

Console Guide



Version 13



Prism Suite® Console Guide published June, 2012

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Patent

Prism Suite is protected under US patent numbers 7,707,571, 7,568,018, and 6,564,369.

Additional Notes

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6-13-2007

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Introduction to Prism Suite

Welcome to Prism Suite®

Prism Suite works the way you work, delivering dynamic configuration management for today's IT professionals. It provides the critical desktop management functionality that administrators use most in an easy to learn, easy to use and easy to implement solution. Prism Suite eliminates the complexity and hidden costs associated with traditional desktop management suites, automating processes and workflow to drive new IT department and help desk efficiencies.

Prism Suite dramatically improves administrative control by delivering real-time insight into the configuration states of computer systems on the network. With Prism Suite, you can create desktop standards to streamline management processes. You'll improve security by discovering, reporting on, and removing undesirable applications – including malware – and patching software applications to eliminate vulnerabilities. And with its workflow capabilities, you can configure Prism Suite to monitor and automatically remediate systems that deviate from their approved configurations.

Prism Suite delivers powerful, flexible, and affordable desktop configuration management. Use Prism Suite to administer all of the computers across your organization from a single location, and streamline processes down to a single mouse click. Reduce user downtime to boost productivity. Get granular insight into your assets to make better decisions on IT spending and resource use. Improve security by automating software patching, and automatically removing unauthorized or non-standard software. And do it all with a single solution that delivers what it promises – Prism Suite.

Components of Prism

Note: For a quick overview and to get started with Prism, please refer to the Quick Start Guide, installed with Prism and available at www.newboundary.com.

Prism uses the concept of a *Channel* to complete its operations. Think of a Channel as the conduit between an administrator and managed computers. Through the Channel, an administrator deploys administrative tasks to computers and monitors their hardware and software.

A Channel relies on the various components described below.

Core Components

While the administrator focuses on the information, preferences, and tasks contained in the Channel, Prism's Smart Update provides the "smarts" that lets Prism accurately implement the administrator's instructions and provide detailed feedback. This remarkable synergy is achieved through these core components.

- **Prism Console:** Interface for the administrator to manage the Channel and its settings; add groups, manage computers; and view detailed deployment, inventory, and other administrative reports.
- **New Boundary Channel Server:** Program that manages communication between the Console, the Clients, and the database. This is the center of Prism operations and is managed via the Console. Through its regular communication with Client computers, the Channel Server allows Prism to implement changes on an on-going basis, without direct intervention on the part of the administrator.
- **Database:** Repository for storing information from the Channel, like Client status, configuration, and deployment details. Reports harvest information from the database.

- **New Boundary Client:** The Client is installed on managed computers so that they can receive changes and report information to the Channel. You can install the Client directly by browsing through Active Directory or your domain's browse list. If the target computers are not available through one of these means, you can install the Client using a Subscription file created in the Console.
- **New Boundary Channel Migration Tool:** Optional tool to help current Prism users migrate Channels created with Prism version 5 or earlier to the current SQL database.

Applications

These applications perform specific functions within Prism. The exercises in this Quick Start Guide introduce these components and their use:

- **Prism Asset Manager:** Inventory managed computers for software applications and hardware configurations—automatically or on-demand. Manage compliance with software licenses through summary and detailed statistics. Asset Manager is integrated directly with the Console for immediate access to functions, data, and reports.
- **Prism Deploy:** Create, schedule, install, and uninstall Tasks that run a command, script, or Prism Package to install changes on managed computers. Deploy is integrated directly with the Console for immediate access to functions, data, and reports.

Package Builder is usually installed on a "clean" computer that is representative of your target environments. On this machine, the administrator builds deployment Packages, edits and customizes them for deployment, and optionally checks them for conflicts.

How Prism Is Licensed

Prism is licensed per computer and uses a separate license for each application.

- Each workstation or server managed through a Channel must have a Prism license.
- Each workstation or server that receives Tasks through Prism Deploy must have a Deploy license.
- Each workstation or server that is inventoried with Asset Manager must have an Asset Management license.

Prism Services

The services are used by the Client or Channel Server, and assist Prism in completing its operations. They are installed along with the Prism components that require them. All of the services require administrator-equivalent privileges to install them. (See Adding and Managing Computers for information on direct Client installation and subscription files.)

The Prism services include:

- **PrismXL Service:** The Prism XL service lets the Client receive changes and return status information to the Channel regardless of the current user's permissions. This service does not give enhanced permissions to any other applications besides Prism .

The service file, PRISMXL.SYS, is installed in
C:\PROGRAM FILES\COMMON FILES\NEW BOUNDARY\PRISMXL.

- **Prism Server:** The Prism Server service lets the Channel Server run continuously on the computer where it is installed. This service is used only by the Channel Server.

The service file, PRISMSEVER.SYS, is installed in the same folder as Prism.

Notes on the Documentation

The documentation includes online Help, a Quick Start Guide, and a user guide for each of the applications. To gain the most from your documentation, please review the following comments:

Quick Start Guide

Please review the *Quick Start Guide* to gain a basic understanding of Prism and to complete a tutorial that leads you through the major features available with Prism. The *Quick Start Guide* is available through the Windows Start menu and through the Help menu in the software.

User Guides

Each of these user guides is designed to support a specific application within Prism. They are all available through the New Boundary web site (<http://www.newboundary.com>).

- **Console Guide:** This guide introduces Prism and covers all of the information you need for managing Channels, computers, and groups.
- **Asset Management Guide:** This guide helps you use Asset Manager to effectively inventory and monitor the computers in your enterprise, and manage license compliance.
- **Deployment Guide:** This guide provides information on using the Console to efficiently deploy changes throughout your enterprise. This document also includes information on the Prism commands.
- **Packaging Guide:** This guide provides information on using the Editor to capture and package changes for distribution. Use the Editor to create Prism files, which you can deploy through the Console. This document also includes information on the `RULES.INI` file.
- **Conflict Checking Guide:** Information on using Conflict Checker to check for conflicts between Prism files. Identify the conflicts with Conflict Checker and fix conflicts through the Editor before you install changes.

Online Help

When you select **Help | Prism Help** or click the **Help** button on a dialog box, the online help for the current application is displayed. Depending on which applications are installed, the Help displayed through the Console may also include information on Asset Manager, Deploy, Editor, and Conflict Checker.

Conventions Used in the Help and User Guides

Buttons, fields, and options	The names of individual fields or options on a pane or dialog box are in bold text . For example, Save button.
Menus	A vertical line () is used to designate an item on a menu. For example, File Open refers to the Open option on the File menu.
Tabs on a dialog box	A vertical line () is used to designate specific tab on a dialog box. For example, Channel Properties Licenses tab refers to the Licenses tab on the Channel Properties dialog box.
Tabs on the main window	<p>The Console window is divided into two main panes—the tree view on the left and details pane on the right. A vertical line () is used to designate the combination of a specific tab in the tree view and a specific tab in the details pane.</p> <p>For example, Managed Members tab refers to the Members tab in the details pane when the Managed tab is selected in the tree view.</p>

Contacting Technical Support

If you are unable to locate answers to your questions within this help file, please use the following resources to receive assistance:

Web site: <http://www.newboundary.com>

Here you will find the online New Boundary Technologies Support Forum, knowledge base articles, and responses to frequently asked questions. The Support Forum is an interactive discussion tool that will bring you in touch with other users of New Boundary Technologies software.

Phone: 612-379-1851
or 800-747-4487

Available 8:30 A.M. to 5:00 P.M. Central Time, Monday through Friday

System Requirements

For detailed information on system requirements, please refer to the New Boundary Technologies support site:

<http://www.nbtnet.newboundary.com/supportkb/article.aspx?id=11033&cNode=8F6U8O>.

Note: You must be an administrator-equivalent user to install the New Boundary Server, Console, or Package Builder.

If you are going to use an instance of SQL Server running on a remote machine, you must have rights to create a domain account that can access that machine. You must also have the rights to add a login in SQL Server.

Microsoft IIS 6.0 or later must be installed on a Web server if you intend to use the NBT Web Proxy to enable HTTP/HTTPS communication from Prism clients or Prism Console outside the network perimeter, to a Prism Server inside the network perimeter. IIS installation and configuration is not part of the Prism Suite installation.

Upgrading from a Previous Version of Prism

Upgrading Existing Installations

When you upgrade from a previous version of Prism to the current version, all of your existing data, Prism files, and Channels are upgraded.

Note: When installing Prism, you can install each of the components on a separate computer. For more information on your choices and our recommendations, see the *Quick Start Guide*.

Upgrading Prism for the Administrator

To upgrade an existing installation begin on the computer where you plan to install the Channel Server. The recommended procedure depends on whether you are installing Prism on the same server as your earlier version or on a different server.

- **Same Server:** See Upgrading Prism on the Same Server.
- **Different Server:** Contact technical support for additional information.
- **Upgrading from Prism version 4.x or 5.x:** If you are upgrading from a version of Prism prior to version 6, contact technical support for additional information.

Upgrading the Client

- After upgrading Prism for the Administrator, you are ready to install the new Client on target computers. See Updating the Client on Target Computers.

Merging the RULES.INI File

The standard installation assumes that the existing RULES.INI file may have been customized by the administrator and must be preserved in its entirety. Therefore, the standard installation merges the new RULES.INI file into the existing RULES.INI file.

If you have customized the RULES.INI file on Client computers, you need to distribute the new RULES.INI file to these Client computers.

For more information on the RULES.INI file, see the *Packaging Guide*, Editor online help, or Console online help.

Upgrading Prism on the Same Server

If the Channel Server for your previous version of Prism is stored on the server where you plan to install the Channel Server portion of the new version of Prism, follow the procedure below.

1. Make a backup of the Prism SQL database, using SQL backup tools.
2. Verify that the computer(s) where you plan to install Prism meets the system requirements.
3. Run the Prism installation expert to install the Channel Server.

The installation detects that a previous version of Prism is installed, so it completes an upgrade installation. This procedure upgrades all of the Prism components that it finds on the server, including the Server, Console, and Editor.

4. After you complete the upgrade, the existing Channels, which are stored in the SQL Server database, are accessible from the newly upgraded Console.

5. If you are installing the Console and/or Editor on different computers, run the Prism installation expert on the computer(s) to install the applications.
6. Launch the Console and open the Channels that were migrated.

If the Channels are not listed on the Select the Channel you wish to manage dialog box, click the **Find** button. For the location, specify the computer where the Channel Server is installed.

7. Update the Client on your target computers. (See Updating the Client on Target Computers.)

Updating the Client on Target Computers

After you upgrade Prism, you can use the Console to install the new version of the Client on target computers.

Note: If you distributed a customized version of the RULES.INI file to target computers for your previous version of Prism, you must distribute the new RULES.INI file to those computers.

Starting from the new Console, upgrade the existing client computers by doing one of the following:

Subscription file

1. From the Console main window, select **Computers | Create Subscription File**. The Subscription File dialog box displays.
2. Select the **Install or Update the Client** option.
3. Click **Settings** and adjust settings on the following tabs:
 - Polling
 - Server
 - Web Proxy Server

Note: If you do not want the Channel settings automatically applied to the managed computer, you must turn off the automatic update option on the Polling tab. See Applying Unique Settings to a Client for more information.

4. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
5. Click **OK** on the **Subscription File** dialog to save your changes.
6. On the Save the Subscription File dialog box, provide a name and location for saving the subscription file.
7. Distribute the subscription file by doing one of the following:
 1. If you are using Deploy, create a Command Task that installs the new subscription file that you saved in step 5 above. Assign the new Command Task to all of the target computers in the Channel.

Note The Task should be defined to run attended and as the current user.

2. If you are not using Deploy, distribute the subscription file through a website, email, or other method.

When the Subscription file is installed, the new Client is installed.

Direct Installation

1. Right-click on one or more computers listed on the Managed tab in the Console.

Note: You can use the **Shift** or **Ctrl** key as you click to select multiple computers.

2. Select **Reinstall Client** from the pop-up menu.
3. Complete the steps in the installation expert.

The Direct method of installation upgrades the Client files on the managed computers. A reboot must occur before the installation is complete.

Getting Started in the Console

Overview of the Console and Channels

The Console is the administrator's program for managing Channels and computers. Through the Console the administrator:

- Adds computers from the network
- Groups computers based on role
- Automatically groups computers based on configuration
- Views detailed reports
- Manages Channel security and settings
- Drags and drops to schedule deployments
- Inventories hardware and software
- Manages software licenses and updates

Populating Channels and Managing Computers


The steps to setting up Channels and managing target computers are simple. The following steps give a brief overview of the process. See the topics listed at the bottom of this page for more detailed information.

1. Name the Channel and select the computer where the Channel Server is installed.
2. Populate the Channel with computers and groups that you want to manage. (You can also create configuration groups to precisely identify targets for a variety of operations.)
3. Use the Prism applications to install changes or inventory computers.
4. Read reports on the outcome, including a summary or detailed information on administrator actions and information about each target.

Opening the Console

To open and use the Prism console:

1. Open Prism Console from the Windows **Start** menu.

Note: If you are using the full Prism Suite, you can also open the Console from the Editor window by clicking the  icon on the Editor's toolbar or choosing **Package | Open Deployment Console**. (This option is available only if the Editor and Console are installed on the same computer.)

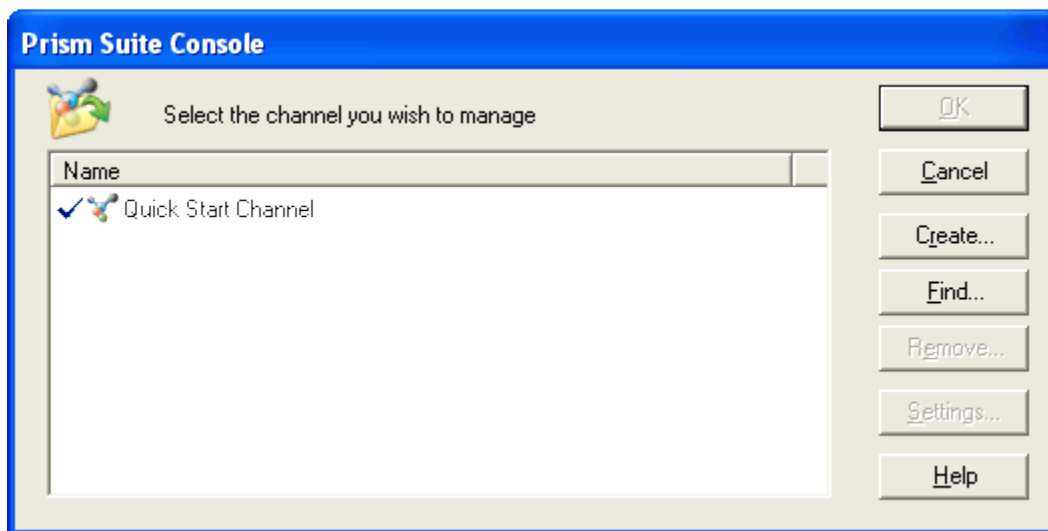
2. The first time you open the console, the Select the Channel you wish to manage dialog box opens.

After your first use, by default the console opens to the main window and displays the last Channel you opened.


3. If you are new to the console, select the *Evaluation Channel* in the Select the Channel you wish to manage dialog box. (See the *Tutorial* for more information on this pre-installed Channel.) If you are at the main window, the Channel you worked on most recently is displayed.

4. Begin work (see Overview of the Console Main Window)
5. Open a different Channel (see Opening a Channel)
6. Create a new Channel (see Setting Up a New Channel)

Select the Channel you wish to manage dialog



The **Select the Channel you wish to manage** dialog box opens when you:

- Open the console for the first time.
- Choose **File | Open Channel**.
- Click  in the main console toolbar.

On this dialog box, create a new Channel or open an existing Channel. The list in the center pane shows the Channels used most recently and the computer where the Channel Server is located.

Create a new Channel

Click the **Create** button. You will have an opportunity to name the Channel and select a computer where the Channel Server is located. The Channel opens in the Console main window. Next, you are ready to add computers.

Work with an existing Channel

Highlight the name of a Channel in the list then click **OK**. The Channel is opened in the Console main window where you can add and modify the computers, groups, and perform other operations.

Find a Channel

If the Channel you want to use is not displayed in the list, click the **Find** button to locate it on the network. After you find the Channel, it is displayed in the Console main window.

Remove a Channel

Highlight the name of the Channel in the list box, then click **Remove**. You have the choice of only removing the Channel from the list displayed here or removing the connection to the Channel Server.

Change the Console Settings

Highlight the name of the Channel in the list box then click **Settings**. These settings govern how the Console communicates with the Channel Server and are used as the default value for installing the Client on managed computers. In the settings dialog box, adjust the following settings for the Channel (refer to Adjusting the Console Settings for more information):

- Server
- Web Proxy Server
- Report timeout period

Main Console Window

Overview of the Console Main Window

When you start the Prism onsole, it opens to the main window as shown below. Through the main window, you manage the computers that subscribe to the Channel, create groups to organize the computers, set up changes to deploy, monitor license use, complete inventories, and view reports .

The Console's main window includes the following features:

- **Menu bar** - This provides access to all main functions.
- **Tool bar** - This provides quick access to various functions. You can open channels, refresh the console, perform actions, and run reports.
- **Tree view** - The left hand pane contains a tree view perspective relative to the currently selected tab. Use this pane to navigate and select items (such as individual computers) and groups. Tabs at the top of the pane provide access to various areas of functionality.
 - **Network:** The Network tab allows you to select computers to manage.
 - **Managed:** The Managed tab shows the currently managed computers and groups.
 - **Configuration Groups:** The Configuration Groups tab shows the configuration groups. These are automatically populated with managed computers.
 - **License Units and Unresolved Files:** The License Units and Unresolved Files tabs show information about software inventories.
 - **Tasks:** The Tasks tab shows information about Tasks that can be deployed to the managed computers.
- **Details pane** - This pane to the right of the tree view shows detailed information relative to the currently selected item in the tree view. The specific contents are controlled through tabs at the bottom of the window. Right-click on an item to choose from a variety of actions. Use the column headings to sort and group the data.
- **Docking and Auto-Hide** - Change the location of panes to suit your preferences.

Toolbar

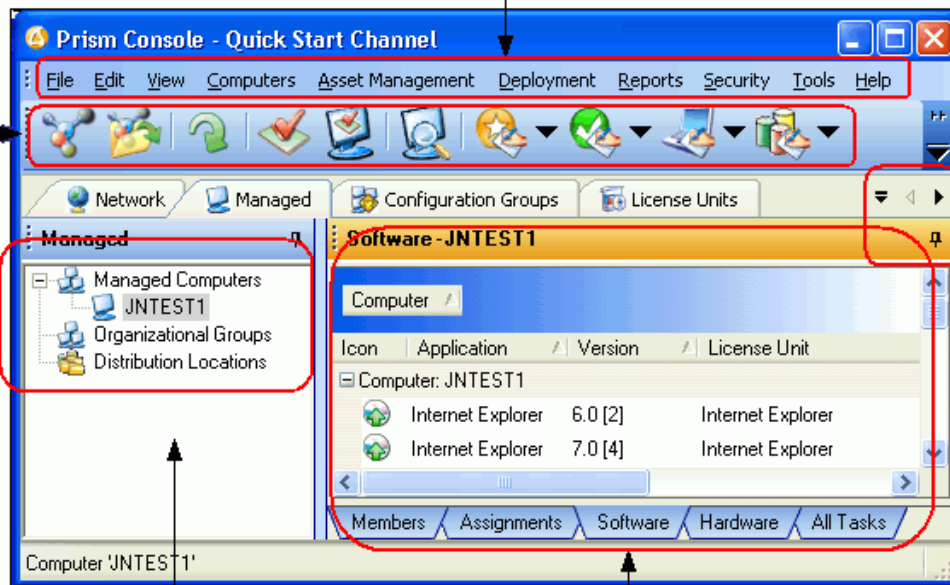
Open Channels, run reports, and request help.
See [Console Toolbar](#).

Menus

Manage the Channel and its contents. Access toolset commands.
See [Console Menus](#).

Docking & Auto-Hide

Change the location of panes to suit your work style.
See [Customizing the Layout](#).



Tree View

Use the tree view pane to navigate and select directories, groups, or individual units.

Tabs at the top of the pane provide access to each toolset and management unit.

The tabs available reflect the toolsets you have installed.

See [Tabs in the Tree View](#).

Details pane

The details pane lists detailed information about the item or items selected in the tree view on the left.

Right-click on an item to choose from a variety of actions. See [Right-Click Menus](#).

Use the column headings to sort and group the data.

See [Customizing the Layout](#).

The available tabs and features depend on the individual Prism applications you have installed. This topic covers all of the options available with Prism.

Console Menus

Use the menus to manage Channels and computers, and access features for the various applications that are used through the Console.

- **File:** Open Channels or work with Console and Client settings.
- **Edit:** Create, edit and delete groups, manage licences, reinstall clients, add computers to a group or view properties of the selected item.
- **View:** Open a specific tab or application by selecting the name on the View menu. Reload the default layout or your custom layout for the Console main window.
- **Computers:** View properties for the selected item, add computers, and set up groups.
- **Asset Management:** Set up custom inventory configurations that you can use at any time. Create baselines that capture the status of your inventory for later comparison reports.

- **Deployment:** Assign and schedule Tasks for deploying changes to managed computers. Also includes options for quickly opening the Package Editor and Conflict Checker.
- **Reports:** Select from administrative, computer, and other reports. You can customize reports with filters, sort order, and grouping, then save the new report for regular viewing. Individual reports, including your custom reports, are available through the submenus.
- **Security:** Create and assign roles to control access to the Channel and its data.
- **Tools:** You can add any application to the Tools menu for easy access from the Console. For some applications, you can also add a menu item to the right-click options for a computer in the tree view. See [Launching External Applications from the Console](#).
- **Help:** View the online help, Tutorial, or Users Guide.

File menu

Options on the File menu include:

- **New Channel:** Set up a new Channel.
- **Open Channel:** Opens a new console.
- **Find Channel:** Opens the Find Channel dialog, allowing you to connect to a channel on a particular server.
- **Import:** Allows you to import Configuration Groups and Asset Management data.
- **Channel Properties:** View and adjust the properties for the Channel, including auto-population settings.
- **Console Settings:** View and adjust the settings that control the communication between the Console and the Channel Server.
- **Client Settings:** View and adjust the default values used when installing the Client directly or with a subscription file. The Client settings can also be set to automatically apply to managed computers.
- **Load Last Channel:** With this option selected the Channel that is active when you exit from the Console is automatically selected and opened the next time you start the Console. Clear this option to select the Channel by name each time.
- **Exit:** Close the Administrator's Console.

Edit menu

The Edit menu options include:

- **Create Group:** Create a new group.
- **Edit Group:** Edit the selected configuration group.
- **Add To Group:** Add an item to a group.
- **Remove From Group:** Remove selected item from a group.
- **Rename:** Rename the selected item.
- **Delete:** Delete the selected item.
- **Properties:** View the properties for the selected item.

View menu

Options included on the View menu include:

- **Toolbar:** Display the toolbar at the top of the Console main window.

- **Status bar:** View the status bar at the bottom of the Console main window.
- **Save My Desktop:** Save the current layout of the Console main window. The next time you open the Console, this layout will be used. (See Customizing the Console View.)
- **Restore My Desktop:** Returns the Console layout to the configuration saved as My Desktop. Use this option if you have made changes, such as hiding the tabs, that you want to undo.
- **Restore Original Desktop:** Returns the Console layout to the default layout. Use this option if you have made changes, such as hiding the tabs, that you want to undo.
- **Refresh:** Refresh the data displayed in the Console if you have not made other changes recently.

Computers Menu

The Computer menu options include:

- **Manage Computer:** Opens the Manage Computer Expert dialog, which allows you to add one or more computers to the channel by name. The list of computers to add is pre-populated with any computers selected on the Network tab. Prism lets you install the Client directly or via a subscription file when the computer is added.
- **Manage Licenses:** Displays license information for a managed computer. If auto-licensing is disabled, allows you to change licenses (assign or unassign) for a managed computer.
- **Reinstall Client:** Reinstall the Client on the highlighted computer. If you have the auto-update option turned off through the Polling tab, use this option to update the Client settings.
- **Create Subscription File:** Subscription files install the Client on a remote computer or other computer that cannot receive the Client directly through the Console. A subscription file can also be used to reconfigure Client settings on a managed computer.

Deployment menu

Options on the Deployment menu include:

- **Create Task:** Create a new Task.
- **Assign Task:** Assign a Task to a computer or group and set the time and date for the Task to deploy.
- **Schedule:** Change the schedule for a Task that has already been assigned.
- **Reinstall:** Reinstall a Task that has been installed previously.
- **Delete Deployment Log Entries:** Deletes Deployment Log Report entries associated with the selected object - Task, Task Group, Computer, or Group. The most recent entries will be retained.
- **Package Editor:** Open the Package Editor application. If the highlighted Task is based on a Prism file, this menu option opens the Prism file in the Editor.
- **Conflict Checker Professional:** Open the Conflict Checker application.

Asset Management menu

Options on the Asset Management menu include:

- **Create Asset:** Opens the Create Asset dialog, which allows you to create non-scannable assets that can be managed through the Assets tab.

- **Manage Asset Types:** Opens the Asset Types dialog. In this dialog, you can create new asset types and assign icons to them.
- **Configure Network Scan:** Opens the Network Scan Configuration dialog. Use this dialog to define the configuration of your network scan.
- **Inventory Now:** Scan the selected computer to generate an inventory its hardware characteristics and the applications installed on the computer.
- **Inventory Configurations:** Manage customized configurations that specify the software and hardware characteristics to be identified by Asset Manager during an inventory.
- **Manage Categories:** Opens the Manage Categories dialog, where user-defined categories can be created and managed.
- **Baselines:** Capture baseline information to be used for future comparisons and reports. A new baseline can be added at any time. Obsolete baselines can be deleted.
- **Reconfigure:** Selecting this option will delete (un-configure) the selected license units, allowing them to then be brought back using the last PSID entries (a recently updated Inventory Database). To prevent them from being recreated, move the item to the **Ignore** folder in the Unresolved Files dialog. This menu option is enabled only if the Automatically Identify License Units option is *enabled* (see the Channel Properties | Asset Management tab).
- **Unconfigure:** Selecting this option will delete (un-configure) the selected license units. Their files will be left in the Unresolved Files dialog. This menu option is enabled only if the Automatically Identify License Units option is *disabled* (see the Channel Properties | Asset Management tab).
- **Hide:** Hides the license unit in the Channel. The license unit and its associated files will not be visible in the console or reports, and will not appear in the Unresolved Files dialog.
- **Restore Hidden License Units:** Restores hidden license units in case there is a need to see the whole list again.
- **Unresolved Files:** Opens the Unresolved Files dialog.
- **User-Defined Fields:** User-defined fields can be defined for both hardware and license units. A user-defined field consists of a name and a description. Values for user-defined fields are specific to each computer, license unit, or asset. These values can be set and viewed within the console and can be viewed in reports.
- **Import Data:** Opens the Import Data dialog, which allows you to import:
 - Hardware user-defined fields;
 - License unit user-defined fields and other properties;
 - Non-scannable asset data;
 - Scanned assets data.

Security menu

Options on the Security menu include:

- **Change User Password:** If security is set up, change the password for the account you specified when logging in to the Channel.
- **Configure Security:** Set up security, add users, and assign roles.

Tools menu

The Tools menu is a special feature that provides access to other applications that you may wish to launch from the Console.

- **Edit Tools Menu:** Add external applications to the Tools menu. For more information, see Launching External Applications from the Console.

Console Toolbar

Use these toolbar icons in the Console main window to open Channels and run reports.



Create a new Channel. The Expert leads you through the steps to set up a new Channel.



Open an existing Channel. The Console displays a list of Channels you have used recently. You can also use the **Find** feature to locate a Channel. (See Finding an Existing Channel.)



Refresh the display.



Perform an inventory on the selected computer.



Create a new task.



Assign tasks to computers.



Select an administrator report that captures information about actions taken by administrators and other users through the Console.



Select a deployment report that captures information about Tasks deployed to managed computers.



Select a computer or group report to capture information about the current status of computers or groups.



Select a distribution report that captures information about Distribution Locations.



Select an asset management report to capture the current status of hardware and software on managed computers.



View the online help.

Note: In addition to the extensive default reports, you can create custom reports to display the information you use most often.

Customizing the Console View

You have various options for customizing the Console main window to suit your needs.

Sorting Data in the Details Pane

- **Position of the columns** - Arrange the columns in a different order by clicking on a column heading and dragging it to a new location.
- **Sort order of the data** - Click the column heading to sort all of the data by that column. To change from ascending to descending order, click the column heading a second time.
- **Add More Fields** - Right-click in the column heading area and choose **More Fields** from the pop-up menu. A floating dialog lists the additional fields that you can add to the details pane.

Grouping Data in the Details Pane

You can group or categorize the data in the details pane by dragging a column heading into the shaded area at the top of the pane. All of the data is grouped by the values currently in that column.

Views

Switch to a different layout by selecting a view from the Views menu.

After making changes, you can return to the default view by selecting **Restore My Desktop** or **Restore Default Desktop** on the Views menu. For example, after rearranging the panes, return to the default view.

Docking and Hiding Panes

Each of the main panes in the Console main window can be moved to a new location or temporarily hidden behind the tree view. See Docking and Hiding Panes.

Each time you open the Console, the view will reflect your new layout.

Save the View

The current desktop is automatically saved when the console is closed. You can also save the current view at anytime:

- Select **View | Save my desktop** to save this new view.

The new layout is applied the next time you open the Channel.

Docking and Hiding Panes

You can customize the layout of the Console main window through dockable panes and auto-hide options.

Repositioning a Pane

The tree view and details pane can be moved into a horizontal or vertical arrangement by docking the panes in a new location.

1. Click in the title bar at the top of the pane and drag the pane to a new location.

A dark gray bar surrounds the pane and changes shape when you get close to a docking position on the window.

2. Release the mouse button to set the pane in the new location.
3. Select **View | Save my desktop** to save this new view.

The new layout is applied the next time you open the Channel.

Hiding a Pane

The Auto-Hide option lets you hide a pane and use the entire Console window for the contents of a specific pane. For example, hide the details pane while focusing on the Network tree view.

1. Click the  in the upper-right corner of the pane.

The pane slips out of sight. A tab available on the left side of the window gives quick access to the hidden pane.

2. Click on the tab on the left side of the window to display the hidden pane.



The pane scrolls into view when you move the cursor over it or over its tab. The pane slips out of sight when you move the cursor off of the pane.

Turning Off Auto-Hide

If you used Auto-Hide to change your display and want to return to the default view or your saved view, select one of these options from the View menu:

- **Restore my desktop:** Returns the layout to your saved view.
- **Restore default desktop:** Returns the layout to the one used when Prism was installed.

Console Features and Shortcuts

The Prism console offers a number of features to help you work more quickly. See the following topics for more information:

- Use Shift and Ctrl keys to select two or more computers for management
- Drag and drop to assign group members and manage computers
- Right-click pop-up menus of common functions
- Double-click an item for the default function
- Use shortcuts and function keys

Shift and Ctrl

To select two or more computers in the details pane, hold the Shift key or Ctrl key down as you click on your selections. This shortcut is especially useful for installing the Client on a large number of computers at once.

- **Shift:** Hold the Shift key as you click on the first and last name to select all of the items in-between.
- **Ctrl:** Hold the Ctrl key as you click on individual names.

Drag and Drop

The Console main window is designed to help you work quickly. You can easily move computers into organizational groups or perform other management functions by dragging and dropping.

For example, to assign a computer to one or more Organizational groups, drag the computer from the list in the Members onto each of the groups.

Right-Click Pop-Up Menus

Most of the actions you can choose through the toolbar and menus are also available with a click of your mouse.

Right-click on an item to open a pop-up menu that displays the actions for that item. Use the right-click to set properties, delete items, perform functions, and so on.

Double-Click for Default Function

Double-click on a target to initiate the default action. For example, double-click on a group to open the Group Properties dialog box.

Shortcuts and Function Keys

The following shortcut keys can be used in the Console main window:

<i>To Do This</i>	<i>Use this Shortcut</i>
Open help	F1
Refresh and update the view	F5
Open the Properties dialog box	<Alt><Return>
Delete the current item	
Open the pop-up menu of actions you can take for the current item	<Shift><F10>

Tabs in the Console Window

Tabs in the Console

By default, the tree view pane on the left side of the Console window lets you navigate through your network, view managed computers and groups, and perform actions on them. When you select a tab or an item in this pane, the details pane on the right changes to reflect your choice.

Note: The tabs available depend on the Prism applications that you have installed.

- **Network:** The tree view left opens to the Network the first time you use Prism. This tab displays the structure of your network and a hierarchical list of all the computers on your network. Use it as your starting point for managing new computers.

With the Network tab active, the details pane on the right side lists all of the computers, in order. Use this information to quickly identify managed computers and whether the Client has been installed. Prism lets you quickly add computers and install the Client from this pane through the right-click options.

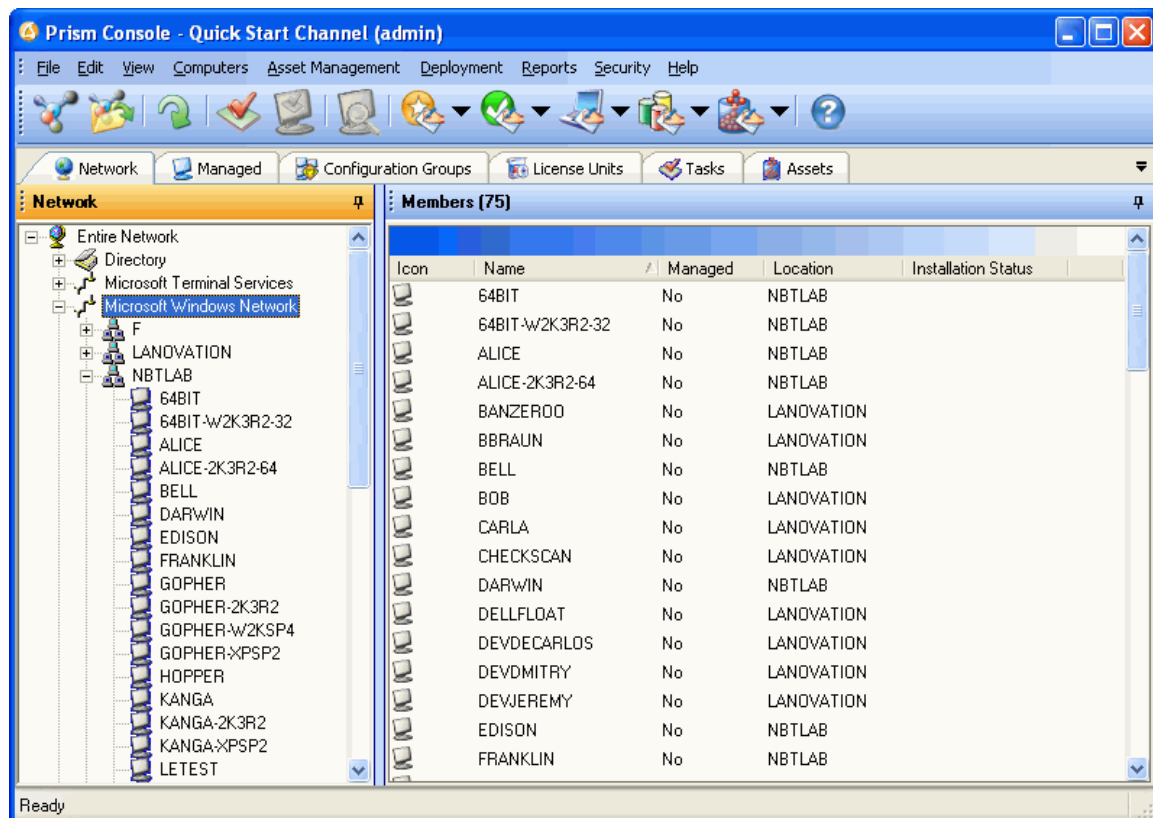
- **Managed:** The Managed tab lists all of the computers that you are managing through the Console. This tab also groups the computers into organizational groups that reflect the Active Directory structure of your network. You can also set up your own organizational

groups to reflect departments, locations, or other useful categories.

