

# CONSOLE GUIDE



Version 2.0



## **Policy Commander Console Guide** - Published January, 2008

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## Welcome to Policy Commander Software

Welcome to Policy Commander® — your command center for managing computer security policies.

Policy Commander improves organizational accountability and helps you secure your enterprise network by automating implementation and enforcement of security policies on Windows computers. It continuously monitors the state of computers on the network, delivering detailed, real-time insight into the state of security policy compliance. Policy Commander remediates non-compliant computers to ensure continuous security policy enforcement, and significantly reduces the time and resources needed to create, test, and implement any security policy for any Windows-based server or workstation.

With Policy Commander, security policy compliance information can be summarized in a dashboard view, or presented in detail for system administrators. Policy Commander automatically alerts users via email when a computer is out of compliance, and can automatically remediate non-compliant systems.

Policy Commander lets administrators define the role and security level of a computer and automatically applies the appropriate security policies for its role and security level. Policy Commander maintains security policies in a central location and provides a browser-based console for centralized administration. Policy Commander delivers a library of security policies based on templates from Microsoft and leading IT security organizations. With Policy Commander, you can also add your own policies and customize existing ones to accommodate your network infrastructure and organizational security needs.

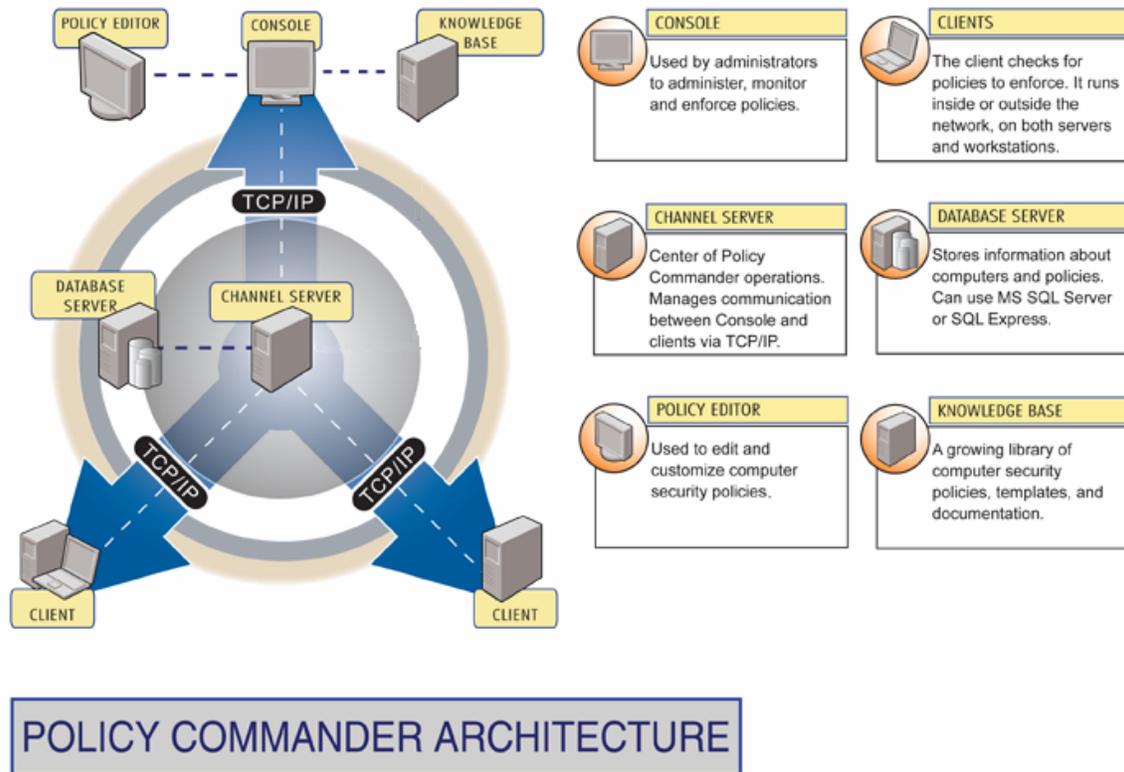
### Policy Commander Architecture

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An administrator uses Policy Commander to enforce security policies on managed computers. Policy Commander is made up of the following components:

- **Console** – The Console is your command center for monitoring compliance and for setting up, enforcing, and managing policies and computers. Open the Console by running PComConsole.exe from your Policy Commander installation folder or from the Start menu.
- **Policy Editor** – The Policy Editor enhances the effectiveness of your policies by adding rules, security templates, and Packages to target specific configurations, compliance, and settings on the managed computer.
- **Channel Server** – The Channel Server manages the communication between the Console, database, and client computers. A channel is a logical collection of managed computers and policies. After you install Policy Commander, the Server works in the background, providing information to the Console and applying changes to Client computers according to your settings.
- **Database** – The Database serves as the repository for storing information like Client status, computer compliance, and policy settings.
- **Client** – The Client is the software run on managed computers that executes policies, reports information to the Server about its current status, and alters the group membership as needed.
- **Knowledge Base** – The Knowledge Base provides you with security policies written by New Boundary Technologies.

The image below provides an overview of how these components work together:



### How Policy Commander Is Licensed

Policy Commander is licensed per computer. Each workstation or server managed through a Channel must have a Policy Commander license.

### Contacting Technical Support

If you are unable to locate answers to your questions about Policy Commander 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 and Notes

### System Requirements

**Note:** You must be an administrator-equivalent user to install any Policy Commander component.

	Console <sup>1</sup>	Policy Editor	Package Builder <sup>2</sup>	Policy Server	Client <sup>2</sup>
<b>Operating System</b>	Windows 2000, Windows XP, Windows Server 2003, or Windows Vista	Windows 2000, Windows XP, Windows Server 2003, or Windows Vista	Windows 2000, Windows XP, Windows Server 2003, or Windows Vista	Windows 2000, Windows XP, Windows Server 2003, or Windows Vista Server-level recommended	Windows 2000, Windows XP, Windows Server 2003, or Windows Vista
<b>Browser</b>	Internet Explorer 5.01 or higher		Internet Explorer 5.01 or higher		Internet Explorer 5.01 or higher
<b>Integration component</b>	.Net Framework version 2.0		.Net Framework version 2.0	.Net Framework version 2.0	
<b>Database</b>				Microsoft SQL Server 2000 SP3 or higher Microsoft SQL Server 2005 MDAC 2.6 or higher (2.8 recommended)	
<b>Network</b>	TCP/IP connection			TCP/IP connection	TCP/IP connection
<b>Processor</b>	Pentium or equivalent	Pentium or equivalent	Pentium or equivalent	Pentium or equivalent	Pentium or equivalent
<b>RAM</b>	512 MB	256 MB	256 MB	512 MB	128 MB
<b>Hard disk space</b>	40 MB	5 MB	15 MB	25 MB (Does not include Microsoft applications.)	6.5 MB

These third-party items will be included in the standard installations as noted for the individual components above.

<sup>1</sup> DEVEXPRESS and INFRAGISTICS DLLS are required to support reporting functions.

<sup>2</sup> CAPICOM.DLL is required to support Package authentication.

### Microsoft Supplemental Installations

These components will be installable separately if needed. They are downloaded from the New Boundary Technologies Web site.

	Installed disk space requirements	Install file size
MSDE 2000 Release A	44 MB	43 MB
MDAC 2.8	40 MB	5.5 MB
.NET Framework 2.0	150 MB	24 MB

### Notes on the Documentation

The documentation includes online Help, a Tutorial, and a user guide. To gain the most from your documentation, please review the following comments:

#### Tutorial

Please review the *Tutorial* to gain a basic understanding of Policy Commander and to complete an exercise that leads you through the major features available with Policy Commander. The *Tutorial* is available through the Windows Start menu and through the Help menu in the software.

#### Online Help

When you select **Help | Policy Commander Help** or click the **Help** button on a dialog box, the online help is displayed.

#### Conventions Used in the Help and User Guides

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

# Getting Started

## Opening the Console

---

To open and use the Policy Commander console:

1. Open Policy Commander from the Windows **Start** menu.
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.

- 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.
  - Begin work (see *Overview of the Console Main Window*)
  - Open a different Channel (see *Opening a Channel*)
  - Create a new Channel (see *Setting Up a New Channel*)
- All Policy Commander Channels are secured. After selecting a channel, enter your credentials to load the channel.

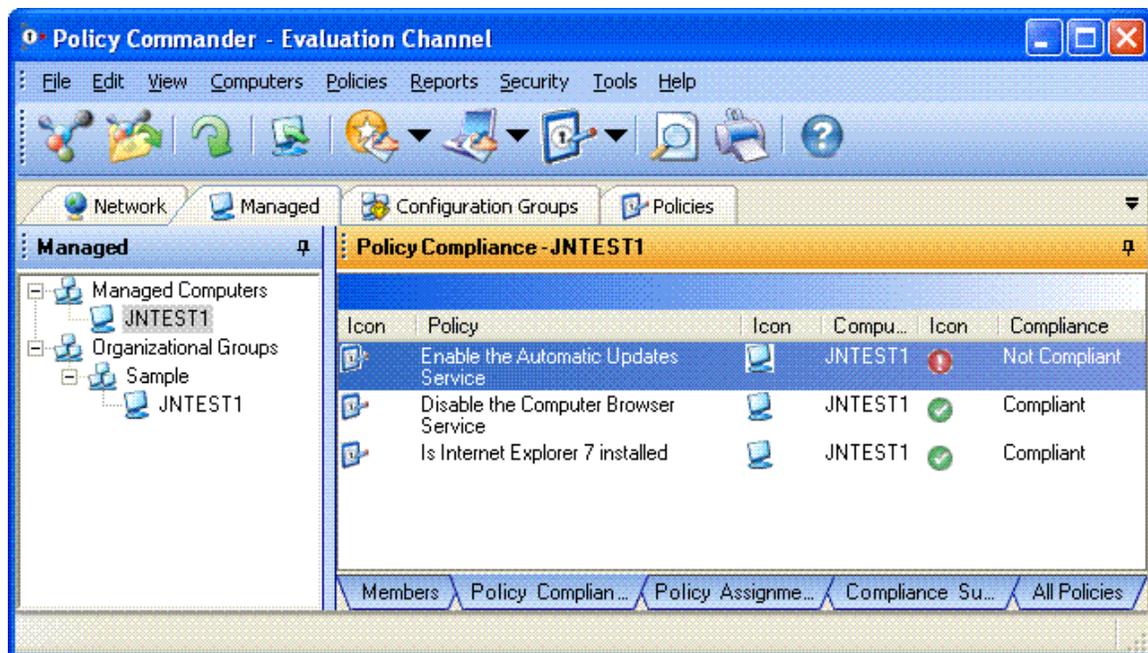
## Overview of the Console Main Window

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When you start the Policy Commander console, 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, enforce security policies, and monitor their compliance.

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, 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.
  - **Policies:** The *Policies tab* is where you manage your policies.
- **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.



## 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.
- **Policies:** Assign and enforce policies, view compliance status, and import and export policies.
- **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. See *Generating and Viewing Reports*.
- **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.

- **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.
- **Import Configuration Groups:** Lets you import configuration groups stored in an XML file.
- **Exit:** Close the Administrator's Console.

### Edit menu

The availability of the options on the Edit menu change based upon the screen you are viewing and the item you have selected. The menu options include:

- **Create Group:** Create a new group.
- **Edit Group:** Edit the selected configuration group.
- **Add To Group:** Add a computer or policy to a group.
- **Remove From Group:** Remove a computer or policy from a group.
- **Rename Group:** Rename the selected group.
- **Delete:** Delete the computer, policy, or group.
- **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.

### Computer Menus

The items available on the Computer and Edit menus depend on the tab open in the tree view and the type of item selected.

- **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.

- **Add Computers:** Add one or more computers by name rather than via the Network tab display.
- **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.
- **Manage Computer:** Add the highlighted computer on the Network tab to the Channel in order to manage it. Policy Commander lets you install the Client directly or via a subscription file when the computer is added.
- **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.

## Policies menu

The Policies menu offers the following options:

- **Assign Policy:** Assign a policy to a computer or group.
- **Enforce Policy:** Enforce a non-compliance policy.
- **Export Policy to File:** Export a policy to a file.
- **Import Policy from File:** Import a policy from a file.
- **Import Policy from Policy Server:** Import a policy from an external server.
- **Policy Editor:** Launch the Policy Editor.

## 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.



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



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



Select a policy commander report to capture information about policy compliance.



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.

## Features and Shortcuts in the Main Console Window

The Policy Commander 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	<Del>
Open the pop-up menu of actions you can take for the current item	<Shift><F10>

## Tabs in the Tree View

---

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, deploy changes, and complete inventories. When you select a tab or an item in this pane, the details pane on the right changes to reflect your choice.

- **Network:** The tree view left opens to the *Network* the first time you use Policy Commander. 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.

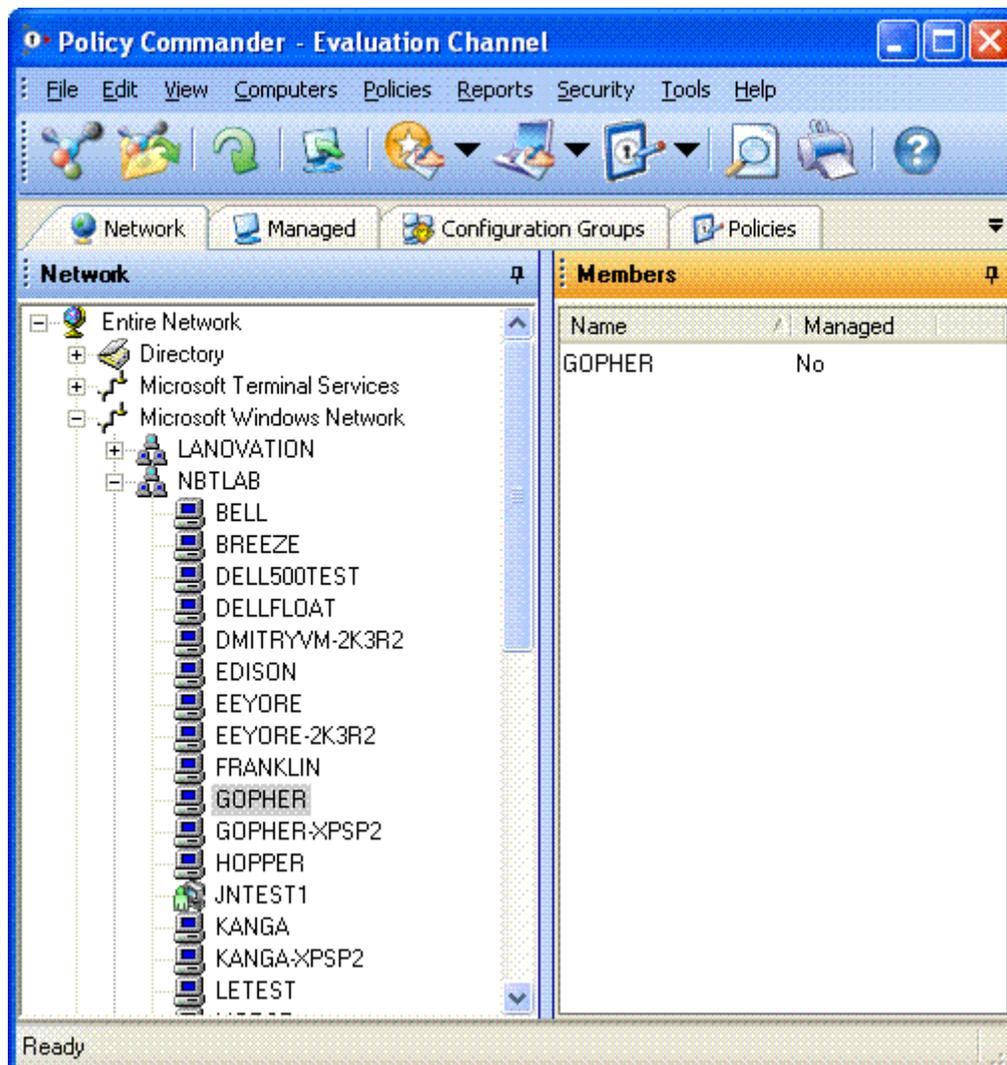
With the Network tab active, the details pane on the right side lists all of the computers, in order. Use this information to quickly identify managed computers and whether the Client has been installed. Policy Commander lets you quickly add computers and install the Client from this pane through the 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.
- **Policies:** The *Policies tab* shows the policies and policy groups, including local policies and those imported by date.

## 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 tab 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 inventory these computers, deploy changes to them, or perform other actions, the computer(s) 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 Policy Commander. 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

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

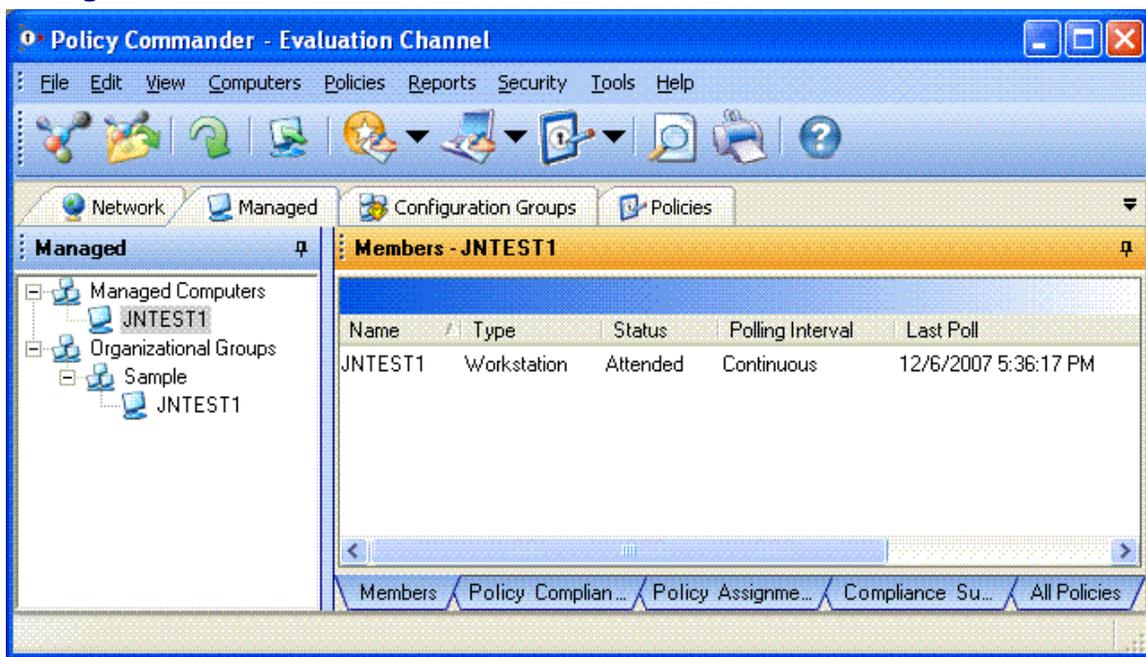
- **Manage Computer:** Add the highlighted computer to the current Channel. (This option is available only for unmanaged computers.)
- **Reinstall Client:** Reinstall the Client on the managed computer. (This option is available only for managed computers.)

### Details pane

With the Network tab selected in the tree view on the left, the details pane on the right displays:

- **Members:** This pane shows a list of computers, whether they are covered by a Policy Commander license, and status of the Client installation.

### 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.

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

### Right Click Options — Computer

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

- **Assign Policy:** Allows you to assign policies to 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*.

- **Reinstall Client:** Reinstall the Client on the highlighted computer. You can install the Client directly over the network or generate a subscription file to install.
- **Properties:** View the properties for the computer. (See *Viewing the Computer General Properties*.)

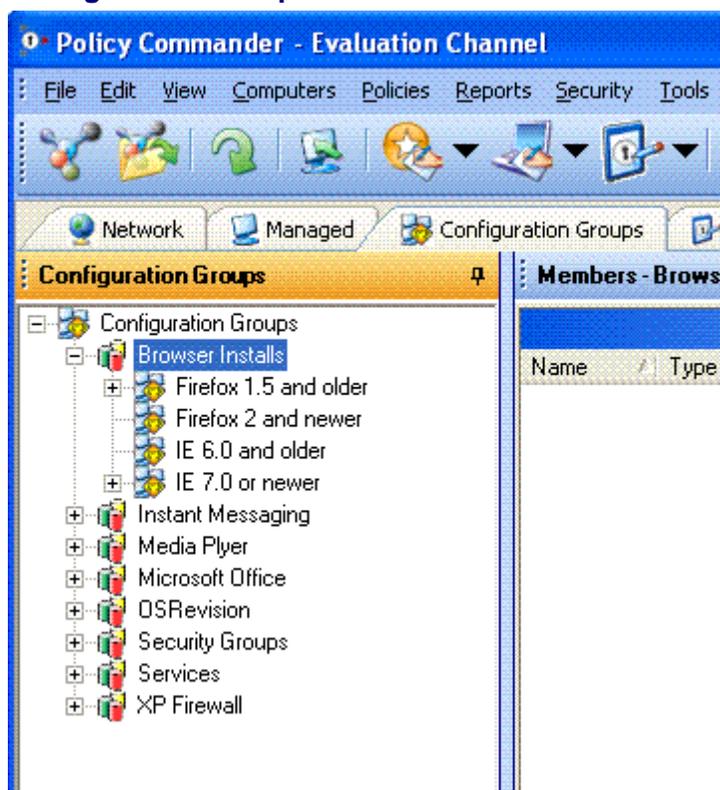
**Note:** These options are available any time you right click on a computer.

### Right Click Options — Group

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

- **Assign Policy:** Allows you to assign policies to the group.
- **Create Group:** Create a new organizational group.
- **Add to Group:** Add a computer to the highlighted group. The *Assign Computer* dialog opens.
- **Rename:** Rename the group.
- **Delete Group:** Remove the highlighted group from the Channel.
- **Properties:** View the properties for the group. (See *Viewing General Group Properties*.)

### Configuration Groups tab



Configuration groups are populated automatically with managed computers, based on configuration values or rules set by the administrator. Configuration groups are dynamic—as the configuration of managed computers change, they are automatically placed in or removed from the appropriate groups. Computers cannot be manually added to Configuration Groups or their subgroups.

