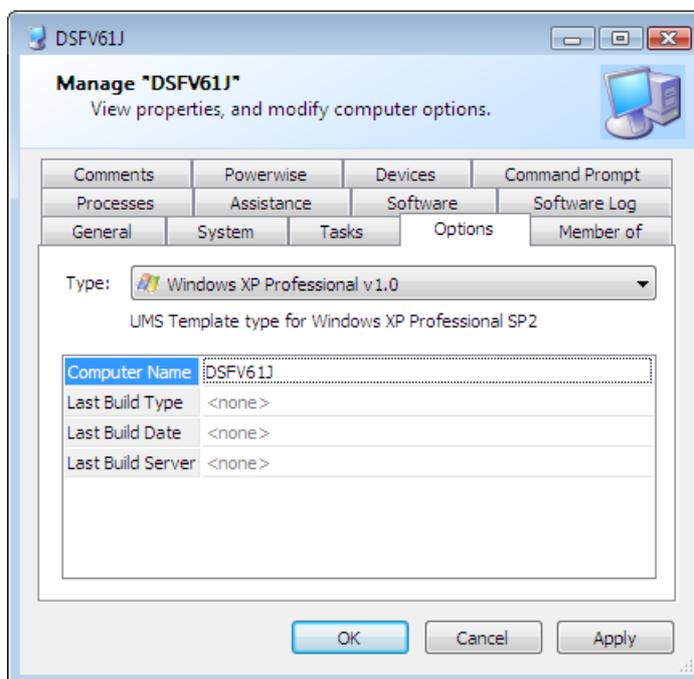
In order to carry out a test build you will launch the management console. To do this you will need to load the UMS Client. For this you can either use the UMS Client installed on the server earlier, alternatively if you are on another machine you can use the Install UMS or UMS Client 'Quick Run' option.

The launch page is located at http://UMS_server_name:2248. For more information see Client Installation.

Within the BIOS configuration of your test workstation you will need to enable PXE and configure the PXE network adapter as the first boot device. Now reboot the workstation so that the workstation is registered by the PXE server and is therefore visible in the Management Console.

You will now see a record of your workstation (identified by MAC Address) in the Management Console. Double click on the record to see the computer properties window.

Select the Options tab and enter a valid computer name in the Computer Name field. Click on OK to save and close the window.



Now right click on the computer record in the console and the context menu allows you to execute a task.

Choose the Deploy Computer task and the Add Task Wizard will load.

Add Task Wizard - Step 1 of 4

Click on Next >

Add Task Wizard - Step 2 of 4

Now select the Immediately check box so that task executes as soon as you complete the wizard, and click Next >.

Add Task Wizard - Step 3 of 4
Click Next >

Add Task Wizard - Step 4 of 4
Click Finish

Now start/reboot your workstation and the task should run from the PXE boot. If you have not configured PXE/Network boot as the default device select it manually; typically by pressing F12.