Use the details pane on the right to sort the computers by their status, view the inventory, or check the status of Tasks—by computer or by group.

- **Configuration Groups:** On the Configuration Groups tab you can create configuration groups to group computers by shared characteristics. These groups provide a powerful tool, letting you identify and target computers based on predefined or user-defined characteristics.
- **Tasks:** Set up and schedule Tasks to deploy changes to your managed computers, including commands, Prism files, and scripts. For easier management, you can also group Tasks based on their function or other shared characteristic. See the Task Deployment section of the Help or the *Deployment Guide* for more information.
- **License Units:** Groups the license units by type, manufacturer, and other categories. From the License Units tab, you can view the status for a specific group or focus on an individual license unit. Refer to the *Asset Management User's Guide* for more information.
- **Assets:** The Assets tab displays the Non-scannable and Scanned Assets in the Channel. Scanned Assets are those identified via network discovery. Refer to the *Asset Management User's Guide* for more information.

Network tab





The Network tab reflects your network structure and lists all of the computers detected on the network. On this tab, you can navigate the network structure to find individual computers. When you highlight a branch or a computer on this tab, the Members panel in the details pane displays information about their status as members of the Channel.

Use the right-click options on this tab to quickly add computers to the Channel and install the Client. To perform actions on the computer(s), they must be added to the Channel and have the Client installed.

Icons

Identify managed computers by their icons:

 This icon in the network structure indicates that the computer has been added to the Channel and is listed on the Managed tab. These computers can be inventoried or receive changes.

 This icon in the network structure indicates that the computer is not currently in the Channel and is not managed through Prism. To add this computer, right-click on the computer name and select **Manage Computer** from the pop-up menu. (See Adding and Managing Computers.)

Right Click Options - Network Tree Node

When you right-click on the root of any tree node, such as **Directory** or **Microsoft Windows Network** or a specific domain or organizational unit, the following action is available:

- **Show All:** This will display all of the computers in the node and in any of its subtrees. This provides a "flattened" view of the network starting at the selected node. The details pane then includes a Location column showing where the computer is located.

Right Click Options - Computer

One of these actions is available when you right-click on a computer listed on the Network tab or in the Details pane..

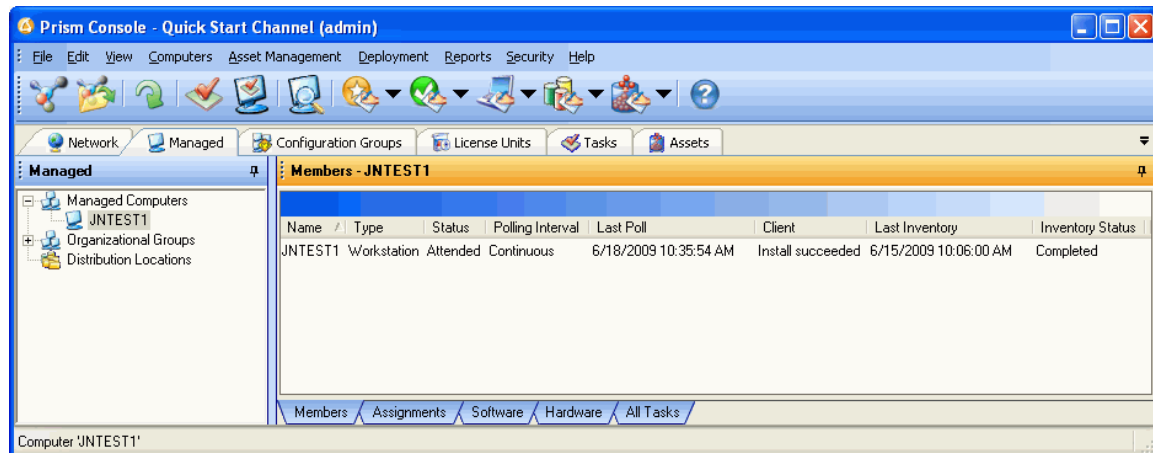
- **Manage Computer:** Add the highlighted computer to the current Channel. (This option is available only for unmanaged computers.)
- **Reinstall Client:** Reinstall the Client on the managed computer. (This option is available only for managed computers.)

Details pane

The details pane on the right displays a list of computers for the selected node in the tree. The information displayed includes:

- **Name:** Name of the computer.
- **Managed:** Indicates if the computer is currently managed in the Channel.
- **Installation Status:** Shows the installation status, if any. Each computer for which an installation was attempted will have a value in this column.
- **Location:** Indicates the location (domain) of the computer. This is displayed only when using **Show All** (see above). If you group by this field, a computer count will be shown next to the name of the Location.

Managed tab



The Managed tab lists all of the computers and organizational groups that you are managing within the Channel. Computers listed here have been added to the Channel. To perform other actions on these computers, they must also have the Client installed.

- Computers may be assigned to organizational groups listed on this tab. These groups reflect your network structure (if you are using Active Directory) or may include custom organizational groups.
- Computers are always listed in the Managed Computers branch. They can also be listed within one or more groups.
- Computers may also belong to Distribution Locations.

This tab is available in the tree view on the left side of the Console main window.

Right Click Options — Managed Computers Branch

This option is available when you right click on the Organizational Groups node on the Managed tab.

- **Add Computers:** Create a new Organizational Group.

Right Click Options — Computer

These options are available when you right click on a computer on the Managed tab.

- **Assign Task:** Assign a Task to this computer and schedule its installation.
- **Inventory Now:** Scan the highlighted computer to generate an inventory its hardware characteristics and the applications installed on the computer.
- **Add to Group:** Select an organizational group to add this computer as a member. (Configuration groups are populated automatically—they cannot be populated through this option.)
- **Remove from Group:** Remove the highlighted computer from the current group. This option is available only when you highlight a computer listed under an organizational group.
- **Delete:** Remove the computer from the Channel. The computer will be listed on the Network tab but excluded from the Managed tab and all reports.

Note: The Client is not un-installed from the computer, the computer is only removed from the Channel. See Deleting a Computer from the Channel.

- **Manage Licenses:** Displays license information for a managed computer. If auto-licensing is disabled, allows you to change licenses (assign or unassign) for a managed computer.
- **Reinstall Client:** Reinstall the Client on the highlighted computer. If you have the auto-update option turned off through the Polling tab, use this option to update the Client settings.
- **Reports:** Generate a report for the selected computer.
- **Properties:** View the properties for the computer. (See Viewing the Computer General Properties.)

Note: These options are available any time you right click on a computer.

Right Click Options — Organizational Groups Branch

This option is available when you right click on the Organizational Groups node on the Managed tab.

- **Create Group:** Create a new Organizational Group.

Right Click Options — Organizational Group

These options are available when you right click on an Organizational group on the Managed tab.

- **Assign Task:** Assign a Task to this group and schedule its installation. The Task is installed for all members of the group.
- **Inventory Now:** If Asset Manager is installed, scan the computers in this group to generate an inventory the hardware characteristics and the applications installed on the computers in the group.
- **Create Group:** Create a new organizational group.
- **Add to Group:** Add a computer to the highlighted group. The Assign Computer dialog opens.
- **Delete:** Remove the highlighted group from the Channel.
- **Rename:** Rename the group.
- **Reports:** Generate a report for the selected group.
- **Properties:** View the properties for the group. (See Viewing General Group Properties.)

Right Click Options — Distribution Locations Branch

This option is available when you right click on the Distribution Locations node on the Managed tab.

- **Create Group:** Create a new Distribution Location.

Right Click Options — Distribution Location

These options are available when you right click on a Distribution Location on the Managed tab.

- **Delete:** Remove the highlighted Distribution Location from the Channel.
- **Rename:** Rename the Distribution Location.
- **Reports:** Generate a report for the selected Distribution Location.
- **Properties:** View the Distribution Location's properties.

Members tab (Managed)

The Members tab in the details pane lists information about the computer or groups of computers highlighted in the tree view. Details include information about the type of computer (workstation or server), status of the client, whether the computer is attended, last time the Client polled the Channel, and so on.

Additional columns can be added to the Members tab by right-clicking in the column headers, selecting **More Fields**, and dragging the desired fields into the header area. The available columns include any Asset user-defined fields that have been defined. The values for these Asset user-defined fields are the values associated with the Asset that correlates with the particular computer.

This tab is displayed in the details pane on the right side of the Console window when the either the Managed or Configuration Groups tab is selected.

Right Click Options — Computer

These options are available when you right click on a computer on the Members tab.

- **Assign Task:** Assign a Task to this computer and schedule its installation.
- **Add to Group:** Select an organizational group to add this computer as a member. (Configuration groups are populated automatically—they cannot be populated through this option.)
- **Remove from Group:** Remove the highlighted computer from the current group. This option is available only when you highlight a computer listed under an organizational group.
- **Delete:** Remove the computer from the Channel. The computer will be listed on the Network tab but excluded from the Managed tab and all reports.

Note: The Client is not un-installed from the computer, the computer is only removed from the Channel. See Deleting a Computer from the Channel.

- **Request Poll:** Issues a request to the Client on this computer to poll the Channel Server as soon as possible, independent of its defined polling interval.
- **Inventory Now:** Scan the highlighted computer to generate an inventory its hardware characteristics and the applications installed on the computer.
- **Manage Licenses:** Displays license information for a managed computer. If auto-licensing is disabled, allows you to change licenses (assign or unassign) for a managed computer.
- **Reinstall Client:** Reinstall the Client on the highlighted computer. If you have the auto-update option turned off through the Polling tab, use this option to update the Client settings.
- **Reports:** Generate a report for the selected computer.
- **Properties:** View the properties for the computer. (See Viewing the Computer General Properties.)

Console Settings

Adjusting the Console Settings

The Console Settings options govern how the Console communicates with the Channel Server.

Open the Console Settings dialog box with one of these actions:

- Select **File | Console Settings**.
- Click the **Settings** button on the Select the Channel you wish to manage dialog box, which opens when you create a new Channel.

Console Settings Tabs


The **Console Settings** dialog box includes three tabs: Server, Web Proxy Server, and Reports.

The **Console Settings | Server** tab defines how the Console should connect to the Server. For more information on this tab, refer to the **Server tab** section in the Managing Computers chapter of this document.

The **Console Settings | Web Proxy Server** tab provides the option of using HTTP for communication between the Console and the Server. For more information on this tab, refer to the **Web Proxy Server tab** section in the Managing Computers chapter of this document.

The **Console Settings | Report** tab lets you set the timeout interval for generating reports.

This tab is available when you select File | Console Settings to change the connection settings for the Console.

- **Time out the report connection after  seconds:** Set the number of seconds that the Console maintains contact with the database server when generating reports.

Since reports can be large, we recommend using the default setting (30 seconds) or setting a longer interval.

Using System Policies to Fine-Tune the Client and Console

Prism supports use of system policy templates to provide fine control over the behavior of the Client and the Console. For example, you may use a policy to hide the Client icon that appears in the system tray. Until you change the policies, the Client icon is visible in the system tray and the only thing a user can do with the Client is to view the About box.

Distributing System Policies with a Prism Package

The Prism installation includes a Prism Package that can be used to modify any of these settings. Using this Package as the basis for creating your own Packages is the easiest way to make changes to the Client and Console settings.

To edit and distribute changes:


1. Open the Prism Client Policies Package file in the Editor. Look for this file in the Prism folder.

Note: If the Editor is not installed on your computer, you may need to open the Editor on the computer where it is installed and browse to the Prism file used for this Task.

2. In the Editor, select **File | Save As** to save the Prism file under a new name to reflect its function.

Save the file to shared location where each of the Client computers can access the file.

3. In the Editor, browse to the policy that you want to change.
4. Right-click on the Registry Value in the pane on the right side of the Editor window. Choose **Modify** from the pop-up list.
5. On the Registry Value window, change the value to 01 to turn the option on or 00 to turn the option off. Click **OK**.

6. If the Prism file includes other policy settings that you do not want to change, highlight each and click the  in the toolbar to delete them.

Note: There are two policies that have dependencies.

- If you enable the UseOnlyApprovedCertificates policy, you must also define at least one thumbprint.
- If you enable the UseOnlyApprovedServers policy, you must also define at least one computer in the Server List.

7. Deploy the Prism file as a Task through the Console.

Alternate Methods for Editing and Distributing the Policy Template

Though the Editor and Console provide quick and easy access to these system policies for editing or distribution, you may choose to use other tools.

The template for Prism (PRISM.ADM) is in C:\PROGRAM FILES\PRISM SUITE\GROUPPOLICY\ADM. It can be edited using a policy editing tool, such as MMC (Microsoft Management Console) for Windows 2000 or a policy editing tool from the operating system resource kit.

The changes can be distributed to target computers using Active Directory. You can apply the updated template to a Domain, Organizational Unit (OU), or users on the network.

Integrating External Applications into the Console

Prism lets you run external applications directly from the console. These applications can be generic - in which case they appear under the top level Tools menu in the Console - or they can apply specifically to individual computers, Assets, and computer groups via right-click menu options.

For example, you can create a right-click menu command on computers that launches a Shutdown command directly against the selected computer.

These applications are added to the Console by creating a special EXTERNALTOOLSCONFIG.INI file in the Console directory. This file defines, for each command, its name, the application to run, any desired arguments, and arguments that identify the specific computer(s), asset(s), or group(s), being manipulated.

To help organize the commands, you can create submenus so you can put your external applications into logical groups.

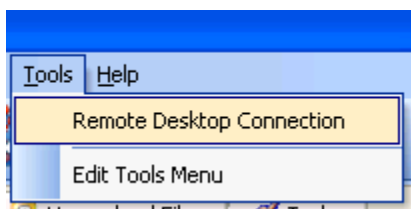
The external application is launched as a separate process. The console does not wait for it to complete nor does it report a final execution status. If the actual launch of the application fails (for example, because the path specified in the .INI file is wrong and the executable cannot be found), a simple error message box is displayed.

Note: The .INI file contents are not filtered against user permissions in any way. If an entry is defined in the .INI file, it will be visible to any user of the Console on that machine.

Caution: Do not use this feature unless you fully understand the implications of launching the external application and fully understand the syntax used in the .INI file.

Tools menu

An application is added to the Console Tools menu by adding a line in the Tools section of the EXTERNALTOOLSCONFIG.INI file. If the .INI file does not exist, or if there are no entries in the Tools section, the Tools menu does not appear.



Computer right-click menu

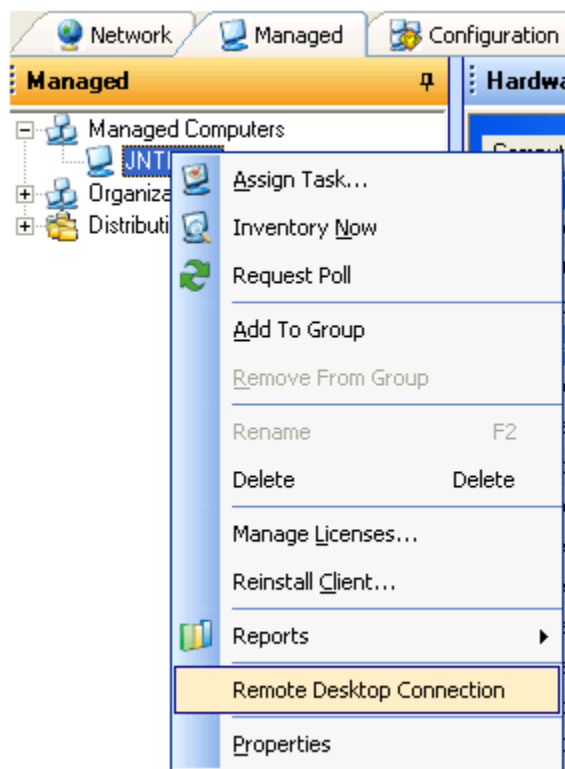
Add an application to the list of options on the right-click menu for a computer or multi-selected set of computers by adding a line to the SingleComputerApps section of the EXTERNALTOOLSCONFIG.INI file. The identity of the computer (name, IP, or MAC address) is passed to the application through the use of variables. If multiple computers are selected, the application is invoked independently for each computer.

For example, you could define a menu item called Remote Desktop Connection in the SingleComputerApps section that runs mstsc.exe:

```
Remote Desktop Connection=mstsc.exe /v:%computername%
```

Selecting this from the right-click menu on a computer will launch a remote desktop session on the selected computer.

Note The applications specified in this section must be able to accept, in their command line, either the name, IP, or MAC address of a computer. See Format of the EXTERNALTOOLSCONFIG.INI File for more information.



The external applications are **not** listed under the following circumstances:

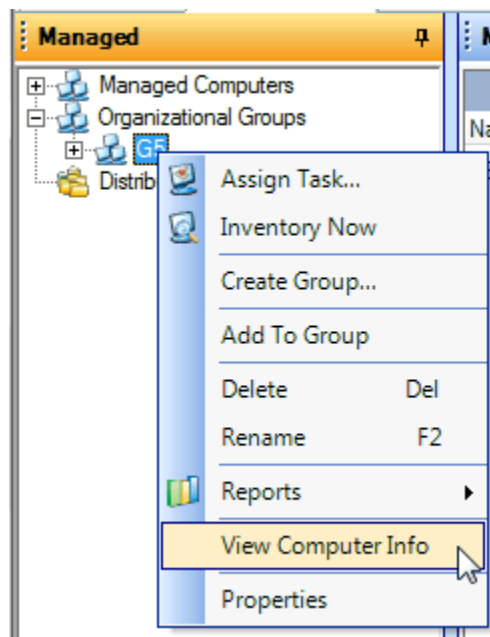
- SingleComputerApps section is empty;
- A group is selected.

Computer Group right-click menu

Add an application to the list of options on the right-click menu for a computer group, multi-selected computers, and single computers by adding a line to the MultipleComputerApps section of the EXTERNALTOOLSCONFIG.INI file. The identity of the selected computers is passed to the application through a single file that contains information about each computer (specifically, each computer's name, IP, and MAC address, with one computer per row).

For example, you could define a menu item called View Computer Info in the MultipleComputerApps section that invokes Notepad. Selecting this from the right-click menu on a group invokes notepad.exe on the file containing information about each computer in the group, including the computer's name, IP, and MAC address.

Note The applications specified in this section must be able to accept, as input, an argument that specifies a file containing computer information in a specific format. Generally, these will need to be custom applications, or scripts that invoke generic applications. See Format of the EXTERNALTOOLSCONFIG.INI File for more information.



The external applications are **not** listed if there are no applications defined in the MultipleComputerApps section.

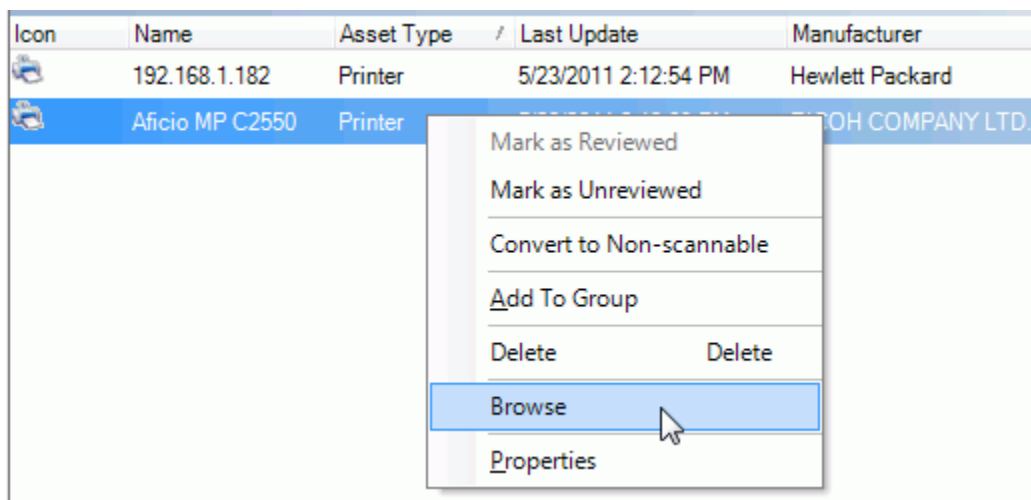
Asset right-click menu

Add an application to the list of options on the right-click menu for a scanned Asset or multi-selected set of scanned Assets by adding a line to the SingleAssetApps section of the EXTERNALTOOLSCONFIG.INI file. The identity of the Asset (name, IP, or MAC address) is passed to the application through the use of variables. If multiple Assets are selected, the application is invoked independently for each Asset.

For example, to access an Asset's status/configuration web page (as many printers, switches, access points, and other devices offer), you could define a menu item called Browse in the SingleComputerApps section to browse the Asset's IP address:

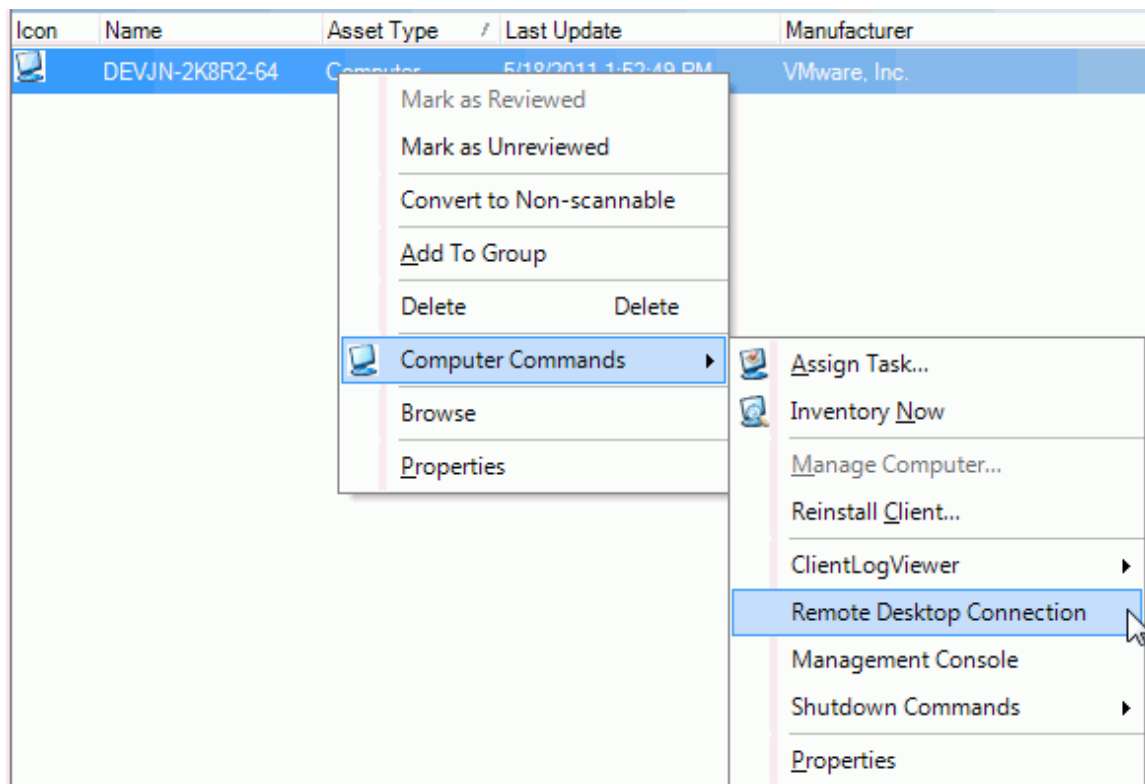
Browse=http://%ipaddress%

Selecting this from the right-click menu on an Asset will launch the default browser against the selected Asset's IP address.



Note The applications specified in this section must be able to accept, in their command line, either the name, IP, or MAC address of an Asset. See Format of the EXTERNALTOOLSCONFIG.INI File for more information.

The Asset right-click menu items apply only to scanned (networked) Assets, as non-scannable Assets have no IP or MAC address. When a scanned computer Asset correlates to a specific managed computer (i.e., a managed computer appears in the scan results), that Asset's right-click menu includes not only the Asset right-click menu options, but also provides access to the computer right-click menu options. In the example below, the selected scanned Asset happens to be a managed computer:



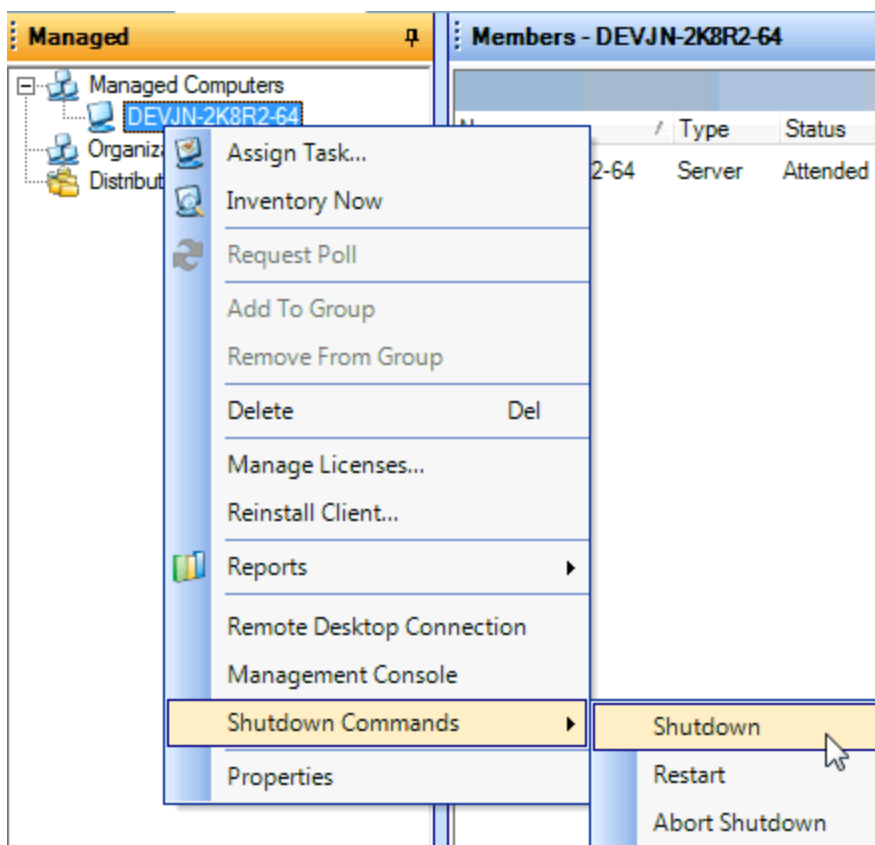
Asset Group right-click menu

Add an application to the list of options on the right-click menu for an Asset group and multi-selected Assets by adding a line to the MultipleAssetApps section of the EXTERNALTOOLSCONFIG.INI file. The identity of the selected Assets is passed to the application through a single file that contains information about each Asset (specifically, each Asset's name, IP, and MAC address, with one Asset per row) as described under Computer Group right-click menu, above.

Sub-menus

You can organize your external applications into submenus, both in the Tools menu and in the right-click menus (computer and group options). This allows you to group related commands together, and makes it easier for the user to navigate through the available tools.

For example, you can put shutdown-related commands together into a submenu called Shutdown Commands.



Format of the EXTERNALTOOLSCONFIG.INI File

The EXTERNALTOOLSCONFIG.INI file is automatically installed in the same directory as the Console executable.

Note Any line in the file beginning with a single quote is taken as a comment line.

Sections

The .INI file may have several sections, each of which must be contiguous (i.e., can appear only once). The section title is enclosed in brackets [] and is followed by the individual menu items, one per line:

[Tools] - Menu items that are added to the Tools menu. The commands in this section can be used to launch applications independent of any selected computers, Assets, or groups.

[SingleComputerApps] - Menu items that will appear in the context menu when one or more computers are selected. This includes all Assets that are of type "Computer" and are manageable. When multiple computers are selected, the command is executed against each computer, sequentially. These commands can use computer name, IP, and/or MAC address in the command line.

[MultipleComputerApps] - Menu items that will appear in the context menu of a selected computer group or multiple selected computers. These commands take a file as input. The file contains names, IP addresses, and MAC addresses for all selected computers.

[SingleAssetApps] - Menu items that will appear in the context menu when one or more Assets (typically network devices like switches and printers) are selected. When multiple Assets are selected, the command is executed against each Asset, sequentially. These commands can use the Asset name, IP, and/or MAC address in the command line.

[MultipleAssetApps] - Menu items that will appear in the context menu of a selected Asset group or multiple selected assets. These commands take a file as input. The file contains names, IP addresses, and MAC addresses for all selected Assets.

Command Syntax

Each line in the file that denotes a specific menu item has the following syntax:

```
<Menu item label> = <commandline>[, <start in directory>]
```

Menu item label

This label is displayed in the menu. It should be relatively short but may contain spaces or underscores to increase readability. For example, any of the following labels could be used:

```
Remote Control
Remote_Control
RemoteControl
```

Commandline

The commandline identifies the executable file that launches the external application. Commandlines may contain spaces, quotation marks, and backslashes, as needed for the syntax of the application to be executed. Double quotation marks (") may be used to enclose the command line but are not required. Spaces separate commands from arguments, so put double quotes (") around the command portion if it contains spaces.

The Commandline can include environment variables enclosed in '%' signs.

SingleComputerApps and SingleAssetApps Sections

The SingleComputerApps and SingleAssetApps commandlines may contain variables to be substituted with actual data at run time. Variables are case insensitive. The variables available are:

%name% - the computer or Asset name (%computername% can also be used)

%ipaddress% - the IP address of the computer or Asset

%macaddress% - the MAC address of the computer or Asset

For example, the following line in the SingleComputerApps section defines a menu item called "Shutdown" that launches shutdown.exe against the selected target:

```
Shutdown="shutdown.exe" -m \\%name% -t 30 -s
```

The following lines in the SingleAssetApps section offer 2 ways to invoke a browser on the Asset's IP address - the first using the default browser, the second using Internet Explorer:

```
Browse=http://%ipaddress%
Browse using IE="%programfiles%\Internet Explorer\iexplore.exe"
%ipaddress%
```

MultipleComputerApps and MultipleAssetApps Sections

Commandlines for MultipleComputerApps and MultipleAssetApps may contain a file name parameter enclosed in (#) delimiters. The filename is not a variable, but an actual file. Prior to executing the command, the named file is populated with information about the selected computers or Assets. After populating the file, the command line is launched with the (#) delimiters replaced with double quotes (").

Each row in the file contains computer/Asset name, IP address, and MAC address, each separated by commas. The file name parameter may contain environment variables. For example, %TEMP% can be used to specify the temporary folder.

The following example defines a menu item named "Computer Names" that uses Notepad to show name, IP, and MAC address for all the selected computers:

```
Computer Names=notepad.exe #C:\compfile.csv#
```

The next example defines a menu item named "Sample App" that invokes a custom application - FileReader.exe - that can take as input the file containing the names, IP, and MAC address of the selected computers. This file will be created in the %TEMP% folder, so its actual location varies by operating system.

```
Sample App="C:\Program Files\Foo\FileReader.exe"  
#%TEMP%\computersFile.csv#
```

Start in directory

A start-in directory may be included for the executable. The start-in directory is optional unless the commandline contains commas.

Start-in directory paths may contain spaces, quotation marks, and backslashes, as needed for the syntax of the application to be executed. Double quotation marks (") may be required to enclose the directory.

If a start-in directory is not specified, the working directory for the launched application is the same as the Console's current directory (unless the application sets its own working directory at startup).

Using the "." syntax to specify the current directory as the start-in directory is sufficient. The following two commandlines are equivalent:

```
Some App="C:\Program Files\Some App\someapp.exe"  
Some App="C:\Program Files\Some App\someapp.exe", "."
```

However, if the commandline contains a comma-delimited list, the following two lines are **not** equivalent:

```
Some App="C:\Program Files\Some App\someapp.exe" /settings=1,2,3  
Some App="C:\Program Files\Some App\someapp.exe" /settings=1,2,3,  
"."
```

Only the second line will work correctly. The first line will result in an error when the Console tries to launch the Some App program with a start-in directory of "3". (Enclosing the commandline in double-quotes would not eliminate the need for a start-in directory.)

Submenus

Submenus can be defined in any section to help organize applications. Multiple submenus can be used in any section, and submenus can be nested. Submenus must be contained within a section.

Syntax

```
[SubMenuBegin]  
  
<Submenu label> = <submenu name>  
  
-- Zero or more commands & submenus --  
  
[SubMenuEnd]
```

Example

The following example defines a submenu whose label is "Shutdown Commands" and whose contents consist of 3 menu items.

```
[SubMenuBegin]
Name=Shutdown Commands
Shutdown="shutdown.exe" -m \\%computername% -t 30 -s
Restart="shutdown.exe" -m \\%computername% -t 30 -r
Abort Shutdown="shutdown.exe" -m \\%computername% -a
[SubMenuEnd]
```

Example ExternalToolsConfig.ini File

The following ExternalToolsConfig file defines 3 menu items on the Tools menu, 2 items (one of which is a submenu containing 3 menu items) on the menu for single computer applications, and 1 menu item on the menu for multiple computer applications.

```
[Tools]
Remote Desktop Connection=mstsc.exe
Edit Tools Menu=notepad.exe "ExternalToolsConfig.ini"

[SingleComputerApps]
Remote Desktop Connection=mstsc.exe /v:%name%
[SubMenuBegin]
Name=Shutdown Commands
Shutdown="shutdown.exe" -m \\%name% -t 30 -s
Restart="shutdown.exe" -m \\%name% -t 30 -r
Abort Shutdown="shutdown.exe" -m \\%name% -a
[SubMenuEnd]

[MultipleComputerApps]
View Computer Info=notepad.exe
#C:\Dev\PrismMain\PrismConsole\Output\Release\compfiles.csv#


[SingleAssetApps]
Browse=http://%ipaddress%
```

Channels

Setting up a New Channel

The Channel lets you manage a set of resources through the Console. In many cases, you need only one Channel to maintain the computers under your responsibility. However, you can create as many Channels as desired.

To create a new Channel:

1. Open the Console.
2. Click  on the toolbar or choose **File | New Channel** from the Console main window.
3. In the New Channel - Server Name dialog box, select the computer where the Channel Server is located. Click **Next**.
4. In the New Channel - Enter a name for the new Channel dialog box, type a descriptive name for the Channel. Click **Next**.

The name of each Channel must be unique.

5. In the New Channel - Use Port Number dialog box, identify a TCP/IP port for the Console to use for connecting to the Channel Server.

Important: The port setting for the Console and the Client on each target computer must be the same. The port for the Client is set by installing the Client directly from the Console or adjusting the Client settings through the Console.

6. In the New Channel - Polling Interval dialog box, set the default value to use for Clients to contact the Channel Server.
7. In the Secure Channel dialog box, indicate whether the Channel should be secured with a password.

If you do not secure the Channel at this time, you can secure it later by selecting **Security | Configure Security** in the Console main window.

Note: This option secures only the Channel you are creating. You must use the Channel Manager application to control permission to create new Channels. By default, anyone who has access to the Console can create a Channel.

8. Click **Finish**.

Note: If Channel creation has been secured through the Channel Manager, Prism displays a dialog box for entering a user name and password for creating a Channel. Only users added through the Channel Manager can create new Channels.


9. Prism displays a dialog box while it creates the new Channel. The new Channel is displayed in the Console main window.

In the main window, you can add computers, create groups, and manage both.