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

### ***Types of Configuration Groups***

There are two types of configuration groups:

- **Predefined groups**

Predefined groups are populated automatically, based on a single variable. After creating a predefined group, subgroups are added automatically to the group, with names that reflect the values in the population of managed computers. Computers populate the subgroup that matches their configuration.

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)

- **User-defined groups**

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.

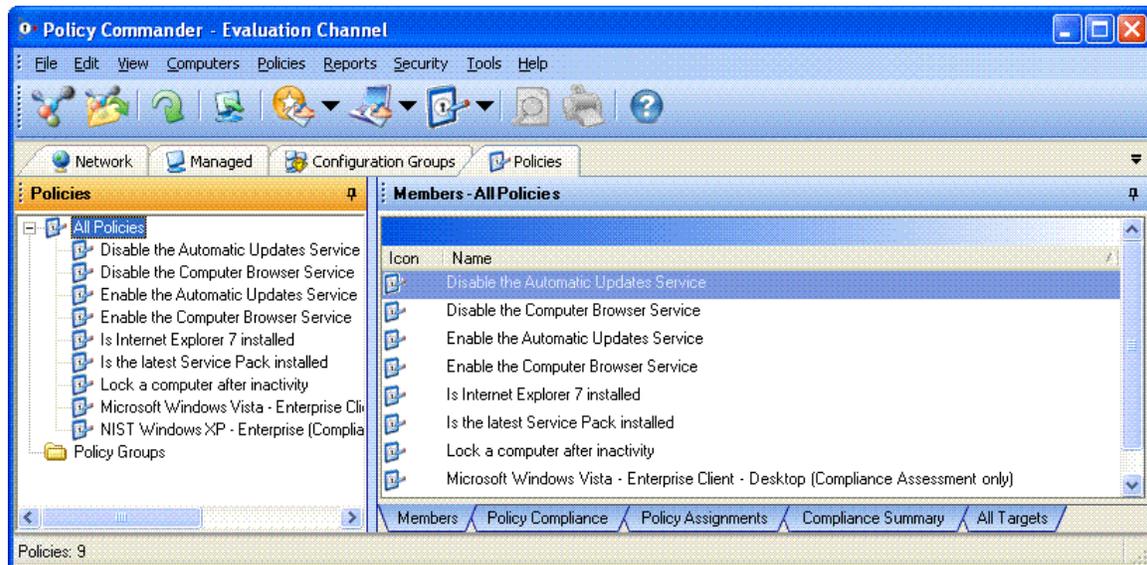
For example, create a User-defined group to identify managed computers running a specific operating system that do not have a specific service pack installed.

### ***Right Click Options — Group***

These options are available when you right click on a group on the Configuration Groups tab.

- **Assign Policy:** Allows you to assign policies to the group.
- **Create Group:** Create a new organizational group.
- **Edit Group:** Edit the group's rules.
- **Rename:** Rename the group.
- **Delete Group:** Remove the highlighted group from the Channel.
- **Properties:** View the properties for the group. (See *Viewing General Group Properties.*)

## Policies Tab



The Policies tab lists all of the policies and policy groups that are in the Channel.

- Every policy in the channel is listed under the All Policies branch. They can also appear within any number of policy groups.
- Policies may be assigned to policy groups listed on this tab. These groups are user-defined, and may reflect any structure you choose. Also, policies imported from an external server retain their structure under the Imported Policies (under Policy Groups).

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

### Right Click Options — Policy

These options are available when you right click on a policy on the Policies tab.

- **Assign Policy:** Invokes the Assign Policy wizard to assign the policy to a computer or group of computers.
- **Add To Group:** Allows you to add the policy to a policy group.
- **Delete:** Deletes the policy from the channel.
- **Export Policy to File:** Allows you to export the policy to a file.
- **Properties:** Opens the Policy Properties dialog.

### Right Click Options — Policy Group

These options are available when you right-click on a policy group listed on the All Policies tab.

- **Assign Policy:** Invokes the Assign Policy wizard to assign the policy group to a computer or group of computers.
- **Create Group:** Creates a new sub-group.
- **Add To Group:** Allows you to add the policy to a policy group.
- **Delete:** Deletes the policy group from the channel.

**Note:** These options are available any time you right click on a policy or policy group. For example, you can select from the same options by right-clicking on a policy on the Managed | All Policies tab.

### 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.

This tab is displayed in the details pane on the right side of the Console window when the Managed tab is selected in the tree view on the left side of the Console window.

#### Right Click Options

These actions are available when you right-click on a computer listed on the Members tab.

- **Reinstall Client:** Reinstall the Client on the highlighted computer. You can install the Client directly over the network or generate a subscription file to install.
- **Delete computer from Channel:** 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*.

- **Properties:** View the properties for the computer. (See *Viewing the Computer General Properties*.)

### Members tab (Policies)

The Members tab lists the policies in the group or the policy currently highlighted on the Policies tab.

This tab is displayed in the details pane on the right side of the Console window when the Policies tab is selected.

#### Details

These columns are shown in the details pane:

- **Icon:** Folder (group) or policy.
- **Name:** Name of the policy.

The following fields can be added using More Fields (right-click on the column headings):

- **Description:** Description of the policy.
- **Email Notify:** Indicates whether or not email notification is enabled for the policy.
- **Auto Enforce:** Indicates whether or not Auto Enforce is enabled for the policy.

#### Right Click Options

These actions are available when you right-click on a policy listed on the Members tab.

- **Assign Policy:** Invokes the Assign Policy wizard to assign the policy to a computer or group of computers.
- **Add To Group:** Allows you to add the policy to a policy group.
- **Rename:** Allows you to rename the policy.

- **Delete:** Deletes the policy from the channel.
- **Export Policy to File:** Allows you to export the policy to a file.
- **Properties:** Opens the Policy Properties dialog.

### Policy Compliance tab

The Policy Compliance tab lists the policy compliance status for policies.

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

- Under the *Managed* and *Configuration Groups* tab, the Policy Compliance tab displays compliance status for all policies assigned to the computer or computer group selected in the tree view.
- Under the *Policies* tab, the Policy Compliance tab displays compliance status for all assigned policies within the selected policy group or selected policy in the tree view.

#### Details

These columns are shown in the details pane:

- **Icon:** Policy icon.
- **Policy:** Name of the policy.
- **Computer:** The name of the computer to which the policy is assigned.
- **[Compliance] Icon:** The compliance icon indicates compliance status.
- **Compliance:** The current *compliance status* of the policy.
- **Last Update:** Shows the last time the compliance state was updated.
- **Error Code:** A code indicating the error. A 0 means the policy is compliant.
- **Summary:** Text describing the reason why the policy is not compliant.

#### Right Click Options

These actions are available when you right-click on a policy assignment listed on the Policy Compliance tab.

- **Enforce Policy:** Enabled only for Not Compliant policies, this will enforce the policy.
- **Acknowledge Enforcement:** Enabled only for Enforced policies, this acknowledges the enforcement. After this, the policy will become Compliant.
- **Policy Properties:** Opens the *Policy Properties* dialog for that policy.
- **Computer Properties:** Opens the *Properties* dialog for that computer.

### Policy Assignments tab

The Policy Assignments tab lists the policy assignments associated with the selected computer, computer group, or policy.

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

#### Details

These columns are shown in the details pane:

- **[Target] Icon:** Indicates whether the target is a computer or computer group.
- **[Policy] Icon:** Policy icon.

- **Policy:** Name of the policy.
- **Assigned Through:** The name of the computer or group through which the policy is assigned.

### ***Right Click Options***

These actions are available when you right-click on a policy assignment listed on the Policy Assignments tab.

- **Delete Policy Assignment:** Deletes the assignment. Note that this does not delete the policy, just its assignment to the target computer or computer group.

### **Compliance Summary tab**

The *Compliance Summary* tab conveys a summary view of compliance that the administrator can use to quickly determine the current level of compliance in the system. It also allows the administrator to drill down to a specific computer or policy, and to a specific policy assignment of interest.

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

#### **Compliance Summary - upper panel**

The table in the summary panel shows how many computers (for the Managed and Configuration Groups tabs) or policies (for the Policies tab) are in each compliance state. The pie chart displays this same data graphically.

#### ***Computer and Policy Compliance***

The notion of compliance displayed in the summary is different than the *compliance states* that apply to a specific policy assignment.

A computer's compliance state is:

**Compliant** - if *all* policies assigned to that computer are either Compliant or Not Applicable.

**Not Compliant** - if *any* policy assigned to that computer is Not Compliant.

**Enforced** - if *any* policy assigned to that computer is Enforced and none are Not Compliant or Error.

**Pending** - if *any* policy assigned to that computer is Pending and none are Not Compliant, Error, or Enforced.

**Not applicable** - if *all* policies assigned to that computer are Not Applicable.

**Error** - if *any* policy assigned to that computer is in an Error state and none are Not Compliant.

A policy's compliance state is:

**Compliant** - if *all* assignments of that policy are either Compliant or Not Applicable.

**Not Compliant** - if *any* assignment of that policy is Not Compliant.

**Enforced** - if *any* assignment of that policy is Enforced and none are Not Compliant or Error.

**Pending** - if *any* assignment of that policy is Pending and none are Not Compliant, Error, or Enforced.

**Not applicable** - if *all* assignments of that policy are Not Applicable.

**Error** - if *any* assignment of that policy is in an Error state and none are Not Compliant.

### Examples

**Example 1:** If a computer has 4 policies assigned to it, and one of the assignments is Not Compliant, that computer is Not Compliant.

**Example 2:** If a computer has 2 policies assigned and both are Compliant, the computer is Compliant.

**Example 3:** If a policy has been assigned to 12 computers, and 11 of those assignments are Compliant and one is Pending, the policy is Pending.

**Example 4:** If a policy has been assigned to 3 computers and all three assignments are Compliant, the policy is Compliant.

**Example 5:** If a computer group's compliance summary pie chart shows that 25% of the computers are Not Compliant, that means 25% of the computers in that group have at least one policy assignment that is Not Compliant.

**Example 6:** If a policy group's compliance summary pie chart is solid green, that means all assignments of that policy are Compliant.

### Details

These values are shown in the upper panel:

- **Policy Count:** The number of policies that are in the corresponding compliance state..
- **Computer Count:** The number of computers that are in the corresponding compliance state.
- **Percent:** The percent of all computers or policies that the count represents.

### Compliance Summary - middle panel

This panel displays the details corresponding to the computers or policies represented in the upper panel. There is one row per computer or policy.

### Details

These columns are shown in the middle panel of the details pane:

- **Icon:** The computer or policy icon.
- **Computer:** The name of a computer associated with the selection (computer or computer group) in the tree view to the left.

- **Policy:** The name of a policy associated with the selection (policy or policy group) in the tree view to the left.
- **[Compliance] Icon:** The compliance icon indicates compliance state for the computer or policy
- **Compliance:** The current compliance state for the computer or policy, as defined above.

### ***Right Click Options***

These actions are available when you right-click on a computer or policy listed on the middle panel.

- **Enforce Policy:** Enabled only for Not Compliant policies/computers, this will enforce the policy for all assignments that are Not Compliant.
- **Acknowledge Enforcement:** Enabled only for Enforced computers or policies, this acknowledges the enforcement for all the assignments that are Enforced.

### **Compliance Details - lower panel**

The compliance details displayed in this panel is specific to the policy or computer selected in the middle panel. For any non-compliant policy assignments, a summary of the cause of the non-compliance is also shown. This panel is very similar to the *Policy Compliance tab*. It displays specific assignments of policies to computers.

For example, when you select a computer in the middle panel that is Not Compliant, the lower panel displays all of that computer's policy assignments. By the definition of *computer compliance* defined previously, at least one of those assignments - and possibly more - are Not Compliant.

### ***Details***

These columns are shown in the lower panel of the details pane.

- **[Compliance] Icon:** The compliance icon indicates compliance status.
- **Compliance:** The current compliance state of the policy.
- **Computer:** The name of the computer to which the policy is assigned.
- **Policy:** Name of the policy.
- **Summary:** Text describing the reason why the policy is not compliant. If no failure description is defined for the policy, the detailed error results will be shown.

The following fields can be added using More Fields:

- **Last Update:** Shows the last time the compliance state was updated.
- **Error Code:** A code indicating the error. A 0 means the policy is compliant.

### ***Right Click Options***

These actions are available when you right-click on a policy assignment listed on the compliance details panel.

- **Enforce Policy:** Enabled only for Not Compliant policies, this will enforce the policy.
- **Acknowledge Enforcement:** Enabled only for Enforced policies, this acknowledges the enforcement. After this, the policy will become Compliant.
- **Policy Properties:** Opens the *Policy Properties* dialog for that policy.
- **Computer Properties:** Opens the *Properties* dialog for that computer.

### **All Policies tab**

The All Policies tab lists all the policies in a tree view.

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

### **Details**

These columns are shown in the details pane:

- **Icon:** Folder (group) or policy.
- **Name:** Name of the policy.

### **Right Click Options**

The available actions vary depending on whether you are clicking on a policy or a policy group.

These actions are available when you right-click on a policy listed on the All Policies tab.

- **Assign Policy:** Invokes the Assign Policy wizard to assign the policy to a computer or group of computers.
- **Add To Group:** Allows you to add the policy to a policy group.
- **Delete:** Deletes the policy from the channel.
- **Export Policy to File:** Allows you to export the policy to a file.
- **Properties:** Opens the Policy Properties dialog.

These actions are available when you right-click on a policy group listed on the All Policies tab.

- **Assign Policy:** Invokes the Assign Policy wizard to assign the policy group to a computer or group of computers.
- **Create Group:** Creates a new sub-group.
- **Add To Group:** Allows you to add the policy to a policy group.
- **Delete:** Deletes the policy group from the channel.

## **All Targets tab**

The All Targets tab lists all the computers and computer groups in a tree view.

This tab is displayed in the details pane on the right side of the Console window when the Policies tab is selected.

### **Details**

These columns are shown in the details pane:

- **Icon:** Folder (group) or computer.
- **Name:** Name of the group or computer.

### **Right Click Options**

These actions are available when you right-click on a computer or group listed on the All Targets tab.

- **Assign Policy:** Invokes the Assign Policy wizard to assign policies to the selected computer or group.
- **Delete:** [For Computers only] Deletes the computer from the channel.
- **Reports:** Allows you to generate a computer report.
- **Properties:** Opens the Properties dialog for the computer or group.

## Customizing the Console View

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### Customizing the Main Window View

You have various options for customizing the Policy Commander 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 Policy Commander 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 Policy Commander, the view will reflect your new layout.

#### **Save the View**

After changing the layout, you can save the current view:

- 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 Policy Commander was installed.

## Launching External Applications from the Console

Policy Commander lets you add external applications to a special Tools menu in the Console and to the right-click options for individual computers in the Managed view. These applications are added to the Console by creating a special `EXTERNALTOOLSCONFIG.INI` file in the Console directory. This feature lets you launch the applications directly from the Console and, if added to the right-click options, send information to the application that identifies the computer.

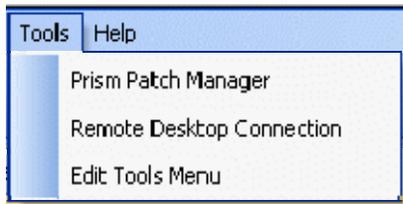
The external application is launched as a separate process. The console does not wait for it to complete nor does it report a final execution status. If the actual launch of the application fails (for example, because the path specified in the `.INI` file is wrong and the executable cannot be found),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

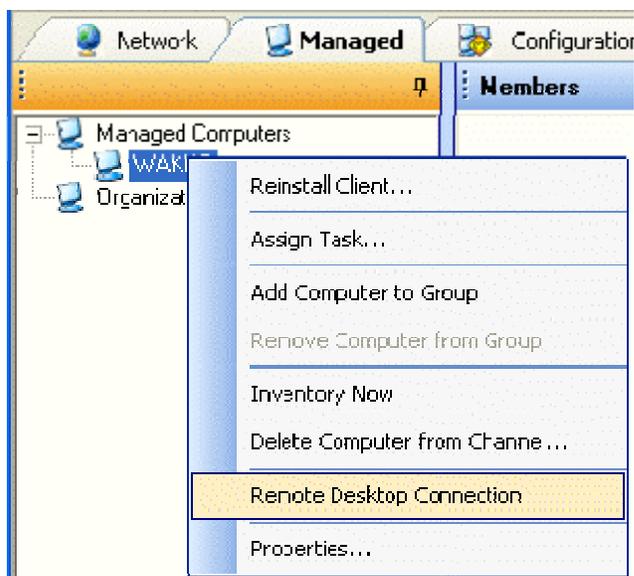


### Computer options

Add an application to the list of options on the right-click menu for a computer by adding a line to the SingleComputerApps section of the EXTERNALTOOLSCONFIG.INI file. You also have the option of adding variables to send information to the external application.

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

- no applications are defined in this section
- a group is selected.
- multiple computers are selected



### Format of the EXTERNALTOOLSCONFIG.INI File

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

#### Sections

The .INI file may have one or two sections. The section title is enclosed in brackets [ ] and followed by the individual menu items.

[Tools] – applications are added to the Tools menu

[SingleComputerApps] – applications are added to the right-click options for a computer in the tree view.

**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 required to enclose the commandline

The SingleComputerApps commandlines may contain variables to be substituted with actual data at run time. Variables are case insensitive: %MACAddress% is the same as %macaddress%.

The variables available are:

```
%computername%
%ipaddress%
%macaddress%
```

**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:

```
Prism Patch Manager="C:\Program Files\Prism Patch Manager\pmconsol.exe"
Prism Patch Manager="C:\Program Files\Prism Patch Manager\pmconsol.exe", "."
```

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

```
Prism Patch Manager="C:\Program Files\Prism Patch Manager\pmconsol.exe"
/settings=1,2,3
Prism Patch Manager="C:\Program Files\Prism Patch Manager\pmconsol.exe"
/settings=1,2,3, "."
```

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

**Examples**

The menu entries seen in the screen shots above could be generated with the following .INI file:

[Tools]

Prism Patch Manager="C:\Program Files\Prism Patch Manager\pmconsol.exe"

Remote Desktop Connection=mstsc.exe

Edit Tools Menu=notepad.exe "C:\Program Files\Prism Suite\ExternalToolsConfig.ini"

[SingleComputerApps]

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

In the example above, for a single computer, when the Remote Desktop Connection menu item is chosen, the target computer's IP address is substituted into the commandline at runtime. The actual remote control commandline, when executed, looks like:

C:\Program Files\Prism Suite\mstsc.exe /target=192.168.0.18

## **Console Settings**

---

### **Adjusting the Console Settings**

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

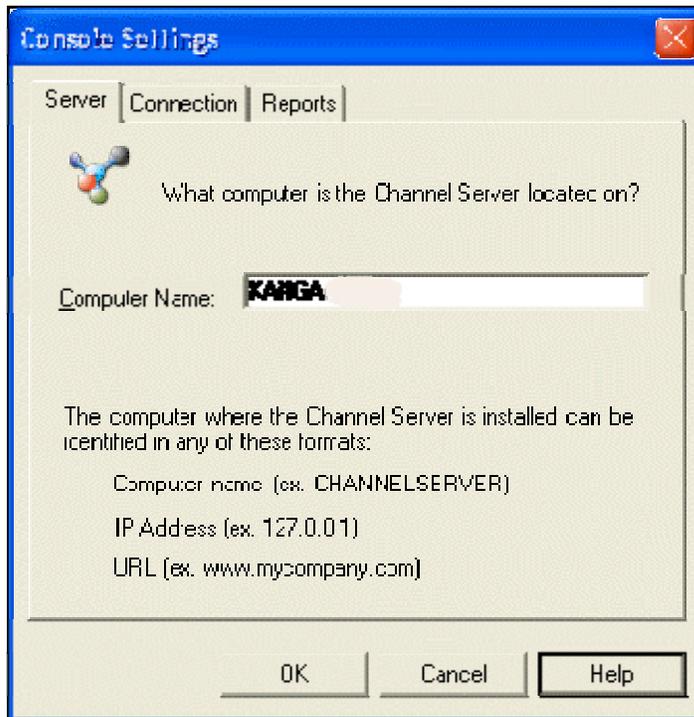
Open the Console Settings dialog box with one of these actions:

- 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.

The Console Settings dialog box includes the following tabs:

- *Server*
- *Connection*
- *Report*

## 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.

Specify the server IP name or URL to be used by the:

- Console to communicate with the Channel Server  
(For the starting point, see *Adjusting the Console Settings*.)
- Client to communicate with the Channel Server.  
(For the starting point, see *Setting the Client Communication Parameters*.)

### **Enter the name of the server**

In the **Server Name** text box, type 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:

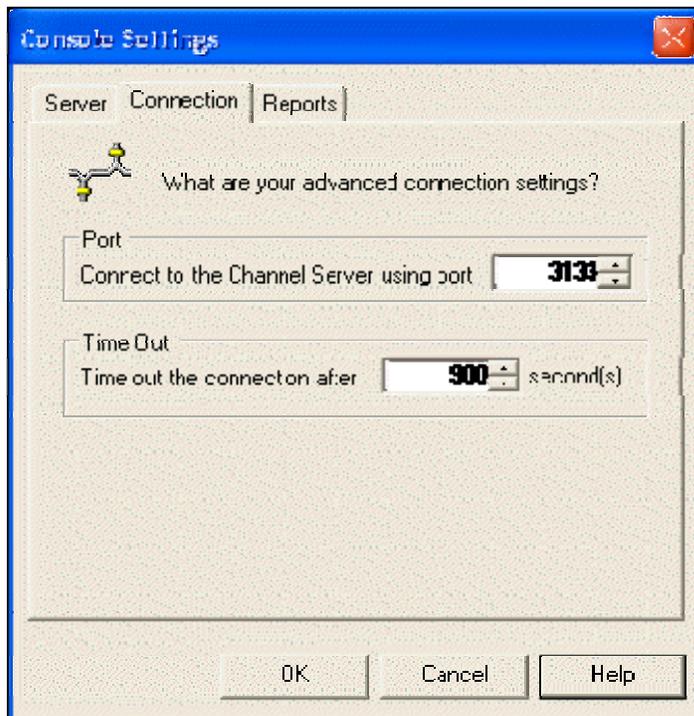
- Computer name, for example CHANNELSERVER
- IP (Internet Protocol) Address, for example 127.0.0.1
- URL (Uniform Resource Locator), for example www.yourcompany.com

It is critical to identify the correct computer.

