# Evaluator's Guide

## PC-Duo Enterprise

Introduction **2**

Getting Started **4**

Creating a New Site **5**

Tour of the Console **7**

Inventory **12**

Software Distribution **14**

Diagnostics **17**

HelpDesk **18**

Remote Control **21**

Distributed Architecture **24**

# Introduction

This guide is a concise, hands-on introduction to the PC-Duo Enterprise Desktop Management Suite and its key features. For more detailed information, refer to the Enterprise User Manuals, or contact us using the details supplied at end of this guide.

## Flexible Architecture

PC-Duo Enterprise uses a simple, powerful and scalable architecture. The Enterprise Console is the control point for interactive and scheduled PC management functions. To manage the PCs on your network from the Console, simply install the PC-Duo Enterprise Client software. Clients can be any mixture of networked, standalone and laptop PCs.

## Manage your Hardware Assets

Hardware Inventory functions enable you to monitor your organization's PC systems from DOS to Windows 2003. A wealth of accurate hardware configuration information is automatically available, and you can also remotely collect system information, such as environment variables and specified INI file settings.

## Collect User Information

Automate the collection of user information, such as location and telephone number, using the customizable user-prompting facility. Pick-lists and data validation controls simplify user entries and ensure reliability and consistency.

## Effective Software Inventory

Identify the software applications installed within your organization at the click of a button. The customizable Applications Library and discovery utilities enable you to identify and manage all the applications installed across your network.

## Manage Software Deployment

Package Policy Manager helps you control the deployment of software throughout your organization. By defining rules on where applications must be, can be and must not be installed, you can pro-actively manage your users' requirements. In addition, the Software Metering module enables you to identify where applications are actually being used - an invaluable resource for managing costs.

## Report Library

Enterprise includes over 50 pre-formatted reports that provide a wide range of Desktop Management information. Additionally, the Database Viewer gives you a customizable, immediate view of asset data. Save your Views in HTML format to make them available through your intranet.

## Reliable Software Distribution

The Enterprise Software Distribution module provides an easy-to-use, centralized method for installing applications and system updates. Working with standard installers, such as MSI and InstallShield, it can be used to manage and control the installation of third-party software with a minimum of preparation.

## Protect and Restore Applications

Enterprise Diagnostics protects and restores applications by taking snapshots of the applications installed on your networked PCs. You can repair applications interactively from the Console, and fix common problems automatically using Diagnostics self-healing - sometimes before users are aware of the problem!

Diagnostics also provides change analysis capabilities. By comparing application and PC settings against a baseline or at different points in time you can quickly identify and correct changes that caused a problem.

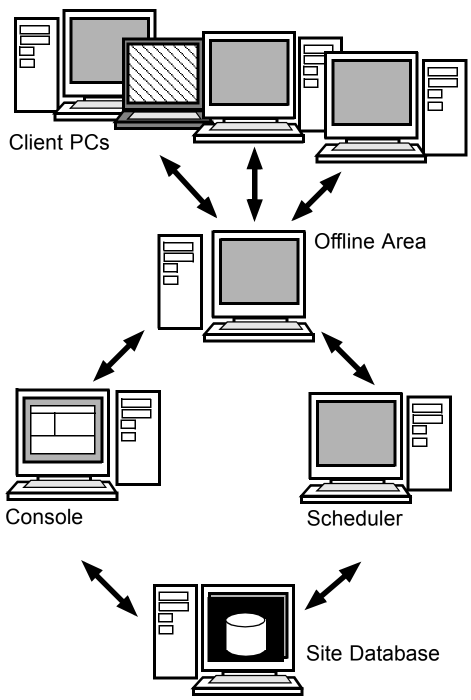
## Track and Manage Support Issues

HelpDesk is a Web-based system for tracking and managing support issues and calls. It features a fully-configurable workflow system that enables you to tailor the system to the way you work, and account-controlled access that enables you to manage the data available to different types of user. Integration with the Enterprise Inventory and Remote Control gives support staff direct access to users and their PCs.

# Enterprise Architecture

PC-Duo Enterprise gives you a real grasp of your organization's assets. Its flexible and scalable architecture enables Enterprise to support all PCs within your organization, even when they are not permanently connected to a network. In addition, the auditing facility enables you to support PCs that are never connected to a network.

Furthermore, because Enterprise uses Microsoft Windows Networking functions, as used by Windows Explorer, it provides maximum compatibility across networks.




# Overview of Components

PC-Duo Enterprise contains the following components.

## Clients

PCs are managed through the Enterprise Client application, which can be used with all Windows platforms. Each Client PC pushes raw data to an intermediate location, called the Offline Area, on a server share. You can automate the rollout of a large number of Client applications using the Distribute Client Software operation, or Logon Scripts. For the evaluation, the Client application is installed using a Client Kit configured at the Console.

## Offline Area

The Offline Area is a shared directory that can be located anywhere on your network. Client PCs store their raw inventory data in this area. From there, it can then be retrieved by Consoles and Schedulers and saved to the Site database. Consoles and Schedulers also use the Offline Area to transfer instructions, such as software distribution details, to PCs on the network. Multiple Offline Areas can be used to support larger or distributed Sites.

## Console

The Console provides the interface to your Site. It enables you to perform tasks (known as operations) on Clients interactively, or to schedule them as Jobs. It also enables you to access Client data through pre-formatted Reports, to control the Client PCs, and to perform Site maintenance tasks. You can create multiple Consoles to spread the work-load across network, and each Console can access multiple Site databases.

## Schedulers

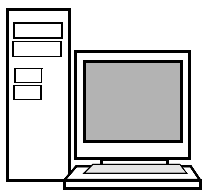
Schedulers automate the execution of operations. They enable you to run operations when network activity is low, and to schedule regular tasks, such as the collection of inventory data. A Scheduler can run as a conventional application, or as a service on Windows NT4, 2000, XP and 2003. To spread the inventory workload and minimize network traffic in segmented networks, Schedulers can be set up on any PC where the Console application is installed.

## Site Database

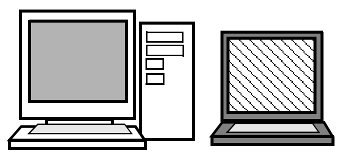
You can use a Microsoft Access, Microsoft SQL Server (version 7 SP3 or later), or Oracle (version 8.1.5 or later) for your Site database. Site databases are accessed from Consoles and Schedulers.

# Getting Started

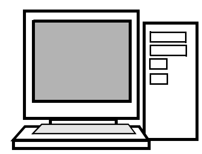
You can install and run PC-Duo Enterprise on one PC. However, to get the most out of your evaluation, we recommend the following set up for testing and demonstration purposes:



One PC running Windows NT4, 2000, XP or 2003 to host your Site database, Offline Area, Console and Client.



One or more networked Windows or Macintosh PCs on which to install additional Clients.



Another Windows PC, to host an additional Console and Scheduler.

## Installing from CD

To install the Console and Scheduler on a PC:

1. Insert the CD and wait for the Autorun program to appear. If the Autorun does not appear, start Autorun.exe from the root directory of the CD.
2. In the Autorun screen, select the Install MDAC Support option to install the latest Microsoft Data Access Component drivers onto your system. You can skip this step if you already have suitable drivers installed.
3. If you want to run the Console on Windows NT4, select the MMC option to install Microsoft Management Console 1.2.
4. Select the Install Console option to install the Enterprise Console application. The Console kit includes the Client components so you do not need to install the Client kit separately.

## Installing from a Web Download

Before installing PC-Duo Enterprise, make sure you have downloaded the necessary components:

- The MDAC Support kit (Skip this step if you are sure suitable drivers are already installed on your system.)
- The Microsoft Management Console (MMC) 1.2 from the Microsoft Web site (if you want to run the Console on a Windows NT4 system).
- The Enterprise Console kit.

When you have downloaded these items, perform the following steps:

1. Open the MDAC Support kit to install the drivers.
2. Install the MMC kit if necessary.
3. Open the Console kit to install the evaluation version of PC-Duo Enterprise.

# Creating a New Site

This section describes how to open the Enterprise Console and how to create a Site using the default settings in the Site Creation Wizard. It automatically creates a Site database using Microsoft Access format - you do not need to have Access installed.

## Using the Site Wizard

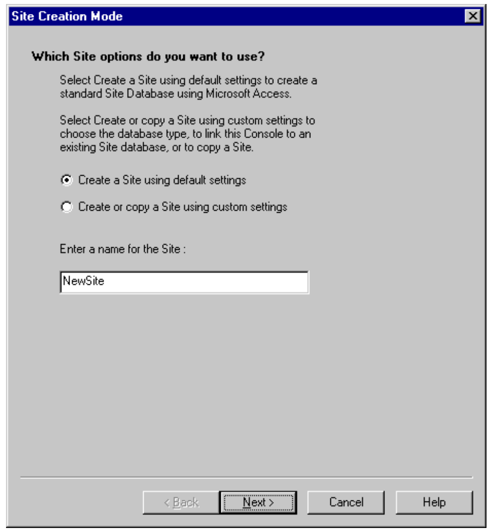
1 To start the Console, click the Windows Start button, then choose Programs, PC-Duo Enterprise, Enterprise Console.