New Channel - Server Name dialog

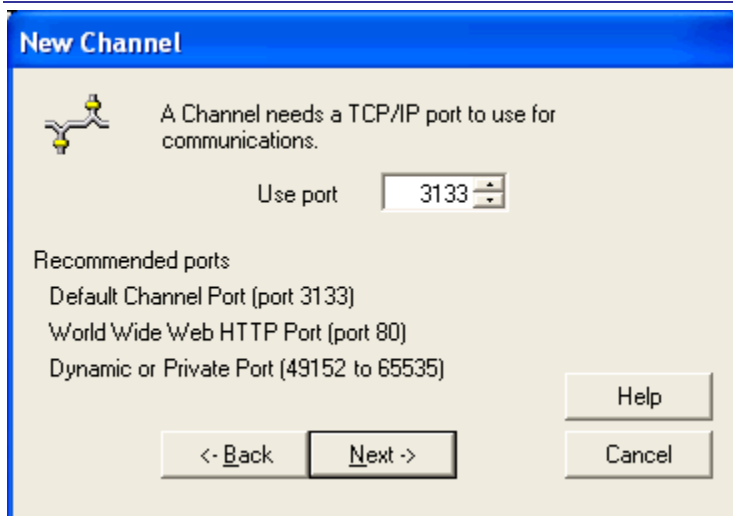
On this dialog box, enter the name of the computer where the Channel Server is installed. This dialog box opens when you are creating a new Channel.

Options include:

- **Server:** Type the name of the computer where the Channel Server is located or use the  to browse for the name.
- ☒ **Use this computer as the server:** With this option selected, the Channel Server is located on the computer where you are currently working. This computer must be turned on and available at all times for proper operation. Prism automatically enters the name in the **Server** text box.
- ☐ **Use this computer as the server:** With this option turned off, you enter the name of the computer where the Channel Server is installed. The computer where you are currently working is not used as the server.

Note: The Channel Server and SQL Server [or MSDE (Microsoft Desktop Engine)] can be installed on the same computer or on different computers.


New Channel - Use Port Number dialog



Identify a TCP/IP port the Console and Clients can use to connect to the Channel Server. In most cases, you can use the default value shown on the dialog box when it opens.

Important: The port setting for the Console and the Client on each managed computer must be the same. The port for the Client is set by installing the Client directly from the Console or adjusting the Client settings with a subscription file.

On this dialog box, do one of the following:

- Click **Next** to accept the value in the **Use Port Number** field.
- Click  to scroll to a port number in the **Use Port Number** field.
- Type the number of the port in the **Use Port Number** field.

We recommend using one of the following port numbers:

- User Port (port 3133)
- World Wide Web HTTP Port (port 80)
- Dynamic or private port (ports 49152 to 65535)

Note: By default, Prism Channels use port 3133 for the Console and Clients to communicate with the Channel Server. This port is an official assignment made by the IANA [Internet Assigned Numbers Authority (www.iana.org)].

If the Client must communicate with the Channel through a firewall, you may need to open port 3133 on the firewall. Otherwise, we recommend using port 80, since that port is typically already open for web browsing.

New Channel - Polling Interval dialog

Set the default polling interval to be used for the Client computers to contact the Channel Server. The value you set here is used when computers are installed directly from the Console and for subscription files generated from this Channel. The values you set on this dialog box can be changed later by selecting **File | Client Settings**, and selecting the Polling tab.

This dialog box opens when you create a new Channel.

Set how often to poll the Server


Choose one of these four Polling options that define how often the Client should check with the Channel Server for new updates:

- **Poll Continuously:** The Client contacts the Channel Server constantly. This option requires more processor time and bandwidth than the following options. It is used only for a small number of computers in a test lab.

Caution: Do not use this setting for your production environment.

- **Poll once every 10 minute(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of minutes.

The Client requires very little bandwidth, so the default value is 10 minutes. The polling interval may need to be adjusted up or down, depending on these factors:

- the number of computers in the Channel
 - the number of groups in the Channel
 - how frequently you deploy Tasks from the Channel
 - how frequently you perform an inventory of the hardware and software of managed computers
- **Poll once every**  **hour(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of hours.
 - **Poll once every day:** With this setting, the Client contacts the Channel Server for updates at the start of each session. A session begins when a user logs on to the computer. There is also an unattended session when the computer is turned on but there is not a user logged on.

Notes Please contact Technical Support for recommendations on the optimal polling interval for your situation.

The default polling interval is 10 minutes. The default polling interval is set when you create the Channel.

Configure the Client to Automatically Apply New Settings for this Channel

- ☒ **Automatically apply settings to all clients:** With this option selected, all clients will inherit the settings made in this tab. This will occur automatically for existing clients the next time they poll the Channel Server as well as for new clients. Each client will automatically be updated whenever client settings are changed for the channel.
- ☐ **Automatically apply settings to all clients:** With this option cleared, the client settings are set individually for each managed computer. The settings on this tab become the default values. They are established (and can be modified) when the Client is installed directly or through a subscription file. To change the settings for an existing Client, you must reinstall the Client with the new settings.


Secure Channel dialog

Secure the Channel you are creating with password protection. After completing the Channel setup, you can further secure the Channel by adding roles, permissions, and user accounts.


This dialog box opens when you are creating a new Channel.

Caution: This option cannot be reversed. If you secure a Channel, it always requires a valid user name and password to open.

Secure this Channel now?

-  **No:** With this option selected, the Channel is not secured. The Channel can be opened by anyone working with the Console. Access to this Channel can be secured later through the Console **Security** menu.

Use the Channel Manager application to control a list of users who can create Channels.

-  **Yes:** With this option selected, this Channel is secured with a password. When security is set for a Channel, the Channel always requires a valid user name and password to open it.


The person who creates the Channel and selects this option is automatically assigned the Channel Admin role. The Channel Admin can create other user accounts, set up passwords, and set permissions within the Channel.

Define Administrator

- **User Name:** Enter a unique user name for the Channel Admin.
The Channel Admin must log in to the Channel with the user name and password entered here.
- **Password:** Type the password that the Channel Admin will use to open this Channel.
- **Retype:** Verify the password by retyping it in this text box.

Opening a Channel

To open a Channel that you want to work with:

1. Click  on the toolbar or choose **File | Open** from the Console main window.


Prism displays the Select the Channel you wish to manage dialog box.
2. Highlight the name of the Channel you want to open. Click **OK**. The Channel is displayed in the Console main window.

If the name of the Channel is not in the list, you can find it quickly. See Finding an Existing Channel.

Finding an Existing Channel

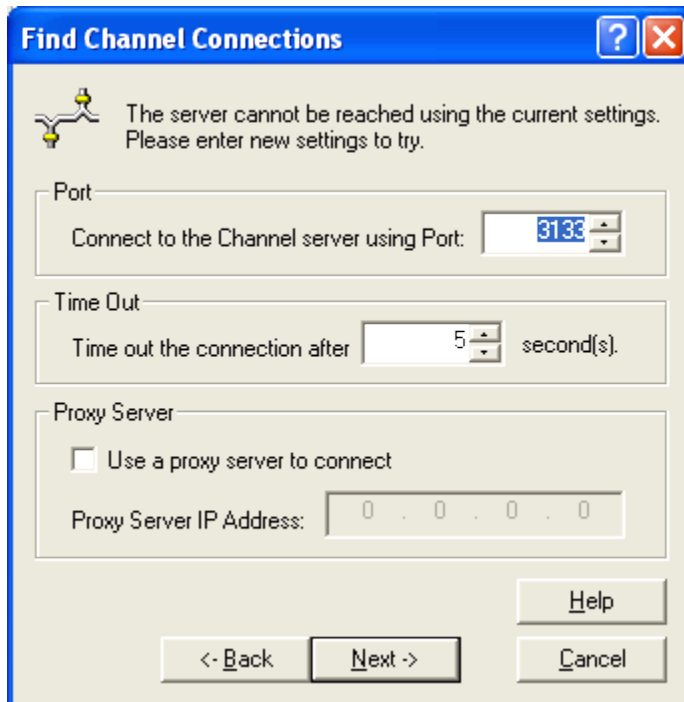
Prism conveniently remembers the Channels you have worked on recently and displays them in the Select the Channel you wish to manage dialog box. However, there are times when you are working from a different computer or need to open a Channel that you have not managed before.

To find a Channel:

1. Choose **File | Find Channel** from the Console main window or click the **Find** button on the Select the Channel you wish to manage dialog box.
2. In the Find Channel Server dialog box, type the name of the computer where the Channel Server is located or click  to browse the network. Then click **Next**.
 - If Prism locates the computer, the Find Channel dialog box lists all of the Channels available. Go to step 4 below.
 - However, if the Channel Server cannot be contacted using the known communication settings, the Expert displays the Find Channel Connections dialog box. Go to the next step.
3. In the Find Channel Connections dialog box, enter the communication settings for the computer you want to find. Prism attempts to locate it based on these new settings.
4. Highlight the Channel you want to open on the Find Channel dialog box. Click **Finish**.

The Console displays the Channel in the main window.


Find Channel Connections dialog



The dialog box titled "Find Channel Connections" has a blue header bar with a question mark icon and a close button. Below the header, there is a message: "The server cannot be reached using the current settings. Please enter new settings to try." To the left of the message is a small icon of a network cable with a yellow light. The dialog contains three sections: "Port" with a label "Connect to the Channel server using Port:" and a spinner box showing "3133"; "Time Out" with a label "Time out the connection after" and a spinner box showing "5" followed by "second(s)"; and "Proxy Server" with a checkbox "Use a proxy server to connect" (which is unchecked) and a text box for "Proxy Server IP Address" containing "0 . 0 . 0 . 0". At the bottom, there are four buttons: "< Back", "Next >", "Help", and "Cancel".

This dialog box is displayed while using the Expert to find a Channel **if** the computer you specified cannot be contacted using the known communication settings.

Enter the communication settings for the Channel Server you want to find. Prism attempts to locate the Channel Server based on these new settings.

- **Port Connect to the Channel Server using Port:** Type a number in the text box or use the  to scroll to a number. The Port is the one that the Console uses to connect to the computer where the Channel Server is located.

We recommend using one of the following port numbers:

- User Port (port 3133)
 - World Wide Web HTTP Port (port 80)
 - Dynamic or private port (ports 49152 to 65535)
- **Time Out Time out the connection after:** Set the number of seconds that the Console on your current computer will keep trying to contact the Channel Server.

If Prism still reports that the Channel Server cannot be found, check for a typo or other entry error on the Find Channel Server dialog box.

Channel Security

Overview of Channel Security

A Channel can be secured with password protection and user roles that control authorization. Securing a Channel requires creating one or more users and setting up roles that define the permissions or privileges available and assigning users to these roles. After adding users and creating roles, individual users must log in to the Channel with a password.

For example, users assigned to the Report User role can view the deployment and computer reports but they do not have access to other Console features. In contrast, the Report Admin role lets a user create and modify reports as well as view them.

Channel security encompasses:

1. **Authentication:** Users can be required to provide credentials to access the channel.
2. **Authorization:** The **Role** assigned to a user defines their authorization in terms of:
 1. **The actions they can perform:** Actions that a role can perform are governed by Permissions. The role's permissions specify the actions a user in that role can take within the Channel, such as assigning tasks or removing computers from the Channel.
 2. **The entities they can access:** Access control specifies the *computers and tasks* within the channel that users in the Role can modify. Because access is defined through groups, it can be as flexible and dynamic as necessary.

Note: This topic discusses only security within a Channel. To secure the creation or deletion of Channels, use the Channel Manager application. (See Overview of the Prism Channel Manager.)

Manage Channel Security dialog

Manage Channel Security- (admin)

You can secure this channel by adding password protection and assigning permissions to users.
IMPORTANT: Once the channel is secured, it cannot be undone.

☒ Secure this channel

Users

User Name	Role	Email Address
admin	Channel Admin	
notadmin	Help Desk	

Add User Edit User Set Password Delete

Roles

Role Name	Description
Asset User	Modifies assets and performs inventories
*Channel Admin	Superuser: manages all channel activities
Channel Power User	Full access except add/edit/deleting of security roles
Help Desk	Allows schedule, task and basic report access
Report Admin	Modifies reports

Secured Groups Add Role Properties Delete

Close Help

The Manage Channel Security dialog box lists the users and roles set up to secure the Channel. The Channel Admin uses this dialog box to add the users and roles, change individual passwords, and set the specific permissions assigned to each role.

This dialog box opens when you select **Security | Configure Security**.

Secure this Channel

Secure the Channel to limit access to its features and data.

- ☒ **Secure this Channel:** With this option selected, the Channel is secured. All users must be assigned a role and have a valid password to open the Channel. The features available to each user are controlled through their assigned Role. This setting cannot be undone.
- ☐ **Secure this Channel:** With this option turned off, the Channel is not secured. Anyone using the Console who has access to the computer where the Channel Server is installed can open the Channel.

Users

The upper section of the dialog box lists the users who have access to the secured Channel and the roles assigned to each user. The currently logged-in user is shown in the title bar in parentheses. All of the users listed have permission to open the Channel. Other permissions available to each user depend on the assigned role.

- **Add User:** Add a user who can open the Channel. The actions that this user can take in the Channel are determined by their assigned Role. When you click this button, the Manage User dialog box opens.
- **Edit User:** Assign a different role or email address to the highlighted user. The user's role gives them access to data and options in the Channel. When you click this button, the Manage User dialog box opens.
- **Set Password:** Set or change the password for the highlighted user. This password is required for opening the Channel. When you click this button, the **Set User Password** dialog box opens.
- **Delete:** Delete the highlighted user. This person can no longer open the Channel.

Roles

The lower section of the dialog box lists the roles available in this Channel. The roles define the permissions or privileges available to users assigned to the role. You can assign the predefined roles provided with every Channel or set up your own roles.

Each Channel automatically includes predefined roles, including Channel Admin, Help Desk, Report Admin, and so on. These roles are marked with * and cannot be edited.

- **Add Role:** Add a new role. When you click this button, the Create New Role dialog box opens.
- **Properties:** Set each of the features, actions, or parts of the Channel that the role can use or view. For example, the role may include permission to add computers or read reports. When you click this button, the Role Properties dialog box opens.
- **Delete:** Delete the highlighted role.
- **Secured Groups:** This opens the **Secured Groups** dialog, which lists all of the groups that have 1 or more roles that are restricted from accessing the member computers.

You cannot delete the role if any users are assigned to the role. Before deleting the role, assign users to a different role. Then use the **Delete** button to remove the role.

User Authentication

When a Channel is secured, access to the channel requires the user to authenticate by supplying credentials. When first secured, credentials for the Channel Administrator (with Role of Channel Admin) must be supplied. This Channel Admin user (whose role and permissions cannot be modified) can then add and delete users, assign roles to users, and change passwords. Users and passwords are set up through the Manage Channel Security dialog box.

Each user can change their own password or have it changed by the Channel Admin. After opening the Channel, an individual user can change their password by selecting **Security | Change User Password**.

Securing a Channel for the First Time

The Channel can be secured when it is created or at a later time. In either case, when the Channel is secured an approved user name and password are always required to open the Channel. This option cannot be reversed.

By default, a new Channel is **not** secured. The Channel can be secured at any of these times:

- **New Channel:** While creating a new Channel, you are asked if you want to secure the Channel with a password. If the Channel is secured when it is created, the user who created the Channel is automatically assigned the Channel Admin role. This role has access to all Channel options and data, including setting up additional users, roles, and passwords.

The Channel Admin's password, which is entered during the Channel setup process, can be changed later through **Security | Change Password**.

- **Existing Channel:** An existing Channel can be secured at any time by selecting **Security | Configure Security**. Prism Policy Commander displays the Manage Channel Security dialog box where you can add users.

Managing User Accounts

Individual users are given access to secured Channels by the Channel Admin. Each user also has an assigned role that defines the permissions or privileges they have within the Channel.

Add a User

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, click the **Add User** button below the list of users in the upper part of the dialog box.
3. On the Manage User dialog box, enter the person's name, password, and email address. The person will use this name and password each time they log in to the Channel.
4. Select a role for the person from the drop-down list in the **Role** field.

Change a User's Role

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, highlight the name of a user in the upper part of the dialog box.
3. Click the **Edit User** button below the list of users.
4. On the Manage User dialog box, select a role for the person from the drop-down list in the **Role** field.

Change a User's Email

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, highlight the name of a user in the upper part of the dialog box.
3. Click the **Edit User** button below the list of users.
4. On the Manage User dialog box, enter the user's email address in the **Email Address** field.

Manage User dialog

The screenshot shows a 'Manage User' dialog box. It has a blue title bar with the text 'Manage User' and a red close button. The dialog contains the following fields:

- User Name:** A text box containing 'hans'.
- Role:** A dropdown menu with 'Channel Power User' selected.
- Password:** A text box with masked characters 'xxxx'.
- Confirm Password:** A text box with masked characters 'xxxx'.
- Email Address:** A text box containing 'hans@xyz.com'.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

On the Manage User dialog box, you can add user names and set a user's role, password, and email.

This dialog box opens when you click the **Add User** or **Edit User** button in the Users section of the Manage Channel Security dialog box. The fields that are available for editing on this dialog box depend on your starting point.

The options include:

- **User Name:** The name or login for the person whose information is being updated. The user name is assigned by the Channel Admin. The user enters this name when opening the Channel. This field is enabled only when using **Add User**.
- **Role:** The role assigned to the user. The role defines the user's permission to view data and use features in the Channel. Each user is assigned only one role. The roles and permissions are set up through the Manage Channel Security dialog box.
- **Password:** The user's new password is entered in this text box. The password must be used the next time the user logs in to the Channel. This field is enabled only when using **Add User**.
- **Confirm password:** Retype the new password to confirm it.
- **Email Address:** The user's email address.

Changing a Password

Each user who has permission to open the Channel also has an assigned password. This password can be changed by the Channel Admin or by an individual user.

Caution: If you lose or forget the password, the Channel Admin can assign a new password, but not retrieve an existing password.

Change your own password

1. Select **Security | Change User Password**.
2. On the **Change User Password** dialog box, enter your new password.

The next time you open this Channel, use the new password.

Change the password for another user

The Channel Admin can set or change the password for each user who has access to the Channel.

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, highlight the user's name.
3. Click the **Set Password** button.
4. On the **Set User Password** dialog box, enter the user's new password.

The next time this user opens the Channel, they must use the new password.

User Roles

A Role defines the authorization level for a user by specifying what **actions** a user can take and what **entities** (e.g., computers) they can modify. Each channel user has a single, designated role, and multiple users can have the same role. New roles can be created to implement specific security objectives.

User roles control:

1. **The actions a user can perform:** Actions that a role can perform are governed by Permissions. The role's permissions specify the actions a user in that role can take within the Channel, such as assigning tasks or removing computers from the Channel.
2. **The entities a user can access:** Access control specifies the computers and tasks within the channel that users in the Role can modify. Because access is defined through groups, it can be as flexible and dynamic as necessary.

Default roles available in the Channel include Channel Admin, Channel Power User, Help Desk, Report Admin, and Report Reader. You can use and modify these roles to suit your needs, and you can create new roles. Roles are created in the Manage Channel Security dialog box, and defined through the Role Properties dialog.

Creating and Assigning Roles

Roles define the permissions or privileges assigned to users in a secured Channel. By default, Prism includes several roles that you can assign to individual users. You can also create your own roles to match the needs of your organization.

Note: To create, assign, or edit roles and permissions, you must open the Channel using the Channel Admin user name and password.

Assign a Role

Roles are assigned by the Channel Admin:

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, highlight a name in the list of users in the upper part of the dialog box.
3. Click the **Edit User** button.
4. On the Manage User dialog box, select a role for the person from the drop-down list in the **Role** field.

Create a New Role

Roles and their permissions can be set up by the Channel Admin.

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, click the **Add Role** button under the list of roles in the lower part of the dialog box.
3. On the Create New Role dialog box, enter a name and description for the role. Press **OK**.
4. Select the new role and press **Properties**.
5. On the Role Properties dialog box, set the specific permissions or privileges that are granted to this role. Press **OK**.
6. Assign one or more users to the role on the Manage Channel Security dialog box.

Edit an Existing Role

The permissions set for an existing role can be changed by the Channel Admin.

Note: Roles marked with * cannot be edited.

1. Select **Security | Configure Security**.
2. On the Manage Channel Security dialog box, highlight a role in the list in the lower part of the dialog box.
3. Click the **Properties** button.
4. On the Role Properties dialog box, set the specific permissions or privileges that are granted to this role. Press **OK**.

Permissions

Permissions authorize a user to take specific actions in the Channel. Permissions include actions such as creating groups, adding computers to groups, adding computers to the channel, and assigning tasks to computers. If a role does not have a specific permission, then all actions governed by that permission will be disabled for users in that role. This means menu items may be unavailable or disabled.

For example, a role can be granted permissions to add and delete computers or can be granted permission to only add computers but not delete them.

Permissions are specified when defining Roles. Permissions for a role are selected on the Permissions tab of the **Role Properties** dialog.

The following sections describe the available permissions that can be granted to Roles.

Asset Management

These permissions authorize the user to perform Asset Management functionality, excluding user-defined fields.

Initiate Hardware and Software Inventories: Allows the user to launch an inventory via **Inventory Now**.

Initiate Network Scans: Allows the user to configure and launch a scan of the network via **Network Scan Configuration**.

Manage Assets: Allows the user to create/edit/delete Assets, manage Asset Types, merge Assets, and convert Assets. It also allows the user to import Asset data when used in conjunction with **Edit User-Defined Field Values**.

Manage Hardware and Software Inventories: Allows the user to create/edit/delete inventory configurations, manage baselines, edit license units, and create/delete license unit groups. It also allows the user to import software data when used in conjunction with **Edit User-Defined Field Values**.

Asset User-Defined Fields

These permissions authorize the user to manipulate user-defined fields and their values. All of these permissions apply to Asset, Hardware, and License Unit user-defined fields.

Add User-Defined Field Definitions: Allows the user to create a user-defined field for Assets, Hardware, or License Units.

Delete User-Defined Fields: Allows the user to delete a user-defined field.

Edit User-Defined Field Definitions: Allows the user to edit a user-defined field (its name and description).

Edit User-Defined Field Values: Allows the user to edit and import user-defined field values for hardware, software and Assets. Note:

- Editing and importing user-defined field values for software also requires **Manage Hardware and Software Inventories** permission.
- Importing user-defined field values for Assets also requires **Manage Assets** permission.

Channel Settings

Edit Channel Properties: Allows the user to modify channel settings (**File | Channel Settings**), including Settings and Maintenance items.

Edit Client Settings: Allows the user to edit the channel-wide client settings (**File | Client Settings**).

Modify Channel License Settings: Allows the user to add product licenses to the channel and remove them.

Computer Groups

Create Groups: Allows the user to create organizational and configuration groups and (in conjunction with Edit Group permission) import configuration groups.

Delete Groups: Allows the user to delete organizational and configuration groups.

Edit Groups: Allows the user to edit organizational and configuration groups and (in conjunction with Create Groups permission) import configuration groups.

Modify Group Membership: Allows the user to add computers to, and remove them from, organizational groups.

Computers

Add Computers: Allows the user to add computers to the channel, reinstall the client, and create subscription files.

Delete Computers: Allows the user to remove computers from the channel.

Edit Computers: Allows the user to modify computer information (including the ability to disable it), initiate a Request Poll, and manage licenses for a computer.

Reports

Modify Reports: Allows the user to add, edit, and delete reports.

Read Audit Reports: Allows the user to access the Administrator Action Log report.

Read Non-Audit Reports: Allows the user to access all non-audit reports.

Note: All Roles must have Modify Reports or Read Non-Audit Reports or both permissions.

Security

Add Admin Users: Allows the user to add new users.

Add Security Roles: Allows the user to create new security Roles.

Change Admin User Roles: Allows the user to change another user's Role.

Configure Group Security: Allows the user to configure group security.

Delete Admin Users: Allows the user to delete users.

Delete Security Roles: Allows the user to delete Roles.

Edit Security Roles: Allows the user to edit Roles.

Set a User's Password: Allows the user to modify another user's password.

View Security Information: Allows the user to view security information, including users, roles, and permissions. If this permission is not granted, all other security permissions are effectively not granted.

Task Assignment

Assign Tasks to Computer Groups: Allows the user to assign tasks to computer groups and reinstall tasks on computer groups.

Assign Tasks to Computers: Allows the user to assign tasks to computers and reinstall tasks on computers.

Delete Task Assignments: Allows the user to delete task assignments (to computers and groups) and delete deployment log entries.

Edit Task Assignments: Allows the user to modify a task assignment.

Task Groups

Create Task Groups: Allows the user to create task groups.

Delete Task Groups: Allows the user to delete task groups.

Modify Task Groups: Allows the user to add tasks to and remove tasks from task groups, and to rename task groups. This permission also allows the user to modify the task group's security.

Task Management

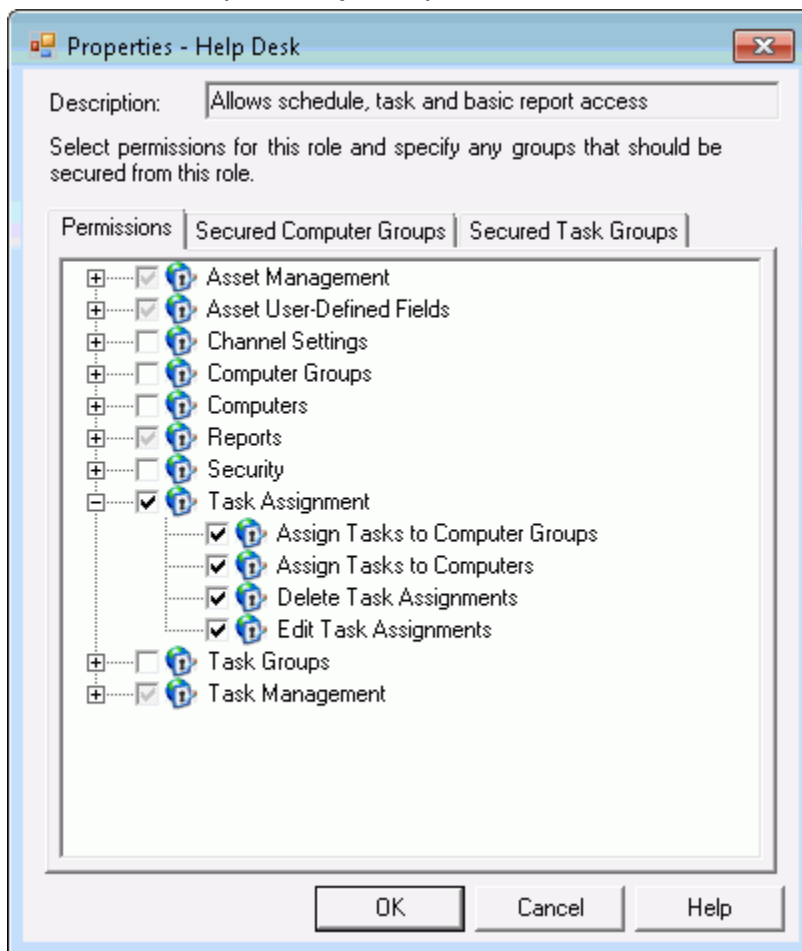
Create Tasks: Allows the user to create tasks via **Create Task** menu item.

Delete Tasks: Allows the user to delete tasks via the **Delete** menu item.

Edit Task 'Run as' Info: Allows the user to change the 'Run as' account information for a task.

Edit Tasks: Allows the user to edit all task properties except the 'Run as' account information and task distribution settings.

Task Distribution: Allows the user to create, edit, and delete Distribution Locations, and allows the user to mark a Task as being distributed. In addition, it allows the user to create and delete tasks, edit task 'Run as' information, rename tasks, and assign tasks.

Permissions tab (Role Properties)

The Role Properties dialog box opens when you click the **Properties** button on the Manage Channel Security dialog box.

On the Permissions tab, select the specific permissions to be granted to the role. Each permission grants certain types of actions, for example creating computer groups (Create Groups permission) or modifying group membership (Modify Group Membership permission).

If a permission is not granted, users in that role will not be able to perform actions associated with that permission. For example, if a Role does not have Modify Group Membership permission, users in that Role cannot add computers to groups. When a permission is not granted, menu items and buttons may be disabled or not visible.

Controlling Access to Computers

By default, a Role's permissions apply to all computers in the Channel. However, a role can be *restricted* such that certain computers cannot be modified by users in that role regardless of the role's permissions. This can be useful in situations where there are individual administrators for independent subsets of computers in the channel - for example, for computers in different domains: Within a domain, one administrator can assign tasks and take other actions, but in another domain they cannot.

Access is controlled by securing specific computer groups from a role. When a computer group is secured from a role, users in that role cannot modify computers in that group, independent of their permissions and even if those computers are in other groups that the user *can* manipulate.

Although secured computers cannot be changed (either directly or indirectly) by the associated role, those computers can be seen, they can be added to and removed from computer groups, and are visible in reports.

Unlike Permissions, which are fixed for the duration of a console session, Access control is dynamic because computers can enter and leave secured groups dynamically. This feature can be very useful. For example, a configuration group based on time-of-day could be defined and secured from a role such that the role can only manipulate computers during non-working hours.

Securing Access to Computers

Securing access to computers can be done in two equivalent ways:

1. **Secure a Role:** First, select a Role by opening the Manage Channel Security dialog, and press **Properties**. On the Secured Computer Groups tab of the **Role Properties** dialog, add groups that are to be secured from users in this role. Users in this role will not be able to modify computers in those groups.
2. **Secure a Group:** First, select a Group and open its **Properties**. Select the Security tab, which lists all available roles. Un-check roles that are to be secured from this group. Users in these roles will not be able to modify computers in this group.

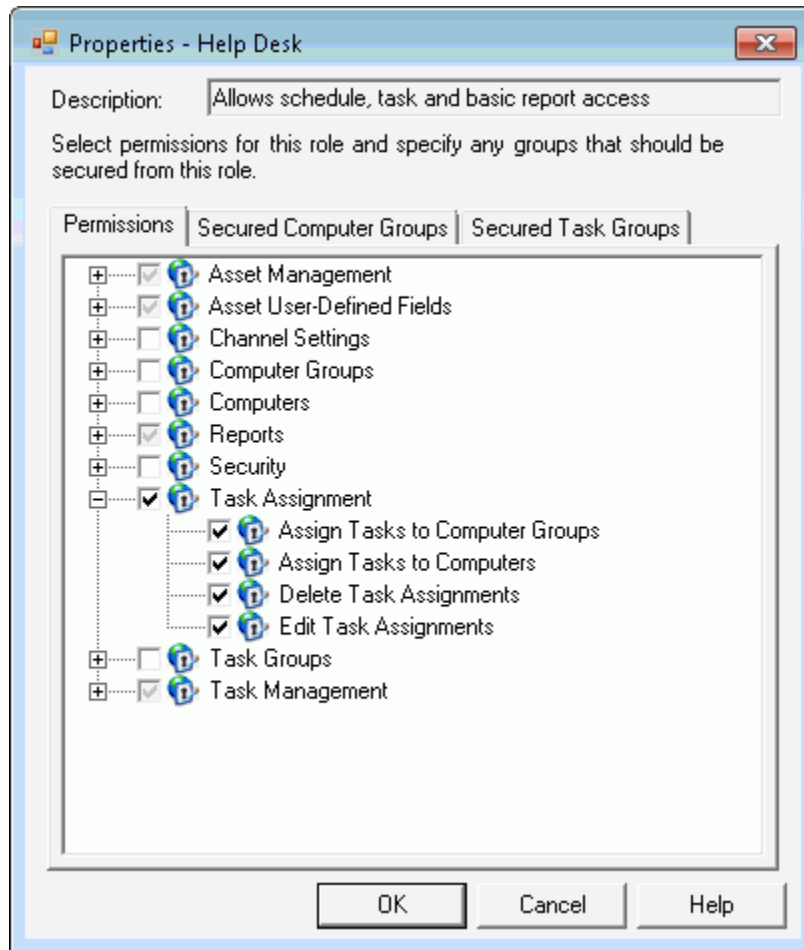
These approaches are equivalent. For example, if you select a group and un-check a role, the group will appear in the list of secured groups under the Secured Groups tab of the role's Properties.

Viewing All Secured Groups

To see all groups that have been secured from one or more roles, open the Manage Channel Security dialog and press **Secured Groups**.

Role Properties

Permissions tab (Role Properties)

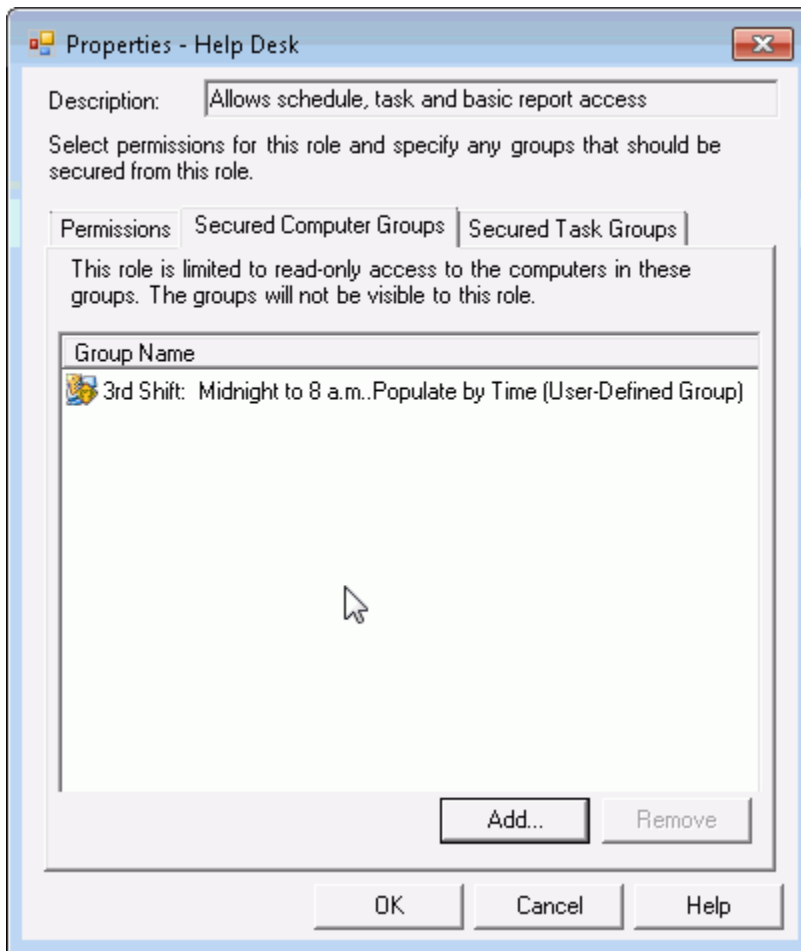


The Role Properties dialog box opens when you click the **Properties** button on the Manage Channel Security dialog box.

On the Permissions tab, select the specific permissions to be granted to the role. Each permission grants certain types of actions, for example creating computer groups (Create Groups permission) or modifying group membership (Modify Group Membership permission).

If a permission is not granted, users in that role will not be able to perform actions associated with that permission. For example, if a Role does not have Modify Group Membership permission, users in that Role cannot add computers to groups. When a permission is not granted, menu items and buttons may be disabled or not visible.

Secured Computer Groups tab (Role Properties)



The Role Properties dialog box opens when you select a Role and click the **Properties** button on the Manage Channel Security dialog box.