### **Change the name of the server**

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.

## Connection tab



On this tab, change the settings for one of these connections. Your starting point determines how the information on this tab is used.

Adjust the settings for the connection between the:

- Console on the administrator's computer and the Channel Server  
(For the starting point, see *Adjusting the Console Settings*.)
- Client on a managed computer and the Channel Server  
(For the starting point, see *Setting the Client Communication Parameters* or *Applying Unique Settings to a Client*.)

### Connection 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 or Client uses to connect to the Channel Server. Both the Console and the Clients must use the same port.

We recommend using one of the following port numbers:

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

**Note:** By default, Policy Commander 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](http://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.

- **Time Out Time out the connection 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.

## Report tab

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.



# Channels

## Setting up a New Channel

### 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. Policy Commander 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 - Enter a name for the new Channel dialog

Type a name for the new Channel that you are creating. Giving the Channel a descriptive name can help you identify it more easily. Each Channel must have a unique name.

This dialog box opens when you create a new Channel.

## 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 | Manage** 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.

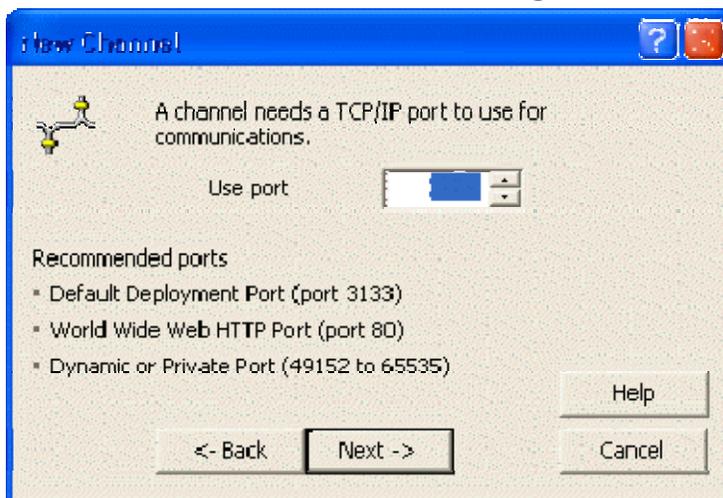
8. Click **Finish**.

**Note:** If Channel creation has been secured through the *Channel Manager*, Policy Commander 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. Policy Commander 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 - 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.

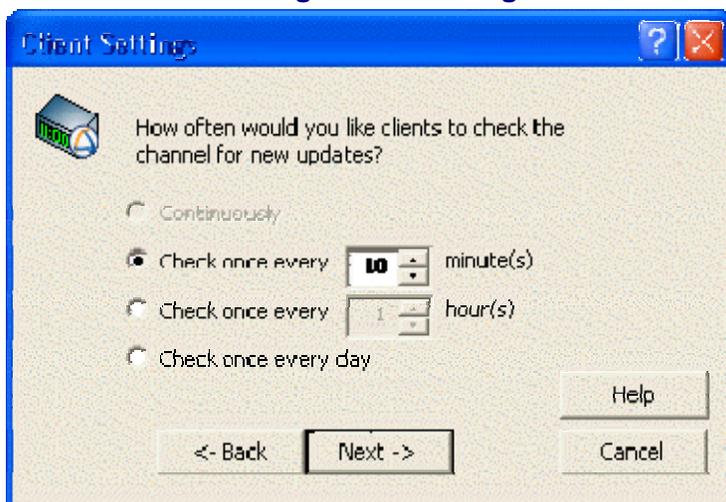
We recommend using one of the following port numbers:

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

**Note:** By default, Policy Commander 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](http://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.

This dialog box opens when you create a new Channel.

Options include:

- **Check once every  minute(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of minutes. Since the Client requires very little bandwidth, the default value (10 minutes) is recommended.
- **Check once every  hour(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of hours.

- **Check 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.

The value you set on this dialog box can be changed later by selecting **File | Client Settings**. The Client Settings dialog box includes a *Polling tab*.

### 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.

---

**Note:** Policy Commander requires that all channels be secured.

---

### 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.

### Overview of the New Boundary Channel Manager

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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 Policy Commander Console.

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**Note:** The Channel Server application is used by these New Boundary Technologies products—Prism Suite, Prism Deploy v6, and Policy Commander. However, these products use separate installations of the Channel Server and separate Channels.

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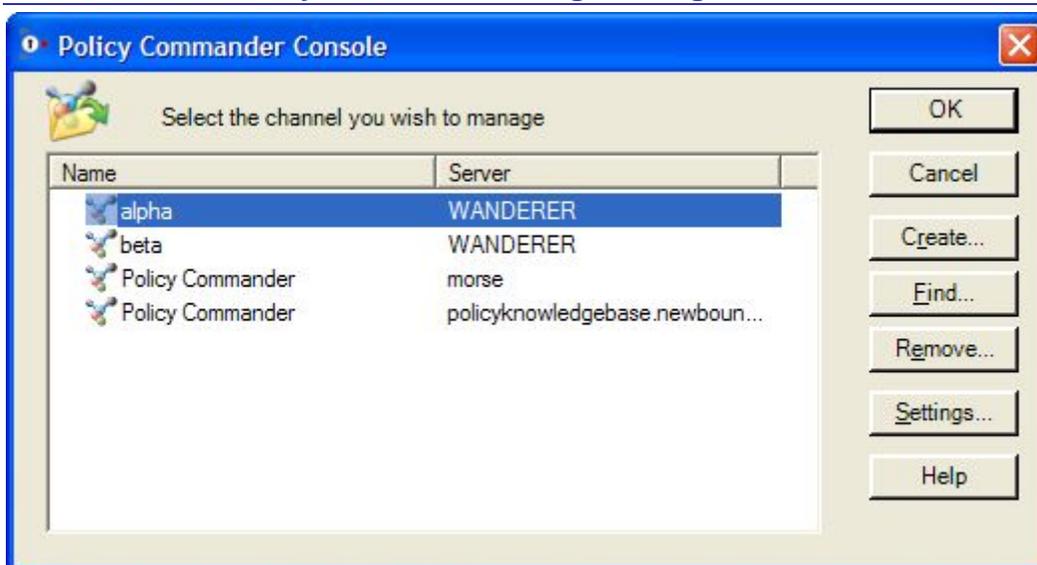
## Opening a Channel

To open a Channel that you want to work with:

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

### Select the Channel you wish to manage dialog



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

- Open the Policy Commander 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:

- *Connection*
- *Server*
- *Report timeout period*

## Finding an Existing Channel

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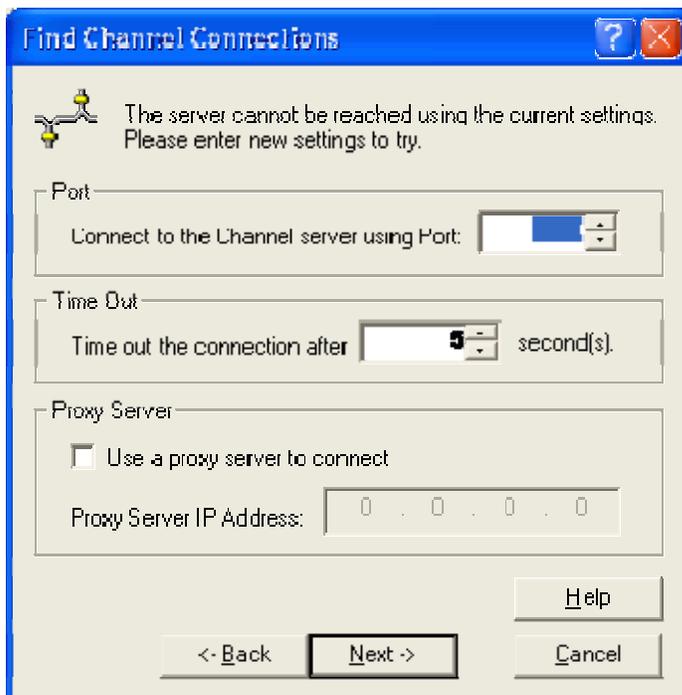
Policy Commander conveniently remembers the Channels you have worked on recently and displays them in the *Select the Channel you wish to manage* dialog box. However, there are times when you are working from a different computer or need to open a Channel that you have not managed before.

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 Policy Commander 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. Policy Commander 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



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. Policy Commander 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.

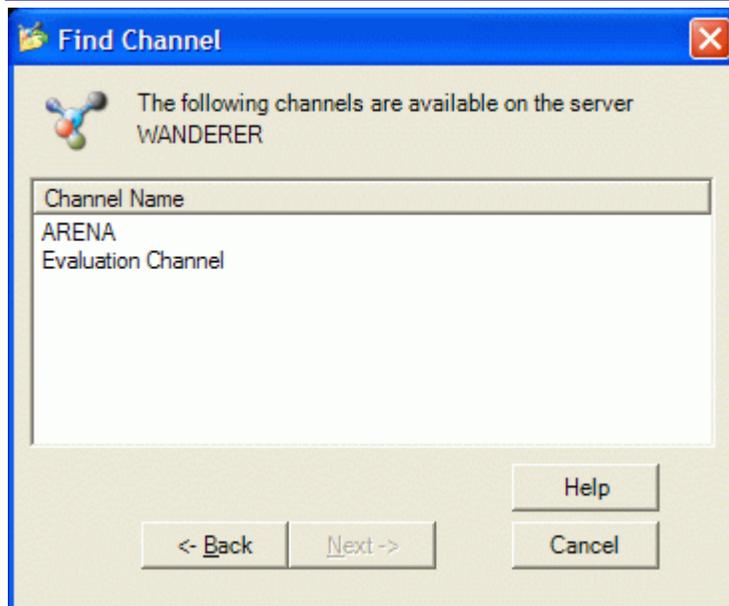
We recommend using one of the following port numbers:

- 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 Policy Commander still reports that the Channel Server cannot be found, check for a typo or other entry error on the *Find Channel Server* dialog box.

## Find Channel dialog

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This dialog box lists the Channels available through the Channel Server you specified. Click on the name of the Channel you want to open and click **Finish**. The Channel is opened in the Console main window.

This dialog box opens when you click **Next** on the *Find Channel Server* dialog box.

## Connect to Channel dialog

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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

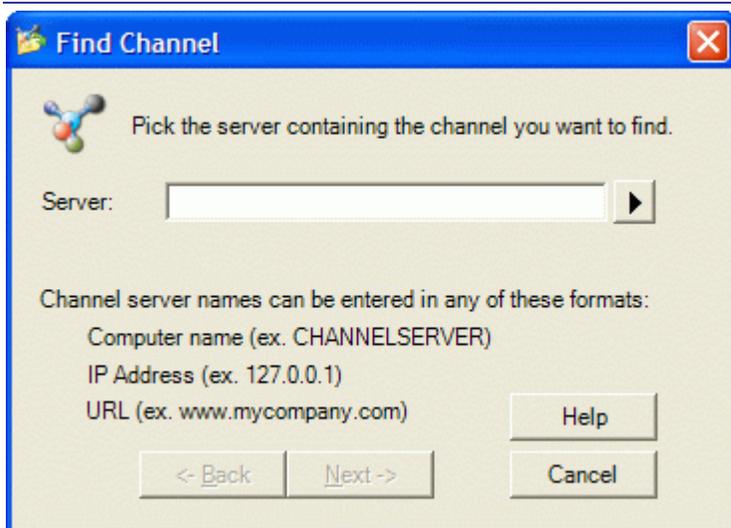
Click the  to select the name from a list of available Channels.

### 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.
- **Policy Commander:** To set up the Client subscription, install the Client software on each target computer.

## Find Channel Server dialog



Type the name of the computer that contains the Channel you want to find or click  to browse the network. When you click **Next**, the Console displays a list of the Channels connected to the Channel Server on this computer.

You can enter the server name in any of the following formats:

- Computer name (for example, FOREST)
- IP address (for example, 127.0.0.1)
- URL (for example, www.yourcompany.com)

This dialog box opens when you 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.

## Channel Security

### Overview of Channel Security

Each Channel can be secured with password protection and user roles that control both the options and the data available to individual users of the Channel. Securing a Channel requires 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.

### Securing the Channel

In Policy Commander, all channels are secured. An approved user name and password are always required to open the Channel.

### Roles and Permissions

Policy Commander provides a set of predefined roles that you can use and modify to suit your needs. You can also create new roles and define their permissions. Roles and permissions are set up through the *Manage Channel Security* dialog box.

- **Role:** A role brings together a specific set of permissions or privileges needed by one or more users in the Channel. Roles are assigned to individual users to control their access to specific areas of the Channel. Default roles available in the Channel include Channel Admin, Channel Power User, Help Desk, Report Admin, and Report User.
- **Permission:** Permissions control the specific features and data a user can access in the Channel. For example, by customizing the permissions, a role can be given access to all aspects of adding and managing computers or limited to only adding computers but not deleting them.

### **Users and Passwords**

Individual users or logins are assigned to roles that control access to features within the Channel. When a Channel is secured, an authorized user name and password are required to open the Channel.

- The Channel Admin can add users, assign roles to users, and change passwords. Users, roles, permissions, 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**.

### **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.

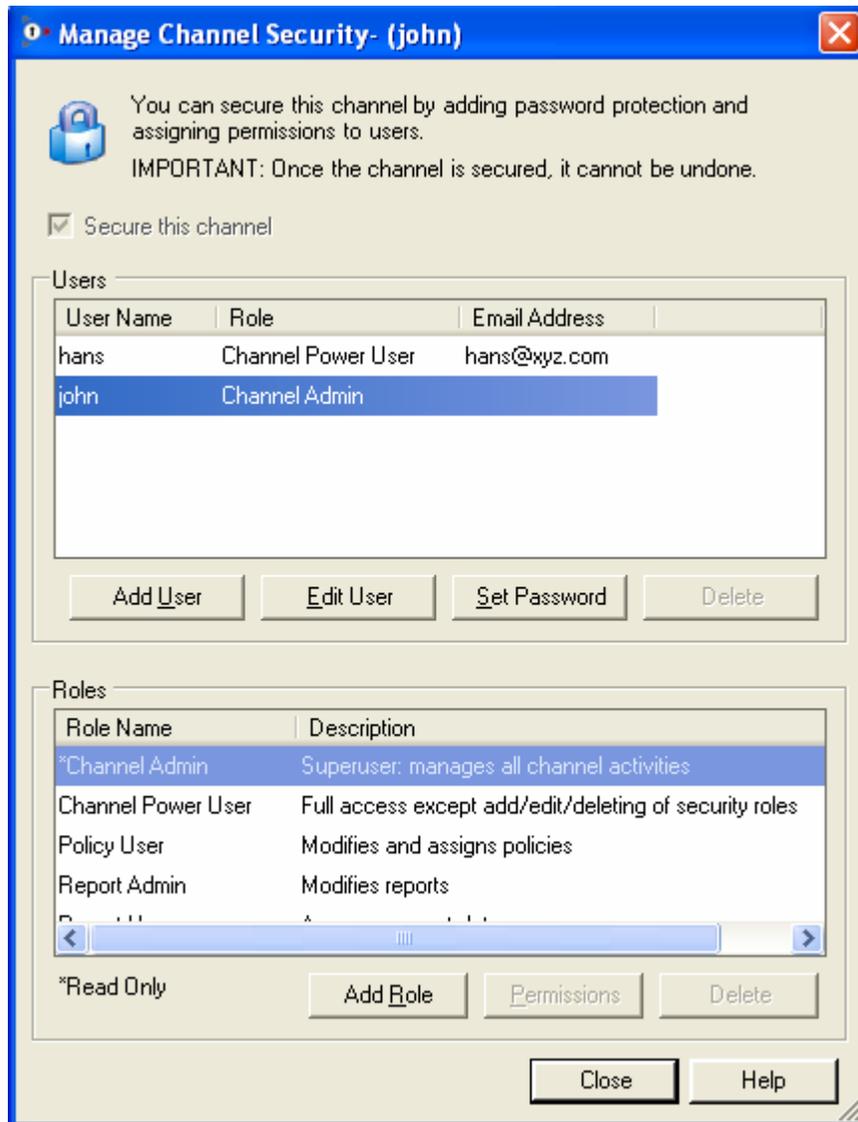
#### **Change a User's Role**

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 Channel Security dialog



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.  
In Policy Commander, all channels are secured.
- **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.
- **Permissions:** 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 *Permissions* dialog box opens.
- **Delete:** Delete the highlighted role.

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.

## Manage User dialog

The screenshot shows a 'Manage User' dialog box with the following fields and values:

- User Name:** hans
- Role:** Channel Power User (selected from a dropdown menu)
- Password:** [Masked]
- Confirm Password:** [Masked]
- Email Address:** hans@xyz.com

Buttons: OK, 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.

## Permissions dialog

On the Permissions dialog box, set or fine-tune the permissions for the Role selected on the **Manage Channel Security** dialog box. Users can only select items or actions permitted by their role. All other icons, menu items, and items in the Console are grayed out. For example, use the permissions to set up a role that is only allowed to Add Groups, but not make other changes.

You can grant access to all actions related to an item or limit the permissions to only specific actions. For example, to let a role add groups, either select the **Groups** check box to give permission to all aspects of working with groups or select the **Add Groups** option within the Groups branch to let the users add groups but not delete them.

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

## Creating and Assigning Roles

Roles define the permissions or privileges assigned to users in a secured Channel. By default, Policy Commander 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 **Permissions**.
5. On the *Permissions* 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 **Permissions** button.
4. On the *Permissions* dialog box, set the specific permissions or privileges that are granted to this role. Press **OK**.

## 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.

## **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, Policy Commander 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

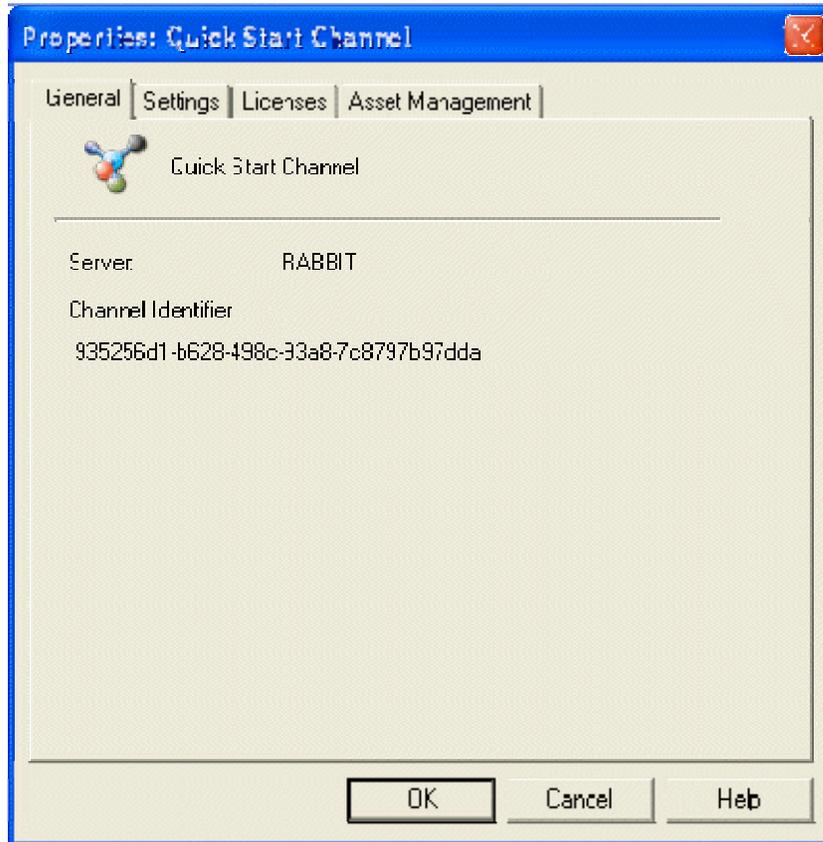
The tabs on the **Channel Properties** dialog box include:

*General tab*

*Settings tab*

*Licenses tab*

### Channel Properties General Tab



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:

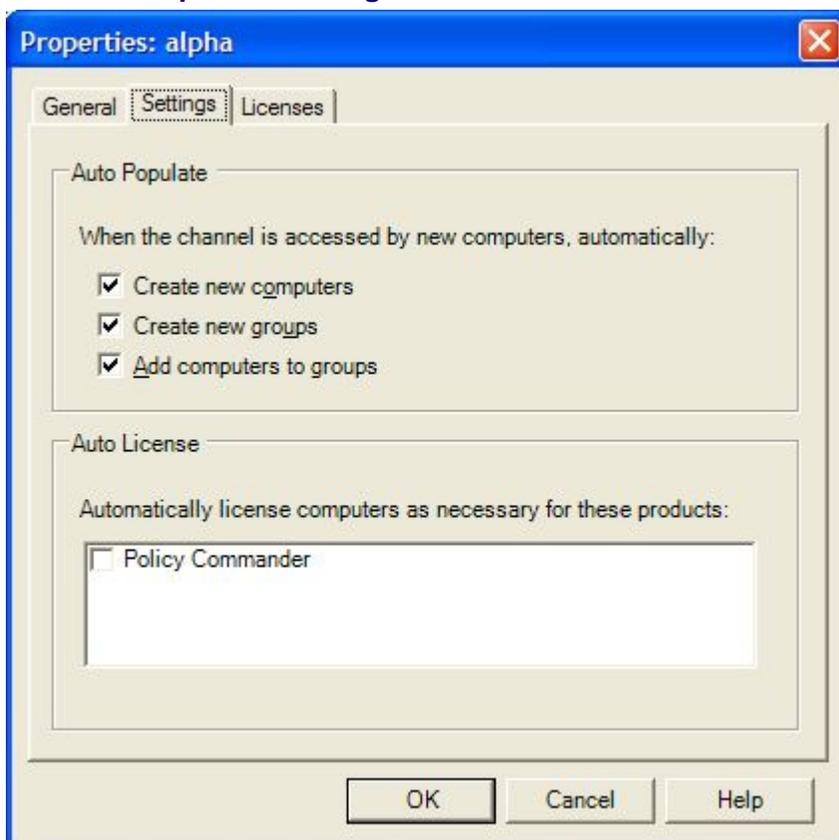


: The name of the Channel

**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.

## Channel Properties Settings Tab



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 Policy Commander 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 Policy Commander license. 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).