Because you must create a Site database before you can store and work with the data from your PCs, the Site Creation Wizard starts automatically the first time you open the Console.


2 Read the information in the Wizard's Welcome dialog, then click the Next button to open the Site Creation Mode dialog.

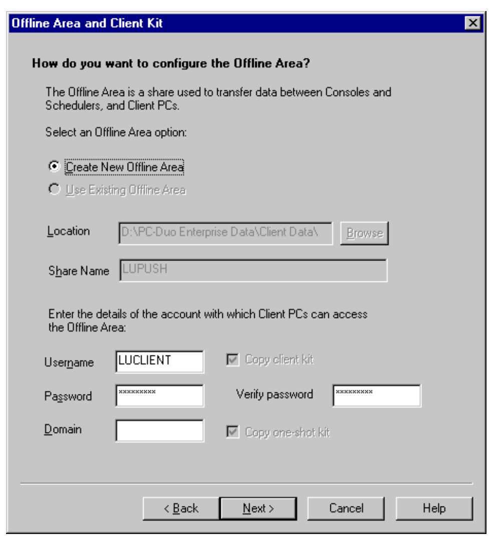
3 In the Site Creation Mode dialog, select the Create a default Site option.

*This option creates all the Site components needed to run PC-Duo Enterprise: a new Microsoft Access database, an Offline Area to which Clients push their data and a configured Client Kit for you to distribute to PCs.*




4 In the Enter a name for the Site database field, type a name for your Site. This name is also used as the Data Source Name (DSN) of the database.

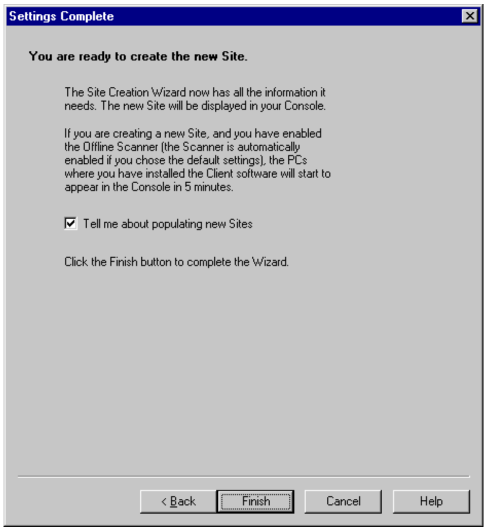
5 Click the Next button to display the Offline Area and Client Kit dialog.




This dialog shows where the Offline Area will be located. Default settings are used because the Site will be generated automatically.

6 If the PC on which you are creating the Site belongs to a Windows Domain, enter its Domain name.

7 Click the Next button to display the Settings Complete dialog.




8 In the Settings Complete dialog, make sure the Tell me about populating new Site check box is selected, then click the Finish button to create the Site database.

9 When the Site name is displayed in the Console's Tree View, double-click the Site to open it. The components of the Site are listed in the Tree View. Click a folder to display its contents in the Console's right-hand pane.

# Installing Clients

When you have created a Site, you must install the Client application on each PC that you want to manage. For this, you need to use the Client Kit that was configured as part of the Site creation.

*You must use a Privileged NT account to install the Client application on Windows NT, 2000, XP or 2003 systems.*

On each PC you want to manage from your Site:

1 Use Windows Explorer to locate the configured Client Kit. By default, the Site Creation Wizard saves it in the \Kit directory of the Console PC's Offline Area (in Windows Explorer, this appears as *ConsolePC*\LUPUSH\Kit).

2 In the Kit directory, double-click INSTALL.EXE to install the Client application.

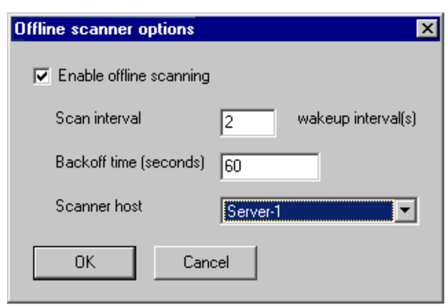
When the Client application is installed and initialized, the PC's hardware and software inventory data is automatically saved to the Site's Offline Area.

# Populating Your Site with Clients

Enterprise detects PCs on which the Client application is running using the Offline Scanner. If you create a new Site using the default settings, the Offline Scanner starts automatically and monitors the Offline Area. When it detects data from a new Client, the scanner adds the Client to the Site database.

To display the new Clients, select All Clients in the Console's Clients folder.

*It can take up to 2 minutes for the Offline Scanner to detect new Clients. If you want to speed up the scanner, click Offline Scanner Options in the Console's Site Management folder, and change the Scan interval value to 1. Click the OK button to save your changes and close the dialog.*




Leave the Console and Offline Scanner running until all your Clients have been detected and displayed in the All Clients View.

*If you have installed the evaluation version of Enterprise, the Offline Scanner can collect data from up to five Clients.*

# Tour of the Console

**Operations**

Contains the management tasks you can perform. Select a folder to display the associated operations.

**Sites**

Each Site contains its own Clients, Groups, Operations, Jobs and Reports.

**Console View**

Lists the contents of the selected folder. For example, to view all the Clients in the Site, select All Clients in the Clients Folder.

**Jobs and Schedulers**

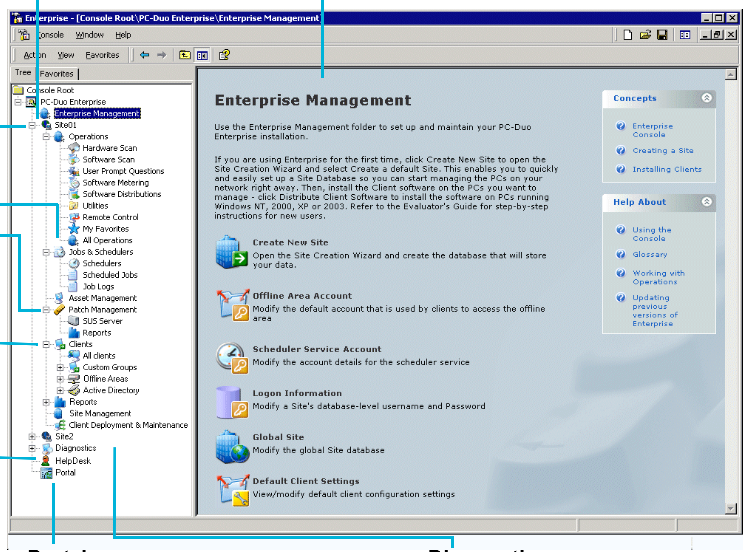
Lists scheduled operations, and the Schedulers that are available to manage them.

**Patch Management**

Automates and monitors the deployment of critical Windows updates.

**Clients**

Lists the PCs managed from Enterprise. PCs are automatically grouped by the properties, such as Active Directory.




**HelpDesk**

Lists and manages help desk issues and support calls.

**Portal**

Makes Enterprise data available to authorized users across the Internet using interactive, reports.

**Diagnostics**

Identifies the causes of software problems, and protects and restores critical applications.

## Viewing Clients

The Client PCs managed by a Site are listed in the Clients folder of the Console Tree. It contains the following sections:

**All Clients** lists all the Clients in your Site. All Clients are automatically added to this folder, so is a good place to check that new Clients have been added to your Site.

**Custom Groups** contains collections of Clients that have similar characteristics, such as PCs that use a specific Bus type, or where a particular operating system is installed.

**Offline Areas** lists the Offline Area assigned to your Site and the Clients they contain.

**Active Directory** If you have installed Active Directory on your network, Enterprise automatically creates a group for each Organizational Unit containing Client PCs.

To view the Clients in a group, select the folder in the Clients Tree.

## Using Groups

Groups enable you to organize and work with PCs that have similar characteristics. You can use them to identify PCs with related properties, and to select multiple PCs whenever you perform an Operation. Enterprise automatically adds a selection of useful groups to the Custom Groups section when you create a Site. However, because no two organizations are the same, Enterprise enables you to create groups for your own use.

To create a new group, right-click the Console's Custom Groups folder, and choose Add Group from the shortcut menu.

To customize a pre-defined group for your own use, right-click the group's entry, and choose Modify Group.

Refer to the online help for information on creating groups.

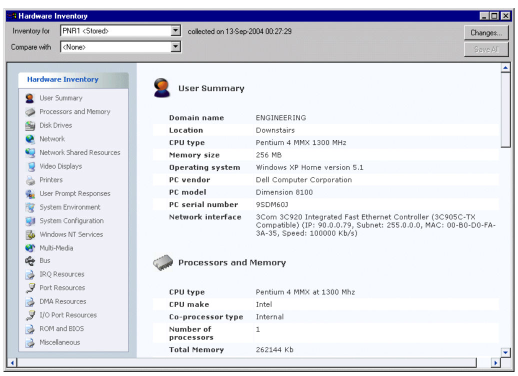
# Viewing Inventory Data

One of the most important aspects of Enterprise is its ability to provide direct, centralized access to detailed information about the PCs within an organization. This section looks at the various types of asset information you can access from the Console.