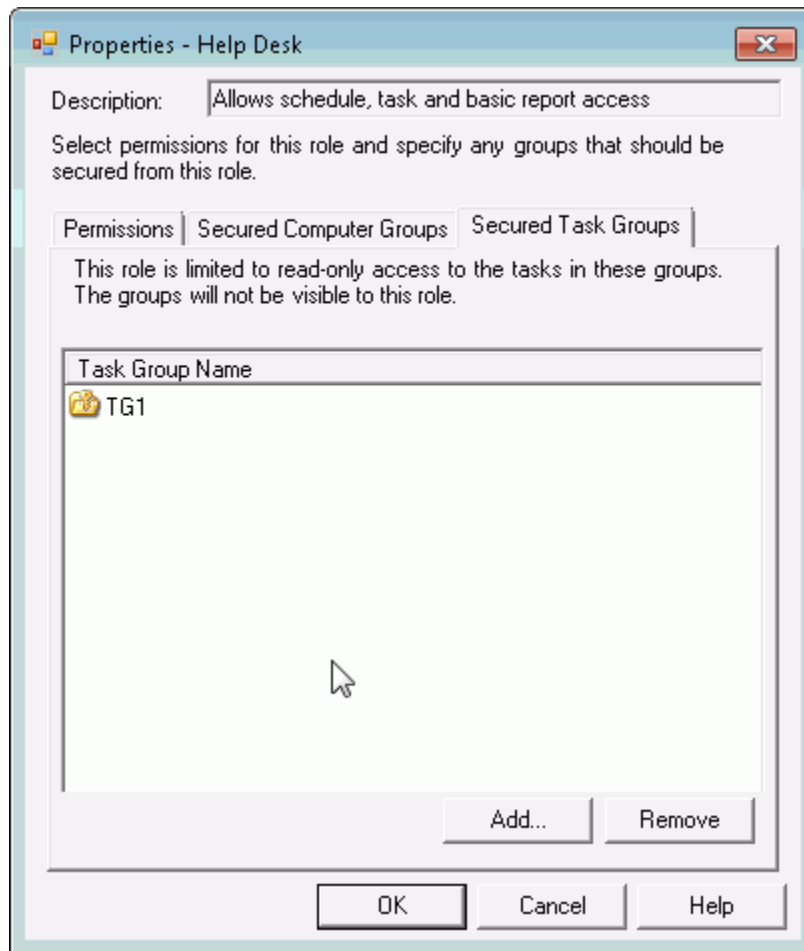
The Secured Computer Groups tab shows the computer groups that are secured from this role. Computers in these groups cannot be modified by this role, even if the role would otherwise have permission. Those computers are effectively "read-only" to users belonging to that role. For example, a role with permission to assign tasks to computers would not be allowed to assign tasks to computers in the listed groups (either directly or via groups to which those computers belong).

Groups secured from a role are not visible to that role in the console. However, the member computers remain visible.

Secured groups have a special icon indicating that one or more roles are secured from that group.

Press **Add** to add a group to the list. To remove a group from the list, select it and press **Remove**.

Secured Task Groups tab (Role Properties)



The Role Properties dialog box opens when you select a Role and click the **Properties** button on the Manage Channel Security dialog box.

The Secured Task Groups tab shows the Task groups that are secured from this role. Task in these groups cannot be assigned or modified by this role, even if the role would otherwise have permission. Those Tasks are effectively "read-only" to users belonging to that role. For example, a role with permission to assign tasks to computers would not be allowed to assign Tasks in the listed Task groups.

Task groups secured from a role are not visible to that role in the console. However, the member Tasks remain visible.

Secured Task groups have a special icon indicating that one or more roles are secured from that group.

Press **Add** to add a group to the list. To remove a group from the list, select it and press **Remove**.

Channel Properties

Loading the Channel at Startup

With the **Load Last Channel** option on the Console's **File** menu, choose whether to automatically open the Console to the Channel you used most recently.

- ☒ **Load Last Channel:** With this option selected, when you open the Console, the Channel you viewed most recently is displayed in the main window. Select this option if you frequently use the same Channel. This option is the default.
- ☐ **Load Last Channel:** With this option turned off, when you open the Console, Prism displays the Select the Channel you wish to manage dialog box. You can choose a Channel to open, create a new Channel, or find an existing Channel. If you maintain and frequently use more than one Channel, you may choose to turn this option off.

Defining Channel Properties

The **Channel Properties** dialog box defines the properties for the Channel currently displayed in the Console window. The tabs of the **Channel Properties** dialog box:

- Display information about the Channel.
- Control the auto-population and auto-licensing options.
- Help you manage the licenses assigned to the Channel.

View and define the Channel properties

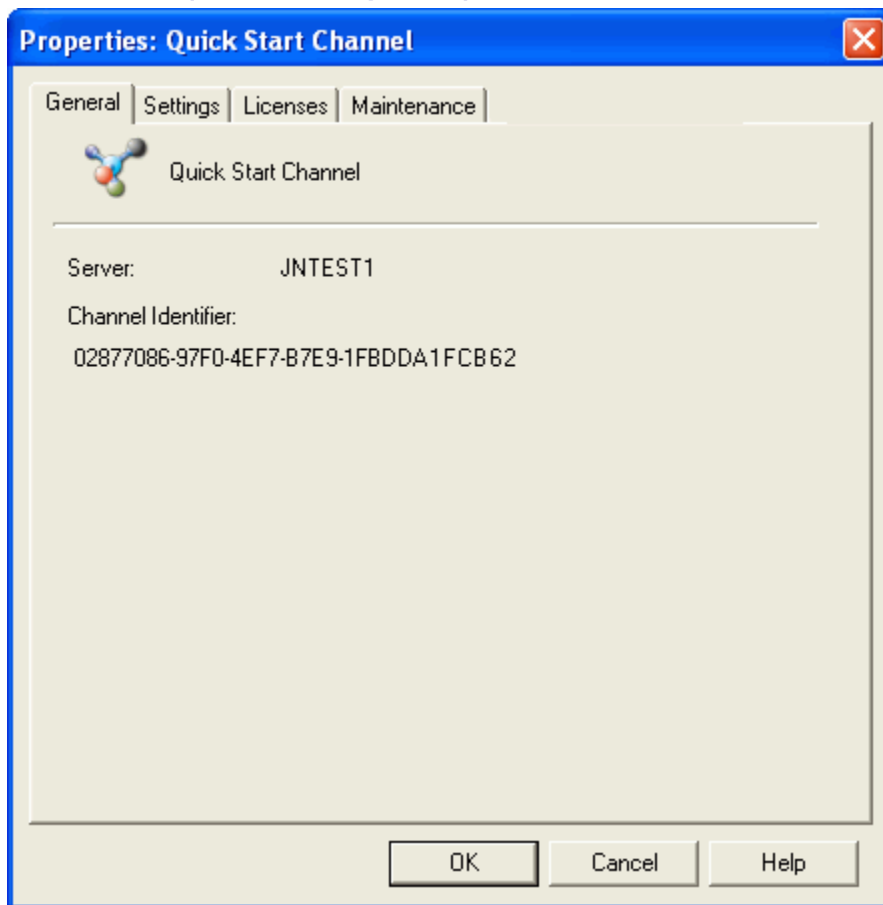
To view and define properties for the Channel, select **File | Channel Properties**. The **Properties: <Channel name>** dialog box opens.

Tabs on the Channel Properties dialog box

The tabs on the **Channel Properties** dialog box include:

- General tab
- Settings tab
- Licenses tab
- Asset Management (This tab is present only if you have Asset Manager installed.)
- Maintenance tab

General Tab (Channel Properties)



The **Channel Properties | General** tab displays information about the Channel that is currently open in the Console main window. This dialog box is displayed when you choose **File | Channel Properties**.

The information includes:

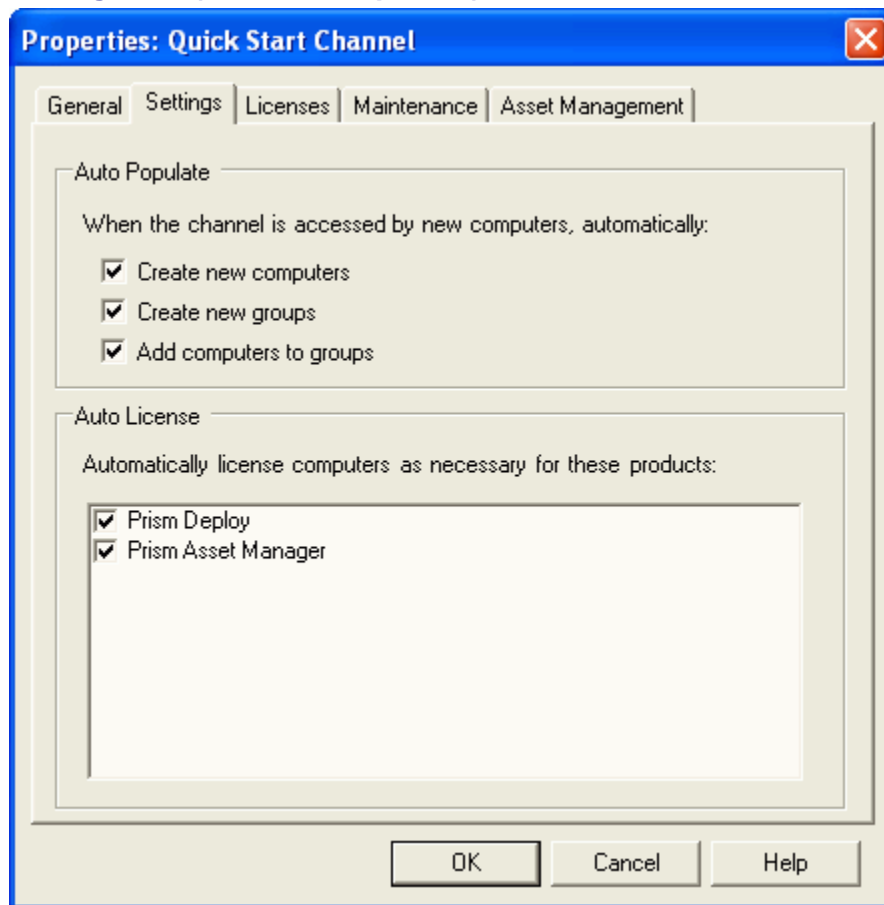


: The name of the Channel

Server: The name of the computer where the Channel Server is located

Channel Identifier: A unique number that identifies this Channel. This number is also recorded in the registry of computers that subscribe to this Channel and computers used to manage the Channel using the Console.

Settings Tab (Channel Properties)



Use the **Channel Properties | Settings** tab to set automatic population and auto-licensing options. When enabled, the Auto-Populate and Auto-License options save you time by populating the Channel with computers and groups and automatically assigning Prism licenses.

You can use a subscription file to install the Client software on a computer and subscribe the computer to a particular Channel. This causes the computer to contact the Channel Server and identify itself. However, the computer will not become actively managed in the Channel until the computer has been assigned a license for one or more Prism Suite products. In this scenario, if you want to automatically license and manage the computer, turn on the **Auto-Populate** and **Auto-License** options. If you want to manually control which computers become managed in the Channel, turn these options off.

This dialog box is displayed when you choose **File | Channel Properties** then click on the **Channel Properties | Settings** tab.

Auto-Populate

- **Create new computers:** Automatically add computers when they start up or contact the Channel Server. To contact the Channel and receive Tasks, a computer must have the Client installed and the Client must subscribe to the Channel.
- **Create new groups:** Automatically create new organizational groups and sub-groups based on Network Containers defined as part of AD (Microsoft's Active Directory) when the computers contact the Channel Server. Computers must be identified within the Channel by their Active Directory name.

- **Add computers to groups:** Automatically add computers to organizational groups if the **Create new groups** option on this tab is selected and the network uses AD (Active Directory).

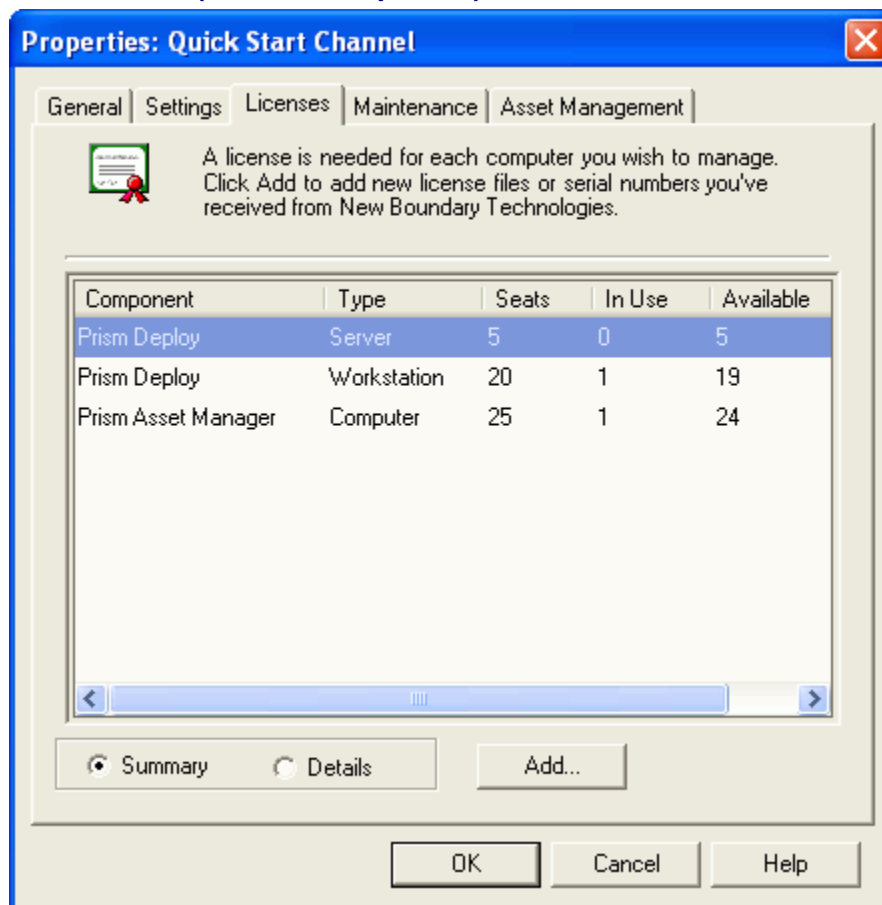
Note: For the computers and groups to auto-populate, the Client must be installed on the computer and the Client must subscribe to the Channel.

Auto-License

- **Prism Deploy:** Automatically assign an appropriate Prism Deploy license (server or workstation) to computers.
- **Prism Asset Manager:** Automatically assign a Prism Asset Manager license to computers. (Prism Asset Manager licenses are the same for servers and workstations).

The Channel will not distribute changes to or receive updates from a computer that does not have a Prism license.

Licenses tab (Channel Properties)





Use the **Channel Properties | Licenses** tab to view information about licenses assigned to the Channel, add licenses so they will be available to new computers as they are added to the Channel, and remove licenses from the Channel Server. Each computer must have an appropriate workstation or server license to receive changes from and respond to the Channel.

When you add license keys to the Channel Server, they are available for the computers added to the current Channel and all other Channels connected to the same Channel Server.

This dialog box is displayed when you choose **File | Channel Properties** then click on the **Licenses** tab.

Views Available

 **Summary:** List the licenses by type with the total number currently in the Channel.

 **Details:** Lists each of the license keys added to the Channel, along with the number of licenses available in each.

Add Licenses with a License Key

If you received a license key for licenses from New Boundary Technologies:

1. On the **Channel Properties | Licenses** tab, click **Add**.
2. In the Add License Keys dialog box, either type the license key or browse for the license file.

The Licenses are added to the server and are available in all Channels.

Add Licenses with a File

If you received a License Pack file (.SFTCHL) from New Boundary Technologies:

1. Save the files on your computer or on the network.
2. On the **Channel Properties | Licenses** tab, click **Add**.
3. In the License keys dialog box, browse to the location of the license pack file you received.

The Licenses are added to the Channel Server and are available in the current Channel. The original license files can be stored in their original location, moved, or deleted.

Remove Licenses

If you wish to add licenses to a different Channel Server, they can be removed from the computer where the Channel Server is located. However, you cannot remove licenses that are in use.

1. Highlight a license key in the list.

If any of the licenses in the key are in use, the managed computers must be unlicensed before removing the license key.

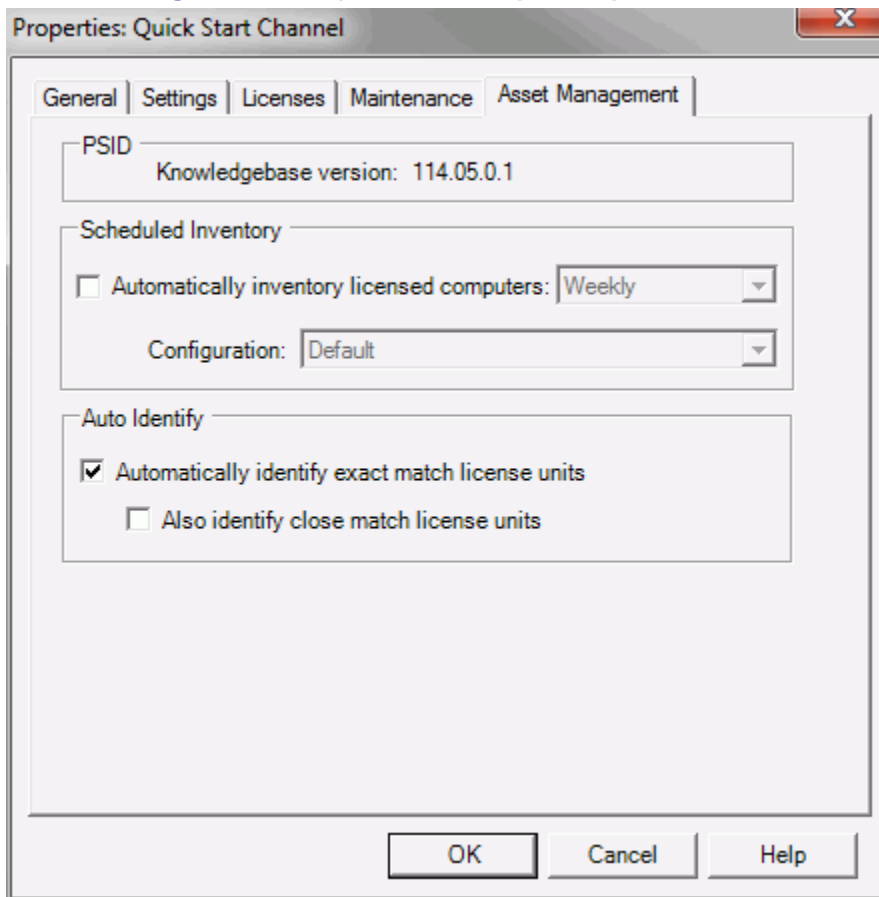
2. Click **Remove**.

The Licenses are no longer assigned to the Channel Server. These Licenses can now be used for another Channel Server if you wish.

Purchase additional License keys

Contact your reseller or New Boundary Technologies. (To contact New Boundary Technologies, visit our Web site at www.newboundary.com or call 800-747-4487 or 612-379-3805.)

Asset Management tab (Channel Properties)



On the Channel Properties | Asset Management tab, set the schedule for the automatic inventory scan of managed computers.

This dialog opens when you select **Asset Management | Settings** or select **File | Channel Properties** and go to the Asset Management tab.

PSID

This area displays the currently installed PSID version.

Scheduled Inventory

- ☒ **Automatically inventory licensed computers:** With this option selected, the software and hardware of managed computers in the Channel are automatically scanned at the interval you specify.

With this option selected, you can also choose the scan configuration to use.

- ☐ **Automatically inventory licensed computers:** With this option cleared, Prism does not automatically scan the managed computers. You can complete an inventory of individual computers or groups on-demand.

Note: The date and time of the most recent scan is displayed in the Managed | Members tab in the main Console window.

Auto Identify - Exact Match

- ☒ **Automatically identify exact match license units:** With this option selected, Prism automatically matches files in the Unresolved Files | Exact Match folder with known license units stored in the PSID. Use this option to reduce the number of unresolved files that you need to assign manually.
- ☐ **Automatically identify exact match license units:** With this option cleared, files that exactly match known license units are listed in the Unresolved Files | Exact Match folder. You can match them to license units manually.

Auto Identify - Close Match

- ☒ **Also identify close match license units:** With this option selected, Prism automatically matches files in the Unresolved Files | Close Match folder with known license units stored in the PSID. Use this option to reduce the number of unresolved files that you need to assign manually.
- ☐ **Also identify close match license units:** With this option cleared, files that are a close match with known license units are listed in the Unresolved Files | Close Match folder. You can match them to license units manually.

Maintenance tab (Channel Properties)

Properties: Quick Start Channel

General | Settings | Licenses | **Maintenance** | Asset Management

Database maintenance

☒ Defragment database indexes Daily

Delete old channel data

☐ Delete admin auditing log entries older than days

☐ Delete task deployment log entries older than days

☐ Delete license usage detail log entries older than days

☐ Delete computers that are inactive for over days

Start time

Start maintenance tasks daily at 12:15 AM

OK Cancel Help

Use the **Channel Properties | Maintenance** tab to administer the channel database.

This dialog box is displayed when you choose **File | Channel Properties** then click on the **Maintenance** tab.

Database Maintenance

- ☒ **Defragment database indexes:** With this option selected, Prism will automatically defragment the channel's database indexes. You can select whether this should occur Daily, Weekly, or Monthly. This option is selected by default.
- ☒ **Recalculate license usage levels:** With this option selected, Prism will recalculate usage levels at the specified frequency. You can select whether this should occur Hourly or Daily. This option is selected by default.

Note Unchecking this box effectively turns off usage tracking.

Delete old channel data

These options allow you to delete older data that can accumulate and eventually degrade database performance.

- ☒ **Delete admin auditing log entries older than:** With this option selected, the administration log will be purged of entries older than the specified number of days.
- ☒ **Delete task deployment log entries older than:** With this option selected, the Task deployment log will be purged of entries older than the specified number of days.
- ☒ **Delete license usage data older than:** With this option selected, the license usage table will be purged of entries older than the specified number of days. Depending on the size of your channel, the number of license units being tracked, and their frequency of use, this table can become large and degrade performance.
- ☒ **Delete computers that are inactive for over:** With this option selected, computers will be deleted from the channel if they have not polled the server within the specified number of days. This can be used to recover unused Prism licenses.

Start time

Specifies the time each day when the database maintenance should occur.

Managing Computers

Adding Computers

Managed Computers

The Manage Computer Expert dialogs step you through the process of managing a computer. The process consists of these steps:

- **Assign a license for at least one Prism Suite product.**

Prism can automatically assign licenses or you can manually assign licenses. Once a computer has been assigned a license, it appears in the Manage tab of the console. However, a computer cannot be actively managed until client software is installed.

- **Adjust Client Settings for the installation.**

You can accept the Channel's default client settings (recommended) or you can override the settings for a specific computer. These settings include the ability to specify alternate credentials to use for the client installation.

- **Install the client software.**

You can install the Client directly over the network or by creating a subscription file. When you directly install the software, Prism immediately pushes the client to the target computer; when you install via a subscription file, you must first create the subscription file and then distribute the file to the target computer where it must be run.

Note: A computer can become managed only if it has been assigned a license. If you install the client software on a computer via subscription file, the computer does not appear in the Managed tab unless the computer has been assigned a license.

Installing the Client Directly over the Network

For computers on a Microsoft network that are turned on, you can directly install the Client from the Console, quickly adding the computers to the Channel.

Add the Computer to the Channel and Install the Client

To install the Client and begin managing the computer immediately:

1. Highlight the name of the computer on the Network tab.

Note: You can add a number of computers at one time. Select a group of computers in the details pane by pressing the **Ctrl** key as you click on computers or by pressing the **Shift** key as you click on the first and last computer.

2. Use one of these options:
 - Select **Computers | Manage Computer**.
 - Right-click on a computer on the Network tab and choose **Manage Computer** from the pop-up menu.
3. In the **Manage Licenses** dialog box, make sure that a license is assigned (either automatically or manually).
4. Click **Next**.
5. Choose **Now via Direct Client Installation** for the **Client Installation method**.

6. If you need to override the default settings for this computer, click the **Settings** button (most settings are disabled if the **Automatically apply settings to all clients** checkbox is checked on the **File | Client Settings** dialog; see Applying Unique Settings to a Client for more information).
 - On each of the tabs in this dialog box, adjust the settings as required for the Client.
 - When you have finished, click **OK**.
7. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
8. Select the **Use alternate credentials** check box if you wish to use alternate credentials for the client installation. This can be useful if you are installing across domains or where you do not have centralized administration accounts.
9. Select the **Reboot computer after installation** check box.
10. Click **Install** to install the Client.
11. Click **Finish** when the installation is complete.

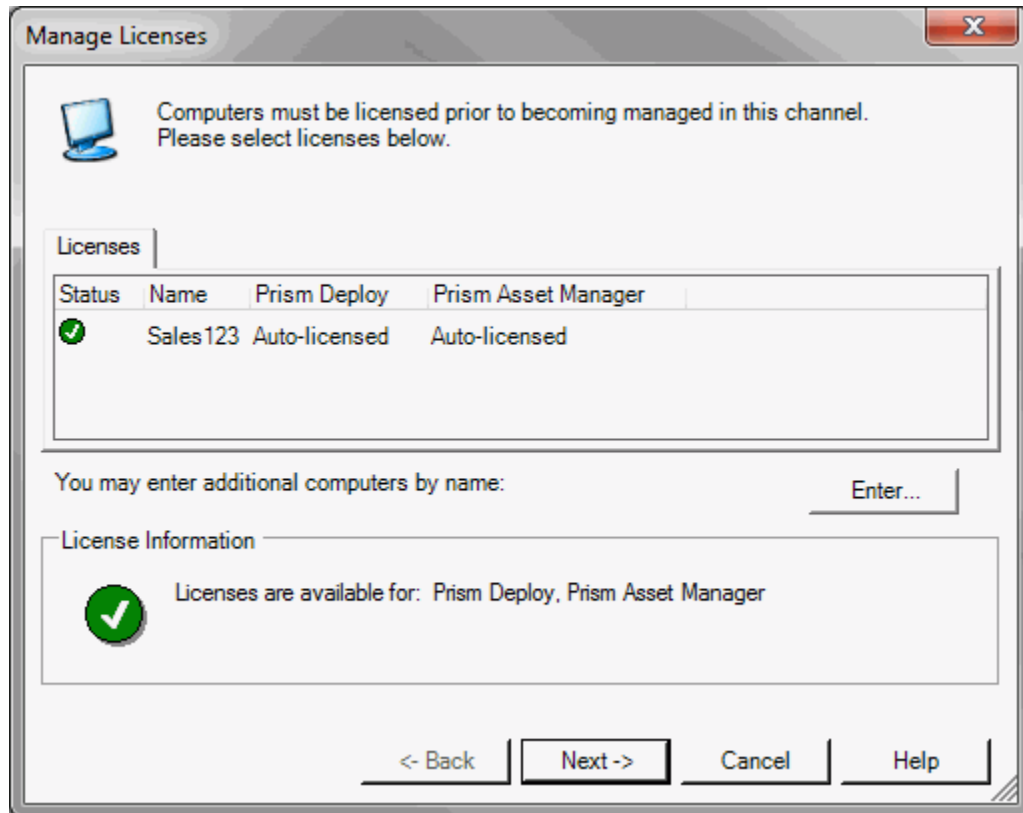
Note The Client Installation dialog and Members tab display client installation status. If the Client installation was not successful, remove the obstacle to the installation and try again. For example, if the installation was unsuccessful because the managed computer was turned off, start up the computer, and then install the Client.

The computer will not communicate with the Channel until the Client is installed and the computer subscribes to the Channel.

Manage Computers Expert

The Manage Computers Expert displays the **Managed Licenses** dialog as the first of two dialogs you use to add computers to the Channel.

Managed Licenses Dialog



This dialog box opens from the Network tab when you select **Computers | Manage Computer** or right-click on a computer name and choose **Manage Computer**. This dialog also opens from the Managed tab when you select **Computers | Manage Licenses** or right click on a computer name and choose **Manage Licenses**.

Licenses Tab

Displays the selected computers along with corresponding license options. Each computer must have at least one available license assigned to be a managed computer. Depending on whether the Channel has enabled auto-licensing (the default), the display allows either view only or editing.

- **Auto-Licensed Enabled** - When auto-licensing is enabled, the system automatically assigns an appropriate available license and displays the message Auto-licensed in the product license column. You cannot manually change license assignments when auto-licensing is enabled.
- **Auto-License Disabled** - When auto-licensing is disabled, use this dialog to assign licenses. To assign a license, click on the selection box for the product. To unassign a license, clear the box for that product.




Enter Button

The **Enter** button allows you to manually add computers to the channel by name. This button is available when managing new computers. To manually add a computer:

1. Click **Enter**.
2. Enter the name of the computer, and click **OK**.

License Information

Displays the current status of Prism licenses in the Channel. As you add computers to the display and licenses are assigned (either automatically or manually), the following icons and messages are displayed to indicate the current license status:

Icon	Description
	Indicates that all listed computers have been assigned at least one license. Also lists the licenses still available for the channel.
	Indicates that one or more computers have not been assigned licenses and will not be managed. Check the display to find the computers that have not been assigned licenses.
	Indicates that although all listed computers have been assigned at least one license, you have attempted to assign an additional product license that is not available.

Client Installation Dialog

Client Installation

Computers must have Client software installed prior to becoming managed in this channel. Please select an installation method below.

Install Status

Type	Name	Status
	Sales123	

Client Installation Method

Now via Direct Client Installation ▼ Use this installation method for computers that are currently accessible on the network and are running Windows 2000/XP/Vista or higher. Client software will be installed automatically and immediately.

Client Settings and Options

Settings... Override client settings for this installation only

Advanced Options... Change default installation locations and network shares

☐ Use alternate network credentials for this installation Credentials...

☒ Reboot computer after installation

<- Back Install Finish Cancel Help

On this dialog, choose the client installation method and options for the computer.

Install Status

This panel lists the computer name and, if the Client Installation Method is **Now by Direct Client Installation**, the installation status for each computer being added to the Channel. If the installation fails, the status column shows details about the cause of the failure.

Note The status information can be saved to an external file by right-clicking in the **Install Status** panel and selecting the **Save Installation Status As** menu option. This can be useful for later troubleshooting of installation problems.

Client Installation Method

There are two methods by which the client can be installed on target computers:

Now by Direct Client Installation	<p>Install the Client on the computer directly from the Console. The Client is installed over the network immediately, if the computer is online.</p> <p>After choosing this option, set your Client Settings and Options (below) and click the Install button to install the Client. The results of the installation are displayed. Click Finish when the install completes successfully.</p>
Later via Subscription File	<p>The computer is assigned a license, but the Client is not installed on the computer. Choose this option to add one or more computers that cannot be reached by the direct install method, for example, if they are not currently connected to the network.</p> <p>After choosing this option, click Finish to add the computer to the Channel. When you are ready to install the Client on this computer, create a subscription file. You can distribute this file via e-mail, a web page, login script, or any other method.</p>

Client Settings and Options

If you choose **Now by Direct Client Installation** as the installation method, you can modify the following settings and options:

Settings	Allows you to override the Channel's default client settings. Note that most settings are disabled if the Automatically apply settings to all clients checkbox is checked on the File Client Settings dialog. See Applying Unique Settings to a Client for more information.
Advanced Options	Allows you to specify the location on the managed computer at which installation files are stored.
Use alternate network credentials	<p>Checking this allows you to specify an alternate account to use for installing the client. This can be very useful when installing across domains, or where administration accounts are not centrally administered.</p> <p>Press the "Credentials" button to enter the user credentials (domain, user name, and password) to use for the client installation.</p>
Reboot computer after installation	When selected, automatically reboots the client computer after installation.

If you choose **Later via Subscription File** as the installation method, settings and options can be modified when you create the Subscription File.

Installation Options dialog

When installing the Client directly, the installation files are stored temporarily in an administrative share on the target computer. By default, this location is on the C: drive. On this dialog box, you can specify a different location for storing the Client files during the installation. For example, if you are using Citrix, the target computer does not have a C: drive, so you must specify a different location.

Specify a root partition or volume as the drive letter name appended with the \$ sign. For example, drive letters C and D are shared as C\$ and D\$.

This dialog box opens when you click the **Advanced Options** button on the **Client Installation** dialog or **Subscription File** dialog.

Specific Installation Folders

Either leave these three edit boxes blank to accept the default paths or enter a path to override the default path where client files will be installed. This also overrides a current install of the client files if they exist on the target computer.

- **Client Executables.** Specify the path where the New Boundary Clients and help files will be installed. If left blank, the files are installed to either the current path of an existing install of the files or the default path **Program Files\New Boundary\Client**.
- **Services and DLLs.** Specify the path where the New Boundary Services and shell extensions files will be installed. If left blank, the files will be installed to the default path **Common Files\New Boundary\Client**.
- **Temporary Files.** Specify the working directory for Prism temporary files. These include rollback files, inventory files, and checkpoint/restart files. If left blank, the Client will use the default path **Documents and Settings\All Users\Application Data\Prism Deploy**.

Subscription Files

Creating a Subscription File to Distribute to Users

For computers that are not on the corporate network or those that do not use Microsoft networking, use the Console to create a subscription file you can distribute to these computers. The subscription file installs the Client and sets the Client to subscribe to the Channel. If the default auto-populate and auto-license options are set for the Channel, the computers are automatically assigned licenses when they contact the Channel Server.

Note: Using a subscription file to install the Client for the first time requires an administrator (a user with administrative privileges). However, an administrator is not required if the Client is being upgraded from a previously-installed version.

Create the subscription file

To create a subscription file for the current Channel:

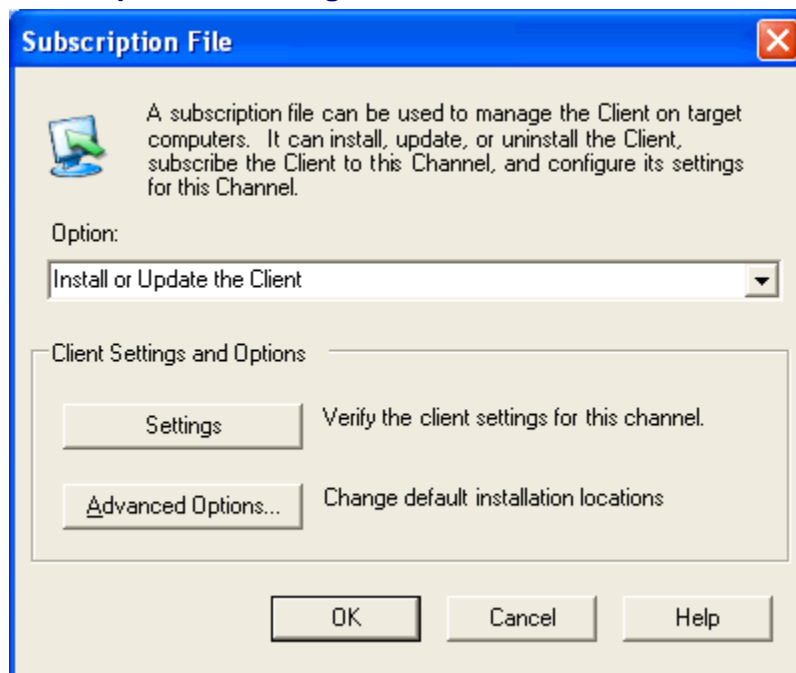
1. Select **Computers | Create Subscription File**. The Subscription File dialog box displays.
2. Select the **Install or Update the Client** option.
3. Click **Settings** and adjust settings on the following tabs:
 - Polling
 - Server
 - Web Proxy Server

Note: If you do not want the Channel settings automatically applied to the managed computer, you must turn off the automatic update option on the Polling tab. See Applying Unique Settings to a Client for more information.

4. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
5. Click **OK** on the **Subscription File** dialog to save your changes.
6. On the Save Subscription File dialog, enter a name for the new subscription file.
7. Distribute the subscription file to the computers.

For example, distribute the file by attaching it to an e-mail message, placing it on a Web site, or including it in a login script. When the Subscription file is executed, it installs the Client and subscribes to the Channel.