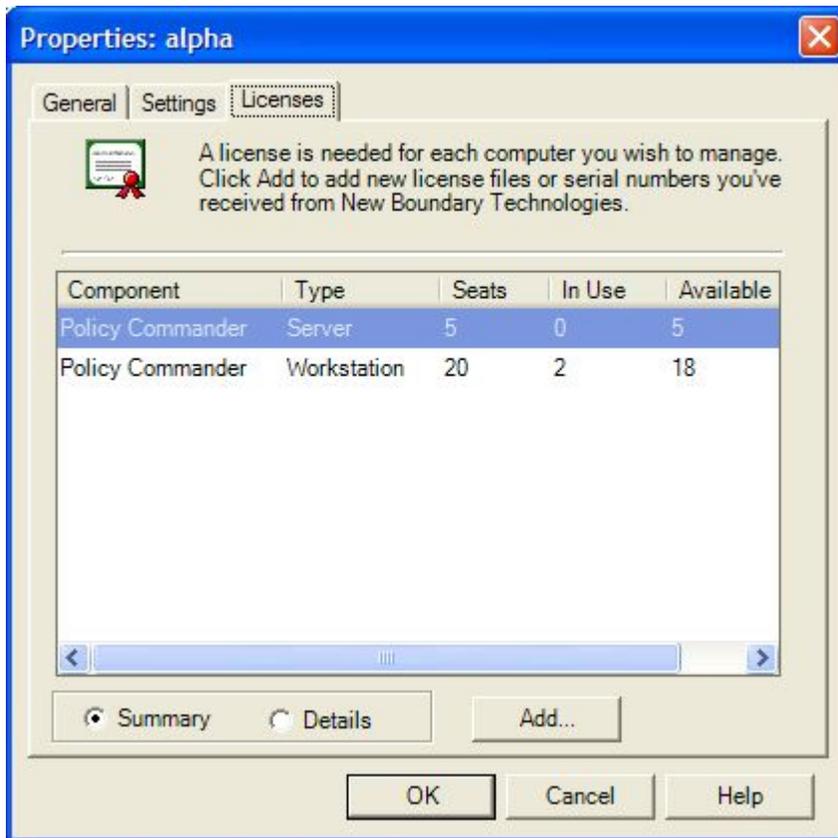
**Note:** For the computers and groups to auto-populate, the Client must be installed on the computer and the Client must subscribe to the Channel.

### Auto-License

- **Policy Commander:** Automatically assign a Policy Commander license to computers.

The Channel will not distribute changes to or receive updates from a computer that does not have a Policy Commander 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 packs 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 packs added to the Channel, along with the number of licenses available in each.

**Add a License Pack with a License Pack Serial Number**

If you received a serial number for a license pack from New Boundary Technologies:

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

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

**Note:** If you are adding Licenses for use with a small Channel, for example one used for a lab, select a license pack with a smaller number of Licenses. Once a license pack is added, the unassigned Licenses in that pack are available only to this Channel and the other Channels on the same server.

**Add a License Pack 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. The name of the license file indicates whether it is a workstation or a server license.
2. On the **Channel Properties | Licenses** tab, click **Add**.
3. In the *License Packs* dialog box, browse to the location of the license packs 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 a License Pack**

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

1. Highlight a license pack in the list.
  - If any of the licenses in the pack are in use, the managed computers must be unlicensed before removing the license pack.
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 Packs**

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

**License Packs dialog**

On the License Packs dialog box, add licenses to the Channel by entering a serial number or by opening the file containing the license packs you want to add. This dialog box opens when you click the **Add** button on the *Channel Properties | Licenses* tab.

After adding a license pack, it is displayed in the list on the **Channel Properties | Licenses** tab.

**Add a License Pack Serial Number**

1. In the text box, type or paste the serial number you received from New Boundary via e-mail.
2. Click **OK** to add the license pack to the computer where the Channel Server is located.

**Add a License Pack File**

1. Type the name and location of the License Pack file in the **File name** field or browse to the file location. License files have the extension .SFTCHL
2. With the name of the License Pack file in the **File name** field, click **Open** to add the license pack to the computer where the Channel Server is located.

**Purchase additional License Packs**

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

# Managing Computers

## About 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.** Policy Commander 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.
- **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, Policy Commander 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.

## Adding Computers

### 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.

7. On the Polling tab, clear the **Configure the Client to automatically apply new Channel settings** check box.
8. On each of the tabs in this dialog box, adjust the settings as required for the Client.
9. When you have finished, click **OK**.
5. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
6. Select the **Reboot computer after installation** check box.
7. Click **Install** to install the Client.
8. Click **Finish** when the installation is complete.

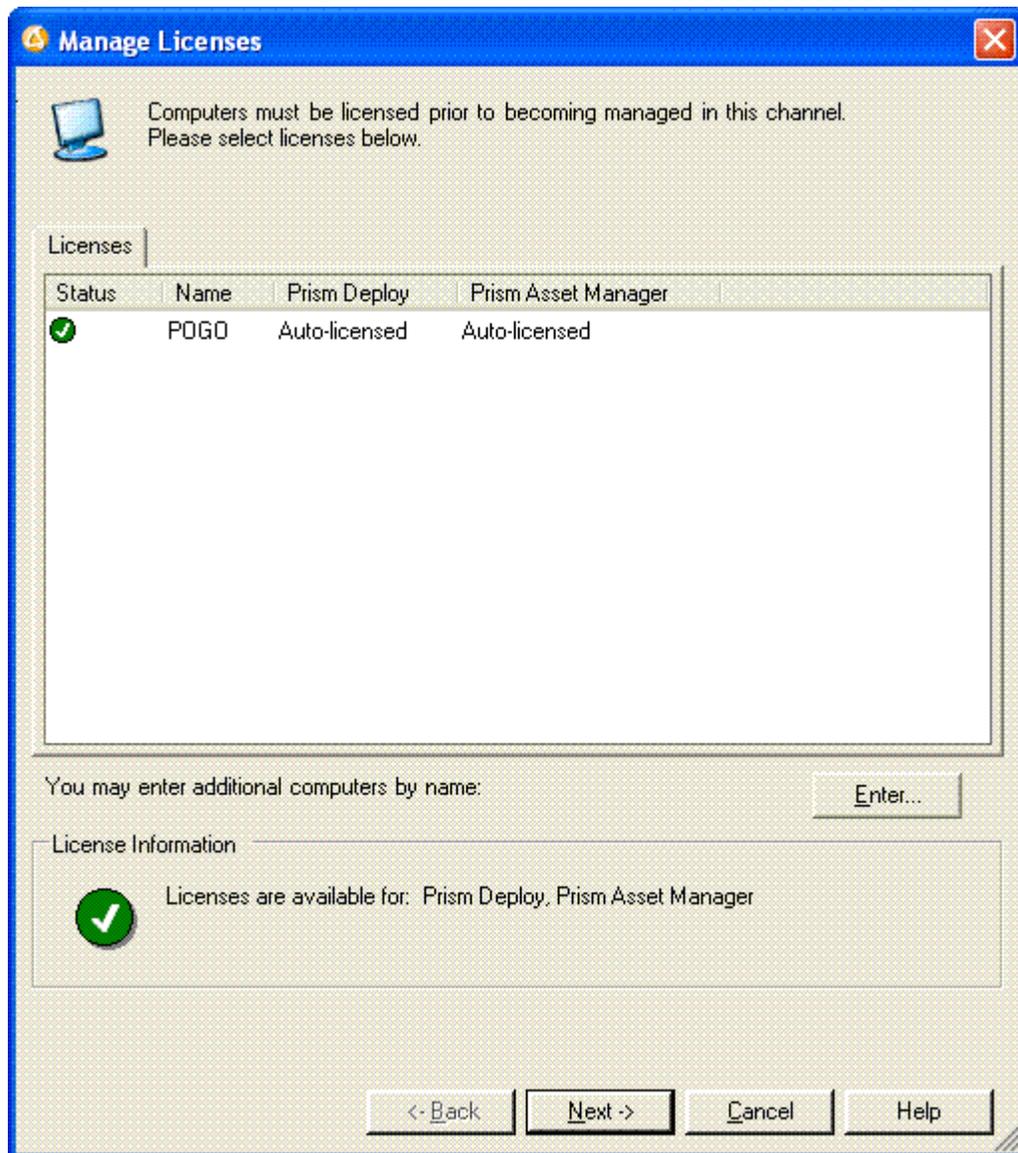
**Note** If the Client installation was not successful, remove the obstacle to the installation and try again. For example, if the installation was unsuccessful because the managed computer was turned off, start up the computer, and then install the Client.

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:

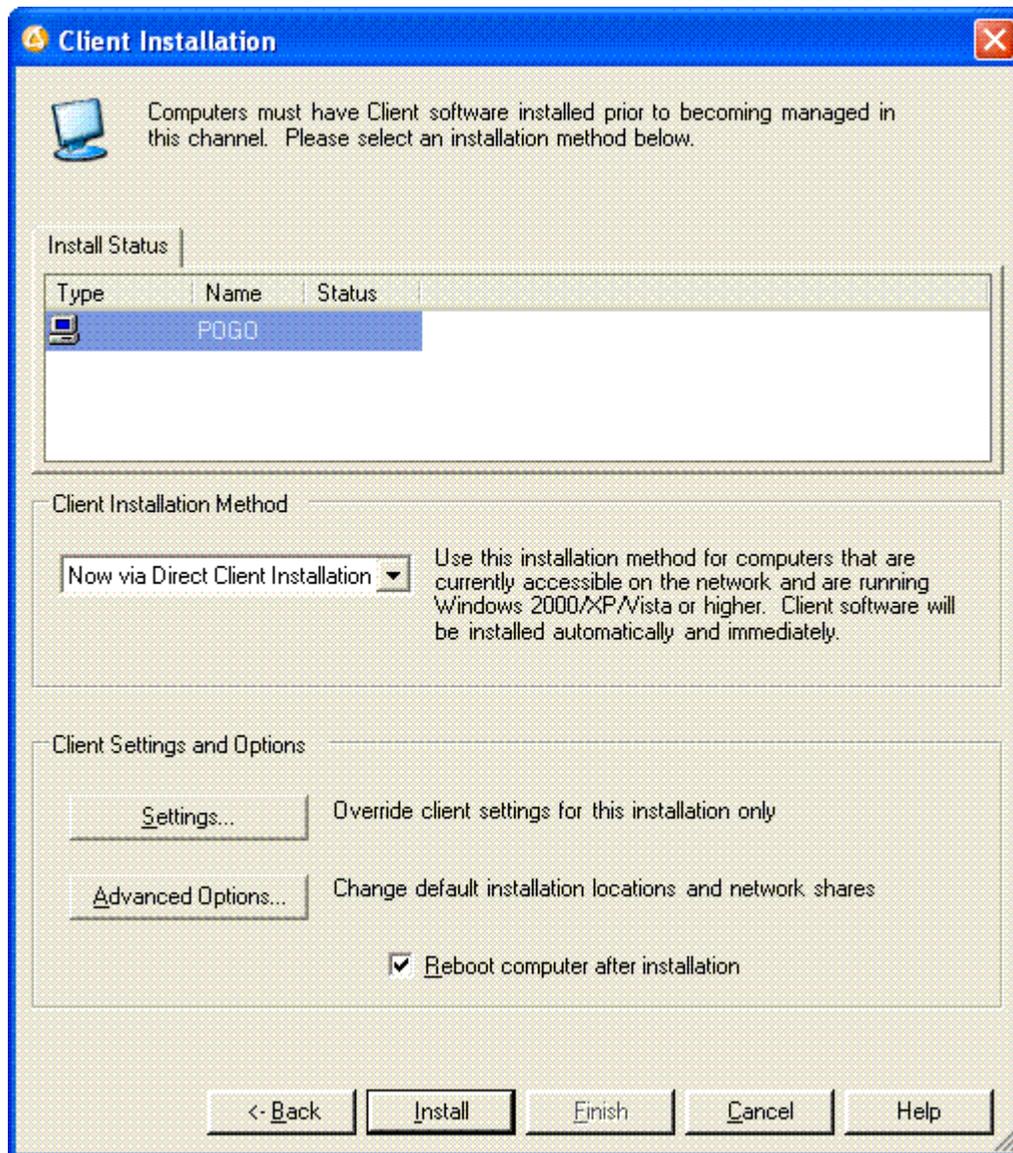
1. Click **Enter**.
2. Enter the name of the computer, and click **OK**.

### License Information

Displays the current status of Policy Commander 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**



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

<b>Install Status</b>	Lists the computer name and status for each computer being added to the Channel.
<b>Now by Direct Client Installation</b>	<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, click the <b>Install</b> button to install the Client. The results of the installation are displayed. Click <b>Finish</b> when the install completes successfully.</p>
<b>Later via Subscription File</b>	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

	<p>they are not currently connected to the network.</p> <p>After choosing this option, click <b>Finish</b> 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>
<b>Settings</b>	For Direct Install only. Allows you to override the Channel's default client settings. See <i>t</i> .
<b>Advanced Options</b>	For Direct Install only. Allows you to specify the location on the managed computer at which installation files are stored.
<b>Reboot computer after installation</b>	For Direct Install only. When selected, automatically reboots the client computer after installation.

### 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\$.

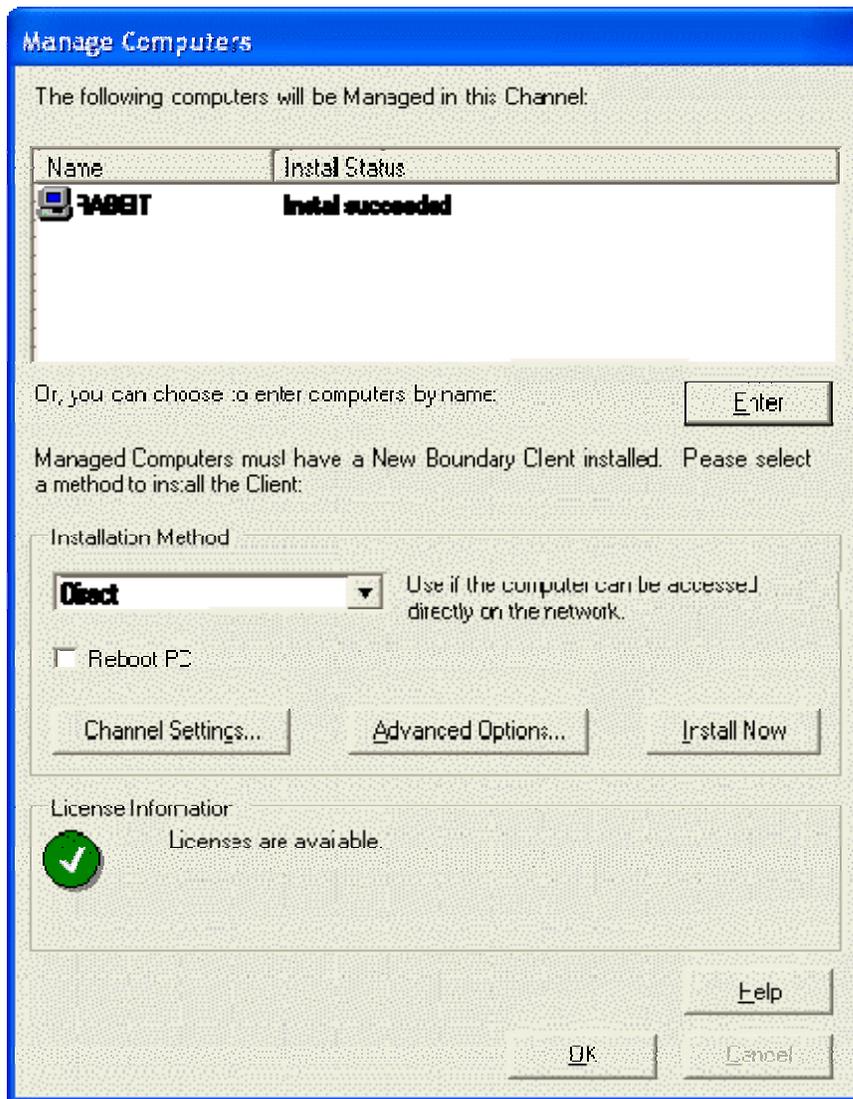
This dialog box opens when you click the **Advanced Options** button on the **Client Installation** dialog or **Subscription File** dialog.

### 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 Policy Commander 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**.

## Manage Computers - Results of Direct Installation dialog



If you choose **Now via Direct Client Installation** on the *Client Installation* dialog box and click **Install**, this dialog box displays the results of the Client installation and offers additional options.

- If the installation was successful, click **Finish**.
- If the installation on one or more computers was unsuccessful, remove the obstacle and try again by selecting **Install**.

## 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).

## Managing Policy Commander Licenses

Each managed computer must have a Policy Commander license assigned. A License Pack defines a block of license numbers that are assigned or could be assigned to computers in the Channel. This block is available from New Boundary Technologies as a serial number received via e-mail or as a binary, encrypted file. When you installed Policy Commander, a block of 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](http://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.

### **Assign Licenses to Computers**

Policy Commander licenses can be assigned automatically or manually.

#### **Auto-Licensing**

By default, auto-licensing is enabled. When you begin managing a computer and a license is available, the Channel automatically assigns an appropriate license 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 download or receive them.

#### **Manual Licensing**

If you disable auto-licensing, 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 removed from the Channel.

## Remove Channel dialog

Choose the options for removing the Channel you selected. This dialog box opens when you highlight a Channel on the *Select the Channel you wish to manage* dialog box and click the **Remove** button.

You can just delete the Channel name from the list of those available through this Console or also remove the connection to the Channel Server. In the **Delete Channel** section of the dialog box, choose from the following options

### **Disconnect Channel**

Choose this option to remove the Channel from the list of Channels listed in the *Select the Channel you wish to manage* dialog box.

**Disconnect Channel:** With this option selected, the Channel name is removed from the Channels associated with the Channel Server.

**Disconnect Channel:** With this option turned off, the Channel name remains listed with other Channels.

## Subscription Files

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### 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*
  - *Connection*
  - *Server*
  - *Naming Convention*
  - *Policy Commander*

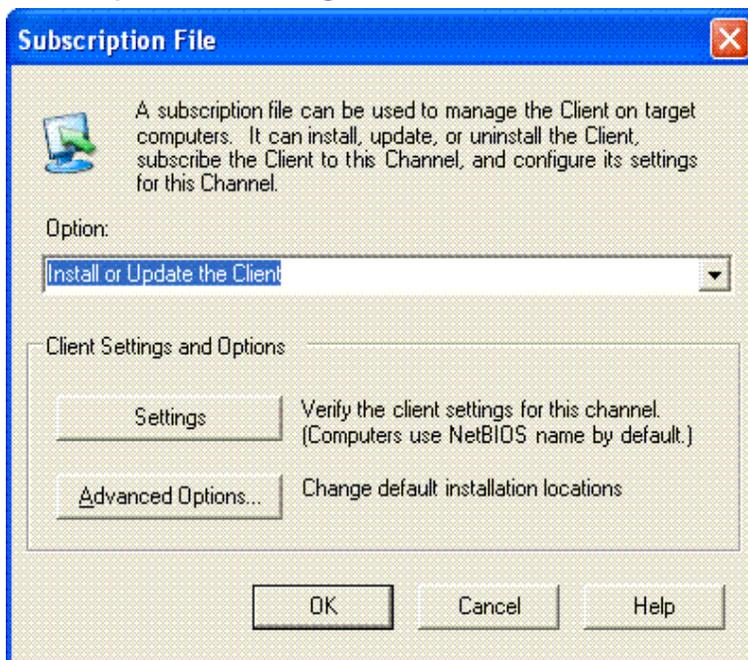
**Note:** If you do not want the Channel settings automatically applied to the managed computer, you must turn off the automatic update option on the *Polling* tab. See *Applying Unique Settings to a Client* for more information.

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:

- *Polling*
- *Connection*
- *Server*
- *Computer Name*

**Note:** If you identify computers by the Active Directory name, be sure to select the *Settings | Computer Name* tab. On this tab, change the preference to Active Directory.

**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.

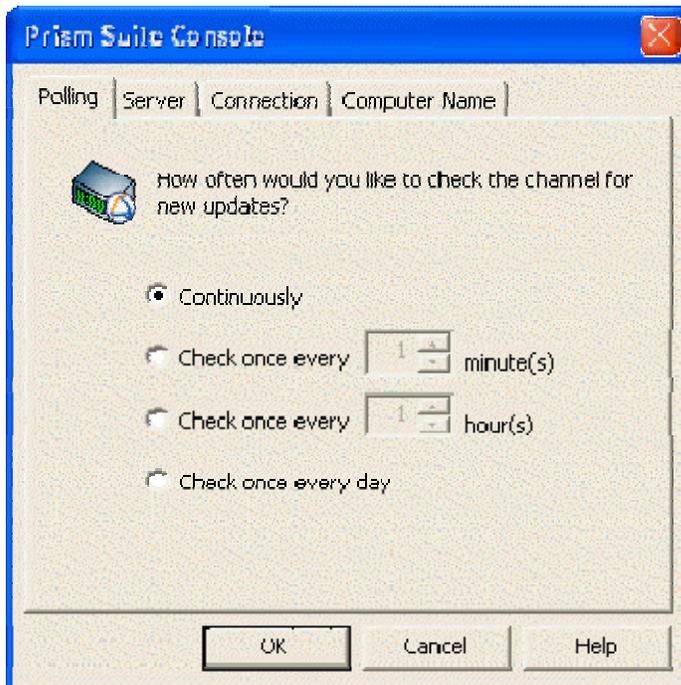
## Advanced Options

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*.)

## 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: 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 options

Choose from the following Polling options:

- **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.

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

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- **Check 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

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

- **Check once every  hour(s):** The Client contacts the Channel Server at the interval you set. The interval is a number of hours.
- **Check 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.

**Note:** 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**

With this option enabled, the client will automatically be updated whenever client settings are changed for the channel.

With this option disabled, the client settings are set individually for each managed computer. They are set when the Client is installed directly or with a subscription file.