## Viewing Hardware Details

1 In the Clients folder, select All Clients to list the Clients at your Site.

2 Right-click a Client, and choose Hardware Details from the shortcut menu. The Hardware Inventory window displays an instant survey of the Client information stored in the Site database.




3 The data is divided into sections. Click a section in the Hardware Inventory list on the left of the window to display its data.

4 Select another Client in the Compare with list. Differences between the Clients are indicated by the difference icon.

5 Click to close the dialog.

## Viewing Software Details

Software inventory data is shown in the Software Identification Manager. To display the software found on a Client:

1 Right-click the Client and choose Software Details from the shortcut menu.

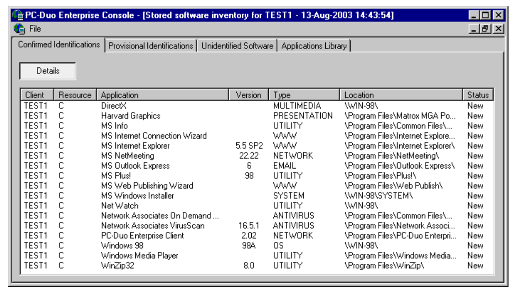
The details are shown in three sections:

**Confirmed Identifications** lists applications identified by application definitions in the Enterprise Applications Library.

**Provisional Identifications** lists applications identified using version information extracted from each application's executable files.

**Unidentified Software** lists the directories that contain executable files which Enterprise is unable to identify.

*The Applications Library tab enables you to view the rules that Enterprise uses to confirm software identifications.*




2 Select the Details button to show information about individual installations. Deselect the Details button to show the information for each application. When you have finished viewing the Software Details, close the window.

## Viewing Client Properties

In addition to gathering information on the software and hardware of Client PCs, Enterprise can also collect and store user information for each Client. User Prompts enable you to define questions to collect information from PC users, or to collect data directly from system files on the PC.

To view the properties currently held for a Client, right-click its entry in the Console, and choose Properties.

# Package Policy Manager

Package Policy Manager enables you to plan and monitor the software installed on PCs so you can control the rollout of applications to your organization's users. Use it to manage software requirements across the network, to control your organization's spending by monitoring license usage, and to identify the use of prohibited or illegal software.

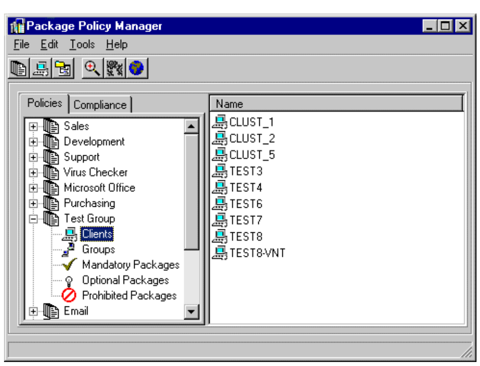
For example, if everyone in your Accounts department uses Microsoft Excel 2000, you can create a Package Policy that associates the department and the application. The Package Policy Manager can then compare the policy with actual installations to identify where Excel is correctly installed, and, more importantly, to identify the PCs where it is not installed, or where the wrong version is installed.

## Creating a Package Policy

1. In the Asset Management folder, click the Specify Package Policies operation to open the Package Policy Manager.
2. Right-click the Tree View and choose Add Policy from the shortcut menu to display the Package Policy Details dialog.
3. In the Name field, type a name for the new policy and click the OK button.

## Adding Clients to a Policy

1. In the Tree View, expand the package policy you just created.
2. Right-click Clients and choose Add Client from the shortcut menu to display the Add Clients dialog.
3. In the Add Clients dialog, select the Clients you want to add to the policy.
4. Click the OK button to add your selections to the policy and close the dialog.




## Adding Packages to a Policy

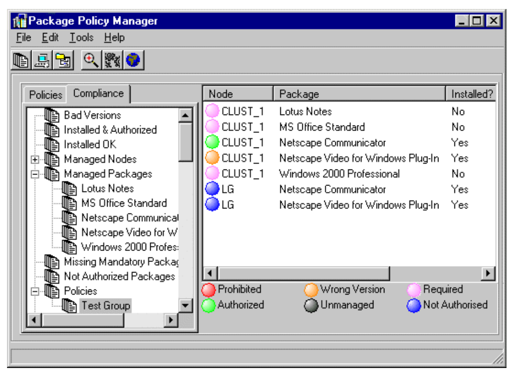
1. In the Policies tree, select Mandatory Packages, Optional Packages, or Prohibited Packages to add a software package to that category.

   The List View displays the packages that are currently assigned to the option.
2. Choose the Edit, Add Package command to open the Add Packages dialog.
3. In the Add Packages dialog, select the package you want to add to the option, then click the OK button.

## Analyzing your Software Assets

When you have created package policies, you can use the Package Policy Manager to check how well the PCs in your organization conform to your policies:

1. In the Package Policy Manager, choose the Tools, Run Analysis menu command.
2. Select the Compliance tab. This contains the categories that identify the compliance status of software on your network.




3. Click the report you want to view. The results of the analysis are displayed on the right of the window.

# Software Metering

While Package Policy Manager helps you regulate the software installed on your network, Software Metering enables you to monitor where software is being used, who is using it and the length of time each application is used for. You can then use Enterprise's pre-defined reports to identify and predict software usage requirements across your organization.

*This data is not normally available until the day after you commence software metering because, by default, Enterprise analyzes the metering data once per day at midnight.*

## Viewing Software Usage Data

1. Select Software Metering in the Console's Operations folder.
2. Double-click the Software Total Users by Day Report.

*Software metering also enables the Package Policy Manager to generate the Unused Mandatory Applications report.*

# Database Views

The Database Viewer provides customizable views of the Site database. It gives you access to any software, hardware and user data held in the database, enables you to create and print custom Reports on your inventory and asset data and enables you to make your data available in HTML format.

## Running Database Views

1. Select the Console's Reports folder and open one of the subfolders. These contain a selection of pre-defined Database Views and Reports .
2. Click a Database View. The View shows fields of information for the selected Clients.
3. Click Details at the bottom of the Database Viewer.

   The Details section contains the SQL (Structured Query Language) definition for this View. If you are familiar with SQL, you can modify this query to customize the information displayed in the Viewer. Alternatively, you can use the SQL Wizard to create the SQL using the natural language interface.
4. When you have finished, close the Database Viewer.

# Reporting

Enterprise is supplied with over 50 pre-formatted Reports, covering such areas as Client Properties, Hardware Inventory details, Software Inventory information, and Software and Hardware Change History. Reports can be previewed from the Console, and printed and exported in various formats.

## Previewing Reports

1. In the Console's Reports folder, select Current Data Reports, and select a report type.
2. Click a Report in the Reports View.
3. In the Select Clients dialog, select the Clients for which you want to create a report. The Report is displayed.
4. If you want to print the Report, click the Printer button in the window's Toolbar. To see more of the Enterprise Reporting facilities, repeat this procedure for different Client selections and Reports.

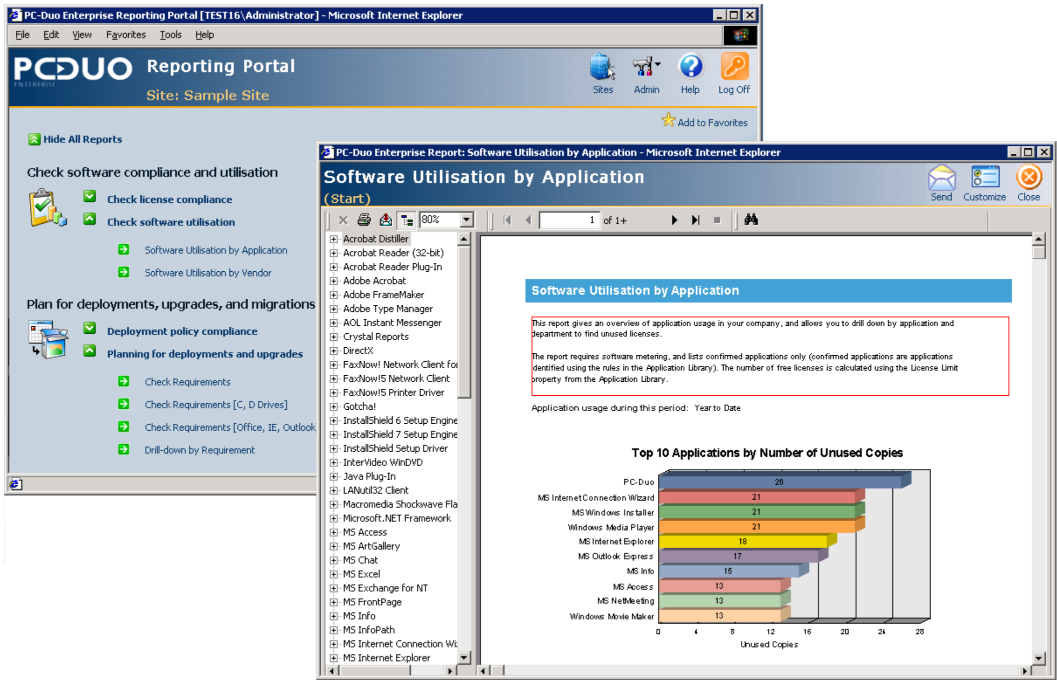
# The Enterprise Portal

The Enterprise Portal provides organization-wide, click-through reporting for PC-Duo Enterprise. Each report in the Portal automatically extracts data from a selected Site and provides analysis capabilities for asset managers. Reports are divided into themes, which concentrate on specific aspects of IT asset management.