Subscription File dialog



A subscription file can be used to install the Client on a computer and set the Client to subscribe to the Channel. Use a subscription file to install the Client on remote computers or computers where the Client cannot be installed directly from the Console. A subscription file can also be generated that un-installs the Client from a computer.

The Subscription File dialog box opens when you select **Computers | Create Subscription File**.

Option

Select an option to determine the type of subscription file you are generating:

- **Install or update the Client:** Install the Client for the first time or update an existing Client to match the settings specified for this subscription file. (See Applying Unique Settings to a Client.)
- **un-install the Client:** un-install the Client on the target computer. After deleting the computer from the Channel, generate this subscription.

Client Settings and Options

When you are creating an install or update subscription file, the **Client Settings** allow you to override the default client settings for a channel.

Settings

The **Settings** button allows you to set the following (for more information on these options, please refer to the section entitled Working with the Client later in this document):

- Polling
- Server
- Web Proxy Server

Note: Most settings are disabled if the **Automatically apply settings to all clients** checkbox is checked on the **File | Client Settings** dialog. See Applying Unique Settings to a Client for more information.

Advanced Options

The **Advanced Options** button allows you to specify paths and folders for installation options.

By default, the settings in the Subscription file match those set for the Channel through File | Client Settings. Click the Settings button to adjust the settings installed with the subscription file. Please note:

- If the **Configure the Client to automatically apply new settings for this channel** option has been *cleared* on the Client Settings | Polling tab, the values set through this dialog box are installed on the Client computer. For example, select this option for remote computers or computers on the network that need specific settings, not the default settings for the Channel.
- If the **Configure the Client to automatically apply new settings for this channel** option is selected on the Client Settings | Polling tab, the Channel settings are applied the next time the Client contacts the server. (See Automatically Maintaining Client Settings.)

Save the Subscription File dialog

Provide a name and location for saving the Subscription file. The file is saved when you click **Save**.

Enter this information:

- **File name:** Type the filename for the new subscription file you are creating.

This file can be saved on a network server, web server, your own computer, or anywhere else you choose. From this location, you can distribute the Subscription file via e-mail, post it on a web page, place it in a login script, or use another method for distribution.
- **Save as type:** The subscription file is an executable file (.EXE), which you can run on the managed computer(s).

Licensing Computers

Managing Prism Licenses

Each managed computer must have a Prism license assigned. A License Key defines a block of licenses that are assigned or could be assigned to computers in the Channel. This block is available from New Boundary Technologies as a license key received via e-mail or as a binary, encrypted file. When you installed Prism, a block of Deploy workstation and server and Asset Manager evaluation licenses were installed along with the application.

Use these evaluation Licenses to get started setting up your Channels and computers. When you purchase permanent Licenses, everything you set up while using the Evaluation Licenses transfers to the purchased Licenses. To purchase additional Licenses, please contact your

reseller or New Boundary Technologies. (To contact New Boundary Technologies, visit our Web site at www.newboundary.com or call 612-379-3805 or 800-747-4487.)

Note: ALL computers that receive software, updates, or other changes via a Channel must have a valid license.

Note: Prism Deploy uses two different types of licenses: one for workstations and another for servers. If you will be managing both workstations and servers with Prism Deploy, you must purchase both types of licenses. Prism Asset Management has only one type of license; it does not distinguish between workstations and servers.

Assign Licenses to Computers

Prism licenses can be assigned automatically or manually.

Auto-Licensing

By default, auto-licensing is enabled for both Prism Deploy and Prism Asset Manager. When you begin managing a computer and a license is available, the Channel automatically assigns an appropriate license or licenses to each computer. The auto-license options are set on the Channel Properties | Settings tab.

The evaluation licenses assigned to computers initially are automatically replaced by permanent licenses when you add them.

Manual Licensing

If you disable auto-licensing for either Prism Deploy or Prism Asset Manager, you can manually assign licenses when you add a computer to the channel. In addition, you can change license assignments for managed computers using the **Computer | Manage Licenses** dialog, as well as the managed computer pop-up menu option **Manage Licenses**.

Status of the License When You Remove a Computer

When a managed computer is removed or deleted from the Channel, its license or licenses are added to the pool of licenses available to computers in the Channel.

When a computer is removed from the network but it remains listed within the Channel, the licenses remain assigned to that computer. If you want to make the license or licenses available to other computers, the computer must be deleted from the Channel.

Client on Target Computers

Working with the Client

The Client is the software that runs on target computers and communicates with the Channel Server to report information about the managed computer and to act on changes initiated through the Console by the administrator.

The Client can be installed directly on computers from the Console or installed with a subscription file generated through the Console. After it is installed, the Client begins polling the Channel Server to report information and receive instructions.

Each time the Client polls the Channel Server, it does the following:

- Provides detailed information about its status and configuration.
- Checks for new configuration rules that may apply.

- Receives and installs updates or other changes based on configuration rules or other criteria set by the administrator.

Note You cannot edit Prism files using the Client. You must use the administrator's Editor program to edit Prism files.

The polling interval and other communication settings for the Client are controlled automatically by setting default values for all managed computers in the Channel or can be set for individual machines by installing the Client on that computer with specific values. See Applying Unique Settings to a Client for more information.

Note An on-demand poll can be initiated by right-clicking on a computer and selecting Request Poll. This forces the client to poll independent of its defined polling interval.

Installing the Client

The Console gives you the following options for installing the Client:

- Install the Client directly over the network (See Installing the Client Directly Over the Network.)
- Create a subscription file that you distribute to users for installing the Client. This file can be included within a Group Policy Object, downloaded from a web site, enclosed in an e-mail message, or placed in the login script for computers. (See Creating a Subscription File to Distribute to Users.)

Client Status Values

The client installation status displayed on the Members tab and in the Client Installation dialog can have many different values. The possible client status values and their meanings are:

- **Invalid Status Code**
- **Never contacted** - the client has never contacted the server
- **Attended** - the client is installed successfully, and at least one user is logged in
- **Unattended** - the client is installed successfully, but no user is logged in
- **Attended (suspended)** - the client is installed successfully, at least one user is logged in, and the machine is in a suspended (sleep) state such as hibernate or standby.
- **Unattended (suspended)** - the client is installed successfully, no user is logged in, and the machine is in a suspended (sleep) state such as hibernate or standby
- **Offline (known)** - the client is installed successfully, the machine is off, and the client shutdown gracefully (i.e., was able to send a status to the server before shutting down).
- **Offline (guessed)** - the client is installed successfully, the machine is off, but the client did not shutdown gracefully.
- **Client stopped**
- **Client stopped - Subscription install in progress**
- **Client stopped - Install in progress**
- **Client stopped - Direct install in progress**
- **Uninstalled**
- **Unsubscribed**
- **Install in progress**

- **Uninstall in progress**
- **Unsubscribe in progress**
- **Install succeeded** - a direct install succeeded
- **Install succeeded, needs reboot**
- **Install succeeded, launch failed**
- **Direct install failed (Access denied)**
- **Direct install failed (Computer not found)**
- **Direct install failed (Source unsupported)**
- **Direct install failed (No RPC)**
- **Direct install failed (Target unsupported)**
- **Direct install failed (Registry access)**
- **Direct install failed (Missing source)**
- **Direct install failed (Busy source)**
- **Direct install failed (Invalid target folder)**
- **Direct install failed (Target folder missing)**
- **Direct install failed (Target file busy)**
- **Direct install failed (Registry write failed)**
- **Direct install failed (Target insufficient)**
- **Direct install failed (Client launch failed)**
- **Direct install failed (Timeout)**
- **Direct install failed (Cancelled)**
- **Install fail code**
- **Install failed (File copy failed)**
- **Install failed (Source deleted)**
- **Install failed (Service install failed)**
- **Install failed (User stopped)**
- **Install failed (Insufficient disk space)**
- **Install failed (Invalid OS)**
- **Install failed (Invalid file)**
- **Install failed (Insufficient permissions)**
- **Install failed (File access failed)**
- **Install failed (File busy)**
- **Install failed (File corrupt)**
- **Install failed (File missing)**
- **Install failed (Duplicate file exists)**

- **Install failed (Apply failed)**
- **Install failed (Service failed)**
- **Install failed (Command failed)**
- **Install failed (Reason unknown)**
- **Local Install failed (Run console as Administrator)**
- **No client installation attempted**

Setting the Client Communication Parameters

By default, the settings that control communication between the Client on a managed computer and the Channel server are specified through the Console. Depending on your needs, you can establish a single set of values that are applied to all managed computers or you can use different settings for a subset of individual Client computers.

For example, if all of the computers you manage are on your internal LAN, automatically apply the same settings to all computers in the Channel. If you have a number of managed computers that are remote, you may wish to provide different settings for the WAN systems versus the LAN systems.

Setting the Default Values

To set the default values for managed computers in the Channel, choose **File | Client Settings**. On the Client Settings dialog box, set values on these tabs:

- Polling
- Server
- Web Proxy Server

How the Default Values are Used

Default values set through the Console are used:

- As the default values when the Client is installed directly or with a subscription file. (See About Managed Computers.)
- When the **Configure the Client to automatically apply new settings** option is selected on the Polling tab, the default settings are applied to each Client as it contacts the Channel Server.

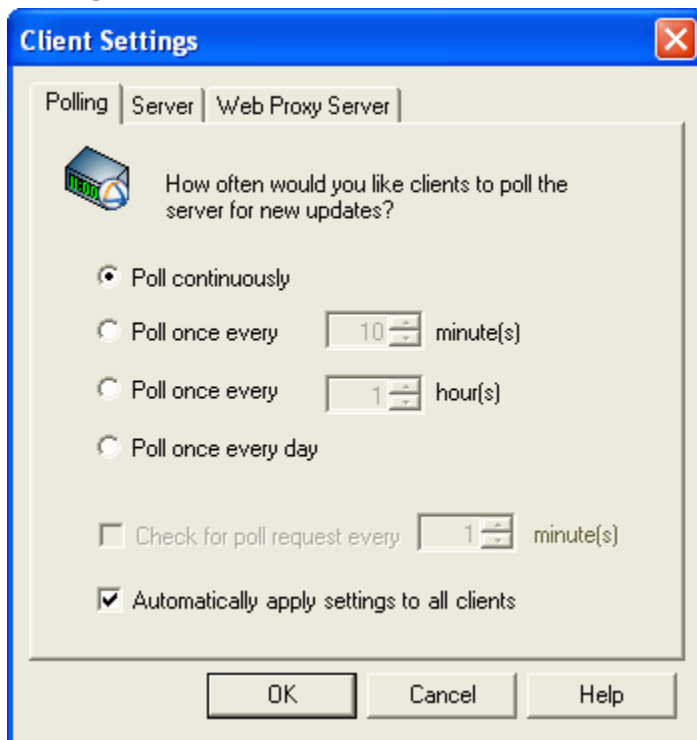
Exclude an individual managed computer from this automatic update by turning off this option when you install the Client on that computer

Setting the Client Values Automatically or Individually

Prism lets you automatically apply a single set of communication parameters to all Clients or adjust the settings independently for specific Clients or selected managed computers. For more information, see the following topics:

- Automatically Maintaining Client Settings
- Applying Unique Settings to a Client

Polling tab



On this tab, adjust the interval at which the Client on a managed computer polls or contacts the Channel Server for updates. This information is used for the Client that is added directly from the Channel and as the default value for subscription files. Your starting point determines how the information on this tab is used.

This dialog box opens when you select one of these options:

- **File | Client Settings:** The values on this dialog are used as the default for installing the Client and may be used to automatically update the Client on managed computers. See *Automatically Maintaining Client Settings*.
- **Settings** button on the Client Installation dialog: Set the communication values used when the Client is installed directly from the Console. See *Setting the Client Communication Parameters*.
- **Settings** button on the Subscription File dialog, which is access through the **Computers | Create Subscription File** menu: Set the communication values used when the Client is installed using a subscription file. See *Creating a Subscription File to Distribute to Users*.

Set the Polling option


Choose one of these four Polling options that define how often the Client should check with the Channel Server for new updates:

- **Poll Continuously:** The Client contacts the Channel Server constantly. This option requires more processor time and bandwidth than the following options. It is used only for a small number of computers in a test lab.

Caution: Do not use this setting for your production environment.

- **Poll once every 10 minute(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of minutes.

The Client requires very little bandwidth, so the default value is 10 minutes. The polling interval may need to be adjusted up or down, depending on these factors:

- the number of computers in the Channel
 - the number of groups in the Channel
 - how frequently you deploy Tasks from the Channel
 - how frequently you perform an inventory of the hardware and software of managed computers
- **Poll once every**  **hour(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of hours.
 - **Poll once every day:** With this setting, the Client contacts the Channel Server for updates at the start of each session. A session begins when a user logs on to the computer. There is also an unattended session when the computer is turned on but there is not a user logged on.


Notes Please contact Technical Support for recommendations on the optimal polling interval for your situation.


The default polling interval is 10 minutes. The default polling interval is set when you create the Channel.

Set how often to check for poll requests

This setting defines whether or not the Request Poll capability is enabled for a Client, and, if enabled, defines how often the Client should check for a request for a poll. The Request Poll feature allows the user to request that the client poll the server independent of the polling interval defined above. It is effectively an "on demand" poll.

This option is not enabled if the polling frequency, above, is set to Poll Continuously.

☒ **Check for poll request every**  **minute(s):** With this option selected, the client contacts the server at the specified interval to determine if a request has been issued for the client to make a poll. If it finds a request, it immediately polls the server to obtain all updates. The minimum value is 1 minute. Since the check has very low overhead, this check can be made at a significantly higher frequency than a normal poll.

☐ **Check for poll request every**  **minute(s):** With this option cleared, the client will **not** check to see if a Request Poll has been issued, and the Request Poll context menu option will be disabled for that client.

Configure the Client to Automatically Apply New Settings for this Channel

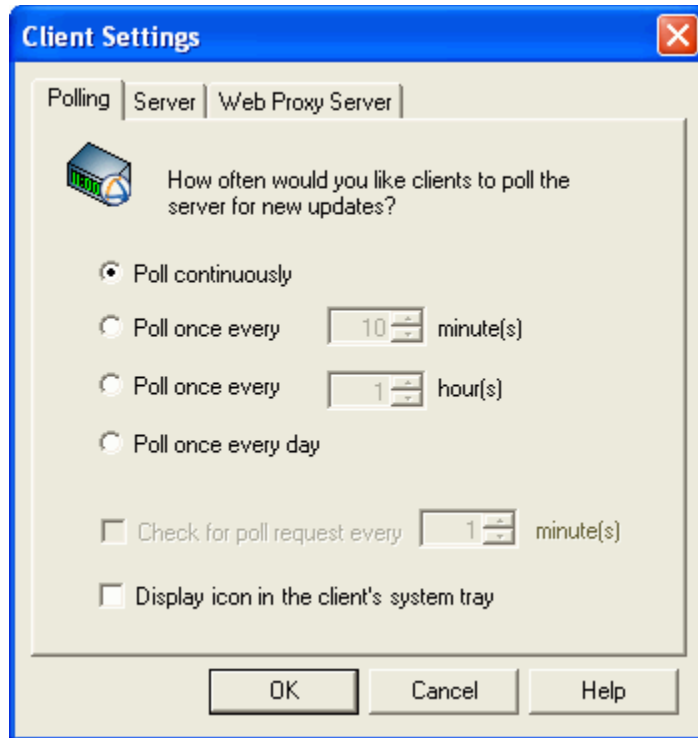
When opened through the **File | Client Settings** menu, this tab contains an option that controls how the settings specified affect Clients.

☒ **Automatically apply settings to all clients:** With this option selected, all clients will inherit the settings made in this tab. This will occur automatically for existing clients the next time they poll the Channel Server as well as for new clients. Each client will automatically be updated whenever client settings are changed for the channel.

Note: Checking this will disable the ability to apply unique settings to individual clients.

- ☐ **Automatically apply settings to all clients:** With this option cleared, the client settings are set individually for each managed computer. The settings on this tab become the default values. They are established (and can be modified) when the Client is installed directly or through a subscription file. To change the settings for an existing Client, you must reinstall the Client with the new settings.

Configure the Client to Display an icon in the client computer's task tray



When opened through **Settings** button on either the Client Installation or Subscription File dialogs, this tab contains an option that controls whether or not the client icon should appear in the managed computer's system tray (notification area) of the taskbar.

- ☒ **Display icon in the client's system tray:** With this option selected, an icon will appear in the managed computer's system tray after the client is installed. In addition to providing a visual indication of the presence of the client, enabling this option provides a configurable set of administration functions to be performed directly on the managed computer.
- ☐ **Display icon in the client's system tray:** With this option cleared, no icon is displayed in the managed computer's system tray. This is the default setting.

Request Poll

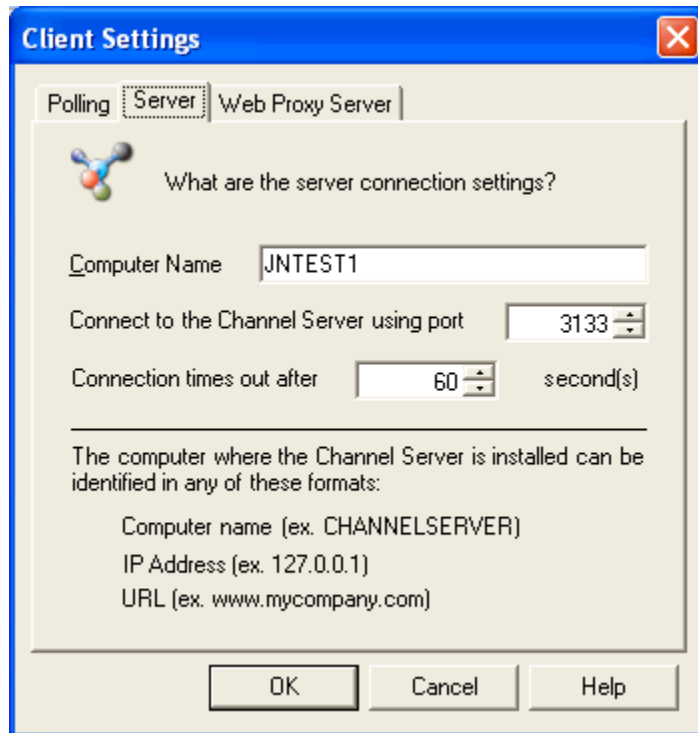
Independent of the polling frequency specified for a client, an "on demand" poll can be initiated at any time by right-clicking on a managed computer and selecting **Request Poll**. This forces the client to perform a one-time poll independent of the Client's normal polling interval.

The **Request Poll** option can be enabled via the **File | Client Settings** menu or when direct installing or creating a subscription file. On the Polling tab of the Client Settings dialog, select a non-continuous polling frequency. Then, select the checkbox labelled **Check for poll request every**, and specify a frequency for the check. Refer to the Polling tab section for more information.

Note If **Check for poll request every** checkbox has not been selected for a client, the **Request Poll** context menu option will be *disabled*. Furthermore, the user must have Edit Computer permission to invoke Request Poll.

Clients implement the Request Poll capability by pinging the Channel Server periodically to see if the user has made a request for a poll. If a request is found, the client will immediately poll the server to obtain all updates. You specify the frequency of this check by setting on the Polling tab of the Client Settings dialog.

Server tab



On this tab, change the name of the computer where the Channel Server resides or change the format of the name. Your starting point determines how the information on this tab is used.

- Console Settings: Specifies how the Console will communicate with the Channel Server.
- Client Settings: Specifies how the Clients will communicate with the Channel Server.

Computer Name


Enter the name of the computer where the Channel Server is installed. Enter the name in the format that the Console or Client computer can use to contact the Channel Server. For example, if the managed computer contacts the Channel Server via the Internet, rather than the corporate network, use an IP address or URL, not the computer name. The name can be entered in any of the following formats:

- Computer name, for example CHANNELSERVER
- IP (Internet Protocol) Address, for example 127.0.0.1
- URL (Uniform Resource Locator), for example www.yourcompany.com

It is critical to identify the correct computer.

If the name is entered as the computer name (SERVER), you may choose to change the name if the resolution of the network name affects performance. In this case, you could specify the IP address instead.

Connect to the Channel Server using port

The Console and Clients connect to the Channel Server using the specified port. Both the Console and the Clients must use the same port. Type a number in the text box or use the  to scroll to a number.

We recommend using one of the following port numbers:

- Prism User Port (port 3133)
- World Wide Web HTTP Port (port 80)
- Dynamic or private port (ports 49152 to 65535)

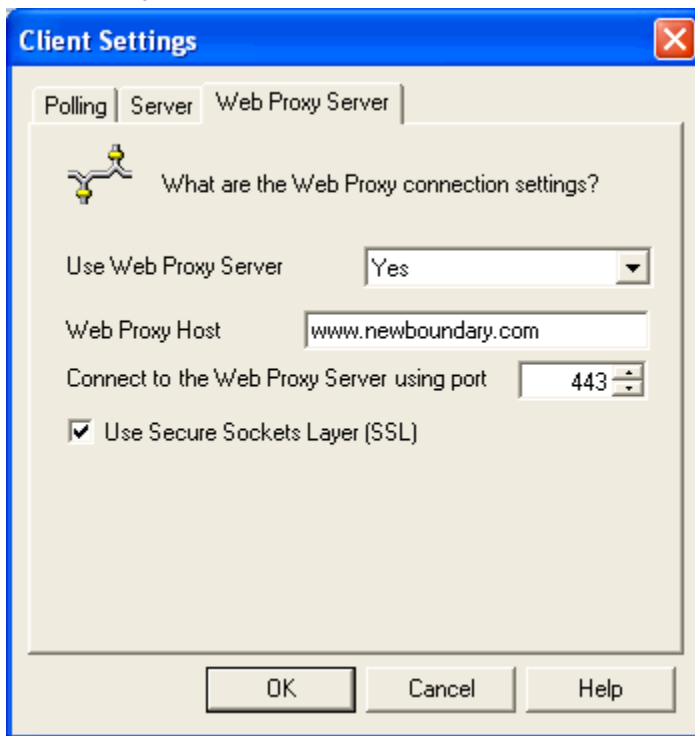
Note: By default, Prism uses port 3133 for communicating between the Client and the Channel Server, and the Console and the Channel Server. This port is an official assignment made by the IANA [Internet Assigned Numbers Authority (www.iana.org)].

If the Client must communicate with the Channel through a firewall, you may need to open port 3133 on the firewall. Otherwise, we recommend using port 80, since that port is typically already open for web browsing, or using the Proxy Server option (below).

Connection times out after

Set the number of seconds that the Console or the Client on the managed computer will keep trying to contact the Channel Server. If the Client fails to make contact during the time out period, it waits until the next polling time to try contacting the Channel Server again.

Web Proxy Server tab



The Web Proxy Server settings provide the option of having the Console and/or Clients connect to the Channel Server over HTTP/HTTPS. This is useful for machines that may be outside a corporate firewall, or laptops that are sometimes on the corporate network and sometimes outside the corporate network.

Enabling this feature means that Channel Servers that are behind a firewall can still be accessed by the Console and/or Clients without using a VPN. However, it requires that you install the Proxy Server on IIS.

Your starting point determines how the information on this tab is used.

- Console Settings: Specifies how the Console will communicate with the Channel Server.
- Client Settings: Specifies how the Clients will communicate with the Channel Server.

Use Web Proxy Server

This option specifies when to use the Web Proxy Server.

- **No:** Do not use the Web Proxy Server for communication to the Channel Server. This is the default setting.
- **Yes:** Always use the Web Proxy Server. All communication will occur over HTTP through the Proxy Server.
- **Auto:** With this setting, the Console/Client will first try the default channel communication. If that communication fails, it will use the Web Proxy Server and communicate over HTTP.

Note Using the Proxy Server option (Yes or Auto) requires that you install the Proxy Server on IIS on a machine that can access the Channel Server.

Web Proxy Server Host

This is the address of the Web Proxy Server. It must be a valid DNS or IPv4 host name. The protocol (http:// or https://) is optional. For example, "http://www.example.com", "www.example.com", and "192.168.1.134" are all valid formats.

Connect to the Web Proxy Server using port

This specifies the Web Proxy Server's port number. Typically 80 is used for HTTP and 443 for HTTPS.

Use Secure Sockets Layer

Check this box to use SSL (HTTPS).

Automatically Maintaining Client Settings

You can use Prism's automatic update option to maintain a uniform set of communication parameters for all managed computers in the Channel. With this option turned on, the default communication settings are applied to all of the managed computers in the Channel each time they contact the Channel Server.

To specify settings that are automatically applied to all managed computers in the Channel:

1. Select **File | Client Settings**.
2. On the Client Settings | Polling tab, select the check box for **Configure the Client to automatically apply new settings for this channel**.
3. Adjust the values on each tab in this dialog box.
4. Click **OK** to save the changes.

Each time a Client polls the Channel, it receives and applies these settings.

Note: To override the automatic update option, change the setting for an individual client. (See Applying Unique Settings to a Client.)

Applying Unique Settings to a Client

If you do not want to automatically apply the default client settings on all managed computers, you can specify unique settings for one or more computers. The settings are applied to the computer when the Client is installed. They can be updated at any time by reinstalling the Client directly or with a subscription file.

Note: Unique client settings (for polling, server, and web proxy server) cannot be applied to a client if the **Automatically apply settings to all clients** checkbox is checked on the **File | Client Settings** dialog, as this setting would effectively override any unique settings on the next client poll. To apply unique settings to individual clients, open the **File | Client Settings** dialog and uncheck **Automatically apply settings to all clients**.

Setting up a New Client

To set unique communications for a new client:

1. On the Network tab, select the computer(s) to add.
2. Right-click and select **Manage Computer** from the pop-up menu.
3. In the Manage Licenses dialog box, make sure that at least one Prism license is assigned (either automatically or manually).
4. Click **Next**.
5. Choose **Now via Direct Client Installation** for the **Client Installation method**.

6. Click the **Settings** button (as noted above, most settings are disabled if the **Automatically apply settings to all clients** checkbox is checked on the **File | Client Settings** dialog).
 - On each of the tabs in this dialog box, adjust the settings as required for the Client.
 - When you have finished, click **OK**.
7. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
8. Select the **Use alternate credentials** check box if you wish to use alternate credentials for the client installation. This can be useful if you are installing across domains or where you do not have centralized administration accounts.
9. Select the **Reboot computer after installation** check box.
10. Click **Install** to install the Client.
11. Click **Finish** when the installation is complete.

The communication settings are applied when the Client is installed. These settings are not changed unless you later reinstall the Client with different settings.

Change Existing Clients

You can change the communication settings for a managed computer by installing the Client directly or with a subscription file.

Change Settings Directly:

To install new settings directly:

1. Highlight the computer(s) on the Managed | Members tab.
2. Right-click and select **Reinstall Client** from the pop-up menu. The **Direct Client Installation** dialog appears.
3. Click the **Settings** button (as noted above, most settings are disabled if the **Automatically apply settings to all clients** checkbox is checked on the **File | Client Settings** dialog).
 1. On each of the tabs in this dialog box, adjust the settings as required for the Client.
 2. When you have finished, click **OK**.
4. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
5. Select the **Use alternate credentials** check box if you wish to use alternate credentials for the client installation. This can be useful if you are installing across domains or where you do not have centralized administration accounts.
6. Select the **Reboot computer after installation** check box.
7. Click **Install** to install the Client.
8. Click **Finish** when the installation is complete.

Subscription File:

To install the new settings through a subscription file:

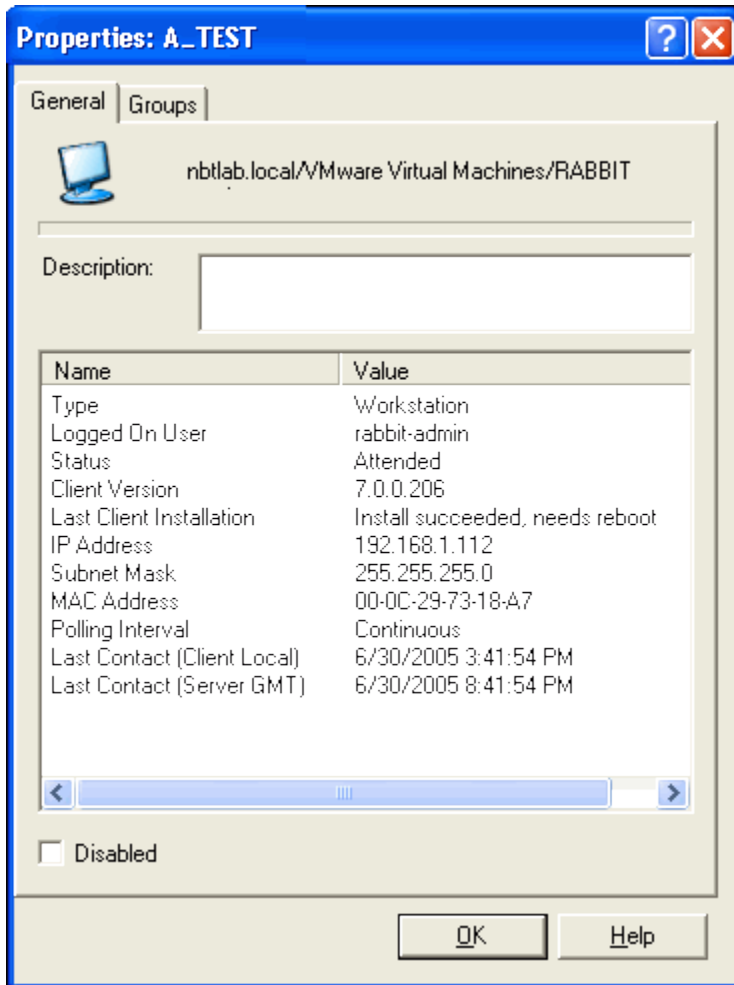
1. Select **Computers | Create Subscription File**. The Subscription File dialog box displays.

2. Select **Install or Update the Client** option.
3. Click the **Settings** button (as noted above, most settings are disabled if the **Automatically apply settings to all clients** checkbox is checked on the **File | Client Settings** dialog).
 1. On each of the tabs in this dialog box, adjust the settings as required for the client.
 2. When you have finished, click **OK**.
4. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
5. Click **OK** on the Subscription File dialog to save your changes.
6. On the Save Subscription File dialog, enter a name for the new subscription file.
7. Distribute the subscription file to the managed computers. You can use either of the following methods:
 1. If you are using the subscription file to install the Client, distribute the file by attaching it to an e-mail message, placing it on a Web site, or including it in a login script.
 2. If you are using Prism Deploy, create a Command Task that installs the new subscription file that you saved. Assign the new Command Task to one or more target computers.

Caution: On the **Task Properties | Execution** tab, the Task should be defined to run attended and as the current user; on the **Task Properties | Command** tab, clear the **Wait for Completion** check box.

Computer Properties


Viewing the Computer Properties



The Computer Properties | General tab displays detailed information about the computer currently highlighted in the main window. The information available on this tab is useful for understanding the computer's environment for troubleshooting.

The Computer Properties | General tab is displayed when you right-click on the name of a managed computer and choose **Properties** from the pop-up menu.

The information includes:

-  Name used to identify the computer
- **Description** - Automatically includes some information about the computer, such as whether it is managed. You can add text by typing directly in the box. This description is displayed on the Managed | Members tab in the main Console window, along with the computer status and other information.

The contents of this text box depend on your environment.


- In Active Directory (AD) environments, the description defaults to the AD description. You can modify this description or add information.

- In all other environments, type a description or other notes directly in the text box.
- **Name/Value** - The box in the middle of the tab displays detailed status information for the computer. You can capture this information by running the Workstation Status report. (See Generating and Viewing Reports.) A portion of the information listed in the status box is also available through the main Console window.

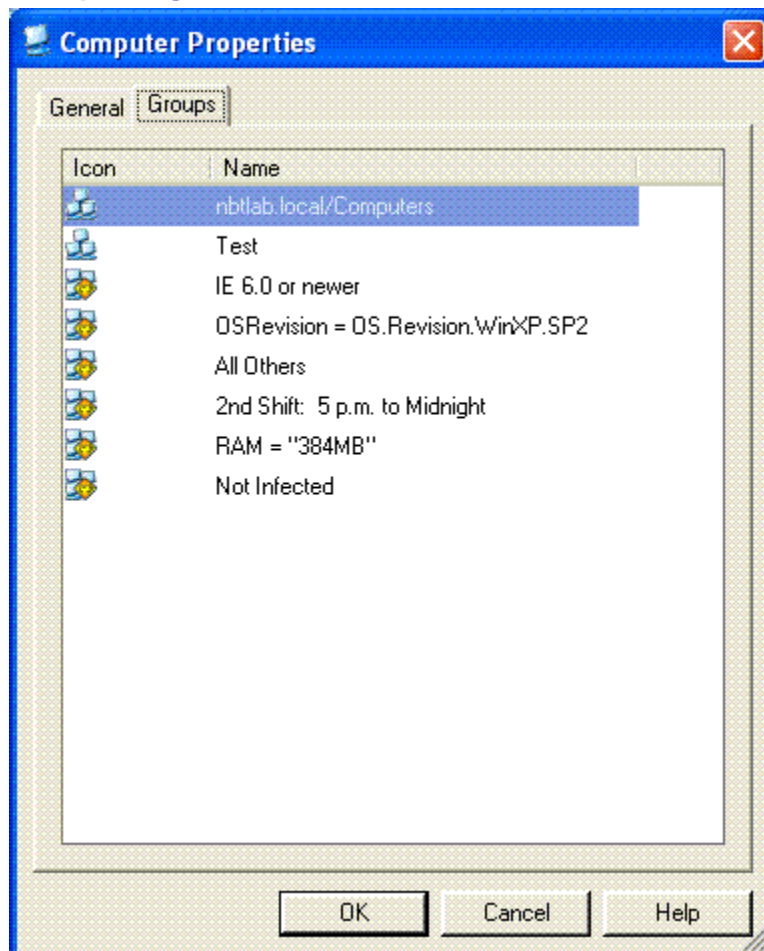
Disable

Indicates whether the computer is active or inactive.

- ☐ **Disabled** - With this checkbox cleared, the computer is active and can receive changes from the Channel or report status and configuration information.
- ☒ **Disabled** - With this checkbox selected, the computer is disabled and cannot receive changes or report status and configuration information, but it remains part of the Channel. Use this option to take a computer off-line temporarily when there is a problem.

 When a computer is disabled, its icon is grayed in the Console main window.

Group Assignments

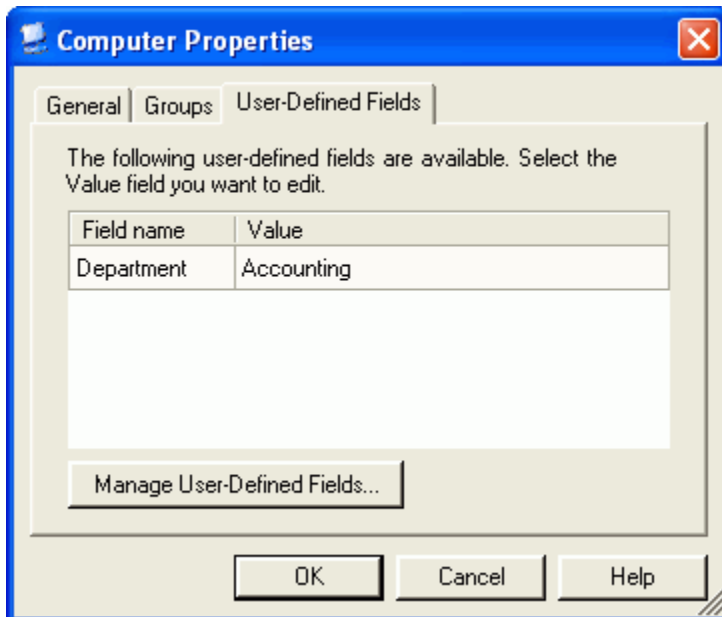


The **Computer Properties | Groups** tab displays information about the selected computer's membership in organizational and configuration groups.