To change the Client settings, you must reinstall the Client with new settings.

## **Working with the Client**

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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 Policy Commander files using the Client.

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.

## **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*.)

## **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*
- *Connection*
- *Naming Convention*
- *Policy Commander*

### ***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.

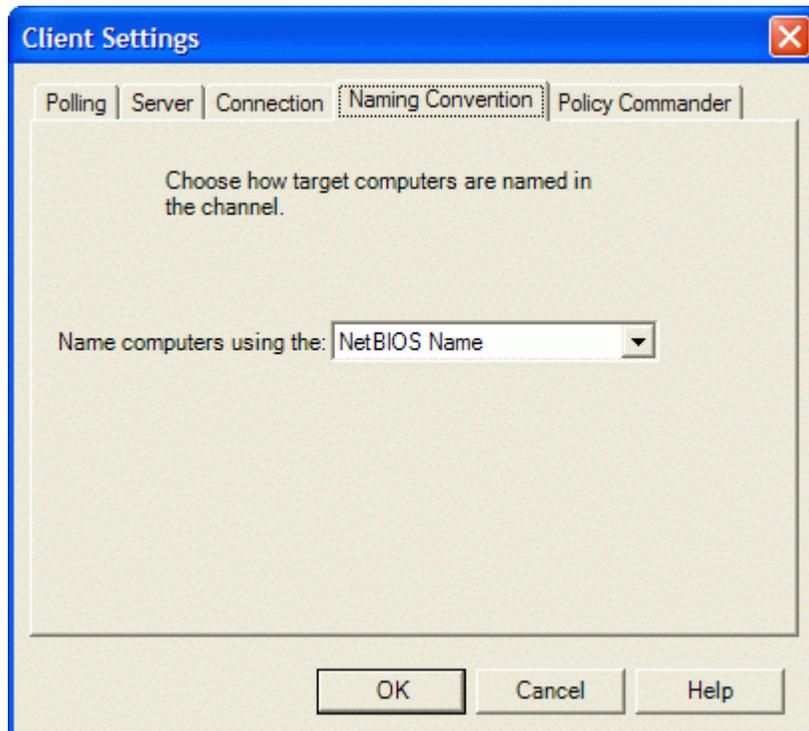
Exclude an individual managed computer from this automatic update by turning off this option when you install the Client on that computer

### ***Setting the Client Values Automatically or Individually***

Policy Commander 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*

## Naming Convention tab



On this tab, choose the type of name you want the computer to return to the Channel after the Client is installed.

This tab is available when you click the **Settings** button on the *Subscription File* dialog box.

### **Naming options**

Choose one of the following naming options from the drop-down list:

- **NetBIOS:** The NetBIOS name is the name that Windows recognizes on the individual computer. This name is displayed in the computer's properties. The NetBIOS name can be used for any computer. This option is the default.
- **Active Directory:** The name used by Active Directory to identify the computer.

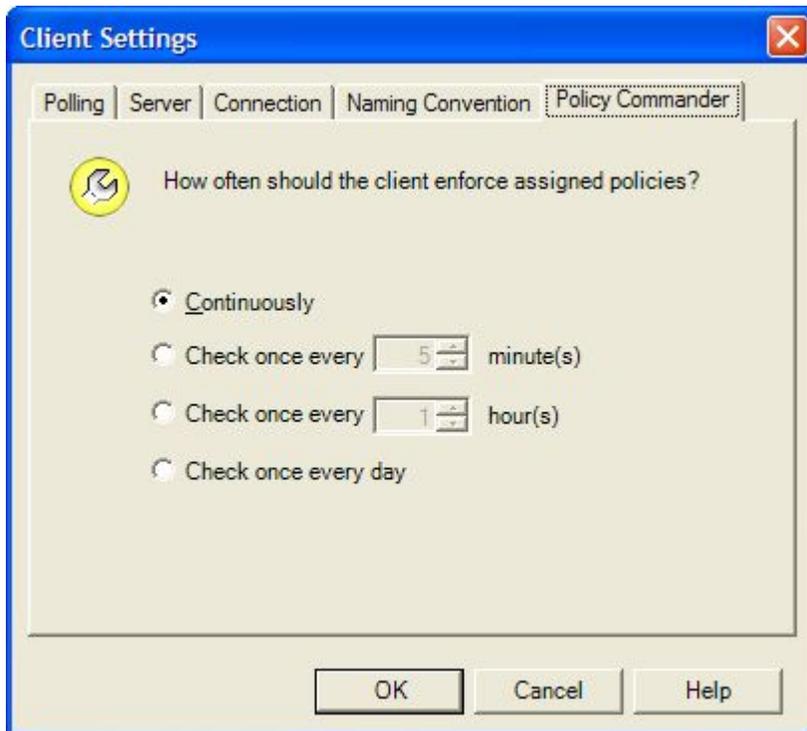
If you set this option and the computer does not have an Active Directory name, the Client returns the NetBIOS name when it contacts the Channel Server. If you have the auto-population options turned on, the NetBIOS name is displayed in the Channel after the computer is added.

Groups are automatically added to the Channel along with computer names, when all of the following are true:

- the Active Directory option is selected on this tab
- a subscription file is used to install the Client
- after installing the Client the computer is rebooted
- the computers use Active Directory
- the auto-population options are turned on

(See *Automatically Adding Organizational Groups from the Network Structure*.)

## Policy Commander tab (Client Settings)



On this tab, select the interval at which the Client on a managed computer evaluates its assigned policies. The Client will evaluate the current policies at this interval even if it has not polled the Channel Server. For example, this setting may be useful for maintaining policies on managed laptop computers that connect to the network less frequently.

For policies assignments that are set to Auto Enforce, this frequency becomes the enforcement interval.

### Set the frequency

Choose from the following options:

- **Continuously:** The Client evaluates policy compliance every 5 seconds. This option requires more processor time 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.

- **Check once every 10 minute(s):** The Client evaluates policy compliance at the interval you set. The interval is a number of minutes. The default value is 10 minutes. The 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
- **Check once every 1 hour(s):** The Client evaluates policy compliance at the interval you set. The interval is a number of hours.
- **Check once every day:** With this setting, the Client enforces the policy once per day.

**Note:** Please contact *Technical Support* for recommendations on the optimal enforcement interval for your situation.

## Automatically Maintaining Client Settings

You can use Policy Commander'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.

### 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 Policy Commander 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.
  7. On the *Polling* tab, clear the **Configure the Client to automatically apply new settings for this channel** check box.
  8. On each of the tabs in this dialog box, adjust the settings as required for the Client.
  9. When you have finished, click **OK**.
10. Click **Advanced Options** if you need to specify paths and folders for installation options. When you have finished specifying **Installation Options**, click **OK**.
11. Select the **Reboot computer after installation** check box.
12. Click **Install** to install the Client.
13. 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.
  1. On the Polling tab, clear the **Configure the Client to automatically apply new settings for this channel** check box.
  2. On each of the tabs in this dialog box, adjust the settings as required for the Client.
  3. 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 **Reboot computer after installation** check box.
6. Click **Install** to install the Client.
7. Click **Finish** when the installation is complete.

#### **Subscription File:**

To install the new settings through a subscription file:

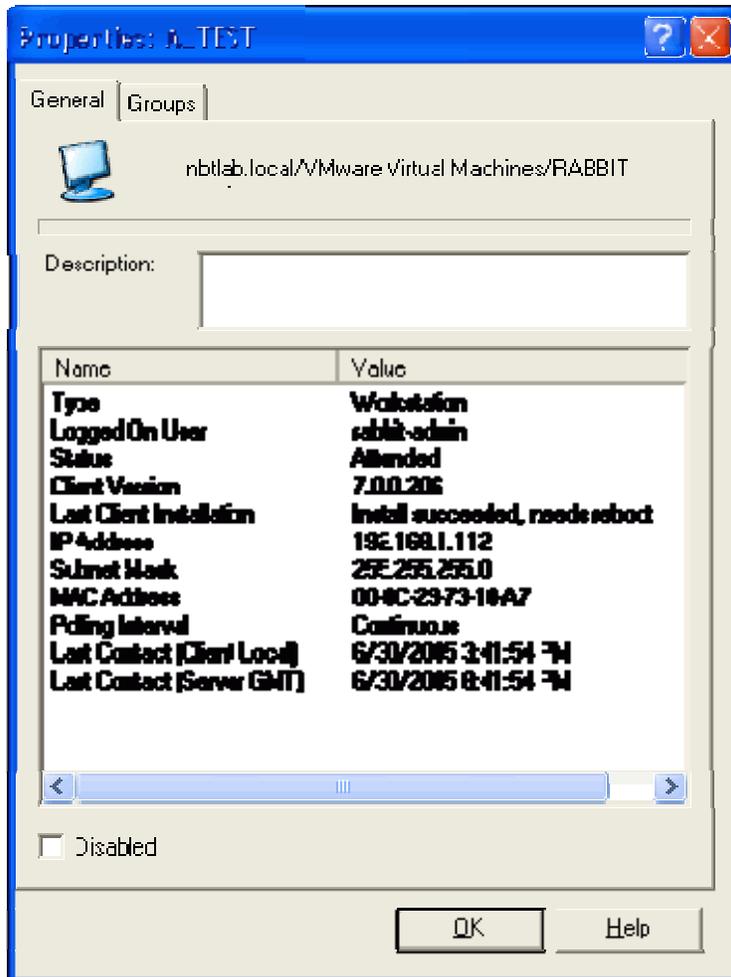
1. Select **Computers | Create Subscription File**. The *Subscription File* dialog box displays.
2. Select **Install or Update the Client** option.
3. Click the **Settings** button.
  1. On the Polling tab, clear the **Configure the Client to automatically apply new settings for this channel** check box.
  2. On each of the tabs in this dialog box, adjust the settings as required for the client.
  3. 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.

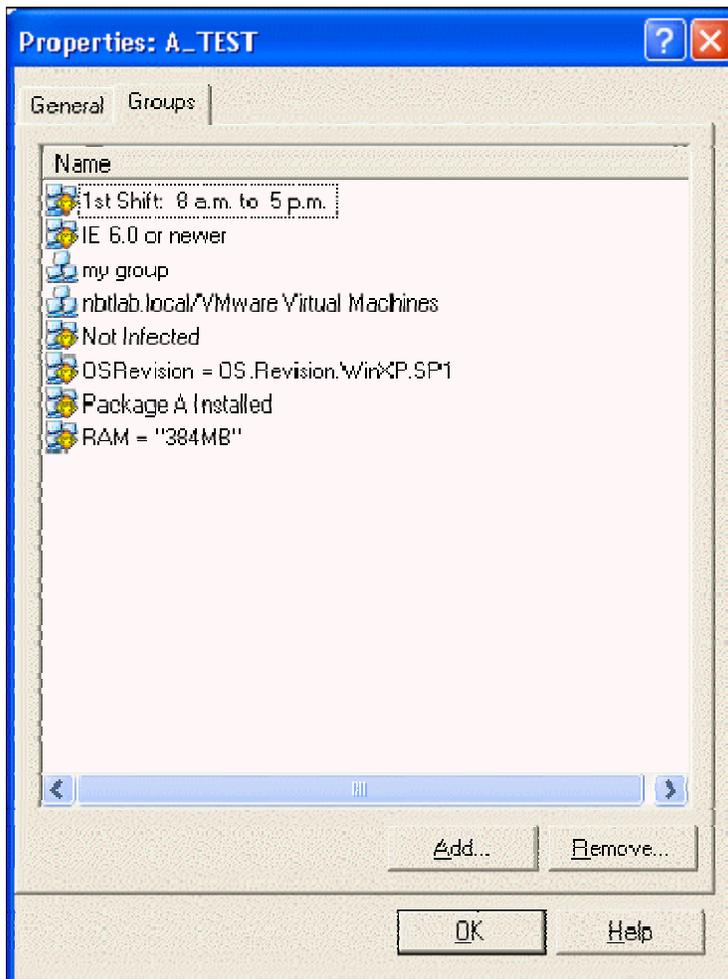
### **Disable**

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

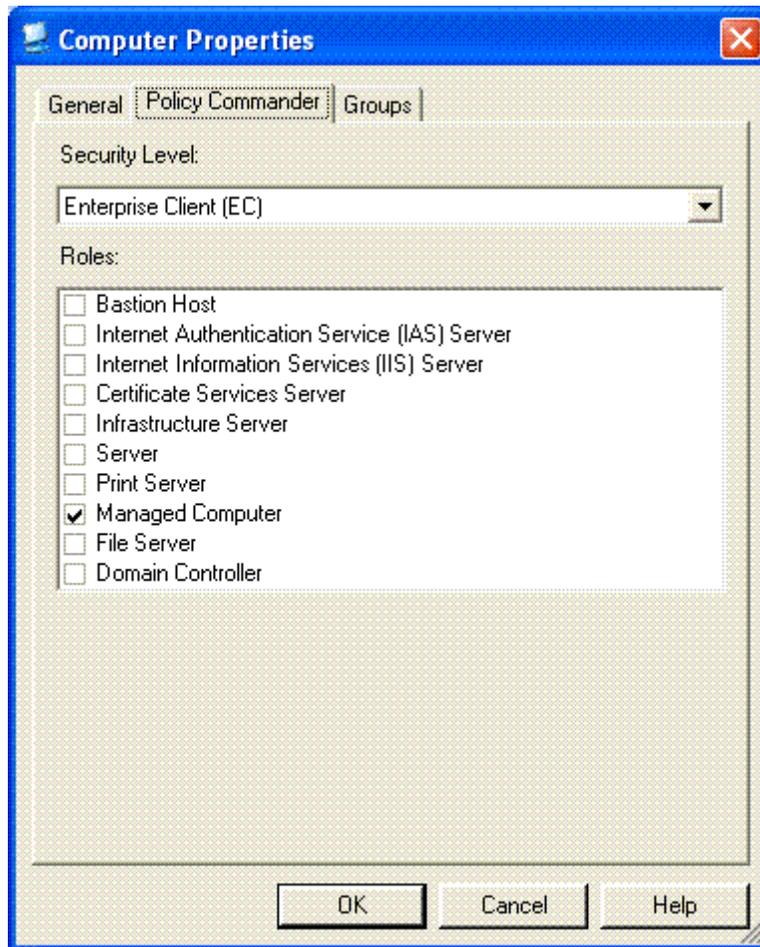


The **Computer Properties | Groups** tab displays information about the selected computer's membership in organizational and configuration groups.

**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.

## Policy Commander Tab (Computer Properties)



The **Computer Properties | Policy Commander** tab displays attributes of the computer that are used to determine which policies apply to the computer. Only policies with matching characteristics are applied to this computer.

**Note:** Before adding a computer to Policy Commander, the Client must be installed on the computer. See *Managing Computers*.

### Security Level

Only policies with a matching security level defined in an applicability step will apply to this computer. The *Microsoft Windows XP Security Guide* defines these levels as:

- **Stand-alone (SA)/Legacy Client:** Client computers in this environment are not members of an Active Directory domain and may need to communicate with systems that run Windows NT® 4.0.
- **Enterprise Client (EC):** Client computers in this environment are located in an Active Directory® directory service domain and only need to communicate with systems running Windows 2000 or later versions of the Windows operating system.
- **Specialized Security - Limited Functionality (SSLF)/High Security:** Concern for security in this environment is so great that a significant loss of functionality and manageability is acceptable. For example, military and intelligence agency computers operate in this type of environment.

**Note:** Use the High security setting with care. Higher security settings can interfere with software applications on the target computer.

## Roles

Defines the roles this computer has. Only policies with matching Role settings are enforced on this computer. A computer can have more than one role. Roles include:

- **Bastion Host:** A secure server that is accessible from the Internet or untrusted public network, making it vulnerable to attack.
- **Certificate Services Server:** A server used to manage X.509-compatible certificates.
- **Domain Controller:** A server that authenticates domain logons and maintains master security database for a domain or group of connected computers.
- **File Server:** A server that stores files for users and provides access to the files.
- **Infrastructure Server:** A server to support Dynamic Host Control Protocol (DHCP) server or a Windows Internet Name Service (WINS server).
- **Internet Authentication Service (IAS) Server:** Server where Microsoft Internet Authentication Service (IAS) is installed. Used for verifying the identity of clients that access the network remotely.
- **Internet Information Services (IIS) Server:** Server that is running Internet Information Services (IIS). Used to deliver content over the Web.
- **Managed Computer:** Any computer that is under your control. This role is the default.
- **Print Server:** A computer that is dedicated to managing the printers on a network so that users can share printers.
- **Server:** Any computer being used as a server. Use this option if you do not want to choose one of the options above to designate it as a specific type of server.

## Disabling or Deleting Computers

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### 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 **Disable** 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 **Disable** check box.
4. Click **OK**.

When you are ready to activate this computer, clear the **Disable** 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 Policy Commander 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. For example, rather than searching out and applying policies to individual computers, set up a group of related members and apply a policy 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 Policy assigned to a group is installed on each new member that joins the group. For example, if you apply a policy to a configuration group, when a computer is added to the group automatically, the policy is applied on that computer. Even if a member is added six months after the policy was originally assigned to the group, it is installed for the new member. The policy can be disabled or deleted when it is no longer needed.

For a preview of Channel groups, add one or more computers to the Evaluation Channel, then, watch as the groups populate. (The Evaluation Channel was installed with Policy Commander. See the *Quick Start Guide* 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. (In this case, you must also have the **Computer Name Selection** set to **Active Directory** in the subscription file advanced settings, on the *Naming Convention* tab.)

See *Automatically Adding Organizational Groups from the Network Structure*.

## Organizational Groups

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### 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.

To use the AD names, you must set the **Computer Name Selection** to **Active Directory** for the Client via the subscription file advanced settings, on the *Computer Name* tab.)

**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, Policy Commander automatically creates the group .local with subgroups YourCompany.local, and Engineering.YourCompany.local. It adds the computer to the new group Engineering.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. (With this option, skip the next step and go to step 3.)
2. In the *New Group: Enter a name for the group* dialog box, type a descriptive name for the group in the text box. Click **Finish**.

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 through the *Add To Group* menu option.
  - Add an individual computer through the *Choose a Group* menu option.

### New Group dialog



Use the Console to set up groups that reflect your organization or groups that reflect the characteristics of the managed computers.

The **New Group** dialog box opens when you right-click on the Organizational Groups branch of the *Managed* tab and select Create Group from the pop-up menu..

On this dialog box, select one of these group types:

- **Organizational Group:** Organizational groups may reflect functional groups, roles within your organization, or group computers by location. Members of an organizational group can be added manually or automatically.
  - Manually assign individual computers to the group from the pool of targets in the Channel. This type of group is most useful for smaller numbers of computers.
  - Automatically populate the organizational group if your network uses Active Directory (AD)
- **Configuration Group:** Configuration groups are populated automatically with managed computers that match criteria you specify. The membership of the group changes dynamically (without your intervention) as the configurations of the managed computers change. With the Configuration Groups, set up either of these types of groups:
  - **Predefined Group:** Select a type of value (operating system, language, CPU, and so on) and the Console automatically creates and populates subgroups based on the value.
  - **User-defined Group:** Create simple to complex rules to determine membership in groups. The rules for the sub-groups can contain different combinations of values, so that computers with very specific criteria can be combined into functionally equivalent units.

### New Group: Enter the Name of the Group dialog

Type a descriptive name for the group you are adding. The name can include spaces.

### Choose a Group dialog

Use this dialog box to assign the current computer to one or more Organizational Groups. The list shows the names of all the organizational groups in the Channel that do not contain the selected computer.

The **Choose a Group** dialog box opens when you select the **Add To Group** menu option on the **Edit** menu or when you right-click on the computer.

#### Assign the computer to a group

1. Highlight the name of a group in the list.
2. Click **OK** to assign the current computer to that group.

#### Assign the computer to more than one group

1. Highlight multiple groups in the list, by doing one of the following:
  - Press <Shift> or <Ctrl> as you highlight multiple group names.
  - Click and drag the cursor to highlight any number of groups in the list.
2. Click **OK** to assign the current computer to the highlighted groups.

### Removing a Computer from a Group

You can remove a computer from an organizational group through the right-click and **Edit** menu options on the *Managed* tab or through the *Group properties | Members* tab.

To remove a computer from an organizational group:

1. On the *Managed* tab, expand the group in the tree view.
2. Right-click on the computer name, or open the **Edit menu**, and select **Remove from Group**.

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

## Configuration Groups

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### 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*.)

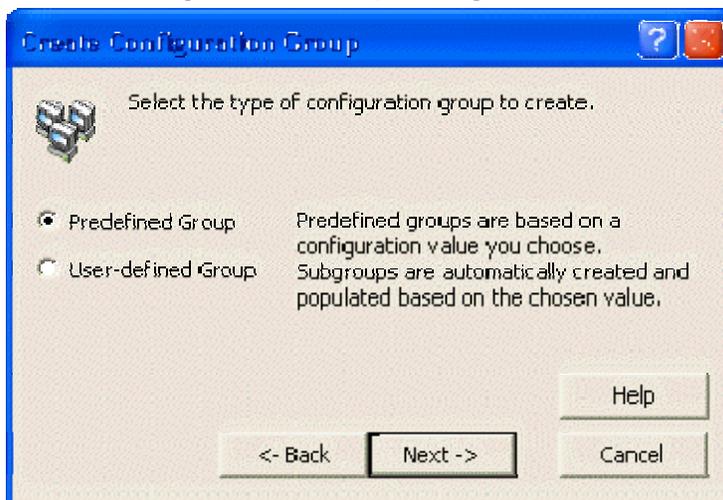
### Add a Predefined Configuration Group

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: Enter a name for the 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



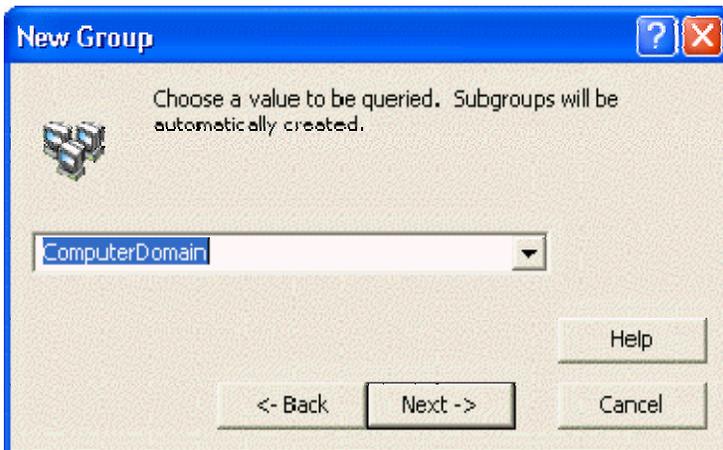
Configuration Groups are dynamic and populate automatically based on the value or rule you set as criteria for membership.