## Installing from CD

You can evaluate Enterprise Portal from the PC on which the Enterprise Console is installed. Other users can access the Portal using Internet Explorer. To install Enterprise Portal:

1. Make sure IIS (Internet Information Services) is installed on the PC you want to use to host the Portal. (To install IIS click Add/Remove in the Windows Control Panel, and select Add/Remove Windows Components.)




2 Insert the CD and wait for Autorun to appear. If Autorun does not appear, start AUTORUN.EXE from the root directory of the CD.

3 In the Autorun screen, select Install Portal and follow the prompts.

4 When the installation is complete, the Portal Site Wizard is displayed so you can choose which Enterprise Sites to make available to Portal users. Select the Sample Site to view the Portal reports using test data.

5 To access the Portal from the Console, open the Portal folder and enter the following URL in the address field:

   //*servername*/pcdeportal/logon.asp

   where *servername* is nodename of the PC on which the Portal is installed.

When you first access the Portal, it asks permission to install the PC-Duo Enterprise Report Navigator, which displays the available reports in your browser. Click the Yes button to continue. Afterwards, you can link to the Portal from the Console or through its logon page as long as you have the correct access permissions.

*To allow other users to access the Portal logon page directly through their browsers, add their names to the PCDEPortalUsers group created by the installer.*

## Viewing Portal Reports

Portal reports are organized hierarchically. This enables you to view a summary of all your data, to drill-down and view details by individual PC, and to view data graphically.

To open a report, click the button in the section you want to work with, and select the report title.

To view the details of a report, double-click a section heading (marked by the expand icon in the section list).

To view the details of a specific section in a report, click the Group Tree button in the toolbar, and select the section in the Report Tree. To return to a previously viewed section of the report, select its entry in the bread crumb trail shown below the report title.

# Inventory

PC-Duo Enterprise provides a comprehensive range of PC management facilities. You can obtain up-to-date information on your PCs at any time using the inventory operations.

## Hardware Inventory

Two variants of the Update Hardware Inventory operation are supplied in the standard Enterprise installation. Both are used to collect Client data from the Offline Area:

**Update Hardware Inventory Interactively** presents the results in the Hardware Inventory window so that you can view the results before deciding whether to save the results to the Site database.

**Update Hardware Inventory** saves the Client data to the database without first displaying the results.

### Customizing Operations

Like other Enterprise operations, you can create variants of the hardware inventory operations and then optimize them to suit your requirements by right-clicking the operation icon and choosing Customize.

### Running Hardware Operations

1. In the Console's Hardware Scan folder, click Update Hardware Inventory Interactively.
2. In the Select Clients dialog, select the Clients for which you want to collect inventory data and click the OK button. Enterprise collects the data from the Offline Area.

   The data is displayed in the Hardware Inventory window. Select a Client in the window's Inventory for list to display its inventory data. Select an entry in Hardware Inventory list to view the details for that section.
3. Click the Save All button to save the information to the database, then close the dialog.

## User Prompting

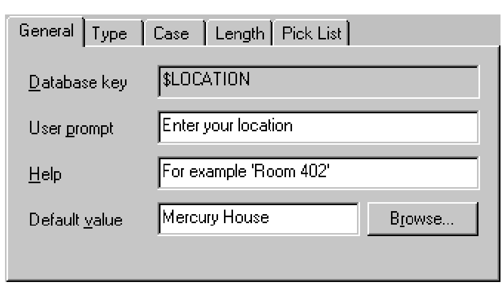
The Get User Data operation distributes prompt files, which enable you to request information from users and their PCs. This section describes how to configure the operation to distribute a customized prompt file.

### Creating a New User Prompt

1. In the Operations folder, select User Prompt Questions. Right-click the Get User Data operation and choose Customize.
2. In the Customize dialog, select the Hardware tab.

*The Get User Data operation is a variant of the Update Hardware Inventory operation with only the User Prompting options enabled.*

3. Click the Edit button to open the User Prompt Editor and display the file. The Editor enables you to create and modify user prompt files.
4. Edit the Introduction field to customize the standard introductory message that is displayed to users.
5. In the Editor, click the Add button to enter a new database key. The new key is displayed in the Database keys list.
6. Select the General tab, and enter the question that you want to display to users in the User prompt field.




7. Use the Type, Case and Length tabs to restrict user replies to specific formats and improve the consistency of the data entered. For example, you can convert replies into uppercase text, or limit the length of user input.

Alternatively, use the Pick List tab to create your own list of pre-defined answers from which users can choose.

8 If you want to collect environment variables, network settings and INI file settings, click the Browse button.

9 When you have created your user prompt, click the Apply button. Save the file under a new name, by choosing Save As in the File menu.

10 Close the User Prompt Editor to return to the Customize dialog.

### Distributing User Prompts

1 In the User Prompt Refresh Customize dialog, click the Browse button, then select the prompt file you saved.

2 Click the Reload button to embed the revised questions in the operation.

3 Click the OK button to save the new operation.

4 Click the Get User Data operation, select a Client in the Select Clients dialog and click the OK button.

The new questions are distributed to the Client through the Offline Area. The user is prompted with the questions when the Client is next scheduled to check the Offline Area, or at the next PC reboot.

5 To force the Client PC to display the prompts immediately, click Start in its Windows Taskbar, then select Programs, PC-Duo Enterprise Client and select Enterprise Client Startup. Your questions are included in the user prompts. Answer the questions.

6 In the Console, click the Update Hardware Inventory Interactively operation. The new information is displayed in the User Prompt Responses section of the Hardware Inventory window.

7 Click the Save All button to save the results in the database.

8 To display the Client data, right-click the Client and choose Properties.

## Software Inventory

Software inventory operations collect information on the applications installed on Client PCs. Using a customizable, regularly-updated Applications Library, and proprietary discovery technologies, they can automatically recognize many commonly-used applications. The stored inventory data can then be used to manage your system assets, to produce inventory reports, and to plan software installations and upgrades.

When a software inventory operation detects files on a Client PC, Enterprise attempts to identify the applications they belong to by first comparing them with the definitions in the Applications Library, and then by searching for version information encoded in the file properties. If Enterprise is unable to identify files using either of these methods, it lists the file locations in the Unidentified Software tab of the Software Identification Manager.

### Performing Software Scans

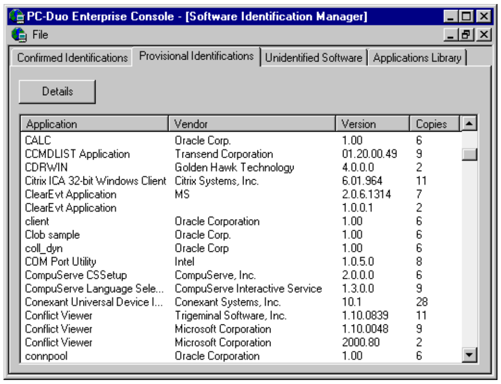
1 Click the Update Software Inventory Interactively operation. This enables you to view the inventory data before saving it to your Site database.

2 In the Select Clients dialog, select the Clients you want to scan and click OK.

The Console collects and analyzes the Client data from the Offline Area, and displays the results in the Confirmed Identifications, Provisional Identifications and Unidentified Software tabs of the Software Identification Manager. Each tab can display the information in two ways:

Select the Details button to show whether the installation has changed since the Client's previous software inventory, and to display the directory location in which each instance of each application was detected.

Deselect the Details button to summarize the results by the applications detected.




**3** Choose Save Results in the File menu to save the results to the Site database.

You can customize software inventory operations to choose which applications are identified and reported by Enterprise and which Client locations are searched for inventory data. For more information on configuring operations to your requirements, see Customizing Software Inventory operations in the Enterprise User Manual.

*To promote provisionally identified or unidentified software to the Confirmed Identifications list, right-click an entry in the Details view and choose Create Identification Rules to open the Software Identification Wizard. Using simple steps, this guides you through the process of creating rules to customize and extend the Application Library for your organization.*

# Software Distribution

Software Distribution enables you to remotely install and update software packages on PCs across your organization's networks. Distributing software is performed in the following stages:

- Prepare a package installation kit on a network server using the instructions supplied with the software.
- Configure the Package Distribution Definitions using the Package Definition Editor.
- Use the Software Distribution Wizard to select the package you want to distribute, to specify its installation method, and to deliver the information to each Client's Offline Area.

The Client's Software Distribution Agent installs the application the next time the Client checks the Offline Area, or when the PC is next rebooted. You can monitor the progress of distribution operations using the Software Distribution Jobs Viewer, or the centralized error and progress logs.

The next sections take a closer look at some of these stages. For a comprehensive guide to Software Distribution, refer to the User Manual.