Note: Configuration groups are populated automatically. You cannot change the membership of configuration groups.

The Computer Properties dialog box is displayed when you right-click on the name of a managed computer and choose **Properties** from the pop-up menu. Click the **Groups** tab to view this tab.

User-Defined Fields tab (Computer Properties)



The Computer Properties | User-Defined Fields tab displays the user-defined fields associated with the computer's hardware inventory.

The Computer Properties dialog box opens when you select a managed computer and either choose **Properties** from the pop-up menu or from the **Edit** menu. Click the **User-Defined Fields** tab to view this tab. This tab exists only if an inventory has been run on the selected computer.

The tab displays the current user-defined fields associated with hardware and the values for those fields. The values can be entered and edited directly in the table. (Values can also be edited directly in the Hardware tab by clicking on the column header for the user-defined field, and then clicking in the cell.)

Press the User-Defined Fields button to create and manage the available user-defined fields for Hardware.

Note If multiple computers are selected, some values in the tab will display a value of "[multiple values]" indicating that the computers selected have different values for the property. Any changes you make in the cell will get saved for all selected computers, otherwise their values remain unchanged.

Disabling or Deleting Computers

Temporarily Disabling Computers

Computers can be temporarily turned off or taken offline while you diagnose a problem. This feature lets you disengage the computer from the Channel without extensive editing.

You can disable a single computer or multiple computers. Highlight the name of one or more computers, then disable them with the **Disabled** check box on the Properties dialog box:

- ☐ **Disabled:** With this option cleared, the computer is active. For example, a computer can receive changes or report configuration information. This option is the default.
- ☒ **Disabled:** With this option selected on the Computer Properties | General tab, the computer cannot receive changes from the Channel and does not update its configuration information.

Disable a Computer

To disable a computer:

1. Highlight the name in the tree on the Managed tab or in the details pane.
2. Open the **Properties** dialog box by right-clicking on the computer name and selecting **Properties** from the pop-up menu.
3. In the Computer Properties | General tab, select the **Disabled** check box.
4. Click **OK**.

When you are ready to activate this computer, clear the **Disabled** check box.

Deleting a Computer from the Channel

When a computer is managed, it is added to the Channel and the Client is installed. To remove a computer from the Channel, you delete it from the Channel and then uninstall the Client.

Delete the Computer

To remove the computer from the current Channel:

1. With the Managed tab open in the tree view, locate the name of the managed computer.
2. Right-click on the name of the computer and select **Delete** from the pop-up menu.
3. When Prism asks you to confirm the deletion, click **OK**.

Note: If you want to remove the computer from the Channel but leave the Client installed on that computer, stop at this point.

Uninstall the Client

Use a subscription file to uninstall the Client from a computer.

1. With the Managed tab open in the tree view, select **Computers | Create Subscription** file.
2. On the Subscription File dialog box, select **Uninstall the Client** from the **Option** drop-down list.
3. Click **Next**.
4. On the Save the Subscription File dialog box, enter a name for the new subscription file.

We recommend using a name that clearly indicates that this file is used for uninstalling the Client.

5. Run the subscription file on the computer to uninstall the Client.

Grouping Computers

Creating Categories of Computers with Groups

Groups let you categorize computers with similar requirements or environments, and then rapidly perform management functions, deploy changes, or complete an inventory designed specifically for the group. For example, rather than searching out and assigning Tasks to individual computers, set up a group of related members and assign a Task to the group as a whole. Or, create groups to track hardware and software at specific locations.

When you set up groups keep the following factors in mind:

- Each computer can be assigned to any number of groups with different shared characteristics.
- The record for a computer added to a group remains in the Managed Computers branch and its name is duplicated under the group.
- Subgroups may be added manually to an Organizational group. (For example, you may have a group named IT and a subgroup named Programmers within the IT group.) Subgroups are added automatically to Configuration groups.
- A Task assigned to a group is installed on each new member that joins the group. For example, if you assign a Task to a configuration group, when a computer is added to the group automatically, the Task is installed on that computer. Even if a member is added six months after the Task was originally assigned to the group, it is installed for the new member. The Task can be disabled or deleted when it is no longer needed.

For a preview of Channel groups, add one or more computers to the Quick Start Channel, then, watch as the groups populate. (The Quick Start Channel was installed with Prism. See the Tutorial for more information.)

Create Groups of Computers

Depending on your needs and the setup of your network, you can create groups and add members manually or automatically.

- **Create organizational groups manually** - You construct organizational groups and add members individually. These groups can reflect locations, application use, function, department, or any other type of category that suits your needs.

(See Manually Setting Up an Organizational Group and Adding Members)

- **Populate organizational and configuration groups automatically** - Groups can be added to the Channel automatically in these ways. In each case, you must have the auto-populate settings turned on for the Channel Properties.
- **Predefined and User-Defined Configuration Groups** - Configuration groups are populated automatically, based on configuration queries and rules you set up. Configuration groups are dynamic—as the configuration of managed computers change, they are automatically placed in or removed from the appropriate groups.

See Building Predefined Configuration Groups with a Shared Characteristic.

See User-defined Configuration Groups for Complex or Customized Groups.

- **Organizational Groups based on AD Structure** - If the network uses AD (Active Directory), the network structure is duplicated in the Channel when computers subscribe to the Channel.

See Automatically Adding Organizational Groups from the Network Structure.

Organizational Groups

Automatically Adding Organizational Groups from the Network Structure

If your network uses Active Directory (AD), the Client identifies the computer using its Active Directory name (as opposed to NetBios name). As long as the Channel is set to auto-populate, the AD structure is duplicated in the Console when computers subscribe to the Channel. Organizational groups are created automatically in the Channel on the Managed Computers tab to match the containers set up on the network.

- Groups are created to match the containers set up on the network.
- Computers are added to the Managed tab and to the applicable subgroup in the Organizational Groups branch.

Note: For these groups to be created and populated:

- After installing the Client, the managed computer must be rebooted.
- The auto-populate setting must be turned on through the Channel Properties. (See Channel Properties Settings.)

Example

When the computer E3465.Engineering.YourCompany.local contacts the Channel Server and is added to the Channel, Prism automatically creates the group .local with subgroups YourCompany.local, and Engineering.YourCompany.local. It adds the computer to the new group Engineering.YourCompany.local.

When you have a specific tool to distribute to the Engineering staff, assign the Task for this tool to the group Engineering.YourCompany.local. The computer E3465.Engineering.YourCompany.local also receives all of the e-mail application updates you distribute to the group YourCompany.local.

Manually Setting Up an Organizational Group and Adding Members

Organizational groups let you create a group and assign individual members to the group from the pool of managed computers in the Channel. Organizational groups may reflect functional groups or roles within your organization or group computers by location. Since they are maintained manually, these groups are most useful for smaller numbers of managed computers or populations that remain constant.

To manually set up an organizational group in the Channel and add members:

1. From the Managed tab, right-click on the **Organizational Groups** branch, then choose **Create Group** from the pop-up menu. Alternately, you may choose **Create Group** from the **Edit** menu.
 - Subgroups can be created by selecting an existing Organizational Group.
2. In the New Group dialog box, type a descriptive name for the group in the text box. Click **OK**.
3. In the Console main window, assign members to the group by doing one of the following:
 - Drag and drop the names of computers onto the group in the Console main window.
 - Add members to the group by selecting the group and using the Add To Group menu option (via right-click or **Edit** menu). Alternately, members can be added from the Group properties | Members tab.

- Add an individual computer by selecting the computer and using the Add To Group menu option (via right-click or **Edit** menu).

Removing a Computer from a Group

To remove a computer from an organizational group:

1. On the Managed tab, expand the group in the tree view.
2. Within that group, select the computer to be removed.
3. Right-click on the computer name (or use the **Edit menu**) and select **Remove from Group**.
4. A confirmation dialog appears. Press **OK** to proceed with the removal.

The computer is removed from the current group. Its membership in other groups is not changed.

You can also remove a computer from an organizational group through the Group properties | Members tab.

Configuration Groups

Building Predefined Configuration Groups with a Shared Characteristic

Predefined configuration groups update automatically, adding and removing members based on a shared characteristic, such as operating system or local time zone. When setting up a predefined group, you choose a single variable as the basis for identifying group members. Computers in the Channel automatically create and populate a subgroup for each unique classification within the group.

For example, if you choose OSVersion for the group value, the subgroups might include:

OSVersion=OS.Version.Win2000

OSVersion=OS.Version.WinXP

Note: For these subgroups to be created and populated, the auto-populate setting must be turned on through the Channel Properties. (See Channel Properties Settings.)

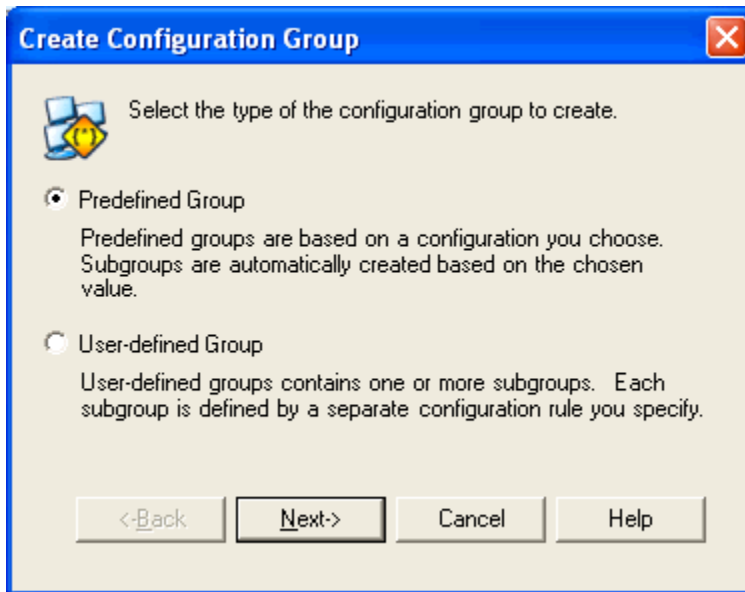
Add a Predefined Configuration Group

To set up a predefined group in the Channel:

1. With the Configuration Groups tab open in the tree view, right-click on the **Configuration Groups** branch in the tree view, then choose **Create Group** from the pop-up menu.
2. In the Create Configuration Group dialog box, select the option button for **Predefined Group**. Click **Next**.
3. In the New Group: Choose a value dialog box, choose a value to serve as a basis for identifying managed computers for the group. Click **Next**.
4. In the New Group dialog box, type a descriptive name for the group in the text box. Click **Finish**.

Subgroups are populated in the Channel when a managed computer contacts the Channel Server. The computers are placed in subgroups automatically based on the value you selected.

Create Configuration Group dialog



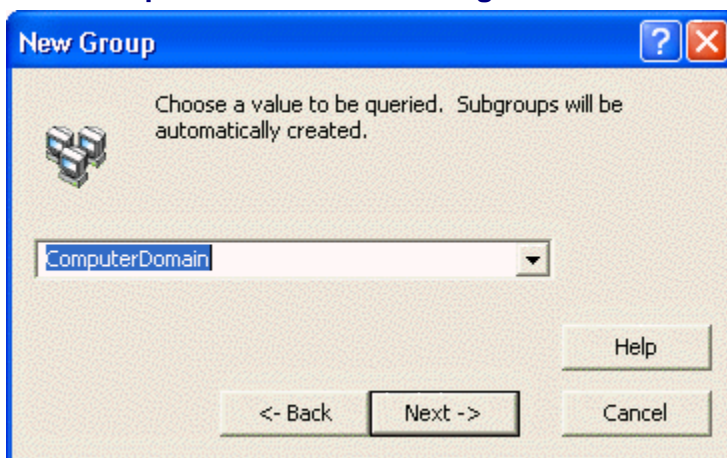
Configuration Groups are dynamic and populate automatically based on the value or rule you set as criteria for membership.

Choose the type of configuration group to create:

- **Predefined Group:** Select the type of value (operating system, domain, CPU, and so on) used to determine which computers are included in the group. The Console automatically creates and populates subgroups based on the value.
- **User-defined Group:** Create simple to complex rules to define the group and subgroups. The rules for each subgroup can contain different combinations of values, so that computers with very specific criteria can be combined into functionally equivalent units.

This dialog box opens when you select the **Create Group** menu option the **Configuration Groups** branch (or a User-Defined group) on the Configuration Groups tab.

New Group: Choose a Value dialog



Choose the value that defines the population for this predefined configuration group. For example, choose RAM to automatically create and populate subgroups based on the amount of RAM on the managed computers in the Channel. A predefined group based on the variable RAM might contain these subgroups:

RAM="128MB" (Computers with 128 megabytes of RAM)

RAM="256MB" (Computers with 256 megabytes of RAM)

This dialog box opens when you select Predefined Group on the Create Configuration Group dialog box.

Note: You can type an environment variable directly in the **Value** field, rather than choosing an item from the drop-down list. For example, you could type in "%SYSTEMROOT%", and subgroups corresponding to each unique system root directory would be automatically created and populated by computers with that same system root directory. The typed value must be enclosed in quotes (" ").

Options include:

- **Computer Domain:** The Windows domain or workgroup of the computer. For example, use this option to create subgroups of computers that receive their Tasks from a specific server.
- **CPUFamily:** The generation or family of the computer's primary processor (Pentium, Pentium Pro/II/III or Athlon, Pentium 4, and so on).
- **CPUMaker:** The manufacturer of the computer's primary processor (Intel, AMD, and so on).
- **CPUModel:** The specific model of the computer's primary processor (Intel_486DX, AMD K6-3, and so on).
- **NumCPUs:** The number of CPUs installed and supported on the managed computer. For example, use this option to install an update that differs for a single processor versus multiple processors.
- **OSFamily:** The family of the operating system on the managed computer. For example, create subgroups for Windows 9x or Windows NT. Use this option to create subgroups based on common features of the operating system, rather than individual versions of the operating system.
- **OSComponents:** The extra components installed on the client operating system. For example, Windows XP Home Edition or Terminal Services.
- **OSRevision:** The service-pack or revision of the computer's operating system (Windows 2000 Service Pack 2, Windows XP Second Edition, and so on).
- **OSRole:** Identifies the managed computer as a server, workstation, or domain controller. (By definition, all Windows 9x computers are workstations.)
- **OSVersion:** The version of the operating system running on the managed computer (Windows 2000, Windows XP, and so on).
- **RAM:** The amount of RAM on the managed computer, in megabytes (MB).
- **SystemBaseLanguage:** The base language identifier (LANGID) for the managed computer. The base language identifiers, both SystemBaseLanguage and UserBaseLanguage, identify a family of languages—English, French, and so on.
- **SystemFullLanguage:** The base language identifier (LANGID) for the managed computer. The base language identifiers, both SystemBaseLanguage and UserBaseLanguage, identify a family of languages—English, French, and so on.
- **TimeZone:** The time zone on the managed computer. This value is determined by the time zone selected in the Date and Time settings on the managed computer.
- **UserBaseLanguage:** The base language identifier (LANGID) for the current user.
- **UserDomain:** The Windows NT domain or workgroup of the user.

- **UserFullLanguage:** The full language identifier (LANGID) for the current user.

User-defined Configuration Groups for Complex or Customized Groups

User-defined groups let you create customized rules to identify groups based on very specific criteria and let you specify multiple values for evaluating and adding group members. The Console provides an Expert to help you with each step of the group set up or lets you type rules directly into an editor. User-defined groups can be as simple as matching a file name or as complex as identifying computers based on the presence or absence of multiple characteristics.

User-defined groups are dynamic. If a computer no longer meets the criteria for group membership, it removes itself from the group. Likewise, if a new computer meeting the criteria for group membership is added to the Channel, it automatically adds itself to the user-defined group. This new member also receives any Tasks that were assigned to the group.

Add User-defined Group

To set up a user-defined group in the Channel:

1. With the Configuration Groups tab open in the tree view, right-click on the **Configuration Groups** branch in the tree view, then choose **Create Group** from the pop-up menu.
2. In the Create Configuration Group dialog box, select the option button for **User-defined Group**. Click **Next**.
3. In the Rule Expert: Assemble a Rule Clause dialog box, define the rule by setting the value type, operator, and value. Click **Next**.

Note: As you select options on this dialog box, the text of the rule is displayed in the **Rule Text** field. Use this information to confirm the content of the rule and learn how to type rules directly in the Rules Editor.

4. In the Rule Expert: Rule Name dialog box, type a name for the group that will be defined by the rule you just created. Click **Next**.
5. In the Edit Rule dialog box, check the syntax of the rule or add logical operators to expand the rule. Click **Finish**.

Subgroups are populated in the Channel when a managed computer contacts the Channel Server.

Rule Expert: Assemble a Rule Clause dialog

Use the fields on this dialog box to define the rule for selecting members of a user-defined configuration group.

This dialog box opens when you either select **User-defined Group** and click the **Next** button on the Create Configuration Group dialog box, while creating a group in the Console, or select **Subgroup Based on Rule** and click the **Next** button when creation a Distribution Location.

Options on this dialog box include:

- **Value Types:** Sets the basis for the evaluating managed computers or members of the group. This type of value on managed computers is compared to the rule. For a complete list of the options available, see User-Defined Variables.
 - When used for a user-defined group, this type of value on all managed computers in the Channel is compared to the rule to determine their membership.
 - When used for an installation rule, this type of value on all managed computers is compared to the rule before installing the Prism file.
 - When used for Distribution Locations, the list of options includes types related to network proximity, such as IP address and computer name.
- **Value type identifier:** If you choose a Value Type enclosed in < >, a text box is displayed for the value itself. For example, if you choose <File Version>, type C:\PROGRAM FILES\ACME SOFTWARE\ACME.EXE in the Value text box to compare the version of this file on the managed computer with the value in the last field on this dialog box.

All strings must be enclosed in quotes (" "), which the Console adds for you automatically in the Rule Expert. If you type a rule directly in the Rule Editor, remember to add the quotes. (See Notes on Rule Syntax.)

- **Comparison Operator:** The comparison operator determines how the value on the managed computer is compared to the rule.

For a complete list and descriptions of the Comparison Operators available in the drop-down list, see Comparison Operators).

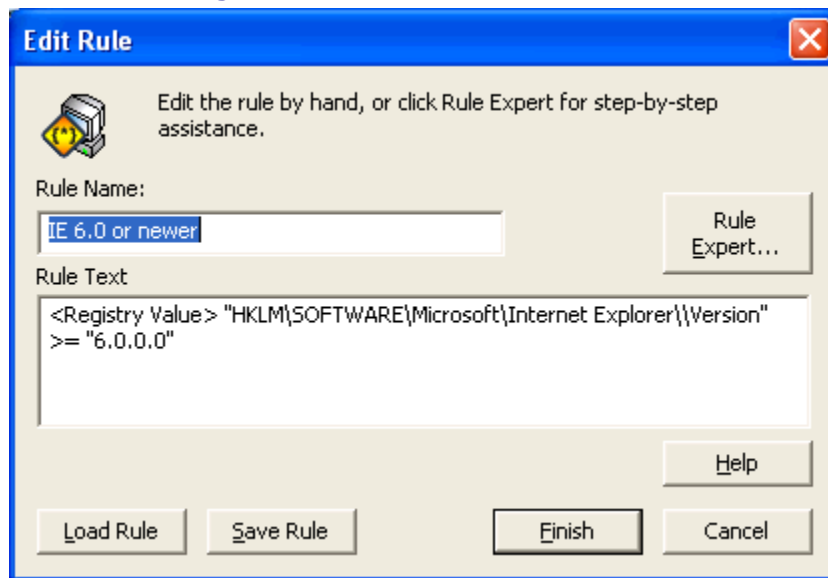
- **Value:** Type the variable value or select an item from the drop-down list. The items available in the drop-down list depend on the selection you made in the Value Types field. For example, if you choose **firstcdletter** in the Value Types field, the Value field lists the drive letters A, B, C, D, E, and so on.

If you type a value directly in this field or directly in the Rule Editor, it must match the values created by New Boundary Technologies for the **Value Type**.

For a complete list of the values, see:

- Predefined Variables
- User-defined Variables
- **Go To Editor** button: Open the Rule Editor. If you are familiar with the syntax and variables for creating rules, you can type the rule directly in the editor rather than using the drop-down lists in the Rule Expert.

Edit Rule dialog



This dialog box shows the rule or subgroup name and the text of the rule itself. Depending on your starting point, use this dialog box to verify the text of the rule and its syntax or type a rule directly into the editor.

This dialog box opens when you do one of the following:

- Click the **Next** button on the Rule Expert: Rule Name dialog box.
- Click the **Go to Editor** button on the Rule Expert: Assemble a Rule Clause dialog box.
- Click the **Edit Rule** button on the on the Group Properties | General tab for a user-defined subgroup.
- Click the **Edit Rule** button on the on the Task Properties | Prerequisites tab for a user-defined subgroup.

Options on this dialog box include:

- **Rule Name:** A descriptive name for the installation rule or the subgroup that is created and populated based on the rule.
- **Rule Text:** The text of the rule is displayed in this box. You can change the rule by typing directly in the box.
- **Rule Expert:** Add logical operators and expand the rule. Through the Rule Expert, use logical operators (AND or OR) to append another rule and create a more complex rule.
- **Save Rule:** Save the rule as a Ruleset file (.RULESET). Saving and importing rules can offer a convenient way to transfer rules to another Prism file or between Prism files and configuration groups in the Console.
- **Load Rule:** Load a Ruleset file (.RULESET) to define the group or installation requirements. Saving and loading rules can offer a convenient way to transfer rules to another Prism file or between Prism files and configuration groups in the Console.

Caution: When you load a Ruleset file through the Rules Editor, it replaces the existing rule text and name.

Choose a Joining Method for the Clause

Choose a conjunction for joining the rules that define a single subgroup. The following example shows two rules joined with the conjunction OR:

```
(CPU = "PENTIUM 5" AND OSVERSION = W2k) OR (CPU = "PENTIUM 4" AND OSVERSION = W95)
```

This dialog box opens when you click the **Rule Expert** button on the Edit Rule.

Choose from these conjunctions:

- **AND:** Only the computers that meet both or all sets of criteria are selected for the group.
- **OR:** Computers that meet either or any of the criteria are selected for the group.

Creating an All Others Group

An All Others group includes all of the computers in the Channel that are not members of another

1. With the Managed tab open in the tree view, right-click on the **PwrGroups** branch in the tree view, then choose **Create Group** from the pop-up menu.
2. In the Rule Expert: Choose a Type of PwrGroup dialog, select the option button for **All Others Group**. Click **Next**.
3. In the Rule Expert: Rule Name dialog box, enter a name for the new group or leave the default name—**All Others**. Click **Next/Finish**.

Rule Expert: Choose a Type of dialog

Create one of the following types of :

- **Subgroup Based on Rule:** Set up a rule that defines the variables and values used to identify computers in the Channel as group members.
- **All Others Group:** Create a subgroup that includes all computers in the Channel that are not members of another subgroup within the Group.

Editing an Existing Rule

After creating a user-defined group, you can edit the rule to make changes in the value type, values, or operators. When you edit a rule, the group members are removed from the group and the group is re-populated, based on the new criteria. You can edit an existing user-defined group through the Group properties or through the Rule Editor. (Only user-defined groups can be edited in this way.)

Edit a User-defined Subgroup Directly

To edit a user-defined subgroup:

1. Right click on the subgroup name in the tree view on the Configuration Groups tab.

Note: Editing is not available for the parent group, only for subgroups based on individual rules.

2. Select **Edit Group** from the pop-up menu.
3. In the Edit Rule dialog box, edit the rule directly in the **Rule Text** field. Or, click the **Add Rule Expert** button to add additional qualifiers to the rule.
4. Click the **Finish** button to save your changes.

Edit a User-defined Group through the Group Properties

The Viewing General Group Properties tab for a user-defined subgroup displays an Edit button. To edit the rule that defines this subgroup:

1. Right click on the subgroup name in the tree view on the Configuration Groups tab.
2. Select **Properties** from the pop-up menu.
3. In the Group Properties | General tab, click the **Edit** button.
4. In the Edit Rule dialog box, edit the rule directly in the **Rule Text** field. Or, click the **Add Rule Expert** button to add additional qualifiers to the rule.
5. Click the **Finish** button to save your changes.

Rules for User-Defined Groups

Rule Variables and Operators for User-Defined Configuration Groups

The rules and variables covered in this section include those used for setting up user-defined configuration groups in the Console or creating scripts with the Prism /ScriptVer command. Rules can be built using the drop-down lists in the Rule Expert or typed directly in the Rules Editor. If you type a rule directly, the values for predefined variables must match those set up by New Boundary Technologies.

Note: Information on the /ScriptVer command is available in the online help or *Deployment Guide* if you have Deploy installed.

Whether it is created with the Rule Expert or typed directly in the Rules Editor, each rule is composed of some or all of these parts in the following order:

1. **Variable type:** Identifies the type of item you are evaluating—variable, registry key or value, INI value, file, file version, file name, folder name, and so on.
2. **Item:** If the Value Type requires an identifier (those value types enclosed in brackets, for example <File>), identify the item here. For example, with the Value Type <File>, enter the path and name of the file. For example:

 <File> "C:\Program Files\Acme Software\Acme.exe"
3. **Comparison Operator or Logical Operator:** Defines how the value on the target computer is compared to the rule. For example: =, Exists, Matches, and so on.
4. **Value or Constant:** The value to compare with the resolved variable's value on the target computer.

Notes on Rule Syntax

When typing rules and their values:

- Variables are usually followed by a comparison operator and additional information. In this appendix:
- Values and other parts of the rule are shown in brackets [].
- Do not type the bracket symbols ([]) when using variables.
- A list of options that you can choose from are shown with a vertical bar | to separate them. For example: [Name1 | Name2]
- Variables support registry value names containing back-slashes (\). In a registry value path, any characters following the first double-backslash (\\) are interpreted as part of the registry's name.

If a registry value type is used and there is not a double-backslash, then the default value for the registry key is used. For example:

"HKLM\Software\Foo\bar\Some Value" : the registry value name is "Some Value"

"HKLM\Software\Foo\bar\Another Value" : the registry value name is "Default"

- Rules are not case sensitive, except for size value abbreviations ("500 MB" is acceptable, but "500 mb" is not). They can be typed in all caps, lower case, or a combination of the two.
- A value must be enclosed in quotes (" ") in these cases:
 - the value contains spaces (for example, "C:\PROGRAM FILES\ANY COMPANY\ANY_EXE.EXE")
 - the value is a string (for example, "computername")
- Constants are not enclosed in quotes (" ").
- Quotes can be embedded by typing two quotes for every embedded quote. For example, the following rule evaluates to true if there is a registry value "Genuine" Intel in the key HKLM\hardware\description\system\centralprocessor:

Exists <Registry Value> "HKLM\hardware\description\system\centralprocessor\\""Genuine\"" Intel"

Constants

For your convenience, several of the variables have constants assigned. When using the Rule Expert, the constants are available in a drop-down list after you choose the variable type. If you are typing the rule directly, the constants must match the values set up by New Boundary Technologies.

See the discussion under each variable for information on the constants.

Comparison Operators

The following comparison operators are supported when creating installation rules on the **File Properties | Requirements** tab in the Editor, setting up user-defined configuration groups in the Console, or creating scripts with the **/ScriptVer** command:

- All comparison operators must be followed by a value.
- All comparisons are case sensitive

Comparison Operators

=	The value on the computer is equal to or matches the stated value exactly. (See note below.)
<>	The value on the computer is not equal to or does not match the stated value exactly. (See note below.)
<	The value on the computer is less than the stated value.
<=	The value on the computer is less than or equal to the stated value.
>	The value on the computer is greater than the stated value.
>=	The value on the computer is greater than or equal to the stated value.
exists	The item exists. Use this option for identifying whether a specific file, folder, registry key, registry value, and so on exists on the computer. For example, use this option to determine whether an application is installed on the computer before sending it an update.

not	Reverses or inverts the meaning of the clause that follows it. For example: NOT EXISTS <file> "C:\Oracle\DB.BIN"
matches	The matches operator uses wild-card characters to determine whether or not an item matches the corresponding value. The portion of the statement that contains wild-cards must be surrounded by quotes. The DOS wild-card system is used: ? represents one character of any value * represents 0 or more characters of any value. For example: IP MATCHES "*.183.*.*"
grepmatches	Use a GrepMatch to identify a more complex pattern than those available with the other operators.

Note: The operators = = and != (used with previous versions of Prism) are equivalent to = and < > respectively:

- If you use = = in a rule or script, Prism translates it to =.
- If you use != in a rule or script, Prism translates it to < >.

Examples Using the Comparison Operators

The following examples show the operator for a rule that identifies computers with less than 64MB of RAM and the operator that identifies computers that use any language other than U.S. English.

```
RAM < 64MB
SYSTEMFULLLANGUAGE <> "Language.Full.English.UnitedStates"
```

Examples Using Grepmatches

The following examples demonstrate the use of GrepMatch for the operator. For more information, visit the support area of the New Boundary Technologies Web site (www.newboundary.com/support/support.htm) for links to additional resources.

The group created with this match contains computers that have an IP Address within the range 192.168.1.*, 192.168.2.*, and 192.168.3.*:

```
IPAddress GREPMATCHES "192\.168\[1-3].*"
```

The group created with this match contains computers with any of these letters as the first letter of their CD-ROM drive—A:, B: C:, or D:

```
FirstCDLetter GREPMATCHES "[A-D]"
```

The group created with this match contains computers where the registry value FileFilter contains *.olb as its first delimited value.

```
<Registry Value> "HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\DbgClr\7.0\Object  
Libraries\{18E32C04-58BA-4a1e-80DE-1C291634166A}\Filters\1\\FileFilter" GREPMATCHES  
"\\*\\.olb.*"
```

Conjunction

You can add additional or contrasting criteria to a rule with the following operators:

- **AND:** Computers that meet **both** or **all** sets of criteria defined by the rule. The Prism file is installed only on these computers or only these computers are selected for the group.

- **OR:** Computers that meet **either** or **any** of the criteria defined by the rule. The Prism file is installed only on these computers or only these computers are selected for the group.

Conjunctions are evaluated left to right, except if precedence operators—parentheses ()—are used in the statement.

Note on Parentheses

Use parentheses to override the normal left-to-right evaluation of a rule. In some cases, use of parentheses changes the outcome of the evaluation. For example:

(CPU = "Pentium 5" AND OSVERSION = W2K) OR (CPU = "Pentium 4" AND OSVERSION = W95)

Values

The values are the sequences of text or numeric characters that are compared with the items on the target computers. Values must be enclosed in quotation marks if they contain spaces or are any current or future logical operator. For example, "here OR there".

Note: Comparison of values is not case sensitive, except for size abbreviations. The size abbreviations KB, MB, GB, and so on must be capitalized.

Prism rules support these types of values:

- **Number:** When a value must be compared against an item, the comparison is numeric if both the item and the value are numeric.
- **Size:** A size is the same as a number but it is followed by the abbreviation for a unit. For example 2.5MB for 2.5 megabytes.

Unit abbreviations include:

KB: kilobytes
MB: megabytes
GB: gigabytes
TB: terabytes

- **Text:** Text values are characters, strings, or other values that do not fit the definition for Number or Size value.
- **Version Number:** The expected format for version numbers is 0.0.0.0. For example:

<file version> "%WINDIR%\FILE.DLL" <= 3.1.0.0

A file version can also be specified in these formats:

1
1.0
1.0.0

Quotes may be used around the version number, if you want the number to be evaluated as a string value or if you wish to use the wild-card characters "?" or "*". Quotes and wild-card characters should only be used with the logical operators MATCHES or GREPMATCHES.

Example

In both of the following examples, the rule evaluates to TRUE if PTCLIENT.EXE is greater than or equal to version 5 and less than version 6.

```
(<file version> "C:\Program Files\Prism\Client\ptclient.exe" >= 5.0) AND
(<file version> "C:\Program Files\ Prism\Client\ptclient.exe " < 6.0)
<file version> "C:\Program Files\ Prism\Client\ptclient.exe " MATCHES "5.*"
```

User-Defined Variables

User-Defined Variables

The user-defined variables are enclosed in angle brackets (< >) in the **Value type** field of the Rule Expert. These values can be used with any appropriate value. Unlike the predefined variables, you are not limited to the values defined by Prism.

Custom

<Custom> ["ProgID"] ["Parameter string"] [comparison operator] ["Value"]

String value supplied by a custom plug-in. To indicate an empty parameter string use empty quotes (""). For more detailed information, see www.newboundary.com/support/support.htm.

Variable Type

String

Environment Variable

<Env Var> [%variable name%] [comparison operator] [Value]

Identifies a specific environment variable in the user's session. Environment variable items must specify an environment variable, a comparison operator, and a value. For example:

<Env Var> "%SESSIONNAME%" = "Console"

Variable Type

String

Prism Variables

In addition to user-session environment variables, such as %USERNAME%, Prism provides the following variables:

PT_YEAR	the current year in four characters (2004, 2005, ...)
PT_YEAR4	the current year in four characters (2004, 2005, ...)
PT_YEAR2	the current year using two characters (04, 05, ...)
PT_MONTH	the number of the current month (01 12)
PT_DATE	the day of the current month (01 31)
PT_DAY	the number of the day of the week (Sunday = 01)
PT_HOUR	the current hour in military time (00 23)
PT_HOUR12	the current hour (01 12) followed by either AM or PM
PT_MINUTE	the current number of minutes past the hour (01 59)
PT_SECOND	the current seconds (01 59)
PT_CD	the first drive letter of your CD-ROM drive (D:, E:, and so on)
PT_OS	the operating system family of your computer (winNT)
PT_MAJOROS	the operating system family of your computer (winNT)
PT_MINOROS	the operating system of your computer (win2k, ...)

File Version

<File Version> [File Path] [comparison operator] [Version_number]

The version of a file on the target computer, for example:

<File Version> "%WINDIR%\MS.DLL" >= 6.1.0.0

The "File Version" item type is a version number, and is considered "0.0.0.0" if the given file does not exist, or if it has no version information. (See Values.)

Variable Type

Version

File

[logical operator] <File> ["File Path"]

The name of a file on the target computer, for example:

NOT EXISTS <File> "C:\DATA\STUFF.DAT"

Variable Type

String

Folder

[logical operator] <Folder> ["Folder Path"]

The path and folder name for a folder on the target computer, for example:

EXISTS <Folder> "C:\Program Files\Acme Software\Acme App"

Variable Type

String

Free Space

<FreeSpace> ["File Path"] [comparison operator] ["Number of TB/GB/MB/KB"]

The amount of free space available on the specified drive. Specify the unit of measure.

For example:

<FreeSpace> "C:\\" > 500MB

Variable Type

Size/Number

INI Value

<INI Value> ["Filepath\\section\\key"] [comparison operator] [Value]

INI Value items must have three double-backslash-separated items: the file path, the section name, and the key name. For example:

<INI Value> "%WINDIR%\Acme.ini\\Audio Section\\Sample Rate" = "InetProtocol file"

Variable Type

String

Registry Key

[logical operator] <Registry Key> ["Registry Key Path"]

Identifies a specific registry key on the target computer. For example:

EXISTS <Registry key> "HKEY_CLASSES_ROOT\exefile"

Note: On 32-bit systems, the Wow6432Node entry, if present, is automatically stripped out of registry keys. See Handling of the Wow6432Node Registry Entry for more information.