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 **Configuration Group** option on the *New Group*.

## 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:

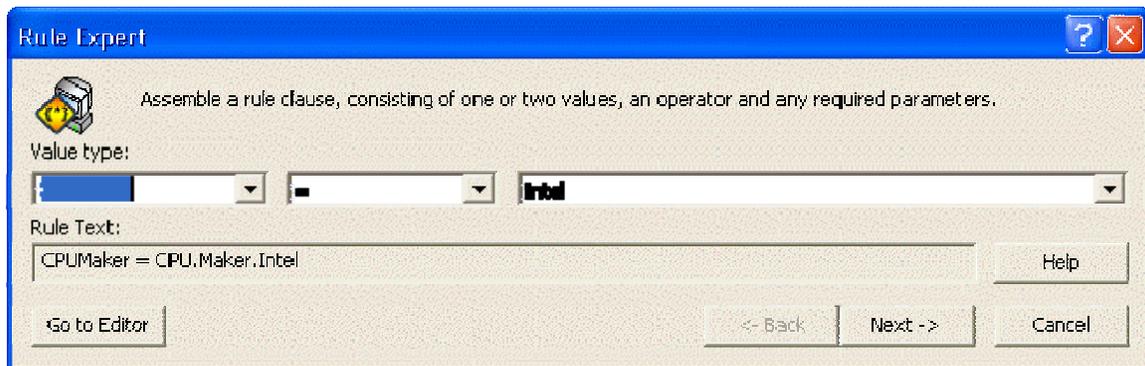
1. With the *Configuration Groups* tab open in the tree view, right-click on the **Configuration Groups** branch in the tree view, then choose **Create Group** from the pop-up menu.
2. In the *Create Configuration Group* dialog box, select the option button for **User-defined Group**. Click **Next**.
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 select **User-defined Group** and click the **Next** button on the *Create Configuration Group* dialog box, while creating a group in the Console.

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.
- **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*).

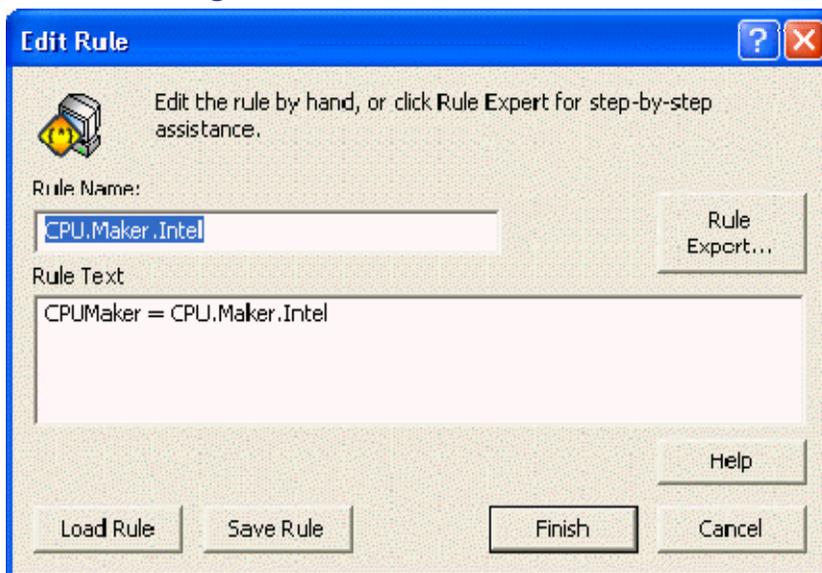
- **Value:** Type the variable value or select an item from the drop-down list. The items available in the drop-down list depend on the selection you made in the Value Types field. For example, if you choose **firstcdletter** in the Value Types field, the Value field lists the drive letters A, B, C, 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** button on the on the *Group Properties | General* 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 Policy Commander file or between Policy Commander 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 Policy Commander file or between Policy Commander files and configuration groups in the Console.

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

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### 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 subgroup within the same user-defined, parent configuration group. For example, if you have a change to distribute to all of the computers except those running Windows XP, create a subgroup for Windows XP, then create an All Others subgroup. You can safely distribute changes to or inventory the All Others subgroup, avoiding the problem of the Windows XP computers.

1. In the *Configuration Groups tab*, right-click on the name of the parent group in the tree view.
2. Choose **Create Group** from the pop-up menu.
3. In the *Rule Expert: Choose a type of user-defined group* dialog box, select the option button for **All Others Group**. Click **Next**.
4. In the *Rule Expert: Rule Name* dialog box, enter a name for the new group or leave the default name—**All Others**. Click **Finish**.

### Rule Expert: Choose a Type of User-defined Group dialog

Create one of the following types of user-defined Configuration Group:

- **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 Configuration 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.

**Importing and Exporting Configuration Groups**

Configuration groups can be exported out of any version of Prism or Policy Commander, and Policy Commander can import these configuration groups. The export file format is XML.

**Exporting Configuration Groups**

Configuration groups can be exported out of a channel by running the `export_config_groups.vbs` script. This utility can be used with any version of Prism or Policy Commander. The utility extracts all of the configuration groups from the channel and stores them in an xml file called `ChannelConfigGroups.xml` in your TEMP folder (for example, `C:\Documents and Settings\user\Local Settings\Temp`).

The utility can be obtained by contacting New Boundary *Technical Support*.

**Script Usage**

```
export_config_groups.vbs <database server> <database name> <loginspec>
```

**database server:** This value specifies the database server containing the channel. If installation was to a named instance, this parameter will be of the form: `<database server\named instance>`

**database name:** This value identifies the specific database instance representing the channel.

**loginspec:** Specifies the authentication approach:

- E: trusted connection -- uses the current login credentials to access the database.
- U: standard SQL connection -- login credentials are specified through the `OSQLUSER` and `OSQLPASSWORD` environment variables.

### Example

The following command produces a ChannelConfigGroups.xml file (in the %TEMP% folder) containing the configuration groups from the Policy\_Commander\_Sample\_1 database name in SQLEXPRESS on MyServer. It authenticates using the current user's login credentials.

```
export_config_groups.vbs "MyServer\SQLEXPRESS" Policy_Commander_Sample_1 -E
```

### Importing Configuration Groups

To import configuration groups, select **Import Configuration Groups** from the **File** menu. A file Open dialog appears. Browse to the XML file containing the configuration groups that have been exported from a channel.

To see the configuration groups in the console immediately, refresh the console.

## 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 Policy Commander /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.

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\Foobar\Some Value" : the registry value name is "Some Value"

"HKLM\Software\Foobar\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.

### Rule Expert: Rule Name

Type a descriptive name for the rule. This name identifies the installation rule or the subgroup that is created and populated based on the rule you create.

The parent group is named automatically, based on the item selected the **Value Type** field in the **Rule Expert: Assemble a Rule Clause** dialog box. You can change the name of the group later, by right-clicking on the name and selecting **Rename** from the pop-up menu.

This dialog box opens when you click **Next** on the *Rule Expert: Assemble a Rule Clause* dialog box.

### 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: <code>NOT EXISTS &lt;file&gt; "C:\Oracle\DB.BIN"</code>
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:  <code>IP MATCHES "*.183.*.*"</code>
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](http://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.
- **OR:** Computers that meet **either** or **any** of the criteria defined by the rule.

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.

Policy Commander 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**

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 Policy Commander.

#### **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](http://www.newboundary.com/support/support.htm).

#### *Variable Type*

String

#### **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

#### **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

#### **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

**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"

Currently, only WMI classes in the root\CIMV2 namespace are supported.

*Variable Type*

Depends on the WMI variable

**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"

*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>

*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

### **Predefined Variables**

Predefined variables include those that are part of Policy Commander like PT\_CD, and those defined as part of the Policy Commander file installation rules. For some predefined variables, the possible values are provided by Policy Commander, not the environment—these values are called constants. For example, Policy Commander 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 DNS Name**

ComputerDNSName [comparison operator] ["DNS Name"]

DNS name of the computer

*Variable Type*

String

### **Computer Domain**

ComputerDomain [comparison operator] ["Domain"]

The domain or workgroup of the computer.

*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
- AMD\_K5\_Model\_0
- AMD\_K5\_Model\_1
- AMD\_K5\_Model\_2
- AMD\_K5\_Model\_3
- AMD\_K6\_Model\_6
- AMD\_K6\_Model\_7
- 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\_486DX2\_Model\_3
- Intel\_486SL\_Model\_4
- Intel\_486SX2\_Model\_5
- Intel\_486DX2E\_Model\_7
- Intel\_486DX4\_Model\_8
- Intel\_Other\_486\_CPU
- Intel\_Pentium\_Model\_1
- 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 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*

- "Microsoft Backoffice"
- "Microsoft Small Business Server (restrictive client license)"
- "Terminal Services"
- "Windows .NET Web Server"
- "Windows 2000 Advanced Server or Windows .NET Enterprise Server"
- "Windows 2000 or Windows .NET Datacenter Server"
- "Windows Small Business Server"
- "Windows Small Business Server"
- "Windows XP Home Edition"

**Operating System Family**

OSFamily [comparison operator] [Constant]

The operating system family on the computer.

*Variable Type*

String

*Constants*

- Windows 9x Family
- Windows NT Family

**Operating System Revision**

OSRevision [comparison operator] [Constant]

The service-pack revision of the operating system.

*Variable Type*

String

**Constants**

- Windows 95, Initial Release
- Windows 95, Service Pack 1
- Windows 95, OSR 2
- Windows 98, Initial Release
- Windows 98, 2nd Edition
- Windows Me, Initial Release
- Windows NT 4.0, Initial Release
- Windows NT 4.0, Service Pack 1
- Windows NT 4.0, Service Pack 2
- Windows NT 4.0, Service Pack 3
- Windows NT 4.0, Service Pack 4
- Windows NT 4.0, Service Pack 5
- Windows NT 4.0, Service Pack 6
- Windows NT 4.0, Service Pack 6a
- Windows NT 4.0, Service Pack 7
- 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 XP, Initial Release
- Windows XP, Service Pack 1
- Windows XP, Service Pack 2
- Windows XP, Service Pack 3

- Windows Server 2003, Initial Release
- Windows Server 2003, Service Pack 1
- Windows Server 2003, Service Pack 2
- Windows Vista, Initial Release

### **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 95
- Windows 98
- Windows 2000
- Windows Me
- Windows NT 4.0
- Windows XP
- Windows Server 2003
- Windows Vista

### **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

#### Constants

Value*	Descriptive Name**
Language.Base.Arabic	Arabic
Language.Base.Bulgarian	Bulgarian
Language.Base.Catalan	Catalan
Language.Base.Chinese	Chinese
Language.Base.Czech	Czech
Language.Base.Danish	Danish
Language.Base.German	German
Language.Base.Greek	Greek
Language.Base.English	English
Language.Base.Spanish	Spanish
Language.Base.Finnish	Finnish
Language.Base.French	French
Language.Base.Hebrew	Hebrew
Language.Base.Hungarian	Hungarian
Language.Base.Icelandic	Icelandic
Language.Base.Italian	Italian
Language.Base.Japanese	Japanese
Language.Base.Korean	Korean
Language.Base.Dutch	Dutch
Language.Base.Norwegian	Norwegian
Language.Base.Polish	Polish
Language.Base.Portuguese	Portuguese
Language.Base.Romanian	Romanian
Language.Base.Russian	Russian
Language.Base.Croatian	Croatian
Language.Base.Serbian	Serbian
Language.Base.Slovak	Slovak
Language.Base.Albanian	Albanian

Language.Base.Swedish	Swedish
Language.Base.Thai	Thai
Language.Base.Turkish	Turkish
Language.Base.Urdu	Urdu
Language.Base.Indonesian	Indonesian
Language.Base.Ukrainian	Ukrainian
Language.Base.Belarusian	Belarusian
Language.Base.Slovenian	Slovenian
Language.Base.Estonian	Estonian
Language.Base.Latvian	Latvian
Language.Base.Lithuanian	Lithuanian
Language.Base.Farsi	Farsi
Language.Base.Vietnamese	Vietnamese
Language.Base.Armenian	Armenian
Language.Base.Azeri	Azeri
Language.Base.Basque	Basque
Language.Base.FYROMacedonian	FYRO Macedonian
Language.Base.Afrikaans	Afrikaans
Language.Base.Georgian	Georgian
Language.Base.Faeroese	Faeroese
Language.Base.Hindi	Hindi
Language.Base.Malay	Malay
Language.Base.Kazak	Kazak
Language.Base.Kyrgyz	Kyrgyz
Language.Base.Swahili	Swahili
Language.Base.Uzbek	Uzbek
Language.Base.Tatar	Tatar
Language.Base.Punjabi	Punjabi
Language.Base.Gujarati	Gujarati
Language.Base.Tamil	Tamil
Language.Base.Telugu	Telugu
Language.Base.Kannada	Kannada
Language.Base.Marathi	Marathi
Language.Base.Sanskrit	Sanskrit
Language.Base.Mongolian	Mongolian
Language.Base.Galician	Galician
Language.Base.Konkani	Konkani

Language.Base.Syriac	Syriac
Language.Base.Divehi	Divehi
Language.Base.Catalan	Catalan
Language.Base.Chinese	Chinese
Language.Base.Czech	Czech
Language.Base.Danish	Danish
Language.Base.German	German
Language.Base.Greek	Greek
Language.Base.English	English
Language.Base.Spanish	Spanish
Language.Base.Finnish	Finnish
Language.Base.French	French
Language.Base.Hebrew	Hebrew
Language.Base.Hungarian	Hungarian
Language.Base.Icelandic	Icelandic
Language.Base.Italian	Italian
Language.Base.Japanese	Japanese
Language.Base.Korean	Korean
Language.Base.Dutch	Dutch
Language.Base.Norwegian	Norwegian
Language.Base.Polish	Polish
Language.Base.Portuguese	Portuguese
Language.Base.Romanian	Romanian
Language.Base.Russian	Russian
Language.Base.Croatian	Croatian
Language.Base.Serbian	Serbian
Language.Base.Slovak	Slovak
Language.Base.Albanian	Albanian
Language.Base.Swedish	Swedish
Language.Base.Thai	Thai
Language.Base.Turkish	Turkish
Language.Base.Urdu	Urdu
Language.Base.Indonesian	Indonesian
Language.Base.Ukrainian	Ukrainian
Language.Base.Belarusian	Belarusian
Language.Base.Slovenian	Slovenian
Language.Base.Estonian	Estonian

Language.Base.Latvian	Latvian
Language.Base.Lithuanian	Lithuanian
Language.Base.Farsi	Farsi
Language.Base.Vietnamese	Vietnamese
Language.Base.Armenian	Armenian
Language.Base.Azeri	Azeri
Language.Base.Basque	Basque
Language.Base.FYROMacedonian	FYRO Macedonian
Language.Base.Afrikaans	Afrikaans
Language.Base.Georgian	Georgian
Language.Base.Faeroese	Faeroese
Language.Base.Hindi	Hindi
Language.Base.Malay	Malay
Language.Base.Kazak	Kazak
Language.Base.Kyrgyz	Kyrgyz
Language.Base.Swahili	Swahili
Language.Base.Uzbek	Uzbek
Language.Base.Tatar	Tatar
Language.Base.Punjabi	Punjabi
Language.Base.Gujarati	Gujarati
Language.Base.Tamil	Tamil
Language.Base.Telugu	Telugu
Language.Base.Kannada	Kannada
Language.Base.Marathi	Marathi
Language.Base.Sanskrit	Sanskrit
Language.Base.Mongolian	Mongolian
Language.Base.Galician	Galician
Language.Base.Konkani	Konkani
Language.Base.Syriac	Syriac
Language.Base.Divehi	Divehi

\* 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.

### **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

**Constants**

<b>Value*</b>	<b>Descriptive Name**</b>
Language.Full.Afrikaans	Afrikaans
Language.Full.Albanian	Albanian
Language.Full.Arabic.SaudiArabia	Arabic (Saudi Arabia)
Language.Full.Arabic.Iraq	Arabic (Iraq)
Language.Full.Arabic.Egypt	Arabic (Egypt)
Language.Full.Arabic.Libya	Arabic (Libya)
Language.Full.Arabic.Algeria	Arabic (Algeria)
Language.Full.Arabic.Morocco	Arabic (Morocco)
Language.Full.Arabic.Tunisia	Arabic (Tunisia)
Language.Full.Arabic.Oman	Arabic (Oman)
Language.Full.Arabic.Yemen	Arabic (Yemen)
Language.Full.Arabic.Syria	Arabic (Syria)
Language.Full.Arabic.Jordan	Arabic (Jordan)
Language.Full.Arabic.Lebanon	Arabic (Lebanon)
Language.Full.Arabic.Kuwait	Arabic (Kuwait)
Language.Full.Arabic.UAE	Arabic (U.A.E.)
Language.Full.Arabic.Bahrain	Arabic (Bahrain)
Language.Full.Arabic.Qatar	Arabic (Qatar)
Language.Full.Armenian	Armenian
Language.Full.Azeri.Latin	Azeri (Latin)
Language.Full.Azeri.Cyrillic	Azeri (Cyrillic)
Language.Full.Basque	Basque
Language.Full.Belarusian	Belarusian
Language.Full.Bulgarian	Bulgarian
Language.Full.Burmese	Burmese
Language.Full.Catalan	Catalan
Language.Full.Chinese.Taiwan	Chinese (Taiwan)
Language.Full.Chinese.PRC	Chinese (PRC)
Language.Full.Chinese.HongKong	Chinese (Hong Kong SAR, PRC)
Language.Full.Chinese.Singapore	Chinese (Singapore)

Language.Full.Chinese.Macau	Chinese (Macau SAR)
Language.Full.Croatian	Croatian
Language.Full.Czech	Czech
Language.Full.Danish	Danish
Language.Full.Divehi	Divehi
Language.Full.Dutch.Netherlands	Dutch (Netherlands)
Language.Full.Dutch.Belgium	Dutch (Belgium)
Language.Full.English.UnitedStates	English (United States)
Language.Full.English.UnitedKingdom	English (United Kingdom)
Language.Full.English.Australian	English (Australian)
Language.Full.English.Canadian	English (Canadian)
Language.Full.English.NewZealand	English (New Zealand)
Language.Full.English.Ireland	English (Ireland)
Language.Full.English.SouthAfrica	English (South Africa)
Language.Full.English.Jamaica	English (Jamaica)
Language.Full.English.Caribbean	English (Caribbean)
Language.Full.English.Belize	English (Belize)
Language.Full.English.Trinidad	English (Trinidad)
Language.Full.English.Zimbabwe	English (Zimbabwe)
Language.Full.English.Philippines	English (Philippines)
Language.Full.Estonian	Estonian
Language.Full.Faeroese	Faeroese
Language.Full.Farsi	Farsi
Language.Full.Finnish	Finnish
Language.Full.French.Standard	French (Standard)
Language.Full.French.Belgian	French (Belgian)
Language.Full.French.Canadian	French (Canadian)
Language.Full.French.Switzerland	French (Switzerland)
Language.Full.French.Luxembourg	French (Luxembourg)
Language.Full.French.Monaco	French (Monaco)
Language.Full.Galician	Galician
Language.Full.Georgian	Georgian
Language.Full.German.Standard	German (Germany)
Language.Full.German.Switzerland	German (Switzerland)
Language.Full.German.Austria	German (Austria)
Language.Full.German.Luxembourg	German (Luxembourg)
Language.Full.German.Liechtenstein	German (Liechtenstein)

Language.Full.Greek	Greek
Language.Full.Gujarati	Gujarati
Language.Full.Hebrew	Hebrew
Language.Full.Hindi	Hindi
Language.Full.Hungarian	Hungarian
Language.Full.Icelandic	Icelandic
Language.Full.Indonesian	Indonesian
Language.Full.Italian.Standard	Italian (Standard)
Language.Full.Italian.Switzerland	Italian (Switzerland)
Language.Full.Japanese	Japanese
Language.Full.Kannada	Kannada
Language.Full.Konkani	Konkani
Language.Full.Korean	Korean
Language.Full.Korean.Johab	Korean.Johab
Language.Full.Kyrgyz	Kyrgyz
Language.Full.Latvian	Latvian
Language.Full.Lithuanian	Lithuanian
Language.Full.Lithuanian.Classic	Lithuanian (Classic)
Language.Full.FYROMacedonian	FYRO Macedonian
Language.Full.Malay.Malaysian	Malay (Malaysian)
Language.Full.Malay.BruneiDarussalam	Malay (Brunei Darussalam)
Language.Full.Marathi	Marathi
Language.Full.Mongolian	Mongolian
Language.Full.Norwegian.Bokmal	Norwegian (Bokmal)
Language.Full.Norwegian.Nynorsk	Norwegian (Nynorsk)
Language.Full.Polish	Polish
Language.Full.Portuguese.Brazil	Portuguese (Brazil)
Language.Full.Portuguese.Portugal	Portuguese (Portugal)
Language.Full.Punjabi	Punjabi
Language.Full.Romanian	Romanian
Language.Full.Russian	Russian
Language.Full.Sanskrit	Sanskrit
Language.Full.Serbian.Cyrillic	Serbian (Cyrillic)
Language.Full.Serbian.Latin	Serbian (Latin)
Language.Full.Slovak	Slovak
Language.Full.Slovenian	Slovenian
Language.Full.Spanish.Spain.TraditionalSort	Spanish (Spain, Traditional Sort)

Language.Full.Spanish.Mexican	Spanish (Mexican)
Language.Full.Spanish.Spain.ModernSort	Spanish (Spain, Modern Sort)
Language.Full.Spanish.Guatemala	Spanish (Guatemala)
Language.Full.Spanish.CostaRica	Spanish (Costa Rica)
Language.Full.Spanish.Panama	Spanish (Panama)
Language.Full.Spanish.DominicanRepublic	Spanish (Dominican Republic)
Language.Full.Spanish.Venezuela	Spanish (Venezuela)
Language.Full.Spanish.Colombia	Spanish (Colombia)
Language.Full.Spanish.Peru	Spanish (Peru)
Language.Full.Spanish.Argentina	Spanish (Argentina)
Language.Full.Spanish.Ecuador	Spanish (Ecuador)
Language.Full.Spanish.Chile	Spanish (Chile)
Language.Full.Spanish.Uruguay	Spanish (Uruguay)
Language.Full.Spanish.Paraguay	Spanish (Paraguay)
Language.Full.Spanish.Bolivia	Spanish (Bolivia)
Language.Full.Spanish.ElSalvador	Spanish (El Salvador)
Language.Full.Spanish.Honduras	Spanish (Honduras)
Language.Full.Spanish.Nicaragua	Spanish (Nicaragua)
Language.Full.Spanish.PuertoRico	Spanish (Puerto Rico)
Language.Full.Sutu	Sutu
Language.Full.Swahili.Kenya	Swahili (Kenya)
Language.Full.Swedish	Swedish
Language.Full.Swedish.Finland	Swedish (Finland)
Language.Full.Syriac	Syriac
Language.Full.Tamil	Tamil
Language.Full.Tatar.Tatarstan	Tatar (Tatarstan)
Language.Full.Telugu	Telugu
Language.Full.Thai	Thai
Language.Full.Turkish	Turkish
Language.Full.Ukrainian	Ukrainian
Language.Full.Urdu.Pakistan	Urdu (Pakistan)
Language.Full.Urdu.India	Urdu (India)
Language.Full.Uzbek.Latin	Uzbek (Latin)
Language.Full.Uzbek.Cyrillic	Uzbek (Cyrillic)
Language.Full.Vietnamese	Vietnamese

\* 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.