## Specifying How Packages are Installed

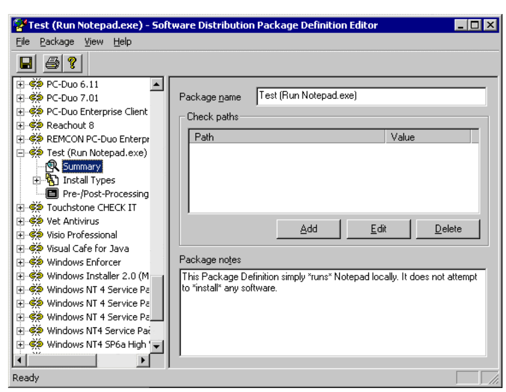
The Package Definition Editor enables you to create and edit Package Definitions, which contain details about how each application must be installed.

**1** In the Software Distributions folder, click the Edit Distribution Definitions operation to start the editor.

The Package Definition Editor lists the currently available Package Definitions in its Tree View. Enterprise is supplied with Package Definitions for a wide range of applications.

**2** To view the details of a Package Definition, click its plus symbol.

**3** Select the Summary section in the expanded definition. The editor displays the name of the package, any notes, and the check paths.



*Check paths are the locations of files supplied with a package, such as the EXE file. They are tested before installing an application and, if any of the specified files are present, Enterprise assumes the package is already installed and does not attempt to reinstall it. They are also tested after the installation to check whether it has been successful.*

You can enter the file size in bytes for any Check paths. If the specified file is found, but has a different size, such as when you are updating a package, the installation will still proceed.

4 Expand the Package's Install Types section and select an Install Type.

*Many packages offer different types of installation to support different operating systems or optional components. You can create a different install type for each combination of installation commands and command switches, and group them in a single definition.*

5 Select the Package's Pre-/Post-Processing section. This specifies any commands that must be executed before and after the package is installed.

6 To conclude this look at the Package Definition Editor, scroll down the list and locate the Test (Run Notepad.exe) Package Definition.

7 Expand the Test (Run Notepad.exe) information. Notice the Install command for this Package is set to run Notepad on the local Client PC.

*For a typical Package Definition, the Install command points to the installation kit's SETUP.EXE, located on a suitable file server.*

8 Close the Package Definition Editor.

## Performing a Distribution

1 In the Console, click the Distribute Software operation. The Select Clients dialog is displayed.

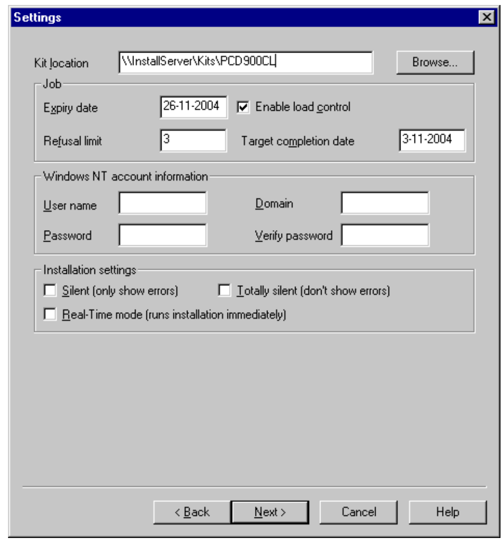
2 Select the Clients to which you want to distribute the software and click OK. The Select Package dialog is displayed.

3 The Select Package dialog enables you to select the Package Definition you want use to distribute the software. Select Test (Run Notepad.exe) from the list.

4 Click Next to open the Client Filter dialog.

This dialog filters out Clients from the distribution. The filters are based on the Platforms supported and a free disk space check. For this demonstration, do not make any changes.

5 Click Next to display the Settings dialog.




The Settings dialog is used to confirm the location of the application's Installation kit, and to specify the last date on which the system will attempt to install the application.

*The Kit location is specified as a UNC (Universal Naming Convention) path, including any account information needed to access the kit location and to install the software. Use the Windows NT account information section to provide these details. You must specify a valid Admin-level account if the Package requires a privileged installation.*

6 For this demonstration, leave the Kit location empty, and enter today's date in the Expiry date field.

7 The Refusal limit field controls the maximum number of times that PC users can refuse an installation when prompted. Type 0.

8 The options in the Installation settings section enable you to choose how the package will be installed. Select Real-Time mode to start the installation as soon as possible, and click Next to display the Monitoring and Logging dialog.

9 Make sure the Monitor distribution feedback for this job check box is selected, and enter a Job name. This name identifies the activities associated with the operation.

10 If you want to record the progress of the installation and any errors encountered during the distribution in separate log files, use the Browse buttons to specify the name and location of the files.

11 Click the Finish button to complete the Software Distribution Wizard.

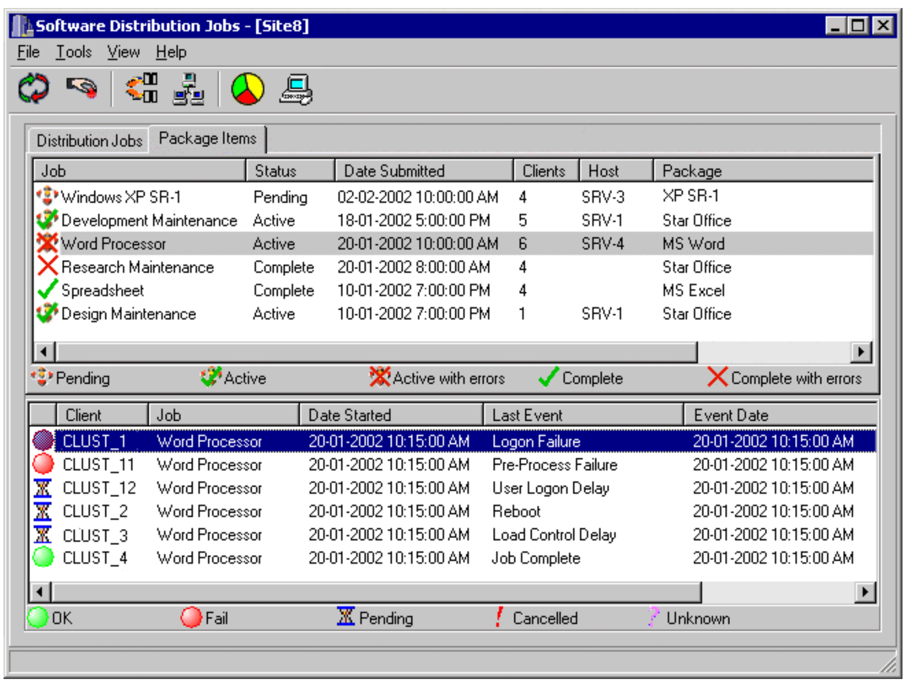
*You can customize the Distribute Software operation to set default values for kit locations, expiry dates, account details and log file locations.*

## The Software Distribution Agent

After completing the Wizard, the distribution information is transferred to the specified Client PCs using the Offline Area.

Each Client's Software Distribution Agent collects the information from the Offline Area the next time the Client is scheduled to check the Offline Area, or at the next PC reboot. The Agent then connects to the installation kit and runs the specified command.

To monitor the progress of the software installation, click the Monitor Software Distribution operation in the Console to open the Software Distribution Jobs Viewer.




## Simulating an Installation on the Client

To avoid waiting or rebooting, you can force the installation to start immediately by restarting the Distribution Agent.

**To restart the Agent on Windows 95, 98 or Me systems:** click Start, Programs, and select PC-Duo Enterprise Client Startup in the PC-Duo Enterprise Client group.

**To restart the Agent on Windows NT, 2000, XP or 2003 systems:** open the Services and restart the Enterprise Distribution Agent.

The Software Agent uses the local PC's path and runs Notepad.exe as the installation command (as specified in the Package Definition). When the Notepad window appears, close it.

# Diagnostics

Enterprise Diagnostics enables you to protect and restore applications by taking automatic and scheduled snapshots of the applications installed on your networked PCs. These can be any applications from small utilities to business critical applications with no limit on the number of protected applications.

Enterprise Diagnostics also provides change analysis capabilities to help determine root causes. By comparing application and PC settings against a baseline or at different points in time, you can quickly identify and correct changes that caused a problem.

## Diagnostics Architecture

Enterprise Diagnostics contains the following components.

### Diagnostics Agents

Agents are installed on each PC on the Network and are tasked with the gathering of audit data and the creation of Snapshots as and when requested by the Console.

### SupportSite

The SupportSite is a shared directory that manages communication between Consoles and Agents, and contains audit reports, profiles, installation kits, license information and configuration settings.

### Console

The Diagnostics folder in the Console is used to create profiles, to audit applications and to protect, diagnose and fix applications.

## Installing from CD

You can evaluate Diagnostics from the PC on which the Enterprise Console is installed. This PC will host the SupportSite and a local Agent. To install Enterprise Diagnostics:

1. Insert the CD and wait for Autorun to appear. If Autorun does not appear, start AUTORUN.EXE from the root directory of the CD.
2. In the Autorun screen, select Install Diagnostics and follow the prompts.