Variable Type

String

Registry Value

<Registry Value> ["Registry Key Path\\Value"] [comparison operator] [Value]

Identifies a specific registry value on the target computer. Two items, one for the key and one for the value name, must be provided and separated by two backslashes (both parts within the same set of quotes, not separately quoted). For example:

```
<Registry Value>
"HKEY_LOCAL_MACHINE\SOFTWARE\Adobe\Acrobat\Reader\5.0\AdobeViewer\\Trusted
Mode" = 2
```

To query default registry values, use this syntax:

<Registry Value> "HKLM\Software\\" = <value>

Note: On 32-bit systems, the Wow6432Node entry, if present, is automatically stripped out of registry keys. See Handling of the Wow6432Node Registry Entry for more information.

Variable Type

String

Total Space on Path

<TotalSpace> ["File Path"] [comparison operator] ["Number of TB/GB/MB/KB"]

Total disk space on the drive where "path" is located. Specify the unit of measure.

<TotalSpace> "C:\> 500MB

Variable Type

Size/Number

WMI

<WMI> ["WMI Class"] [comparison operator] [Value]

WMI items must specify a WMI class, a comparison operator, and a value. For example:

<WMI> "Win32_OSRecoveryConfiguration.WriteToSystemLog" = "True"

Variable Type

Depends on the WMI variable.

Predefined Variables

Predefined Variables

Predefined variables include those that are part of Prism like PT_CD, and those defined as part of the Prism file installation rules. For some predefined variables, the possible values are provided by Prism, not the environment—these values are called constants. For example, Prism includes a list of potential values for the CPUFamily variable—486, PentiumPro/II/III-Athlon, Pentium4, and so on.

Predefined variables are used without special punctuation or text. For example, a rule to evaluate the amount of RAM on the target computer:

```
RAM >= 128MB
```

If the name of a predefined variable is enclosed in quotes, it is interpreted as a string value—not considered to be a predefined variable. For example, "CPUMaker" is a string with the value CPUMaker. CPUMaker is a predefined variable containing the CPU type.

Computer Active Directory (AD) Name

```
ComputerADName [comparison operator] ["Domain/Organizational Unit/Name"]
```

Active Directory (AD) name of the computer. The name must be written in canonical format, for example:

```
ComputerADName = "NewBoundary.local/Computers/pc1"
```

Variable Type

String

Computer Domain

```
ComputerDomain [comparison operator] ["Domain"]
```

The domain or workgroup of the computer.

Variable Type

String

Computer DNS Name

```
ComputerDNSName [comparison operator] ["DNS Name"]
```

DNS name of the computer

Variable Type

String

Computer Name

```
ComputerName [comparison operator] ["Computer Name"]
```

Host name of the computer. This variable resolves to %computername%.

Variable Type

String

CPU Family

```
CPUFamily [comparison operator] [Constant]
```

Family of the computer's primary processor.

Variable Type

String

Constants

- Pre486
- 486
- Pentium_K5/K6
- PentiumPro/II/III_Athlon
- Pentium4
- Other

CPU Maker

CPUMaker [comparison operator] [Constant]

Manufacturer of the computer's primary processor.

Variable Type

String

Constants

- AMD
- Centaur
- Cyrix
- Intel
- Unknown

CPU Model

CPUModel [comparison operator] [Constant]

Model of the computer's primary processor.

Variable Type

String

Constants

- | | |
|------------------|-------------------------|
| • AMD_AM486 | • Intel_486DX2_Model_3 |
| • AMD_K5_Model_0 | • Intel_486SL_Model_4 |
| • AMD_K5_Model_1 | • Intel_486SX2_Model_5 |
| • AMD_K5_Model_2 | • Intel_486DX2E_Model_7 |
| • AMD_K5_Model_3 | • Intel_486DX4_Model_8 |
| • AMD_K6_Model_6 | • Intel_Other_486_CPU |
| • AMD_K6_Model_7 | • Intel_Pentium_Model_1 |

- AMD_K6-2_Model_8
- AMD_K6-3_Model_9
- AMD_K6-3_Model_10
- AMD_K6-3_Model_11
- AMD_K6-3_Model_12
- AMD_K6-3_Model_13
- AMD_K6-3_Model_14
- AMD_K6-3_Model_15
- AMD_Other_K5/K6_CPU
- AMD_ATHLON
- AMD_Other_CPU
- Cyrix_CPU
- Centaur_CPU
- Intel_486DX_Model_0
- Intel_486DX_Model_1
- Intel_486SX_Model_2
- Intel_Pentium_Model_2
- Intel_Pentium_Model_3
- Intel_Pentium_MMX_Model_4
- Intel_Other_Pentium(P5)_CPU
- Intel_Pentium-Pro_Model_1
- Intel_Pentium-II_Model_3
- Intel_Pentium-II_Model_5
- Intel_Celeron_Model_6
- Intel_Pentium-III_Model_7
- Intel_Pentium-III_Model_8
- Intel_Pentium-III_Model_10
- Intel_Pentium-III_Mobile_Model_11
- Intel_Other_Pentium(P6)_CPU
- Intel_Pentium-4_Model_0
- Intel_Other_Pentium(P15)_CPU
- Intel_Other_CPU

First CD Letter

FirstCDLetter [comparison operator] [Constant]

Drive letter of the first CD-ROM drive on the computer.

Variable Type

String

Constants

A, B, C, ... Z

IP Address

IPAddress [comparison operator] ["Value"]

The IP address of the primary network card in the computer. If the target computer has multiple IP addresses, this value actually contains multiple IP addresses—so you can compare to any of its IP addresses.

Variable Type

String

NIC Address

NICAddress [comparison operator] ["Value"]

The NIC address of the primary network card in the computer. If the target computer has multiple network cards, this value actually contains multiple NIC addresses—so you can compare to any of its NIC addresses.

Variable Type

String

Number of CPUs

NumCPUs [comparison operator] [Number]

The number of CPUs installed and supported on the computer.

Variable Type

Number

Operating System Bits

OSBits [comparison operator] [Constant]

Indicates if the operating system is 32-bits or 64-bits.

Variable Type

String

Constants

- 32-Bit
- 64-Bit

Operating System Components

OSComponent [comparison operator] [Constant]

The extra components installed on the client operating system. For example, Windows XP Home Edition or Terminal Services.

Variable Type

String

Constants

- Windows Small Business Server
- Windows 2000 Advanced Server or Windows .NET Enterprise Server
- Microsoft Backoffice
- Terminal Services
- Microsoft Small Business Server (restrictive client license)
- Windows 2000 or Windows .NET Datacenter Server
- Non-application server mode running one interactive session
- Windows XP Home Edition
- Windows .NET Web Server
- Windows Storage Server 2003
- Windows Server 2003 Compute Cluster Edition
- Windows Home Server

Operating System Edition

OSEdition [comparison operator] [Constant]

The edition of the operating system.

Variable Type

String

Constants

- Edition Undefined
- Ultimate Edition
- Home Basic Edition
- Home Premium Edition
- Enterprise Edition
- Home Basic Edition N
- Business Edition
- Server Standard Edition (full installation)
- Server Datacenter Edition (full installation)
- Small Business Server
- Server Enterprise Edition (full installation)
- Starter Edition
- Server Datacenter Edition (core installation)
- Server Standard Edition (core installation)
- Server Enterprise Edition (core installation)
- Server Enterprise Edition for Itanium-based Systems
- Business Edition N
- Web Server Edition
- Cluster Server Edition
- Home Server Edition
- Storage Server Express Edition
- Storage Server Standard Edition
- Storage Server Workgroup Edition
- Storage Server Enterprise Edition
- Server for Small Business Edition
- Small Business Server Premium Edition
- Home Premium Edition N
- Enterprise Edition N
- Ultimate Edition N

- Windows Server 2003 R2
- Unlicensed

Operating System Family

OSFamily [comparison operator] [Constant]

The operating system family on the computer.

Variable Type

String

Constants

- Windows NT Family

Operating System Revision

OSRevision [comparison operator] [Constant]

The service-pack revision of the operating system.

Variable Type

String

Constants

- Windows 2000, Initial Release
- Windows 2000, Service Pack 1
- Windows 2000, Service Pack 2
- Windows 2000, Service Pack 3
- Windows 2000, Service Pack 4
- Windows Server 2000, Initial Release
- Windows Server 2000, Service Pack 1
- Windows Server 2000, Service Pack 2
- Windows Server 2000, Service Pack 3
- Windows Server 2000, Service Pack 4
- Windows XP, Initial Release
- Windows XP, Service Pack 1
- Windows XP, Service Pack 2
- Windows XP, Service Pack 3
- Windows XP x64, Initial Release
- Windows XP x64, Service Pack 1
- Windows XP x64, Service Pack 2
- Windows Server 2003, Initial Release
- Windows Server 2003, Service Pack 1

- Windows Server 2003, Service Pack 2
- Windows Vista, Initial Release
- Windows Vista, Service Pack 1
- Windows Vista, Service Pack 2
- Windows Server 2008, Initial Release
- Windows Server 2008, Service Pack 2
- Windows Server 2008 R2, Initial Release
- Windows Server 2008 R2, Service Pack 1
- Windows 7, Initial Release
- Windows 7, Service Pack 1

Operating System Role

OSRole [comparison operator] [Constant]

Role in which the computer's operating system operates. For example, Workstation, Server, or Domain Controller.

Variable Type

String

Constants

- Domain Controller
- Workstation
- Server

Operating System Version

OSVersion [comparison operator] [Constant]

The specific operating system on the computer.

Variable Type

String

Constants

- Windows 2000
- Windows Server 2000
- Windows XP
- Windows XP x64
- Windows Server 2003
- Windows Vista
- Windows Server 2008
- Windows Server 2008 R2
- Windows 7

RAM

RAM [comparison operator] [Number]

Amount of ram on the computer, in bytes

Variable Type

Size / Number

System Base Language

SystemBaseLanguage [comparison operator] [Constant]

The base language identifier (LANGID) for the managed computer. The base language identifiers, both SystemBaseLanguage and UserBaseLanguage, identify a family of languages—English, French, and so on.

Variable Type

String

System Full Language

SystemFullLanguage [comparison operator] [Constant]

The full language identifier (LANGID) for the managed computer. The full language identifiers, both SystemFullLanguage and UserFullLanguage, identify a specific language variant—English (United Kingdom), German (Germany), German (Austria), and so on.

Variable Type

String

Time Zone

TimeZone [comparison operator] [Constant]

The Current Time Zone specified in the computer's date and time properties. For example Central Standard Time.

Variable Type

String

Constants

Value*	Descriptive Name**
TimeZone.DatelineStandardTime	(GMT-12:00) International Date Line West
TimeZone.SamoaStandardTime	(GMT-11:00) Midway Island, Samoa
TimeZone.HawaiianStandardTime	(GMT-10:00) Hawaii
TimeZone.AlaskanStandardTime	(GMT-09:00) Alaska
TimeZone.PacificStandardTime	(GMT-08:00) Pacific Time (US & Canada); Tijuana
TimeZone.MountainStandardTime	(GMT-07:00) Mountain Time (US & Canada)
TimeZone.MexicoStandardTime2	(GMT-07:00) Chihuahua, La Paz, Mazatlan
TimeZone.USMountainStandardTime	(GMT-07:00) Arizona

TimeZone.CentralStandardTime	(GMT-06:00) CentralTime (US & Canada)
TimeZone.CanadaCentralStandardTime	(GMT-06:00) Saskatchewan
TimeZone.MexicoStandardTime	(GMT-06:00) Guadalajara, Mexico City, Monterrey
TimeZone.CentralAmericaStandardTime	(GMT-06:00) CentralAmerica
TimeZone.EasternStandardTime	(GMT-05:00) Eastern Time (US & Canada)
TimeZone.USEasternStandardTime	(GMT-05:00) Indiana (East)
TimeZone.SAPacificStandardTime	(GMT-05:00) Bogota, Lima, Quito
TimeZone.AtlanticStandardTime	(GMT-04:00) Atlantic Time (Canada)
TimeZone.PacificSAStandardTime	(GMT-04:00) Santiago
TimeZone.SAWesternStandardTime	(GMT-04:00) Caracas, La Paz
TimeZone.NewfoundlandStandardTime	(GMT-03:30) Newfoundland
TimeZone.GreenlandStandardTime	(GMT-03:00) Greenland
TimeZone.SAEasternStandardTime	(GMT-03:00) Buenos Aires, Georgetown
TimeZone.E.SouthAmericaStandardTime	(GMT-03:00) Brasilia
TimeZone.Mid-AtlanticStandardTime	(GMT-02:00) Mid-Atlantic
TimeZone.CapeVerdeStandardTime	(GMT-01:00) Cape Verde Is.
TimeZone.AzoresStandardTime	(GMT-01:00) Azores
TimeZone.GMTStandardTime	(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London
TimeZone.GreenwichStandardTime	(GMT) Casablanca, Monrovia
TimeZone.RomanceStandardTime	(GMT+01:00) Brussels, Copenhagen, Madrid, Paris
TimeZone.W.EuropeStandardTime	(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
TimeZone.CentralEuropeStandardTime	(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague
TimeZone.CentralEuropeanStandardTime	(GMT+01:00) Sarajevo, Skopje, Warsaw, Zagreb
TimeZone.W.CentralAfricaStandardTime	(GMT+01:00) West Central Africa
TimeZone.GTBStandardTime	(GMT+02:00) Athens, Istanbul, Minsk
TimeZone.SouthAfricaStandardTime	(GMT+02:00) Harare, Pretoria
TimeZone.E.EuropeStandardTime	(GMT+02:00) Bucharest
TimeZone.EgyptStandardTime	(GMT+02:00) Cairo
TimeZone.FLEStandardTime	(GMT+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius

TimeZone.IsraelStandardTime	(GMT+02:00) Jerusalem
TimeZone.ArabicStandardTime	(GMT+03:00) Baghdad
TimeZone.ArabStandardTime	(GMT+03:00) Kuwait, Riyadh
TimeZone.RussianStandardTime	(GMT+03:00) Moscow, St. Petersburg, Volgograd
TimeZone.E.AfricaStandardTime	(GMT+03:00) Nairobi
TimeZone.IranStandardTime	(GMT+03:30) Tehran
TimeZone.ArabianStandardTime	(GMT+04:00) Abu Dhabi, Muscat
TimeZone.CaucasusStandardTime	(GMT+04:00) Baku, Tbilisi, Yerevan
TimeZone.AfghanistanStandardTime	(GMT+04:30) Kabul
TimeZone.EkaterinburgStandardTime	(GMT+05:00) Ekaterinburg
TimeZone.WestAsiaStandardTime	(GMT+05:00) Islamabad, Karachi, Tashkent
TimeZone.IndiaStandardTime	(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi
TimeZone.NepalStandardTime	(GMT+05:45) Kathmandu
TimeZone.N.CentralAsiaStandardTime	(GMT+06:00) Almaty, Novosibirsk
TimeZone.CentralAsiaStandardTime	(GMT+06:00) Astana, Dhaka
TimeZone.SriLankaStandardTime	(GMT+06:00) Sri Jayawardenepura
TimeZone.MyanmarStandardTime	(GMT+06:30) Rangoon
TimeZone.SEAsiaStandardTime	(GMT+07:00) Bangkok, Hanoi, Jakarta
TimeZone.NorthAsiaStandardTime	(GMT+07:00) Krasnoyarsk
TimeZone.ChinaStandardTime	(GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi
TimeZone.NorthAsiaEastStandardTime	(GMT+08:00) Irkutsk, Ulaan Bataar
TimeZone.SingaporeStandardTime	(GMT+08:00) Kuala Lumpur, Singapore
TimeZone.W.AustraliaStandardTime	(GMT+08:00) Perth
TimeZone.TaipeiStandardTime	(GMT+08:00) Taipei
TimeZone.TokyoStandardTime	(GMT+09:00) Osaka, Sapporo, Tokyo
TimeZone.KoreaStandardTime	(GMT+09:00) Seoul
TimeZone.YakutskStandardTime	(GMT+09:00) Yakutsk
TimeZone.Cen.AustraliaStandardTime	(GMT+09:30) Adelaide
TimeZone.AUSCentralStandardTime	(GMT+09:30) Darwin
TimeZone.AUSEasternStandardTime	(GMT+10:00) Canberra, Melbourne, Sydney
TimeZone.E.AustraliaStandardTime	(GMT+10:00) Brisbane
TimeZone.WestPacificStandardTime	(GMT+10:00) Guam, Port Moresby

TimeZone.TasmaniaStandardTime	(GMT+10:00) Hobart
TimeZone.VladivostokStandardTime	(GMT+10:00) Vladivostok
TimeZone.CentralPacificStandardTime	(GMT+11:00) Magadan, Solomon Is., New Caledonia
TimeZone.NewZealandStandardTime	(GMT+12:00) Auckland, Wellington
TimeZone.FijiStandardTime	(GMT+12:00) Fiji, Kamchatka, Marshall Is.
TimeZone.TongaStandardTime	(GMT+13:00) Nuku'alofa

* If you are typing a constant directly in the Rules Editor, use the constant as it is given in the first column.

** The descriptive name is displayed in the drop-down list in the Rules Editor.

User Active Directory (AD) Name

UserADName [comparison operator] ["Domain/Organizational Unit/user name"]

Active Directory (AD) name of the current user. The name must be written in canonical format, for example:

UserADName = "NewBoundary.local/marketing/val"

Variable Type

String

User Base Language

UserBaseLanguage [comparison operator] [Constant]

The base language identifier (LANGID) for the current user.

Variable Type

String

Constants

See the list of constants for System Base Language

User Domain

UserDomain [comparison operator] ["Value"]

The domain or workgroup of the current user.

Variable Type

String

User Full Language

UserFullLanguage [comparison operator] [Constant"]

The full language identifier (LANGID) for the current user.

Variable Type

String

Constants

See the list of constants for System Full Language

User Name

UserName [comparison operator] ["Name"]

The name of the user currently logged on to the computer. If no one is logged on, Username is <unattended>. For example, create a new user-defined group and type UserName = "Julie", then assign a Task to this subgroup. The subgroup is populated with a new member each time Julie logs on to a computer that is on the network. From one Task assignment, Julie receives the Task on each computer she logs on to, without taking time to identify each computer and assigning the Task to each of these computers.

This variable resolves to %username%.

Variable Type

String

Importing Configuration Groups

The Prism Console makes it easy to import pre-tested configuration groups into your channel by downloading them from a New Boundary Technologies server. By default, there is one server from which you can import configuration groups. In the future, other servers may be configured.

To import a configuration group from the New Boundary Technologies server:

1. Open the Select Configuration Group Server dialog in one of the following ways:
 1. From the **File** menu, select **Import -> Configuration Groups**
 2. On the **Configuration Groups** tab, select the **Configuration Groups** root node, right-click, and select **Import**.
2. Select a source from the list.

Note: In environments that block outbound traffic, the following URL needs to be white-listed to allow access to the New Boundary Technologies' configuration groups server: **contentstore.newboundary.com**.

3. Press **Next** to open the configuration group selection dialog.
4. In this dialog, select the configuration groups you wish to import, and press **Add groups** to add them to your channel.
5. Press **Close** to terminate the connection.

The configuration groups you downloaded can be seen on the Configuration Groups tab.

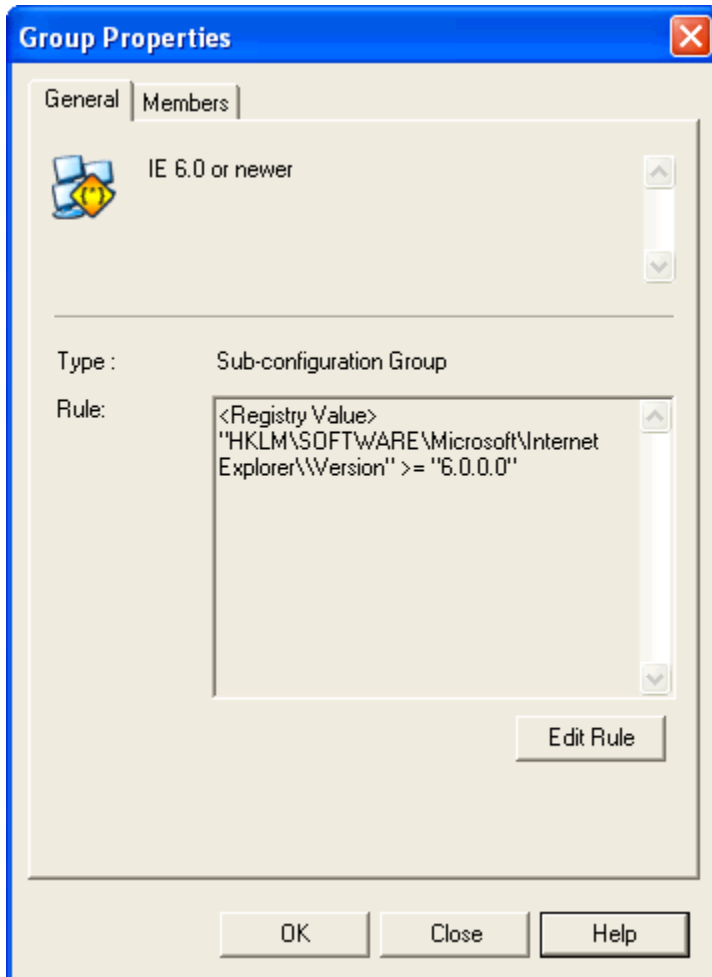
Receiving Notifications when Group Membership Changes

You can receive an email notification when a Configuration group's membership changes. Simply select the desired group, open the Group Properties dialog, and click on the Notifications tab. You can choose to receive emails when a computer joins or leaves the group.

You can choose which users receive the emails, and whether they receive summary emails or one email per event.

Group Properties

General tab (Group Properties)



The **Group Properties** | **General** tab displays information about the group currently highlighted in the main window.

The Group Properties | General tab is displayed when you right-click on the name of a group and choose **Properties** from the pop-up menu.

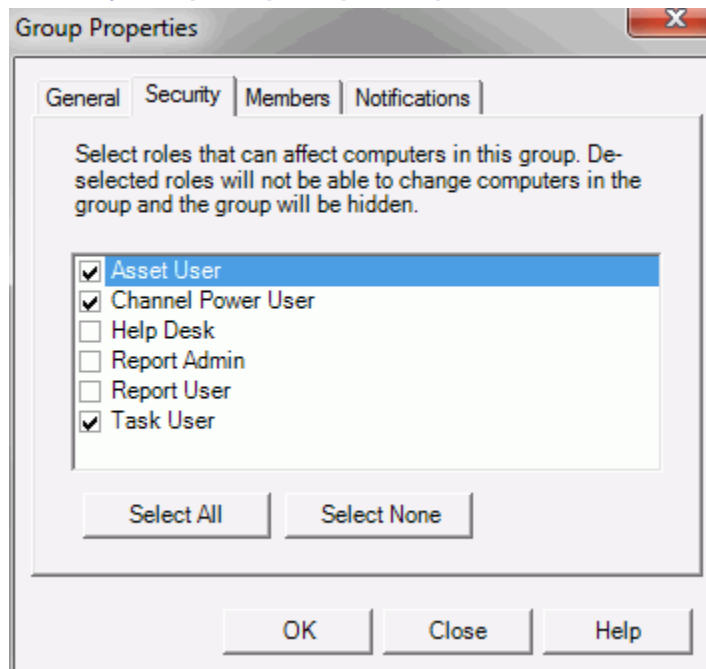
The information includes:

- Descriptive name for the group.
- **Type**: The type of group.
- **Rule**: If the group is a user-defined subgroup, the tab shows the text of the rule and includes an **Edit Rule** button. This button is not available for other types of groups.

Edit Rule: Open the Rule Editor, where you can edit or change the rule that defines the group. After making changes to the rule, the group is re-populated, based on the criteria set with the new rule.

(See Editing an Existing Rule.)

Security tab (Group Properties)



The **Group Properties | Security** tab displays information about the roles that are allowed to see the group and modify the computers within the group.

The Group Properties dialog box is displayed when you right-click on the name of a group and choose **Properties** from the pop-up menu. Click the **Security** tab to view this tab.

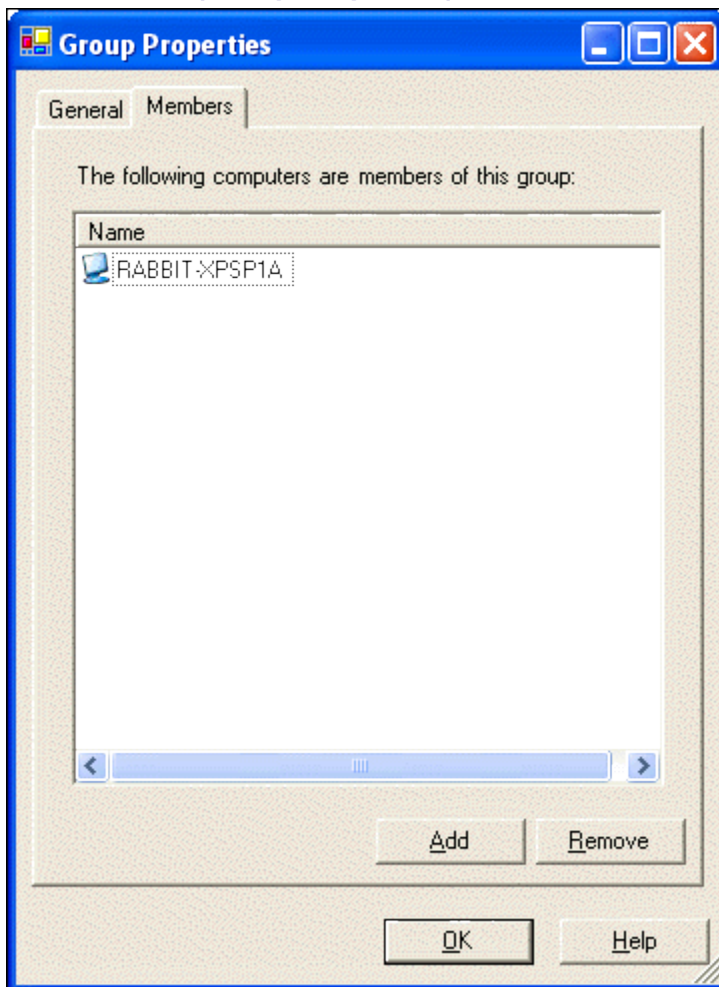
If a role is *not* selected, a user in that role:

- Will not be able to see the group in the console;
- Will not be able to modify the computers that are members of that group elsewhere in the console. This means, for example, that they will not be able to make assignments to those computers through other (visible) groups to which any of those computers belong. If they assign to such a group, the assignment applies only to those computers that user can see; the secured computers will not receive the assignment.

The list of all secured groups in the channel can be seen from the Manage Security dialog. Also within that dialog, the list of groups secured from a specific role can be seen in the Role Properties dialog (within the Secured Groups tab).

Note This tab is visible only if the channel is secured and the user has permission to view security information.

Members tab (Group Properties)



The **Group Properties | Members** tab displays information about the computers that are members of the selected group. On this window, you can also add additional computers as members or remove members from an organizational group.

Note: Configuration groups are populated automatically. You cannot change the membership of configuration groups on this tab.

The Group Properties dialog box is displayed when you right-click on the name of a group and choose **Properties** from the pop-up menu. Click the **Members** tab to view this tab.

Add members to an organizational group

1. Click **Add** on the **Group Properties | Members** tab.
2. In the Assign Computer dialog box, highlight the name of one or more computers.
3. Click **OK** to add the new member(s) to the group.

The new member(s) will receive any Tasks already scheduled for the group, as well as Tasks assigned to the group in the future.

Remove members from an organizational group

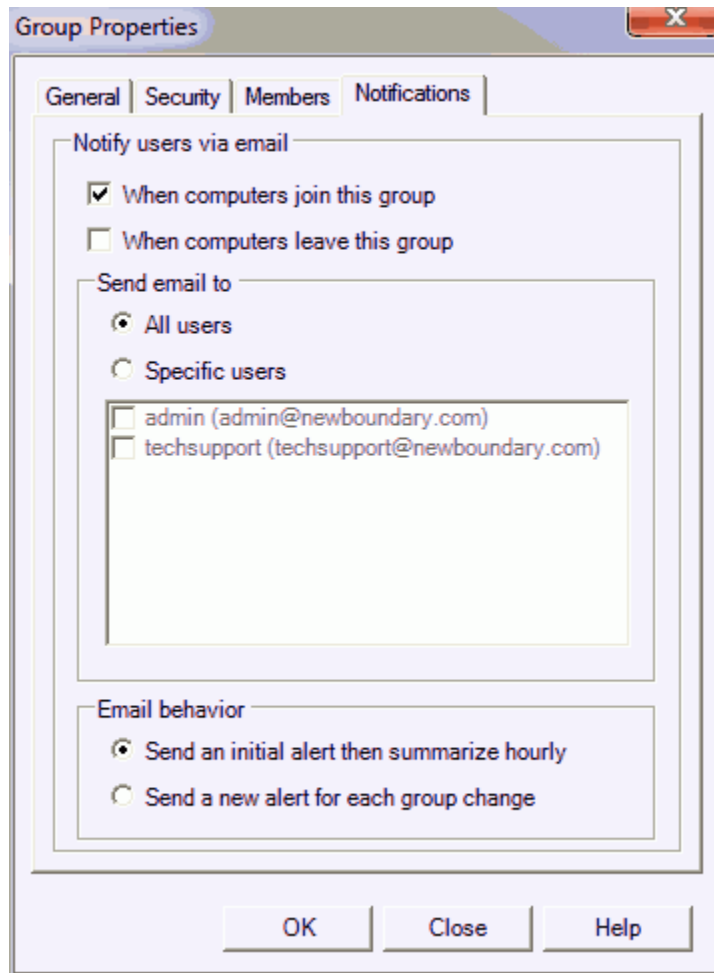
1. Highlight the name of one or more computers on the **Group Properties | Members** tab.

2. Click **Remove** to remove the member(s) from the group.

This member will no longer receive Tasks assigned to the group.

Note: If you only want to temporarily remove a member from the group while you troubleshoot a problem, disable the computer. For more information, see the Computer Properties | General Tab.

Notifications tab (Group Properties)



The **Group Properties | Notifications** tab allows you to configure alerts. This allows you to receive an email when membership changes within a Configuration Group.

This tab is displayed when you select a Configuration Group and open the Group Properties dialog and click on the **Notifications** tab. You can choose to receive emails when a computer joins or leaves the group:

- ☒ **When computers join this group:** With this option selected, notifications will be sent whenever a computer joins the group.
- ☒ **When computers leave this group:** With this option selected, notifications will be sent whenever a computer leaves the group.

You can choose to send failure emails to all users or you can select specific users.

You can also select whether users receive a summary email (hourly), or an email for each task failure. Sending summary emails helps reduce the likelihood of users receiving a flood of emails.

Note Enabling email notifications requires configuration within your SQL Server database. Please refer to the New Boundary Technologies support site at <http://www.nbt.net.newboundary.com/download/support/kb.htm> for instructions on how to configure email for your specific environment.

Internet Capabilities

Prism Suite's Console and Clients can be configured to communicate with the Prism Server over the internet using HTTP. This feature allows the administrator to run the Console from a remote location - from home, on the road, in a hotel, or anywhere that has internet access. It allows the channel to manage computers that are distributed across remote locations and behind firewalls. The Client can run on laptops disconnected from the corporate network. In fact, a laptop can be configured to automatically failover to HTTP/S when it does not have direct access to the corporate network.

By coupling the internet capability with the use of Distribution Locations, all channel communication, including Task deployment, can occur over HTTPS. This provides a uniformly secure, internet configuration that does not require network shares or VPN. This is particularly useful for managing remote locations and roving laptops.

HTTP support introduces an additional component to the Prism installation: the **NBT Proxy Server**. The NBT Proxy Server is a small application installed on IIS. The NBT Proxy Server accepts HTTP requests from the Console and/or Clients and invokes the Prism Server on their behalf.

To enable Prism Suite's internet capability, follow these steps:

1. Install the NBT Proxy Server web application on IIS on a machine that can access the Prism Server. You can increase security of the communication by enabling SSL (https).
2. Configure the Console and/or Clients to use the Proxy Server. This is done on the Web Proxy Server tab of Console Settings and Client Settings dialogs.

Installing the NBT Proxy Server

The NBT Proxy Server is a small application installed on IIS that accepts HTTP requests from Clients and invokes the Channel Server.

Installation steps are as follows:

1. Identify the IIS machine where the NBT Proxy Server will be installed.
 1. Using the IIS administration console, identify the specific Site where the NBT Proxy Server will be installed (e.g., "Default Web Site"). Open the Site's **Properties**, select the **ASP.net** tab, and verify that the "ASP.NET version" is 2.0 or greater.
 2. If you wish to use HTTPS, enable SSL for the site. Consult IIS help documentation for more information.

Note It is strongly recommended that SSL be used for increased security.

2. From the installation folder on the machine where Prism is installed, copy the Server\NBTProxyServer.msi file from your Prism installation folder to the IIS machine.
3. Launch the NBTProxyServer.msi file on the IIS machine.
4. On the **Welcome** dialog, press **Next**.
5. On the **Select Installation Address** dialog, select the appropriate **Site** from the dropdown. Press **Next**.

Caution Please do not change the **Virtual directory** setting, "NBTProxyServer". This value is required by Prism Clients.

6. On the **Confirm** dialog, press **Next**. This will install NBT Proxy Server application.

7. On the **Installation Complete** dialog, press **Close**.

Generating Reports






Generating and Viewing Reports

Prism reports provide detailed information on the status of computers and groups in the Channel, actions taken by the administrator or other users, deployment of changes, and inventory of managed computers. After generating a report, you can filter the data, group it by category, or set the sort order to refine and rearrange the output. Reports can be viewed on screen for a quick summary, exported to a file for further analysis, or formatted and printed directly from the Console.

In addition to the default reports, you can create and save custom reports with the data and views you need most often. Your custom reports are added to the tabs on the **Reports** window after being saved.

Types of Reports

You can select these types of reports on the **Reports** menu or by clicking an icon on the toolbar:

-  **Administrator Reports:** Report on actions taken by the Administrator or other users in the Channel. Depending on the specific report you choose, the report may list the name of the user, actions taken (computers added, groups set up, permissions edited, and so on), target group or computer, and so on.
-  **Computer and Group Reports:** Report on the computers, servers, and groups in the Channel. Depending on the specific report you choose, the report may list the name of the computer or group, Client status, IP address of the computer, and so on.
-  **Deployment Reports:** Report on the deployment of Tasks. Depending on the specific report you choose, the report may list the name of the target computer or group, status of the installation, time applied, errors, and so on.
-  **Distribution Reports:** Report on the Distribution Locations.
-  **Asset Management Reports:** Report on the software and/or hardware inventory of a computer or group of computers. Using baselines, you can also use these reports to track changes over time.

Generate a Report



To generate a report:

1. Select a report type using the **Reports** menu or by clicking one of the report icons in the toolbar.
2. Select a specific report from the resulting menu.
3. A report window is generated within which you can customize the results, export the report to a file, or print the report.