**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**

<b>Value*</b>	<b>Descriptive Name**</b>
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.

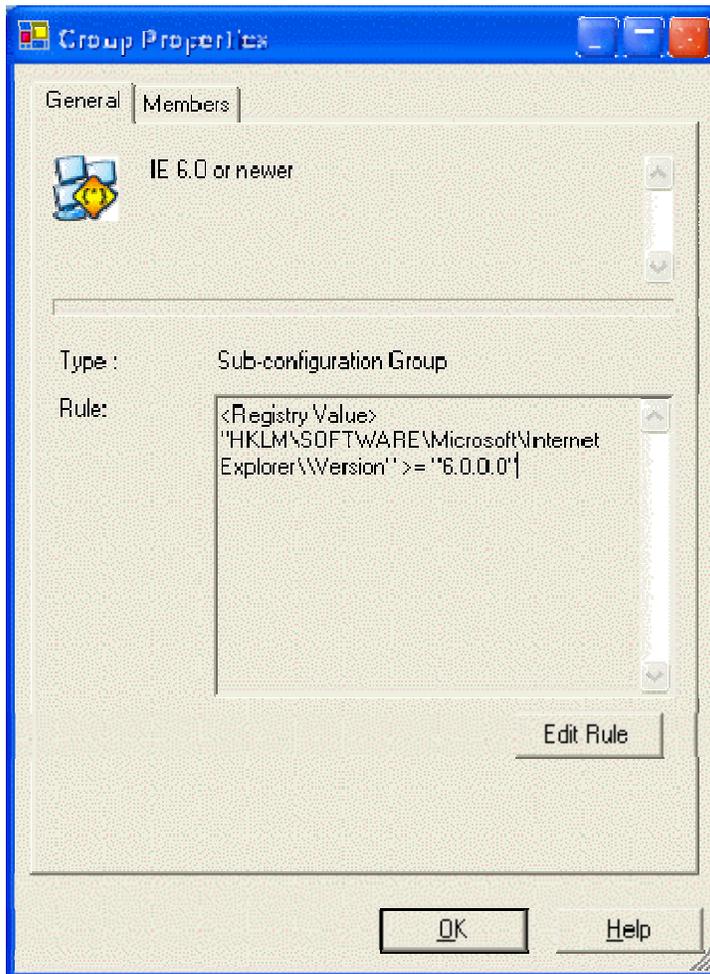
This variable resolves to %username%.

#### *Variable Type*

String

## Group Properties

### Viewing General 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.

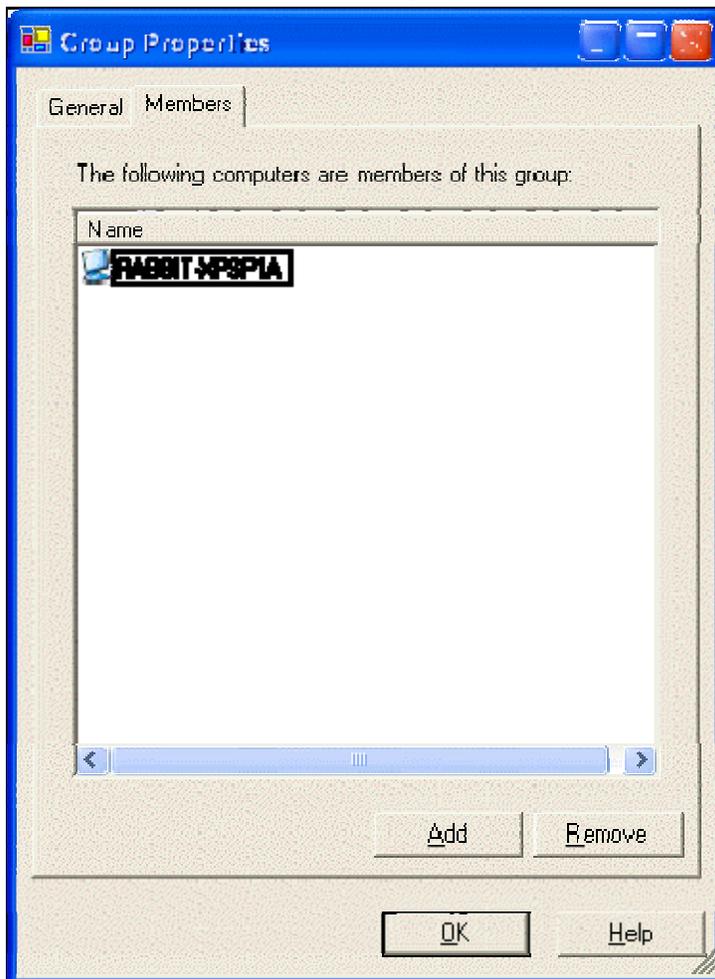
The information includes:

-  Descriptive name for the group
- **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.*)

## Adding Members to the Group



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 policies already assigned to the group, as well as policies 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 policies 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*.

### **Assign Computer dialog**

Use this dialog box to add members to the current Organizational Group. When you view this dialog box for an Organizational Group, the list shows the names of all the computers in the Channel.

The **Assign Computers** dialog box opens when you select **Add To Group** from the **Edit | Add To Group** menu or by right-clicking on the group. It also appears when you click the **Add** button on the *Group Properties | Members* tab.

#### **Add one member to the Group**

1. Highlight the name of a computer in the list.
2. Click **OK** to add the computer as a member of the current group.

#### **Add more than one member to the Group**

1. Highlight multiple computers in the list, by doing one of the following:
  - Press <Shift> or <Ctrl> as you highlight multiple computer names.
  - Click and drag the cursor to highlight any number of computer names in the list.
2. Click **OK** to add these new members to the current group.

# Policies

## What is a policy?

In Policy Commander, a "policy" is formally defined as follows:

A **policy** is an electronic representation of a computer configuration. It encapsulates everything needed to assess and enforce the compliance state of a computer, and is contained within a single file.

A policy defines conditions for *applicability* and *compliance* on a target computer. Furthermore, it defines the actions necessary for that policy to become *enforced*. Defining a policy and its applicability, compliance, and enforcement steps is accomplished with the Policy Editor.

For example, a given policy may be applicable only to Windows XP machines. When *assigned* to a computer, the policy's applicability steps are evaluated to determine whether or not the policy applies to the computer. If it does apply, the compliance steps are evaluated to assess compliance. If the computer is out of compliance with the policy, the administrator may *enforce* the policy, bringing the computer into compliance. Hence there are several *compliance states* that apply to the assignment of a policy to a computer. An assigned policy is in exactly one of those states at one time for any given computer.

Policy Commander helps you monitor and enforce policies on your computers. As individual computers fall out of compliance from time to time, use Policy Commander to enforce the security settings immediately, or assess the situation and enforce each one individually.

A policy's life cycle can be summarized as follows:

1. A policy is *assigned* to a computer.
2. The policy's *applicability* steps are evaluated on the computer. If they are not satisfied, the policy assignment is called Not Applicable and no further action is taken.
3. The policy's *compliance* steps are evaluated on the computer. If the computer satisfies those steps, the policy assignment is called Compliant and no further action is taken.
4. For a Not Compliant policy, the administrator can apply the *enforcement* steps to bring the computer into compliance. The policy assignment is called Enforced. The administrator may choose to make the policy enforce automatically.
5. For an Enforced policy, the administrator can *acknowledge* the enforcement. The policy is then called Compliant.

Steps 2-4 are repeated every time the client evaluates policies.

The console provides several ways to manage, apply, and monitor policies in your channel. You can:

- *Import policies* from a local file system on your PC or network.
- *Download policies* from an external server. This can be done from the New Boundary Technologies knowledge base (over the web) or from other external policy libraries.
- *Export policies* to the file system.
- *Delete a policy* from your channel.
- Launch the Policy Editor and *create and edit* your own policies.

- Create *policy groups*, add policies to those groups, and remove policies from those groups.
- View and modify *policy properties*.
- *Assign policies* to computers and computer groups.
- *Enforce a policy* on a computer.
- View the *policy assignments* for a computer, policy, or group.
- View *policy compliance* for a specific set of policy assignments.
- View a *compliance summary* showing the overall state of your system's compliance from a computer- or policy-centric perspective.

## Managing Policies

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### Importing Policies

Follow these steps to import a policy file from the file system into your channel:

1. Select the **Policies** tab.
2. On the **Policies** menu, select **Import Policy from File**.
3. In the **Open Policy File** dialog, navigate to the folder containing the policy you want to import. Select the file and press **Open**.
4. If the policy already exists in the channel, the **Confirm Policy Overwrite** dialog will appear.
  1. If you select **Overwrite**, the existing policy will be replaced in the channel.
  2. If you select **Add New** (the default behavior), a new policy will be added. Its name will be the same as the original, but the current date and time will be appended to make the name unique. You may want to change the name(s) to something more meaningful.

Now the policy is ready for use.

### Downloading Policies

Policy Commander makes it easy to download policies from external servers, notably the New Boundary Technologies Knowledge Base.

To download a policy from an external policy server:

1. On the Policies menu, select **Import Policies from Policy Server....**
2. In the *Add Policies to your Channel* dialog, select the desired external server. Press **Next**. This will connect you to the external server.
3. The *Import Policies from Policy Server* dialog box displays the available policies in a tree structure.
4. Select the policies you want to download and press the **Add** button. You can repeat this as many times as you wish.
5. Press **Close** to terminate the connection.

The policies you downloaded can be seen on the *Policies tab*. The downloaded policies appear under both the All Policies list and under the Imported Policies folder. Note that the folder structure of the external policy server is reflected under the Imported Policies folder.

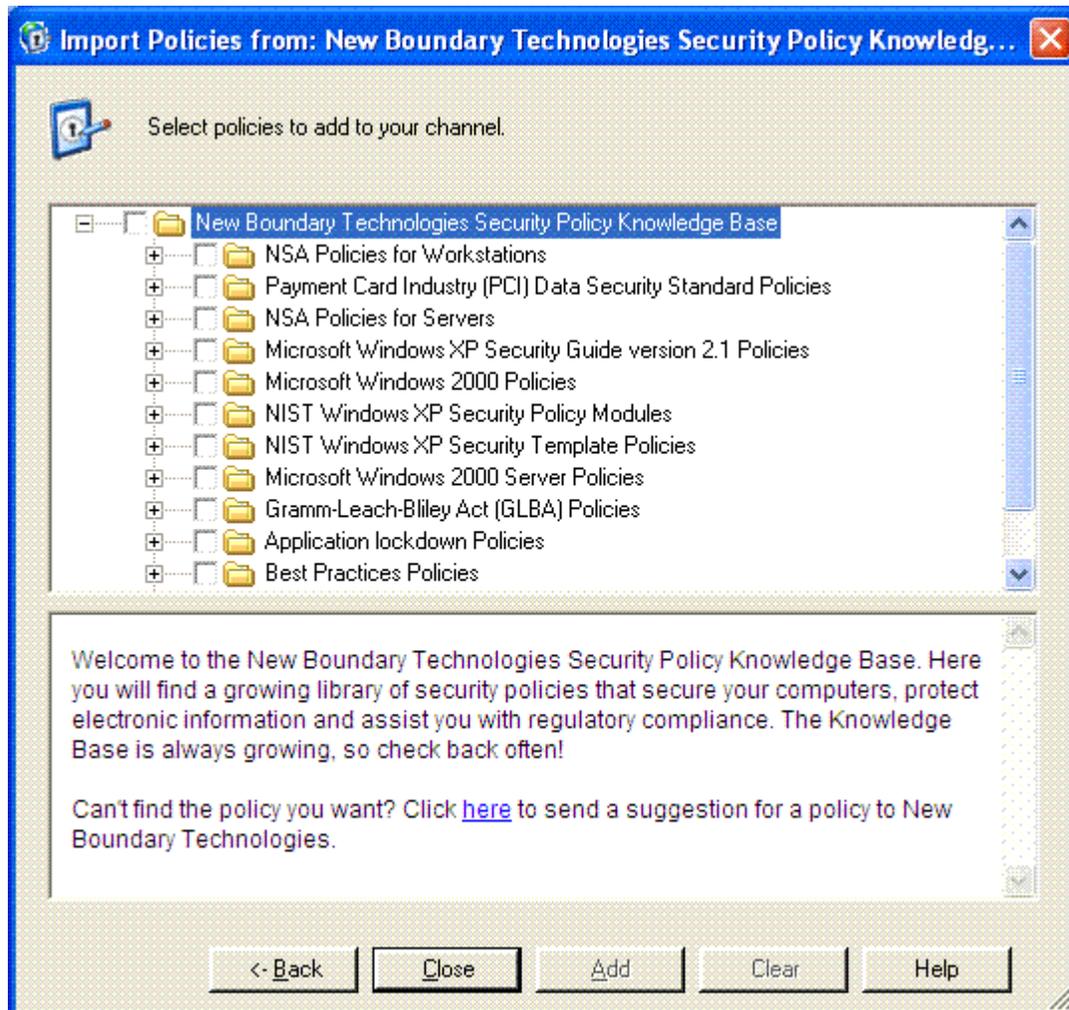
### Select Policy Server Dialog



Select a source for the policies that you want to import into Policy Commander. The New Boundary Technologies knowledge base has an extensive collection of policies available for your use.

This dialog opens when you select **Import Policies from Policy Server** from the **Policies** menu.

## Import Policies from Policy Server Dialog



This dialog allows you to select policies to download to your channel. The title bar displays the name of the external server.

The upper pane in this dialog displays the server's policies in a tree structure. The policies are organized by groups, and the groups may be nested.

The lower pane displays a description of the policy or folder selected. This description may include hyperlinks to external sites, providing additional information about the policy.

To add policies to your channel, simply select the individual policies or groups you want to download, and press the **Add** button.

### Buttons

**Back** - Returns you to the *Select Policy Server* page.

**Close** - Closes the dialog and terminates the connection.

**Add** - This causes all checked policies and folders to be downloaded into your channel. You may select and add policies as many times as you wish.

**Clear** - Clears the checked policies. This has no impact on your channel.

## Exporting Policies

Before the Policy Editor can be used to modify a policy in your channel, you need to export the policy to your file system. To export a policy to your local file system, follow these steps:

1. Select the **Policies** tab.
2. Select the policy you wish to export.
3. On the **Policies** menu, select **Export Policy to File...**
4. In the **Save Policy File** dialog, navigate to the destination folder and if desired, modify the file name. Then press **Save**. This saves the policy to a file.
5. The **Policy Saved** dialog then appears, asking if you would like to open the file in the Policy Editor. Press **Yes** to launch the Policy Editor.

## Deleting Policies

When a policy is no longer useful or when it has been replaced, you can delete it from the Console. This action changes only the view and enforcement of policies through Policy Commander. It does not change or remove the underlying security template (INF) that was originally added to create the policy.

To delete a policy from your channel:

1. Select the **Policies** tab.
2. Select the policy you want to delete.
3. On the **Edit** menu, select **Delete**.

**Note** This can also be done using a right-click menu or by simply pressing the **Delete** button on your keyboard.

4. A confirmation dialog appears to confirm the action.

## Creating and Editing Policies

Using the Policy Editor, you can create new policies and modify existing policies. You can also make changes to individual security templates that are part of the policy.

To edit an existing policy in your channel, you must:

1. *Export* the policy to the file system.
2. Launch the Policy Editor on that policy. When you export the policy, the **Policy Saved** dialog appears. Pressing **Yes** opens the Policy Editor on that saved policy file.
3. Make your changes in the Policy Editor.
4. Save the file in the Policy Editor.
5. *Import* the policy back in to the channel.

## Policy Properties

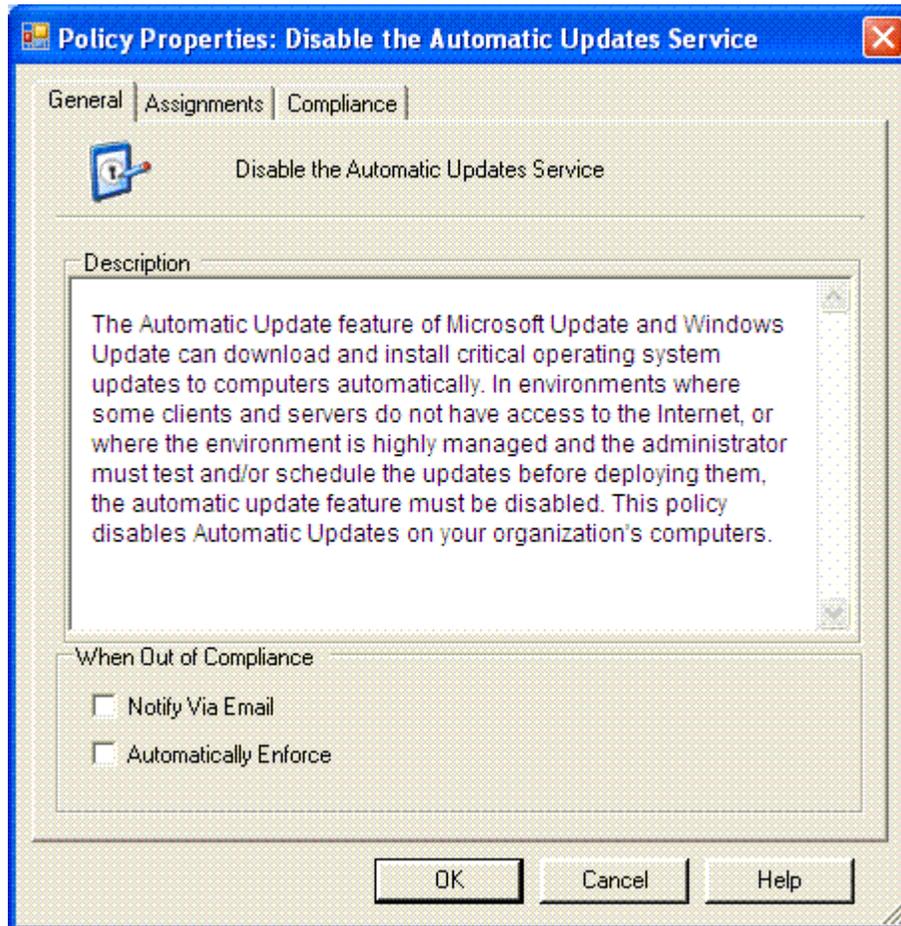
The Policy Properties dialog displays information about the policy. Using this dialog, you can view the policy's description, view assignments, and view compliance status.

The Policy Properties dialog opens when you right-click on a policy and select **Properties**, or when you select a policy then select **Properties** on the **Edit** menu.

- The *General tab* displays the policy's description and provides control over the Auto Enforce and Email Notify preferences.
- The *Assignments tab* shows the policy's current assignments.

- The *Compliance* tab shows the policies current compliance status.

### General Tab (Policy Properties)



The Policy Properties dialog opens when you right-click on a policy and select **Properties**, or when you select a policy then select **Properties** on the **Edit** menu.