   Select Complete as the Setup Type, and enter a username and password for an account that has access to the share. The share is created with everyone – full control.

## Diagnosing Applications

Before you can diagnose an application, you must first create a Profile. It specifies the files, registry keys, and other components required by the application. Diagnostics includes tools to automate the creation of Profiles, and sample Profiles are available in the Diagnostics Profiles folder. See the online help for information about Profiles.

When you have generated a Profile, you can audit and protect the application:

**Audit** generates a baseline of the working application from the PC where it is installed. This produces a detailed view of how the application is currently installed. If the application subsequently fails, this data enables you to make a comparison between the working state and the broken state, and to identify possible problems.

**Protect** produces an audit report, and creates a backup of the files used by the application. When a fault is detected, Diagnostics uses this to offer potential fixes, enabling you to repair the application quickly and easily. Protected applications can also be self-healed using repair jobs. Repair jobs are scheduled audits that automatically fix any problems they detect.

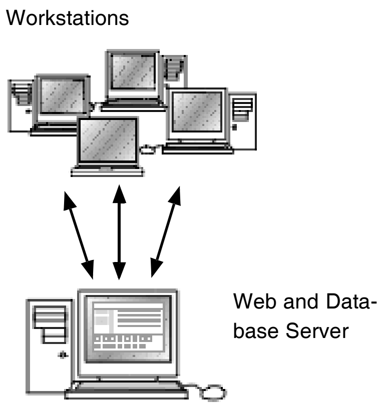
You can audit and protect applications by right-clicking on any PC in the Entire Network folder and choosing Audit or Protect. You can select any PC where the Diagnostics Client software is installed, or select groups of PCs by opening a Site in the Sites folder.

# HelpDesk

Enterprise HelpDesk is a Web-based system for centrally tracking and managing help desk issues and calls. Because Enterprise Help-Desk is Web-based, you have access to issues from any browser, anywhere, any time from either an Access or SQL database. And since it's on the Web, deployment costs are minimized - there is nothing to install on supported PCs.

Although Enterprise HelpDesk is Web-based, it works like a Windows application, not like a set of static HTML pages. It uses pop-up dialogs for tasks like generating reports and attaching files to records. When you run a query, view a record, or submit a new issue, Enterprise HelpDesk dynamically updates its interface.

## HelpDesk Architecture




Enterprise HelpDesk contains the following components.

### HelpDesk Web

HelpDesk Web is a Web-based application that users run to enter issues, query the data-base, and generate reports. Each Web view is an instance of HelpDesk Web. Web views are generated using the Web View Editor.

### HelpDesk Web Server

HelpDesk Web Server is the Web server component of HelpDesk Web and should be installed on a Web server (a PC running Internet Information Services). The HelpDesk Web Server installation includes a Microsoft Windows service (Mq Issue Agent) that generates and sends e-mail notifications.

### HelpDesk Admin

HelpDesk information can be stored in one central database, known as a project, or distributed across multiple databases for different application areas or business units within your organization. Projects have common user accounts, group privileges and administration utilities, but they help you separate discrete domains of information. This enables you to optimize your system to suit the way you work.

HelpDesk Admin is a Microsoft Windows application for administering Enterprise Help-Desk projects.

### Web View Editor

Web View Editor is a Microsoft Windows application that enables you to create Web Views for your Enterprise HelpDesk projects. Web Views are HTML/ASP pages that provide access to Enterprise HelpDesk projects through a Web browser.

### HelpDesk Web Admin

HelpDesk Web Admin is a Web-based admin-istration tool. It allows you to perform addi-tional administrative tasks over the Web.

## Installing from CD

You can evaluate HelpDesk from the PC on which the Enterprise Console is installed. This PC will host the HelpDesk installation. Other users will be able to access the Help-Desk from Internet browsers.

IIS (Internet Information Services) must be installed to run HelpDesk. To install IIS click Add/Remove in the Windows Control Panel, and select Add/Remove Windows Compo-nents.

To install Enterprise HelpDesk:

1. Insert the CD and wait for Autorun to appear. If Autorun does not appear, start AUTORUN.EXE from the root directory of the CD.
2. In the Autorun screen, select Install HelpDesk and follow the prompts. Select Complete as the Setup Type.
3. Enter a username and password in the HelpDesk Notification Service dialog. This Service sends e-mail notifications when a change is made to any monitored field in the HelpDesk. Evaluation license keys for Access and SQL are available from README.HTM.

# Using HelpDesk

The HelpDesk installation includes several default accounts that provide different levels of access to its features. You can log on with any of the following accounts:

**admin** has full administrative privileges and a password of *admin*.

**demo** has full administrative privileges and no password.

**guest** has limited privileges.

**analyst, group leader, employee** are role-based accounts with different user permissions. They are used to demonstrate the workflow features of Enterprise HelpDesk. They have no password.

To log on to Enterprise HelpDesk:

1. Start your Web browser and open the Web view logon page (typically http://server/helpdesk, where **server** is the name of your Web server).
2. In the Logon Name field, type the user name and password you want to use.
3. Click Logon. HelpDesk lists the Web views that your account has permission to open.
4. Click a Project / View to open the Web view.

## Finding and Listing Issues

Use the Query, Sort, and Layout lists to generate and format lists of issues in the Summary List. A layout is the set of columns displayed in the Summary List. The Summary List displays the results of a query as pages. The number of results can be defined by the HelpDesk administrator.

## Building Ad-hoc Queries

The Ad-hoc Query Editor enables you to build queries that test the value of a single field. Predefined queries can find broad categories of issues, such as all open issues or all assigned issues. You can also search for issues submitted during a specific period, or keywords in the various issue fields.

To define an ad-hoc query:

1. Logon to HelpDesk using the Admin or Demo account, and click the Show button on the Toolbar.

*Access to the Ad-hoc Query Editor is controlled by the privileges associated with the log on account.*

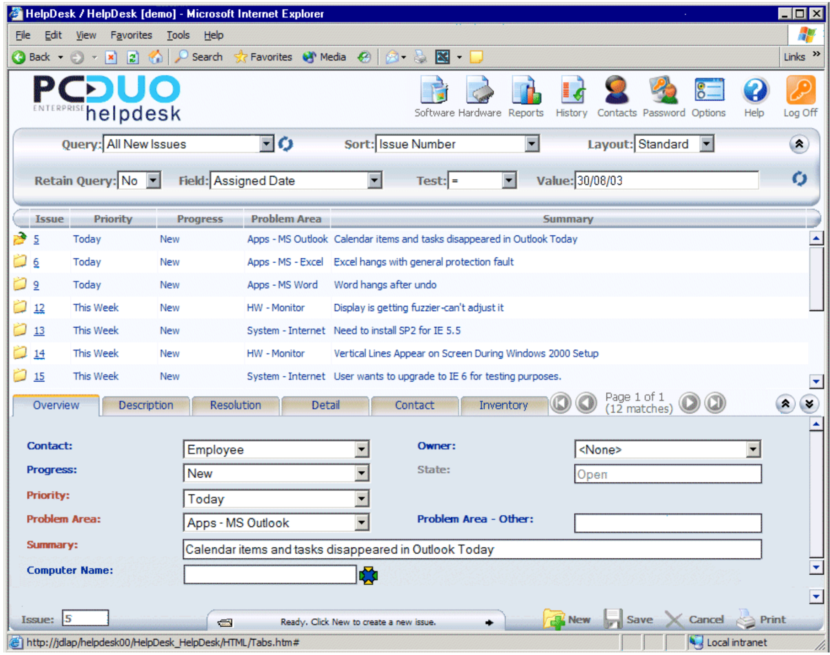
2. In the Field list, click the issue field you want to search.
3. In the Test list, click a query operator, enter the value you want to search against in the Value field and press Enter. Alternatively, choose a search value from the Value list.

## HelpDesk Web Views

With HelpDesk Web views, you can provide separate views for employees and for help desk staff. Each view is accessed through the same Web-based interface. The main difference between views is the set of queries and fields available in the view:

**Queries** determine what issues users can retrieve from the project database. This enables you to restrict employee access to issues they submitted, while allowing support staff to access to all issues in the database.

**Fields** determine what information users can view and modify in each issue. Fields can be used to prevent employees from seeing the fields used to track and resolve issues.




## Default Views

The HelpDesk contains two default views:

**HelpDesk** Displays all issues and issue information. Intended for use by support staff, the HelpDesk view defines the issue lifecycle and enforces workflow rules.

**Employee** Displays only the issues and information submitted by employees. It enables employees to submit new issues and check the progress of existing issues, but prevents them from viewing notes and information added by the support staff.

## Issue Tracking

Organizations normally have a well-defined process for handling calls. In Enterprise HelpDesk, this process is implemented as a workflow. Each step in the process corresponds to a possible value of the Progress field. For example, the steps for resolving a simple problem might be New, Assigned, In Progress, and finally, Resolved.

To move an issue to the next step in the process, users change the value of the Progress field.

Log on as employee and create a new issue. Try logging on as different users and follow your issue through the workflow by changing the Progress field. For more information on flow charts, refer to the manual or the online help.