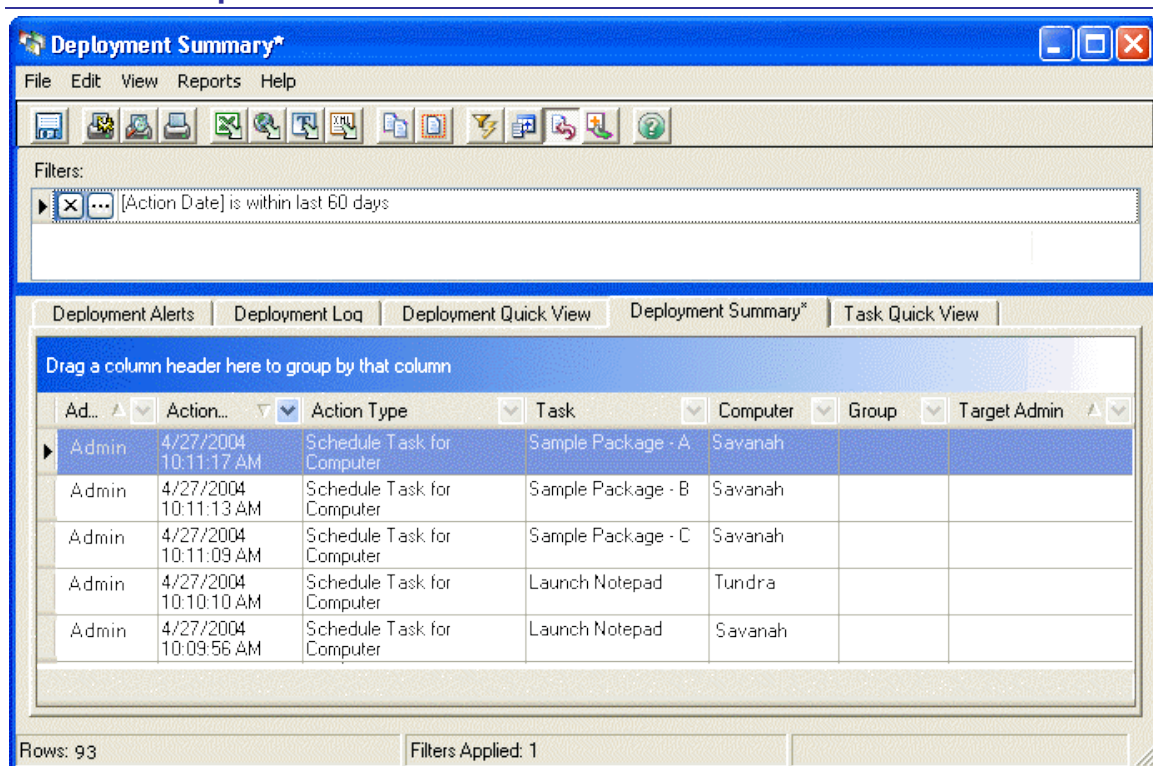
Print Directly from the Main Window

To print the contents of the details pane in the main window:

1. Click in the details pane.
2. Select one of the following:

1. Click the  icon in the toolbar to open the contents of the details pane in the Print Preview window. With this option, you can add a header, footer, and page number to the report before printing.
2. Click the  icon in the toolbar to send the contents of the details pane directly to your printer.

Generated Report Window



When you generate a report, Prism displays the results in a report window. From this window, you can update the content of the report with filters, export the report to a file, change the layout, or print the report.

Note: The reports contain a wealth of information and customization options. In addition to sorting and filtering the results, you can add or remove fields to customize the report content. You can also save your customizations for future use.

Toolbar

Use the toolbar icons to format, print, export, or filter the report. For more information, see the Report Toolbar.

Customize the Report

You have several options for customizing, refining, or filtering the data displayed in the report window. For more information, see:



- Customizing a Report
- Filtering a Report
- Grouping the Report Results

Export the Report

Export and save the report displayed on-screen in a variety of file formats. To export the report, click an export icon in the toolbar or select **File | Export** on the report window.

For more information, see Exporting Reports.

Print the Report

- **Print:** Click the  icon in the toolbar to print the report.
- **Preview:** Click the  icon in the toolbar to preview and format the printed report. From the Print Preview window, you can add a header or footer to the report.

Delete the Report

When you no longer need a custom report, go to the tab that displays the report. Select **Edit | Delete**.

Report Toolbar

These icons are available in the toolbar on the main report window.



Save the current settings for this report.



Set margins, page orientation, and paper size for the printed report.



Display a Print Preview.



Print the report.



Export to a Microsoft Excel file (.XLS).



Export to an HTML file.



Export to a comma-delimited text file (.TXT)



Export to an XML file.



Copy the highlighted text to the clipboard.



Select all of the text in the report.



Show the filters applied to this report.



Add fields to the report.



Let the text wrap in each cell.



If the report is grouped, expand all of the groups.



View the online help for the report window.

Exporting a Report

The results of any report can be exported to a file for further analysis or included in a document.

Export formats

- Microsoft Excel (.xls)
- HTML
- Text File (.csv) – comma delimited
- XML

Export a Report

1. After generating the report, click one of the export icons in the Report Toolbar or select **File | Export To** on the Generated Report Window.
2. Choose a format for saving the report to a file.

Saving a Report

After customizing the layout, applying a filter, or making other changes, you can save the changes to the current report or save the changes as a new report.

Note: When you save a report, your saved version is now available in the Channel to all users.

Save Changes to an Existing Report

To save changes to an existing report select **File | Save**. Your changes are applied to the report open at the time. Each time this report is opened in the Channel, your customizations are applied.

Save a Custom Report

To save the changes as a custom report, select **File | Save As**. Prism asks for a name and description for the new report.

Your custom report is now listed on the appropriate submenu with the other reports.

Customizing a Report

After generating a report, you can customize the layout and content of the report. Use filters, group by items, or change the sort order on the Generated Report Window to create a custom report.

Add a Column



Add columns to the report by clicking the icon in the toolbar or selecting **View | More Fields**. Prism opens a palette listing the additional fields. Drag an item from this palette onto the main window to place a new column.

Remove a Column

To remove a column from the report, right-click on the column heading. Choose **Remove Field** from the pop-up list of options.


Filters

Use filters to include or exclude specific types of information from the report. The filters are displayed in a box in the upper part of the report window.


For more information, see [Filtering a Report](#).

Sort Data and Arrange the Layout

The column headings reflect the types of data in the report. Use the column headings to customize the content and layout of the report:

- **Arrange the columns** - Click on a column heading and drag it to a new position.
- **Sort a column** - Click on the column heading itself or click the  next to a column heading to change the sort order for that column. The sort order for the entire report is based on this column.

To sort by two or more columns, right-click on each column heading and select a sort order. The sorting priority is based on the arrangement of the columns from left to right.

- **Categorize the data** - You can limit the report to a subset of the data or group the data by an item:
 - Click the  next to a column heading to display a pop-up list of options for limiting the content of the report. For more information, see [Filtering a Report](#).
 - Right-click on the column heading to display a pop-up list of options. From this list, change the sort order or group the results.
- **Group the Data** - The entire report can be divided into groups based on any of the column headings. For more information, see [Grouping the Report Results](#).

Save the Report

Your customizations can be saved to the default report or under a new name as a customized report. For more information, see [Saving a Report](#).

Grouping the Report Results

The entire report can be divided into groups based on the items in a column. This feature is useful for reports that contain a large number of records, which you may not want to display all at once. For example, generate the Administrator Action report, then group the results by the name of the administrator. To view the actions taken by an individual administrator, you can expand only that group, without viewing all of the records.

Group the data in a report

- Click on a column heading and drag it into the dark-blue bar just above the column headings. The report is grouped by the items available in this column.
- Right-click on a column heading. Select **Group by this field** from the pop-up list of options.
The report is grouped by the items available in this column.

Note: When you group the items in a report, right-click on the Group heading to display a drop-down box that lists the items or categories available in the group.

Expand or Collapse the Groups

To expand or collapse all of the groups:

- Right-click in the shaded area where the group labels are displayed. Choose the **Full Expand** or **Full Collapse**.

- Click the  in the toolbar. This toggle expands or collapses all of the groups.

To expand or collapse one group:

- Click the + or – next to the group name.

Clear the grouping

If groups have been applied to the report, use one of these methods to remove the groups and return to simply a list of records.


- Right click in the shaded area just above the column headings. Select **Clear Grouping** from the pop-up menu.
- To remove just one field from the grouping, right-click on a field in the shaded area and choose **UnGroup**. You remove the group for only that field without clearing the other groups.

Filtering a Report

The actions, items, dates, or other types of information listed in the report can be categorized or refined by applying a filter to the generated report. When the report opens, the default filter (if applicable) is displayed in the upper part of the report window. The report includes only the records that match the criteria you set with the filter. For example, the default Administrator Log uses a filter to display only actions taken during the past 60 days.

Add a Simple Filter


Add a filter by selecting a category within one of the columns:

1. Click  next to the label in a column heading.

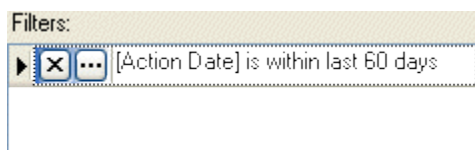
A drop-down box lists the items or categories available in the column.

2. Select an item or category to display in the report.


Your selection is now displayed in the Filters box in the upper part of the report window. For example, select Add Computer from the list of categories in the Action Type column of the Administrator Action Log. The report lists only the computers added to the Channel and the Filters box now includes an Action Type filter.

3. Click the  icon in the filter box to add additional criteria or modify the filter.

The Filters box is displayed in the report main window when filters have been applied to the report.



Change a Filter


To change a filter, click the  icon next to an item in the filter box. On the Custom Filter dialog box, set the criteria for the filter.

Delete a Filter


To remove a filter, click the  icon next to an item in the filter box.

Create a Custom Filter

Create a custom filter by changing an existing filter or adding a new filter. To set up a custom filter:

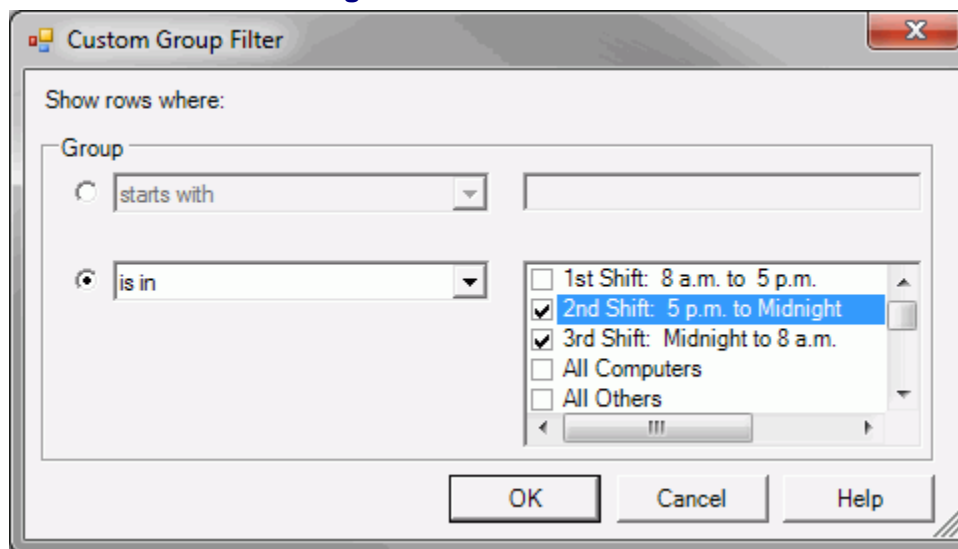
1. Click  next to the label in a column heading.
2. In the drop-down box, select **(Custom)**.
3. On the Custom Filter dialog box, set the criteria for the filter.

Custom Filter dialog



The options available in the Custom Filter dialog box depend on the type of item selected when you opened this dialog box. The Custom Filter dialog box opens when you click the  icon next to a filter or when you select (Custom) from the  pop-up list of options from a column heading in the report window.

- **Items in the Channel:** When you filter on the computers, groups, tasks, or users in the Channel the Custom Filter Item dialog box opens.
- **Information related to an Item:** When you filter on the date, time, status, action or other text, the Custom Filter Information dialog box opens.

Custom Filter Item dialog



When you filter on the computers, groups, tasks, etc. in the Channel, this dialog box lists the names available in the current Channel.

The Custom Filter dialog box for an item opens when you click the  icon next to a filter or when you select (Custom) from the  pop-up list of options from a column heading in the report window.

Show Rows Where

Filtering can be based on either string comparison or membership by selecting the appropriate radio button:

- **String comparison:** In the drop-down list, select "starts with", "ends with", or "contains". In the text box, enter the comparison text.

- **Membership:** In the drop-down list, select a comparison operator. Use this comparison to include or exclude items from the report. In the list on the right, select the check boxes for items to compare.



Item Comparison Operators

When setting up a filter based on an item in the Channel (computer, group, Task, or user), choose from these comparison operators:

- is in
- is not in
- is blank
- is not blank
- is like
- is not like

Custom Filter Information dialog

When you filter on the date, time, status, action, or other text, this dialog box lets you customize the filter based on one or two items. For example, for a date field, select **Within the last 60 days** to view only the most recent records.

The Custom Filter dialog box opens when you click the  icon next to a filter or when you select (Custom) from the  pop-up list of options from a column heading in the report window.

Category

In the field on the left, select the data comparison operator to use when filtering the data in the report. In the field on the right, enter the value you want to match.

For example, to filter on the Notepad Task, enter **equals** in the first field and **Notepad** in the second field. The report will only contain data related to this Task.

Conjunction

When setting up a filter based on information such as a date, action, status, and so on, you can add additional or contrasting criteria to the report filter. Select a conjunction in the middle of the dialog box and enter the second filter in the second row of text boxes.

- **And:** The report includes the records that meet **both** or **all** sets of criteria set up on this dialog box.
- **Or:** The report includes the records that meet **either** or **any** of the criteria set up on this dialog box

Show Time

If you are customizing a filter that is applied to a date, the dialog box includes this check box.

- ☒ **Show Time:** With this option selected, the time is included with the date in the filter. Use this option to restrict the report to specific hours.
- ☐ **Show Time:** With this option cleared, the data is filtered only based on the date.

Filter Comparisons for Data

When setting up a filter based on data such as a date, time, action, status, or other text, choose from these comparison operators:



- equals
- does not equal
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- is blank
- is not blank
- within last 30 days
- within last 60 days
- within last 90 days

Print Preview

Printing a Report

After generating a report, you can print it directly from the report window. Prism also provides a print preview and formatting options.



Print a report

- Click the  icon to send the report directly to your default printer.
- Click the  icon to preview the report before printing it.

Format a report


To set the page size, margins, or page orientation click the  icon on the Generated Report Window or select **File | Page Setup**.

To add a report name, the date, page numbers, or the current username to the report header or footer:

1. Click the  icon to preview the report.
2. On the Print Preview window, click the  icon.
3. On the Report Properties dialog box, set up the header and footer for the document.

4. Click **OK** to view the changes on the print preview window.

Print Preview

The Print Preview window shows how the report will look when it is printed. From this window, you can also add a header or footer and change the page setup before printing. This window opens when you click the  on the generated report window.

Toolbar

Use the icons in the toolbar to add a header or footer, send the report to the printer, or view the report. The icons include:



Add a header or footer to the report.



Print the report.



Set up the page size and layout.



Switch between Actual Size and Fit in Window views with a mouse click.



Zoom out.



Zoom in.



Set the zoom percentage.



Go to the first page of the report.



Go to the previous page of the report.



Go to the next page of the report.

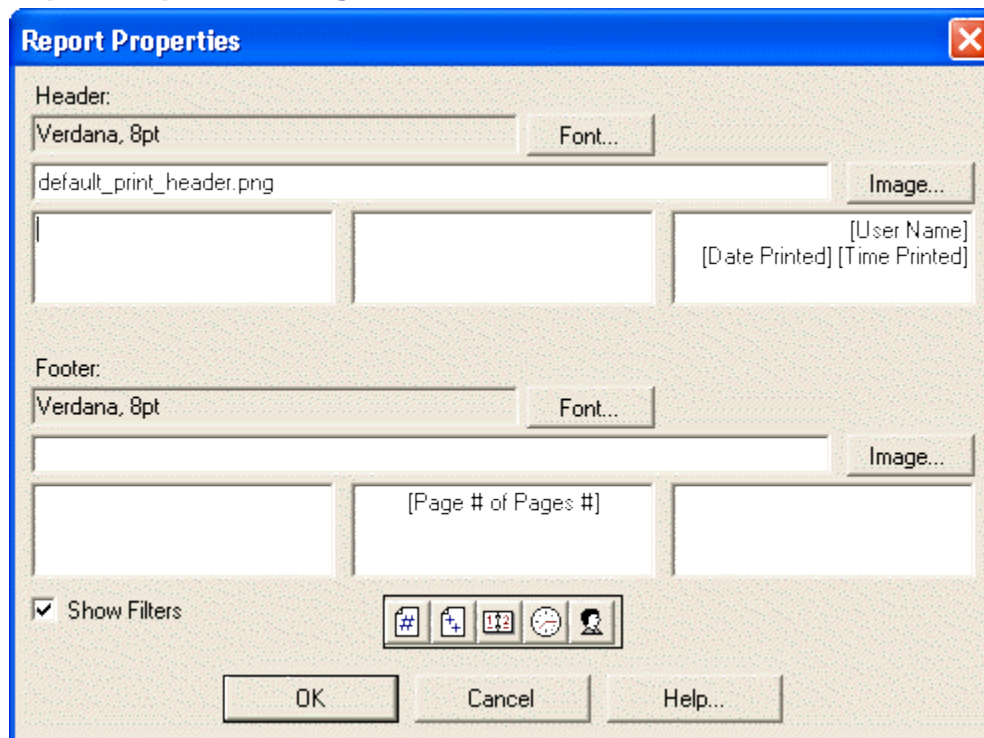



Go to the last page of the report.



Close the Print Preview window.

Report Properties dialog



On the Report Properties dialog box, add a header or footer to the printed report. This dialog box opens when you click the  icon on the print preview window.

Toolbar

Icons on this window include:



Insert the page number



Insert the number of pages in the report.



Insert the date when the report is printed.



Insert the time when the report is printed.



Insert the name of the user currently logged into the Console.



Insert the name of the report.

Header/Footer

Use the text boxes to place text and an image in the left, center, or right section of the header or footer.

- **Font:** Click the **Font** button to change the font used for the header or footer on the report.
- **Image:** Click the **Image** button to browse for an image file to include in the header or footer.
- **Report label:** Click in a text box and type a report name or other text.

- **Page number, date, and so on:** Click an icon in the toolbar to insert the page number, date, or other information automatically.

Show Filters

Indicate whether to display the filters that are applied to the report.

- ☒ **Show Filters:** With this option selected, the filter box from the main report window is printed on the first page of the report.
- ☐ **Show Filters:** With this option turned off, the filter box is not included in the printed report.

Managing the Channel Server

Overview of the New Boundary Channel Manager

The Channel Manager provides an interface for you to work with the New Boundary Channel Server. Use this application, which is available through the Windows taskbar, for these actions:


- Secure the creation of new Channels
- Add or remove the names of users who have permission to create Channels
- Start or stop the Channel Server
- Connect Channels to the Channel Server after they were disconnected by un-installing the Channel Server or removed through the Prism Console.

Note: The Channel Server application is used by these New Boundary Technologies products—Prism Suite, Prism Deploy, Policy Commander, and PwrSmart. However, these products use separate installations of the Channel Server and separate Channels.

Opening the Channel Manager

The Channel Manager opens from the Windows taskbar on the computer where the Channel Server is installed.

Open the Channel Manager

To open the Channel Manager, right-click on the  icon in the Windows taskbar.

Channel Manager Options

These options are available on the pop-up menu:

- **Stop Channel Server:** Stop or shutdown the Channel Server.

Generally, you will not use this option unless there is a problem with the computer where the Channel Server is installed. The Channel Server must be running for Clients to receive changes from the Prism Console, receive security settings from Policy Commander, power schemes from PwrSmart, or provide updates to the Channel.

- **Start Channel Server:** Start the Channel Server if it has been stopped.
- **Configure Security:** Secure the creation of Channels and control the list of users who are permitted to create Channels. Use this option to limit the people who can create channels, and add names passwords to assign this privilege.

When you select this option, the Channel Management Security dialog box opens.

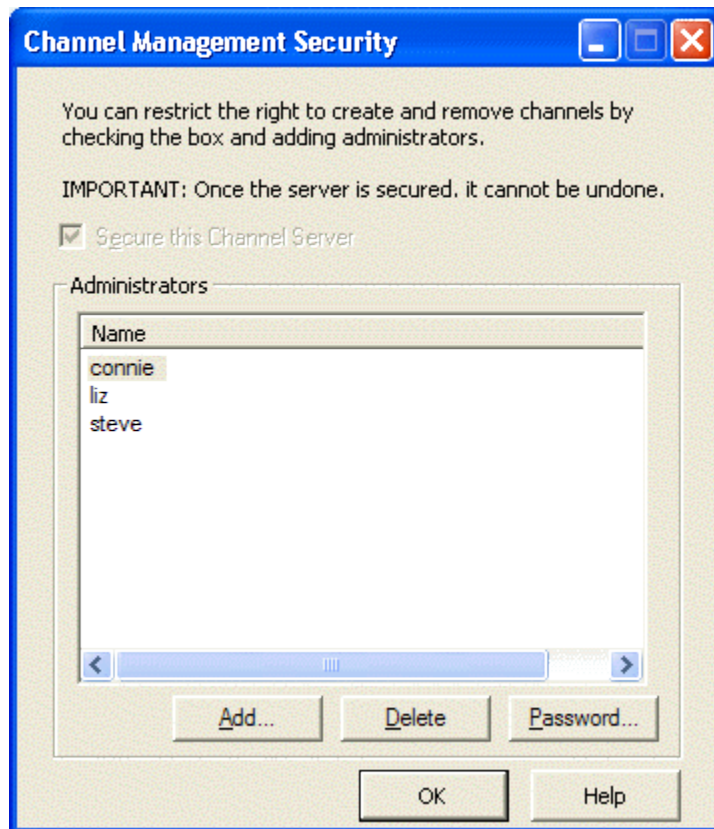
Note: Securing access to a specific Channel is controlled through the Console. See "Overview of Channel Security" in the *Console Guide* or Console online Help.

- **Connect Channel:** Connect an existing Channel database to the Channel Server. For example, reconnect a Channel database that was removed through the Policy Commander Console. Or, reconnect a database that was managed by another Channel Server which has since been un-installed (referred to as an "orphaned Channel").

When you select this option, the Connect to Channel dialog box opens. (See Connect to Channel for important notes on connecting a Channel.)

- **Exit:** Close the Channel Manager menu. This selection does not affect the Channel Server.

Channel Management Security dialog



On this dialog box, secure the creation of new Channels on this Channel Server. This dialog box opens when you select **Configure Security** from the Channel Manager pop-up menu.

Options include:

- ☒ **Secure this Channel Server:** With this option selected, only the users listed on this dialog box have permission to set up new Channels on this installation of the Channel Server. Creation of new Channels is password protected. When this option is set, it cannot be reversed.
- ☐ **Secure this Channel Server:** With this option cleared, the creation of Channels is not restricted.

Note: Securing access to a specific Channel is controlled through the Console. See "Channel Security" in the *Console Guide* or Console online Help.

When you select the **Secure this Channel Server** check box, these options are available:

Add

Add a user to the list of people who can create Channels. Each time this user sets up a new Channel, they must enter the username and password assigned here. The Manage User dialog box opens.

Each of the users listed is given Channel Admin privileges, which lets them create Channels, add or delete users from the Channel Manager, and change passwords.

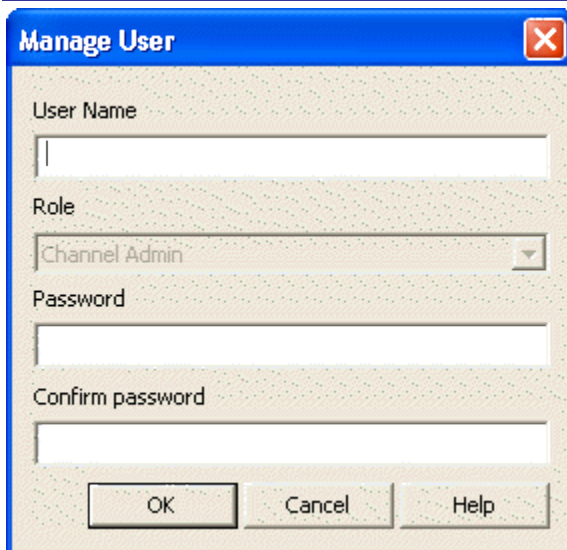
Delete

Delete the highlighted name from the list of users. Once deleted, this person cannot create new Channels.

Password

Change the password for the selected user. The Manage User dialog box opens.

Manage User dialog

The image shows a 'Manage User' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog has a light beige background with a dotted pattern. It contains four input fields: 'User Name' (a text box), 'Role' (a dropdown menu showing 'Channel Admin'), 'Password' (a text box), and 'Confirm password' (a text box). At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

On the Manage User dialog box:

- Add the username or login for a person who is being given permission to create Channels.
- Change a user's password.

This dialog box opens when you click the **Add** button on the Channel Management Security dialog box.

The options include:

- **User Name:** The username or login for the person whose information is being updated. The name is assigned by the administrator who is adding the name. It does not have to match the person's network login or other username.

This user enters their user name and password when creating a new Channel.

- **Role:** The role assigned to the user. By default, everyone is assigned the Channel Admin role through the Channel Manager.

Roles with specific permissions for accessing or modifying data, targets, or Tasks within a Channel are set up for a specific Channel within the Console.

- **Password:** Enter the password this user will enter when creating a Channel.
- **Confirm password:** Retype the new password to confirm it.

Channel Connection Wizard - Authentication dialog



Indicate the mode you want to use when connecting to the SQL Server database that stores Channel information. You should select the same option you used during installation. This dialog box is part of the Connect Channel wizard in the Channel Server.

The options include:


- Windows Authentication
- SQL Server Login

Connect to Channel dialog

On this dialog box, select the name of the Channel database that you want to connect to this Channel Server. After you select the database and complete the dialog boxes in this Wizard, the Channel is displayed in the list of Channels available through this Channel Server.

This dialog box opens when you select Connect Channel from the Channel Manager pop-up menu.

Connect a Channel to the Channel Server

Click the  to select the name from a list of available Channels.

Note: If you are moving a Channel created with a previous version of Prism from another server to the computer where the Channel Server is installed, first move the older Channel's folders to the new server. Then use the Channel Migration Tool.

During the Prism installation or when Channels are migrated using the Channel Migration Tool, the Channel Manager automatically connects these Channels to the Channel Server. You do not need to use the Channel Manager to manually connect the Channels.

See the Channel Migration Tool online Help for more detailed information.

Caution: The Channel Manager can only reconnect a Channel that is that is in the same SQL Server instance as that used by the Channel Server.

To connect a version 6 Channel that is installed in a different SQL Server instance, you must (1) use database tools to move the database to this Channel Server's SQL instance, and (2) make some manual changes to the database tables. Visit the support section of www.newboundary.com for more detailed information.

Establish Client Connection to Channel

In most cases, you should set the computers in this Channel to subscribe to the Channel after connecting it to the Channel Server.

- **Prism Suite:** To set up the Client subscription, you can add the computers directly from the Console or create a subscription file from the Channel.

Console Error Messages

Console Error Messages

Messages 0 to 1000

- 0: The operation succeeded
- 100: An unknown error occurred (Alert)
- 300: The channel is corrupt. (Alert)
- 800: The computer does not exist in the channel (Alert)
- 1000: The task has already been performed (Ignore)

Messages 1100 to 1900

- 1100: The task has been performed after the specified time (Ignore)
- 1200: The task has not been performed after the specified time (Ignore)
- 1300: The time scheduled has not arrived yet (Ignore)
- 1400: The task's command or file name could not be resolved (Alert)
- 1500: The task required a file in use for another operation (Alert)
- 1600: The task requires a file that does not exist (Alert)
- 1700: The file could not be overwritten (Alert)
- 1800: A file required by the task is in use by another process (Alert)
- 1900: A file required by the task is in use by another process (Alert)

Messages 2000 to 2900

- 2000: An error occurred executing the task (Alert)
- 2100: The user cancelled the operation (Caution)
- 2200: The user declined to execute the task (Caution)
- 2300: The operating system is not correct for this task (Ignore)
- 2400: There was not enough disk space to execute the task (Alert)
- 2500: A variable required by the task was not in the correct format (Alert)
- 2600: A variable could not be resolved to an existing file or folder name (Alert)
- 2700: A variable could not be resolved (Alert)
- 2800: Insufficient environment space (Alert)
- 2900: The user declined to specify a required variable value (Caution)

Messages 3000 to 3900

- 3100: The computer is disabled (Caution)
- 3200: The task is disabled (Caution)
- 3300: The computer is not licensed (Caution)
- 3600: A file required to remove the software is missing. (Alert)

3700: There are insufficient rights to access the file. (Alert)

3800: An invalid command was encountered. (Alert)

3900: An attempt was made to play a script recursively. (Alert)

Messages 4000 to 4900

4000: The Prism service could not be installed and/or started. (Alert)

4100: The file is not in the expected format. (Alert)

4200: The file was created by a later version of the software than the one running. (Alert)

4300: Installation was cancelled by the administrator. (Ignore)

4400: An unexpected internet error occurred accessing the file. (Alert)

4500: An internet communications error occurred accessing the file. (Alert)

4600: The credentials passed to the server do not match the credentials required to log on to the server. (Alert)

4700: The Internet server name or address could not be resolved. (Alert)

4800: The computer does not have the required internet support. (Alert)

4900: The format of the specified internet address is not valid (Alert)

Messages 5000 to 5900

5000: Logon failed. (Alert)

5100: The task information is corrupt. (Alert)

5200: The command could not be executed. (Alert)

5300: "The ""Start In"" folder is invalid." (Alert)

5400: "The task does not have an ""uninstall"" command." (Alert)

5500: The package has a variable requiring user input in unattended mode. (Alert)

5600: Deleted computer contacted channel. (Alert)

5700: File installation rule conditions not met. (Alert)

5800: Client upgrade needed to execute task. (Alert)

5900: Package digital signature authentication failed. (Alert)

Messages 6000 to 6200

6000: The connection was dropped while accessing the remote package. Restart will be attempted. (Caution)

6100: Distributed file does not exist. (Caution)

6200: Windows Installer error. (Caution)

Glossary

Channel

A Channel is a hierarchical list of targets (computers and groups in your organization) and tasks (the Prism files and commands that you want to distribute to them) and it is a vehicle for scheduling and distributing Prism files, commands, and scripts.

Each Channel contains a list of the targets that will receive updates via Prism and the new software, updates, or changes that you want to install on these targets.

Client

The Client is an application that resides on target computers and provides the vehicle for installing Prism files. The executable file PTCLIENT.EXE is used to run the Client software.

When used with Prism, the Client provides information to the Console about the target computer, its users, and licensing. It receives updates from the Console and allows for the distribution of Prism files using other delivery methods, such as a login script, e-mail, or SMS.


When the Client software performs tasks on user computers using Prism's commands or shell extensions, it can be installed either on a computer's local hard drive, or on a shared network drive.

Command Task

A Command type of task in a Prism Channel runs a command or command file. This type of task is very versatile, letting you use the task to open a web site URL or run any command or script that will run on the target computer.

Computer


Computers are workstations or servers with the appropriate type of Prism license assigned and the Prism Client installed. Computers are added to a Channel manually or automatically. Once the computers are in place, they are ready to be inventoried and managed.


 When a computer is disabled through the **Properties | General** tab, the icon is grayed. Tasks are not installed on a disabled computer. Use this feature when you want to temporarily remove an item while you solve a problem. After resolving the problem, bring the computer back on-line by turning off the Disable option on the **Properties | General** tab.


current user

The current user is either the person currently logged on to the computer or the default user, if no one is logged on.

grayed icon

 In Picture files shown in the Editor, grayed items indicate that only file information is stored, not the file contents. Packages and Prism Self-Installing files always contain file contents.

 The computer icon is grayed in the Console window to indicate that it is disabled. While it is disabled, this computer cannot receive Tasks or other updates from the Channel.

 The Task icon is grayed in the Console window to indicate that it is disabled. While it is disabled, this Task cannot be installed on a target computer.

Tasks and targets are disabled in the Console by using the **Disable** check box on the **Properties | General** tab. The **Disable** option lets you temporarily take a computer offline or halt the installation of a task while you investigate and repair a problem.

Group

Groups in a Prism Channel let you categorize computers with similar requirements or environments, and then rapidly deploy tasks designed specifically for the group. Rather than searching out and assigning tasks to individual computers, set up a group of related members and assign a task to the group as a whole. The task is installed for each member of the group, at the same time.

Networks that use Active Directory (AD) or NetWare Directory Services (NDS) use groups to differentiate these names. For example, two employees are named JConrad. By placing them in separate groups, the network and your Channel see each as a unique individual. For example, the identifiers in the network and in your Channel would be JConrad.Sales.US (in the Sales group, within the US group) and JConrad.Marketing.US (in the Marketing group, within the US group). With Auto-Populate options turned on for the Channel, these groups are added automatically.

Organizational Groups


Use organizational groups to reflect the structure of your organization. These groups are generally populated manually, except on networks that have Active Directory (AD).

Networks that have Active Directory (AD) use groups to differentiate similar names. For example, two employees are named JConrad. By placing them in separate groups, the network and the Channel see each as a unique individual. The identifiers in the network and in the Channel would be JConrad.Sales.local (in the Sales group, within the local group) and JConrad.Marketing.local (in the Marketing group, within the local group). With auto-populate enabled on the Channel Properties Settings tab turned on for the Channel, these groups are added .

Package

Prism creates a Package when it compares two Prism files or a stored Prism file with your current environment. You can also create a Package with the Expert or build a customized Package.

The Package contains the files, registry keys, INI file lines, shortcuts, or text file sections that were added, changed, or deleted. Prism stores a Package as a Portable Windows Change (PWC) file.

In the Editor window and the dialog boxes that let you open or save a file, a Package has the  icon.

Package task

A Package type of task in a Prism Channel installs a Prism file that you created.


PFX file

A PFX file (Personal Information Exchange format) is a password-protected file that contains both an authentication certificate file plus its private key. The PFX file is used to digitally sign Prism files for security and authentication. Use the Editor to digitally sign Prism files.

A PFX file is an industry standard format. It can be created by using the Microsoft PVKIMPRT utility or other tools.

Picture

A Picture is a record of the files on your computer. Pictures can include any type of file, including directories, registry keys, INI file settings, shortcuts, executable files, and text files. Prism stores a Picture as a Portable Windows Format (PWF) file.

In the Editor window and the dialog boxes that let you open or save a file, a Picture has the  icon.

Portable Windows Information (PWI) File

The type of file Prism uses to save a Picture definition (customized Picture options).

Prism File

With Prism, you can create several types of files. The best selection will depend on the proximity of the target computers and the features offered by each type of file.

The file types include: Picture , Package , and Prism Self-Installing file .

PSID

The Prism Software Identification Database (PSID) is a database of software information, containing information on thousands of software applications. Asset Manager uses the information in this database to automatically identify license units, suites, and applications discovered on managed computers. This database is updated regularly by New Boundary Technologies for the benefit of maintained customers.

Task

Tasks in a Prism Channel are Prism files, scripts, and commands that you plan to execute or install on target computers. To distribute the software or update settings contained within a Task, assign the Task to one of the targets (User, computer, Container, or Group) by dragging and dropping or using the scheduling feature. Set the time for distribution and you are finished.

Tasks can be added at any time and scheduled for installation immediately or at a future time.

un-install file [Portable Windows Rollback (PWR)]

Prism creates an un-install file each time a Prism file is installed on a computer. Each computer gets a unique un-install file. Having a unique un-install file ensures that Prism only un-installs the registry settings, INI entries, files, and so on that were added or changed when the Prism file was initially installed to the computer.

User-defined Group

User-defined groups offer the greatest flexibility. User-defined groups let you identify one or more criteria for selecting members and offer a variety of methods of comparison.

For example, create a User-defined group to identify target computers running a specific operating system that do not have a specific service pack installed. After creating this group, set up a Task containing the service pack. Assign the Task to the new group created by your rule and install this missing service pack.

WMI (Windows Management Instrumentation)

Windows Management Instrumentation (WMI) is a set of specifications from Microsoft used for accessing and sharing management information over a network.

working directory

Some applications need access to files in a particular directory in order to execute and must be launched from the directory where these files reside. This directory is referred to as the working directory.

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