## Accessing Inventory Information

HelpDesk now provides direct access to the detailed software and hardware information held in the PC-Duo Enterprise Site database. This simplifies the process of logging new support issues and enables support staff to understand and identify problems quickly so speeding up issue resolution. To access the data, enter the PC name in the HelpDesk Web view.

## Remote Access to PCs

HelpDesk Web views are fully integrated with PC-Duo Enterprise Remote Control. If you have also purchased the Remote Control module, you can use its ActiveX component to provide support staff with immediate access to any PC where there is a support issue. To access a PC, enter the Computer name and click the Remote Control button.

# Remote Control

PC-Duo Remote Control expands Enterprise to include online, interactive support for PC users. Using Graphical Driver Interface intercept technology to capture screen updates, PC-Duo enables support staff to view and control any PC at any location across a LAN, WAN or the Internet while minimizing network usage and giving high real-time performance.

PC-Duo Remote Control has two main components:

The Control application, featuring an intuitive, folder-based interface that enables users to organize supported PCs in the way that best suits them.

The Client application, a background task which enables Controls to access the PC and Client users to communicate with Controls.

## Installing from CD

1 Insert the CD and wait for Autorun to appear. If Autorun does not appear, start AUTORUN.EXE from the root directory of the CD.

2 In the Autorun screen, select Install Remote Control and follow the prompts.

3 In the Setup Type dialog, select:

   **Client** to install the Client application, so the PC can be controlled from a Control PC.

   **Control** to install the Control software, so this PC can display and control other PCs.

   **Custom** to install both the Client and Control application and to specify the components to be installed.

4 Follow the prompts and select the default options to complete the installation. Your system is automatically configured to use a TCP/IP connection.

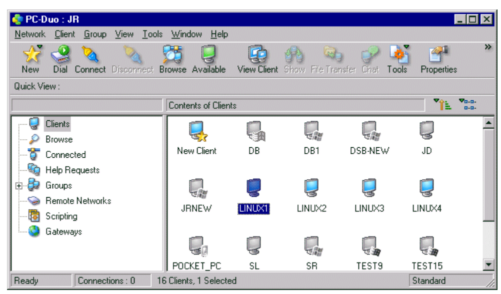
## Viewing Clients

PC-Duo Remote Control provides powerful, easy-to-use access to multiple PCs enabling support staff to view and diagnose problems remotely. As well as viewing multiple Clients simultaneously, Remote Control allows Clients to be viewed by multiple Controls, facilitating collaborative support from dispersed support specialists.

To open Remote Control from the Enterprise Console, click an operation in the Remote Control folder and select the Clients you want to work with.

### Opening Remote Control in standalone mode

1 Click the Start button in the Windows Taskbar, and click the PC-Duo Control command in the Programs menu to start the Control application.




2 Click the Browse button in the Toolbar.

3 In the Browse Network dialog, click the OK button to list currently available Clients. The Clients are listed in the Control's Browse folder.

4 Double-click a Client to connect to it and display its screen.

5 Select a button in the Client window to choose how you want to interact with the Client. Click:

   **Share mode** to control the Client PC with the mouse and keyboard from both the Control and Client PC.

   **Watch mode** to view the Client PC passively.

   **Control mode** to control the Client PC and disable the Client user's input.

# Communicating with Client Users

PC-Duo Remote Control provides several modes of communication between Control and PC users. One-to-one and one-to-many Text Messaging provides a simple way for support staff to disperse information, while the Chat feature is invaluable for contacting remote users when no telephone is available.

## Sending a message to Clients

1 Select Clients in the Control window's Tree View, right-click the Client to which you want to send the message and choose Message from the shortcut menu.

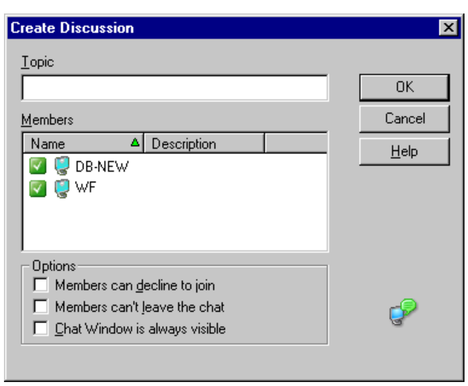
2 In the Send Message dialog, select Currently selected Clients and type your message in the text box.

3 Click the Send button to send your message to the Client.

*To send a message to all the Clients in a group, right-click the group in the Groups view.*

## Chatting with Clients

1 In the List View of the Control window, select the Clients you want to chat with and click the Chat button in the Toolbar.




2 In the Create Discussion dialog enter a Topic title, select the chat options you want to use and click the OK button to start the Chat. A Chat window is displayed on the Control screen and all the Clients you selected.

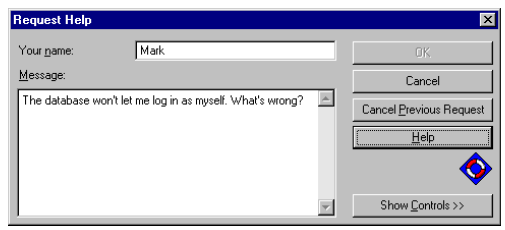
3 In the Chat window, enter a Message and click the Send button to start the chat. To end the Chat session, click the Close button.

# Communicating from Clients

Remote Control Client users can also request help and initiate chats using the Client application.

## Requesting Help

1 Right-click the Client icon in the Windows system tray and choose Request Help from the shortcut menu.




2 In the Request Help dialog, enter Your name, type a Help Request in the Message field and click the OK button.

If no Controls are connected, a message box is displayed, notifying you that the Help Request will be sent when a Control PC connects to your Client.

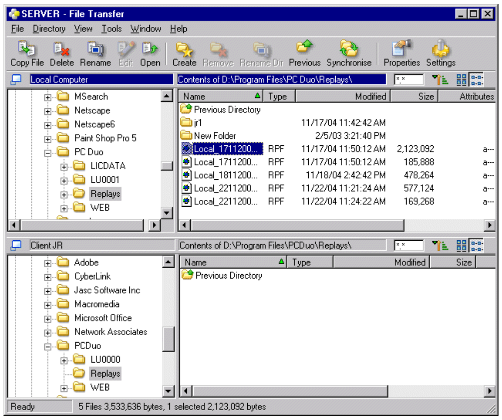
## Using the Chat Feature

Client users can initiate a Chat session with any Control user that is connected to their PC. To start a chat, right-click the Client icon in the system tray and choose Chat from the shortcut menu.

# Access to Client Data

Remote Control provides direct access to Client PC information, helping support staff diagnose problems quickly and efficiently. The System Snapshot feature enables Control users to collect over 600 items of hardware and configuration data from Client PCs, while the File Transfer and Directory Synchronization allow support staff to transfer files and synchronize directories through an

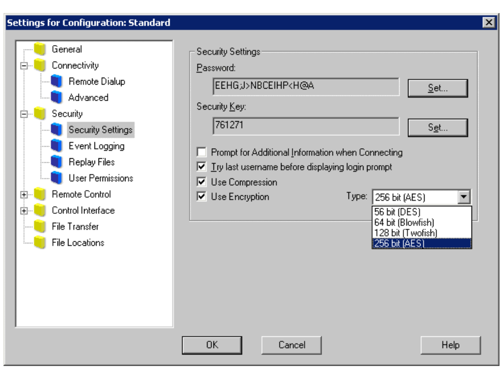
Explorer-style interface. Clipboard support allows you to speed up remote diagnosis by capturing text from remote applications.




## Multi-level Security

All organizations need to protect sensitive information and make certain that it is only available to those users who have a need to know. PC-Duo Remote Control provides a wide range of security functions that ensure your systems are protected. Triple password matching provides extra security for remote control sessions performed across the Internet.

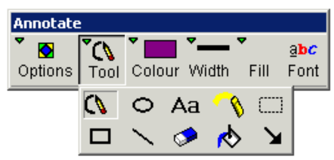
Access to Control PCs is by configurable, password-protected profiles that specify which modes of remote control access can be used, and the directories that are available for File Transfer. Control access to Client PCs is controlled by completely separate profiles, which give Client users the ability to refuse connection attempts.




Activity Logs can record all Control activity, giving an accurate audit trail of help desk activity. The Record and Replay feature securely records all remote control sessions, protecting both the Client user and the Control user from misuse of Remote Control's capabilities. Multilevel passwords, user acknowledgments and security key coding complement the encryption of all Remote Control network traffic, using any of the several encryption standards supported, up to the 256-bit Advanced Encryption Standard.

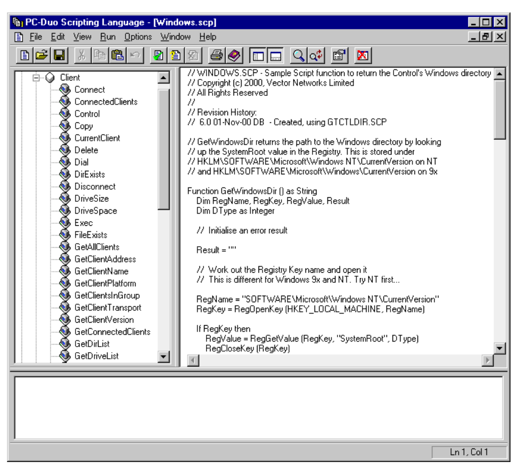
## Training and Presentations

Remote Control is a powerful training and presentation tool. The Show feature enables Control users to broadcast their screen to multiple PCs simultaneously, while the Annotate facility enables the presenter to highlight particular areas of interest. You can use it to help users become familiar with new software, even before it is installed on their PCs.




## Additional Features

Use powerful Scripting to automate application and system management processes. Command Line Launch allows you to integrate Remote Control into existing help desks and system management frameworks.



# Distributed Architecture

You have already set up and populated a Site database. The next stage in your evaluation is to install another Console and Scheduler to share this database. Before installing other distributed Consoles, you must first share the database.

*This description of how to set up multiple Consoles with an Access Site database is intended for evaluation purposes only. Because Access is designed for single user systems, we recommend you do not use it with multiple Consoles or Schedulers for live support tasks.*

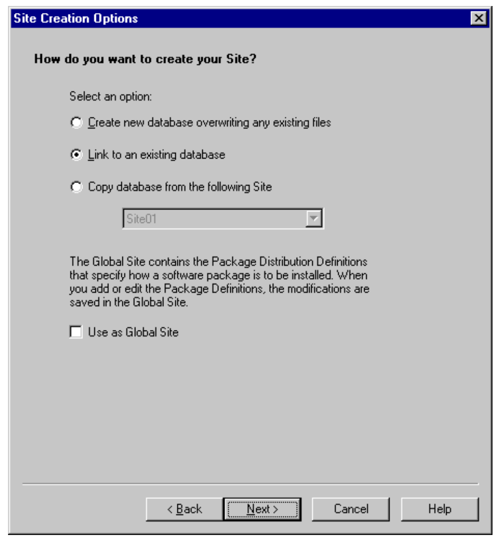
## Sharing the Site Database

1. At the PC where the Console is installed, use Windows Explorer to navigate to the PC-Duo Enterprise Data\Databases directory. To share the directory, right-click its entry in Explorer and choose Sharing.
2. Select the Shared as option, then enter a Share Name of LUDATA.
3. Click Permissions to open the Access Through Share Permissions dialog, then click Add to set the access permissions for this shared directory. For evaluation purposes, use Guest access and full permissions.

   The Site database is shared and accessible from other Consoles. You can now install another Console and Scheduler, and submit and monitor Scheduled Jobs in a distributed environment.

## Setting up another Console

1. On another PC, install the Enterprise Console.
2. Start the Console. The Site Creation Wizard starts automatically.
3. In the Welcome dialog, click the Next button.
4. In the Site Creation Mode dialog, select the Create a custom Site option, and enter the name of your existing Site.
5. Click the Next button to display the Database Type dialog. Make sure Microsoft Access is selected, then click Next.
6. In the Site Creation Options dialog, select Link the Console to an existing Site database, then click the Next button.




7. In the Access Database Configuration dialog, click the Browse button to display the Open dialog.
8. In the Open dialog, navigate to the LUDATA share, and select the *SiteName*.mdb file in your Enterprise installation directory (where *SiteName* is the name of your original Site).
9. Click the Open button to return to the Access Database Configuration dialog, then click the Next button.
10. In the Settings Complete dialog, deselect the Tell me about populating new Sites check box, then click the Finish button.

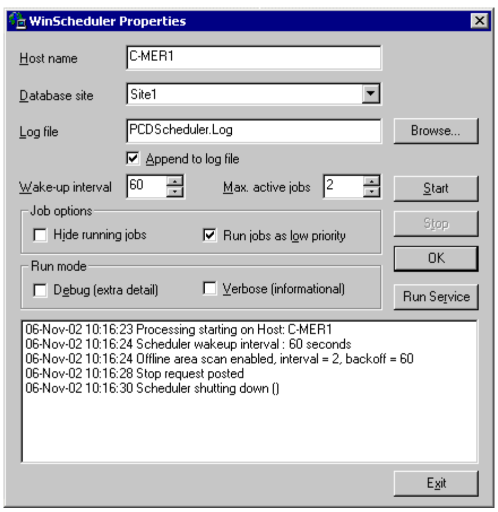
    Enterprise creates a Data Source Name on this PC, which points to the database specified in the Location field.
11. In the new Console Tree, select the Site. You are now sharing the Site database with your first Console, and the Client data you have previously collected is immediately available.

## Configuring the Scheduler

The Scheduler for the new Console must now be configured to work with the shared Site database. To do this, you must set up the Database path definition and other Scheduler parameters.

1 Click the Configure Scheduler operation in the Site Management folder. The Scheduler appears as an icon in the System Tray of the Windows Taskbar.

2 Double-click the icon in the System Tray to display the WinScheduler Properties dialog.




3 Click Stop to stop Scheduler. Select your Site in the Database site list.

4 Enter a location and name for the Scheduler Log file, or click Browse to select a file. By default, the file is saved to PC-Duo Enterprise Data\Logs, but any available path can be used.

5 Click Start to restart the Scheduler, then click OK to close the dialog.

Alternatively, if the Scheduler is running on Windows NT, 2000, XP or 2003 and you want it to be available to run Jobs when no user is logged on, click Run Service to run the Scheduler as a Service.

## Checking the Scheduler Status

In the Console's Jobs and Schedulers folder, select Schedulers, and check the status of the local Scheduler.

The Scheduler from the original Console, and the Scheduler from the new Console are listed with a status of Active.

*For information on the Scheduler status, check the log file specified in the WinScheduler Properties dialog.*

# Jobs

A Job is a combination of an operation, the Clients on which the operation is to be performed, settings that specify when the operation is to be run and logging instructions.

Jobs save their results to the Site database, and can generate events. All jobs can be monitored from the Console using the Scheduled Jobs View. Software distribution jobs can also be monitored at each stage using the Software Distribution Jobs Viewer.

## Submitting a Job

1 In the Software Scan folder, right-click the Update Software Inventory operation and choose Submit Job from the shortcut menu.

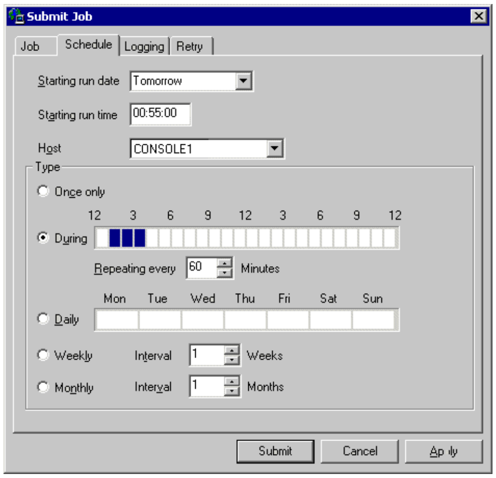
2 In the Select Clients dialog, select the Clients for which you want to collect software inventory data, and click OK. The Submit Job dialog is displayed.

3 In the Job tab, enter a Job name.

4 Select the Schedule tab. In the Host list, select the Scheduler that will be responsible for running the job.

*The Host list contains all the Schedulers available to run scheduled operations at the current Site.*

*You can specify a default Scheduler for an operation using the General tab in the operation's Customize dialog.*




5 The Schedule tab is also used to specify how often you want the Job to run. Select During, select the hours in which you want the Job to run, and set the Repeating every field to 60 minutes. This means the Inventory scan runs whenever it can during the hours marked, and will restart every 60 minutes.

6 Accept the default values in the Logging tab, then click Submit to schedule the operation.

## Monitoring Job Progress

1 Click Scheduled Jobs in the Jobs and Schedulers folder to display the Jobs View. Your Job has a status of Pending until it is scheduled to start.

2 On completion, the Job is deleted if it was scheduled to run once, or placed in Pending status if it was scheduled to repeat.

3 If you want to run a Pending Job again, without waiting for the 60 minute interval, right-click the Job and choose Run Now from the shortcut menu.

4 When the Job is finished, select Job Logs in the Jobs and Schedulers folder to look at the results of the first run. The Job Log View is displayed.

5 Right-click the Job in the Job Logs View, and choose View Client Log from the shortcut menu.

6 After inspecting the Client Log, right-click the Job in the Job Log View again and choose View Event Log.

*You can customize the Update Software Inventory operation to report the paths with unrecognized applications, and then re-run the Job.*

# Concluding the Evaluation

This completes your overview of PC-Duo Enterprise. To evaluate the product further, look at some of the other features, such as One-shot Auditing, which enables you to collect inventory data from PCs without installing the Client application, and Patch Management, which automates and manages the installation of security patches and service releases from Microsoft. You can also refer to the User Manuals and online help, which contain in-depth information about the various product features.

# Contact Us

If you have any questions regarding the PC-Duo Enterprise Suite, please consult the User Manuals included in this kit, or contact us directly,

**In the US or Canada**

toll free: 800 330 5035
email: support@vector-networks.com

**Outside the US and Canada**

call: +44 (0) 1827 67333
email: support@vector-networks.co.uk

## PC-Duo Enterprise on the Web

For the latest information, software and updates, visit Vector Networks' Web site at www.vector-networks.com.