The General tab contains the following settings:

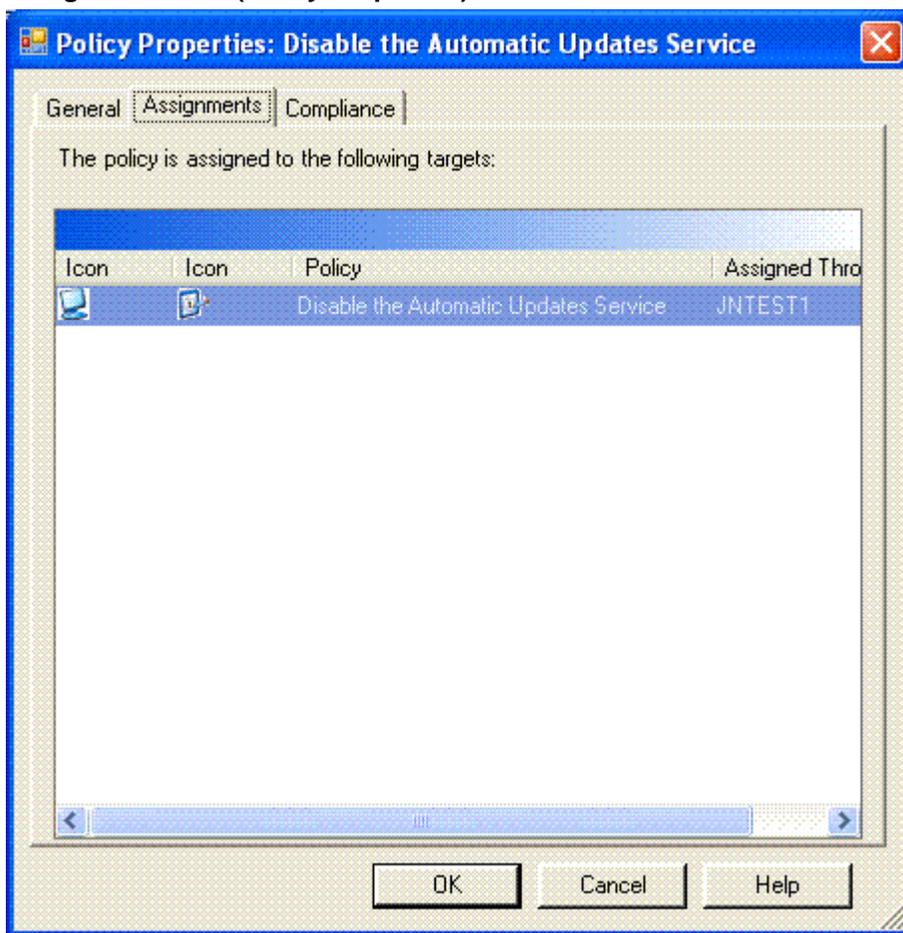
- **Description**  
Provides a description of the policy and what it does.
- **When Out of Compliance**
  - Notify via email:** With this option selected, Policy Commander automatically sends an email message to each of the people who have requested email notification when a computer is out of compliance with this policy. Email addresses for notification are set up through the **Manage Channel Security** dialog, which can be accessed via the **Security** menu.
  - Notify via email:** With this option cleared, email is not sent if a computer is out of compliance with the policy.
  - Automatically Enforce:** With this option selected, the policy is automatically enforced on all computers to which the policy has been assigned. When the Client on a target computer detects that it is out of compliance with the policy, Policy Commander automatically enforces the policy.

The status changes to Enforced when the policy is successfully enforced.

- Automatically Enforce:** With this option cleared, you must initiate the enforcement manually. This is done using the **Enforce Policy** menu option. Until you enforce the policy, Policy Commander displays the Not Compliant status when it detects a computer out of compliance with this policy.

**Note:** Do not use the Automatically Enforce setting until you have tested the policy and are very confident in the policy's settings. This option can be changed at any time through the Policy properties.

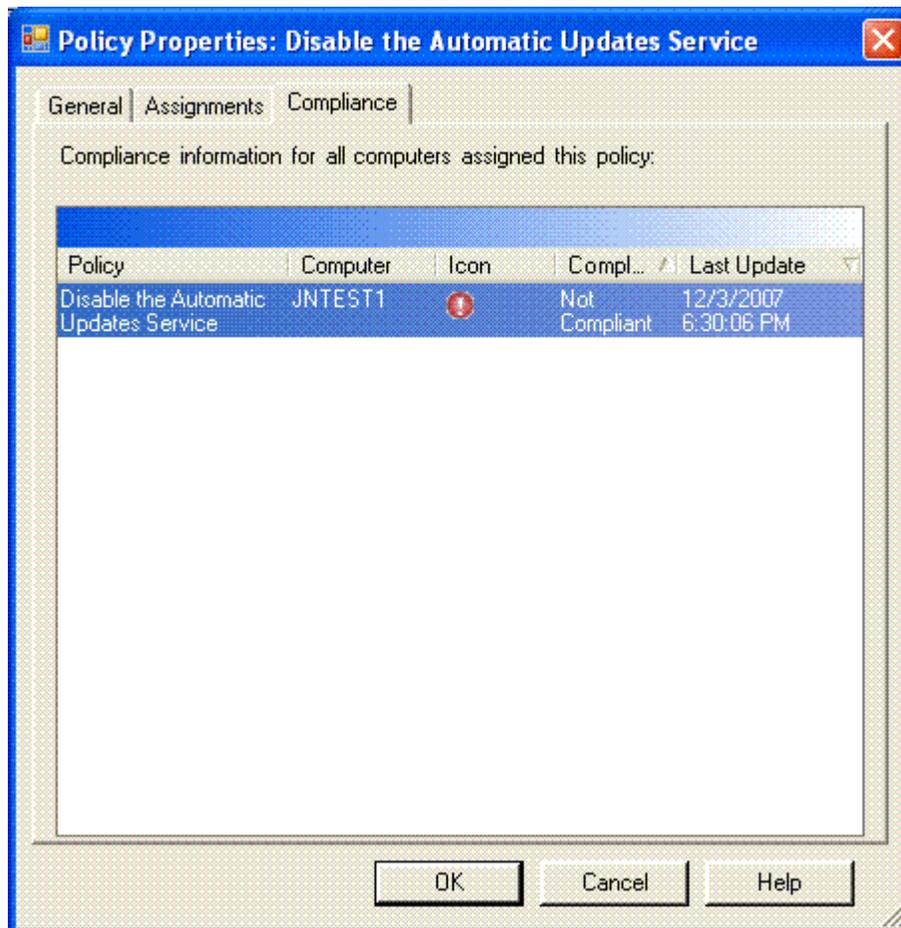
### Assignments Tab (Policy Properties)



The Policy Properties dialog opens when you right-click on a policy and select **Properties**, or when you select a policy then select **Properties** on the **Edit** menu.

The Assignments tab displays the policy's current policy assignments (see *Policy Assignments tab* for details). You can delete a policy assignment by right-clicking an assignment and selecting **Delete Policy Assignment**.

## Compliance Tab (Policy Properties)



The Policy Properties dialog opens when you right-click on a policy and select **Properties**, or when you select a policy then select **Properties** on the **Edit** menu.

The Compliance tab displays the policy's current policy compliance. You can enforce and acknowledge policy assignments on this tab by right-clicking an assignment.

### Roles for Policies and Computers

Roles available on the *Policy Properties* page and the Computer Properties page include:

- **Bastion Host**  
A secure server that is accessible from the Internet or untrusted public network, making it vulnerable to attack.
- **Certificate Services Server**  
A server used to manage X.509-compatible certificates.
- **Domain Controller**  
A server that authenticates domain logons and maintains master security database for a domain or group of connected computers.
- **File Server**  
A server that stores files for users and provides access to the files.
- **Infrastructure Server**  
A server to support Dynamic Host Control Protocol (DHCP) server or a Windows Internet Name Service (WINS server).

- **Internet Authentication Service (IAS) Server**  
Server where Microsoft Internet Authentication Service (IAS) is installed. Used for verifying the identity of clients that access the network remotely.
- **Internet Information Services (IIS) Server**  
Server that is running Internet Information Services (IIS). Used to deliver content over the Web.
- **Managed Computer**  
Any computer that is under your control. This role is the default.
- **Print Server**  
A computer that is dedicated to managing the printers on a network so that users can share printers.
- **Server**  
Any computer being used as a server. Use this option if you do not want to choose one of the options above to designate it as a specific type of server.

## Policy Groups

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### Creating Policy Groups

A policy group is a collection of related policies.

A policy group can be assigned to a computer or group of computers. Assigning a policy group to any target is equivalent to assigning each individual policy in the group to the target. Note in particular that this means a policy added to a group *after* the group has been assigned to a computer will *not* automatically be assigned to that same computer.

To create a policy group:

1. Select the **Policies** tab.
2. Select the policy group under which you want to create the new group.
3. On the **Edit** menu, select **Create Group....** (Or you can right-click on the group).
4. The New Policy Group dialog appears. Enter the name of the new policy group. Then press **OK**.

Policies can easily be *added to groups* or *removed from groups*.

### Adding Policies to a Group

To add policies to a *policy group*:

1. Select the *Policies tab*.
2. Select the **All Policies** node in the tree.
3. On the *Members tab*, select the policies you want to add to the policy group.
4. On the **Edit** menu, select **Add To Group** (or you can right-click on the selected policy).
5. The **Add Policies to Group** dialog appears. Select the target policy group. Then press **OK**.

### Removing Policies from a Group

To remove policies from a *policy group*:

1. Select the *Policies tab*.
2. Select the policy group in the tree.

3. On the *Members tab*, select the policies you want to remove from the policy group.
4. On the **Edit** menu, select **Remove From Group** (or you can right-click on the selected policy).
5. A confirmation dialog appears. Press **Yes** to remove the policies from the group.

## Enforcing Policies

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### Assigning a Policy

For a policy to be enforced on a computer, the policy must first be assigned to the computer. Policy assignment can be done in a variety of ways in the console: using the policy assignment wizard or drag and drop, and starting with a policy and assigning it to target computers or starting with a computer and selecting policies to assign to it.

#### Policy Assignment Wizard

##### **Starting with a Policy or Policy Group**

1. Select the *Policies tab*.
2. Select the desired policy or policy group in the tree.
3. On the **Policies** menu, select **Assign Policy...** (or you can right-click on the selected policy or policy group).
4. The Assign Policy wizard appears. Press **Next**.
5. In the *Assign Policies dialog*, select the computers or computer groups you want to assign the policy to. Press **Finish** to assign the policy or policy group to the selected targets.

##### **Starting with a Computer or Computer Group**

1. Select the *Managed tab* or *Configuration Groups tab*.
2. Select the target computer or computer group in the tree.
3. On the **Policies** menu, select **Assign Policy...** (or you can right-click on the selected computer or computer group).
4. The Assign Policy wizard appears. Press **Next**.
5. In the *Assign Policies dialog*, select the policies you want to assign to the computer or group. Press **Finish** to assign the selected policies to your computer or computer group.

#### Drag and Drop

##### **Starting with a Policy or Policy Group**

1. Select the *Policies tab*.
2. Select the desired policy or policy group in the tree.
3. Select the *All Targets tab*.
4. Drag the policy or policy group to the target computer.

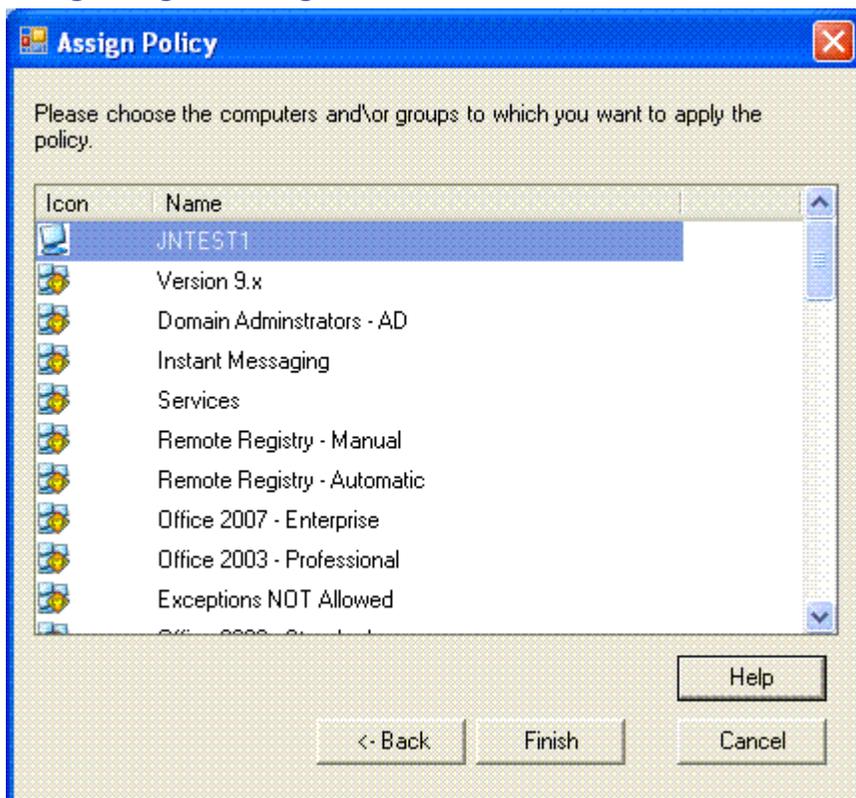
##### **Starting with a Computer or Computer Group**

1. Select the *Managed tab* or *Configuration Groups tab*.

2. Select the target computer or group in the tree.
3. Select the *All Policies tab*.
4. Drag the target to the desired policy.

**Note** Policy group to computer group assignment via drag and drop is not allowed.

### Assign Targets Dialog

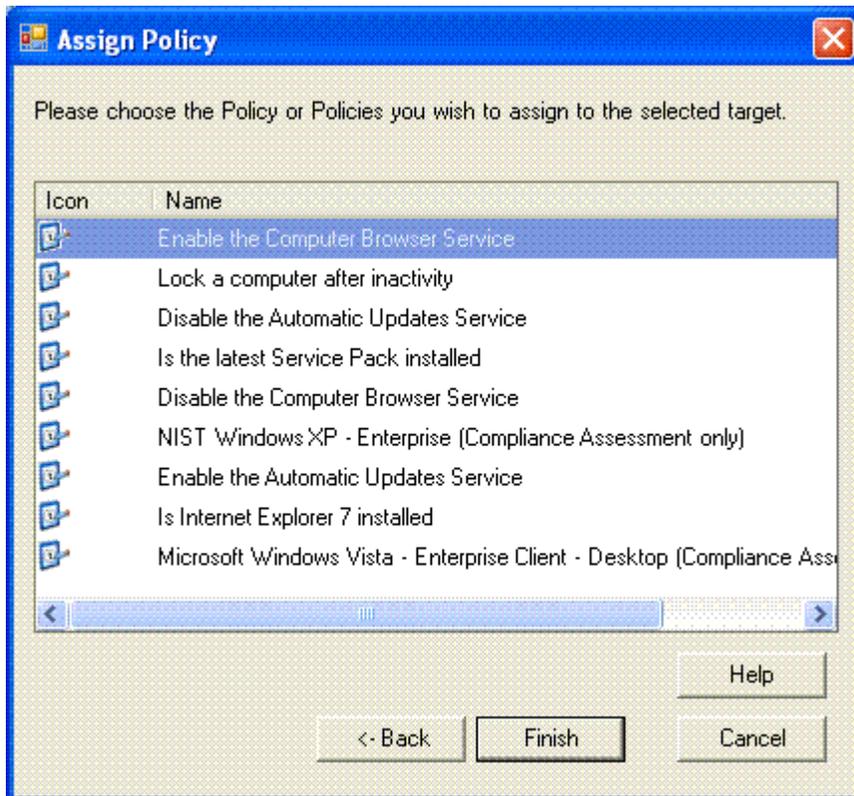


On this page, select the target computers to which you want to assign the selected policies. This list includes all of the computers and computer groups in the channel. Policies assigned to the group are enforced on members of the group.

This page opens when you click **Next** in the Assign Policy dialog.

Press **Finish** to assign the policies to your selected targets.

## Assign Policies Dialog



On this page, select the policies that should be enforced for the selected targets. This list includes all of the policies in Policy Commander. Policies assigned to the group are enforced on members of the group.

This page opens when you click **Next** in the Assign Policy dialog.

Press **Finish** to assign the policies to your selected target.

## Viewing Assignments

Policy assignments are viewed through the *Policy Assignments tab*. Each assignment shows the policy's name and the computer or computer group that through which it was assigned.

### Assignments for a Computer or Computer Group

To see the assignments for a computer or computer group:

1. Select the *Managed tab* or *Configuration Groups tab*.
2. Select the desired computer or computer group in the tree.
3. Select the *Policy Assignments tab*.

The assignments for the selected computer or computer group will be displayed. For a computer, the assignments may include both direct assignments (Assigned Through the name of the computer) and assignments via a group that the computer belongs to. For a computer group, only the assignments to that specific group are shown.

### Assignments for a Policy

To see the assignments for a policy:

1. Select the *Policies tab*.

2. Select the desired policy in the tree.
3. Select the *Policy Assignments* tab.

The assignments for the selected policy will be displayed.

### Deleting a Policy Assignment

Deleting an assignment can be done easily through the Policy Assignments tab. Deleting an assignment does not delete the policy or the target. When an assignment is deleted, that policy will not longer be evaluated on the target.

To delete an assignment:

1. Select the *Managed* tab, *Configuration Groups* tab, or *Policies* tab.
2. Select the desired computer, computer group, or policy in the tree.
3. Select the *Policy Assignments* tab.
4. Right-click on the desired assignment and select **Delete Policy Assignment**. You can select multiple assignments if desired.

### Viewing Policy Compliance

Policy compliance is viewed through the *Policy Compliance* tab. Each row in this tab shows the *compliance state* of a specific policy assignment. A policy assignment to a computer can be:



**Compliant:** if the computer satisfies the compliance conditions defined within the policy.



**Not Compliant:** if the computer fails to satisfy the compliance conditions defined within the policy. This may require *enforcement* on the part of the administrator.



**Enforced:** if the policy has recently been enforced on the computer (after having been Not Compliant). To become compliant, the enforcement must be *acknowledged* by the administrator.



**Pending:** when the computer has not yet reported its compliance state.



**Not Applicable:** if the computer properties do not satisfy the policy's applicability conditions.



**Error:** when there is an internal error in Policy Commander, such as a communication failure.

#### ***Policy Compliance for a Computer or Computer Group***

To see compliance states for a computer or computer group:

1. Select the *Managed* tab or *Configuration Groups* tab.
2. Select the desired computer or computer group in the tree.
3. Select the *Policy Compliance* tab.

#### ***Policy Compliance for a Policy or Policy Group***

To see compliance states for a policy or policy group:

1. Select the *Policies tab*.
2. Select the desired policy or policy group in the tree.
3. Select the *Policy Compliance tab*.

**Note** To see the most up-to-date compliance states, you may want to refresh the console using

the  button in the tool bar.

## Compliance States

There are several compliance states that apply to the assignment of a policy to a computer:



**Compliant:** A compliance state is **compliant** if the computer to which the policy is assigned satisfies the compliance conditions defined within the policy.



**Not Compliant:** A compliance state is **not compliant** if the computer to which the policy is assigned fails to satisfy the compliance conditions defined within the policy.



**Enforced:** A compliance state is **enforced** if the policy has recently been *enforced* on the computer. Enforcement makes the computer compliant. The next section illustrates enforcement.



**Pending:** A compliance state is pending when the computer has not yet reported its compliance state.



**Not Applicable:** A compliance state is not applicable if the policy has been assigned to the computer but the computer properties do not satisfy the policy's applicability conditions.



**Not assigned:** A compliance state is not assigned if the policy has not been unassigned.



**Error:** A compliance state is in the error state when there is an internal error in Policy Commander, such as a communication failure.

## Compliance Summary

Compliance summaries are viewed through the *Compliance Summary tab*. The Compliance Summary tab conveys a summary view of compliance that the administrator can use to quickly determine the current level of compliance in the system. This tab serves as a dashboard for monitoring policy compliance. It also allows the administrator to drill down to a specific computer or policy, and to a specific policy assignment of interest.

### Viewing a Compliance Summary

#### **Compliance Summary for a Computer or Computer Group**

To see compliance states for a computer or computer group:

1. Select the *Managed tab* or *Configuration Groups tab*.

2. Select the desired computer or computer group in the tree.
3. Select the *Compliance Summary* tab.

### **Compliance Summary for a Policy or Policy Group**

To see compliance states for a policy or policy group:

1. Select the *Policies* tab.
2. Select the desired policy or policy group in the tree.
3. Select the *Compliance Summary* tab.

**Note** To see the most up-to-date compliance states, you may want to refresh the console using

the  button in the tool bar.

### **Enforcing a Policy**

When a computer is out of compliance with a policy, you can enforce it to bring it into compliance. Enforcement can be done manually through the *Policy Compliance* tab or the *Compliance Summary* tab. Enforcement can also be configured to be done automatically.

#### **Manual Enforcement**

To bring a computer into compliance with a policy:

1. From the *Policy Compliance* tab, select the policy assignment that is Not Compliant (  ).
2. On the **Policies** menu, select **Enforce Policy** (or you can right-click on the selected policy assignment).
3. The **Confirm Policy Enforcement** dialog appears. Press **Yes** to enforce the policy.

You can also enforce all policy assignments for a computer or policy.

1. From the *Compliance Summary* tab, select the computer or policy in the middle panel that is Not Compliant (  ).
2. On the **Policies** menu, select **Enforce Policy** (or you can right-click on the selected computer or policy).
3. The **Confirm Policy Enforcement** dialog appears. Select the assignments you wish to enforce. Press **Yes** to enforce all of the selected assignments.

The enforcement action occurs the next time the Client contacts the server.

**Note** To see the most up-to-date compliance states, you may want to refresh the console using

the  button in the tool bar.

#### **Automatic Enforcement**

Automatic policy enforcement is set in the *Policy Properties dialog*. To enable automatic enforcement on a policy:

1. Select the *Policies* tab.
2. Select the desired policy.
3. On the **Edit** menu, select **Properties** (or you can right-click on the selected policy and select **Properties**). The *Policy Properties dialog* opens.

4. Check the  next to **Automatically Enforce**.

With this option selected, Policy Commander automatically enforces the policy when the Client finds that the computer is out of compliance with the policy. If a problem interferes with this policy being enforced, the policy and computer are listed with the Not compliant status in the console.

The Client even continues to enforce its policies when it is not connected to the network (for example a laptop user who is traveling). Set the enforcement interval for the Client in the *Policy Commander* tab of the Client Settings dialog.

### Acknowledging an Enforcement

To help you monitor security activity, Policy Commander uses the Enforced status to highlight computers that were recently brought into compliance with a policy. Acknowledging an enforcement changes the *compliance state* of an assignment from Enforced to Compliant.

To acknowledge a policy assignment that is in the Enforced state:

1. From the *Policy Compliance* tab, select the policy assignment that is Enforced (  ).
2. Right-click and select **Acknowledge Enforcement**.

**Note** To see the most up-to-date compliance states, you may want to refresh the console using the  button in the tool bar.

### Best Practices

#### **Test, test, test!**

When new security settings are applied, they can interfere with the operation of existing software applications and other operations on the target computers. We strongly recommend testing each new policy thoroughly in the test environment before moving it to the production environment.

Set a small group of computers as the test environment through the computer properties. When the policy has proven to be compatible with other policies and applications on the test computer, it can be moved to the production environment.

## Generating and Viewing Reports

Policy Commander reports provide detailed information on the policy status of computers and groups in the Channel. 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.
-  **Policy Commander Reports:** Reports including compliance details, compliance history, policy group members reports, and policy properties reports.

### Generate a Report

To generate a report:

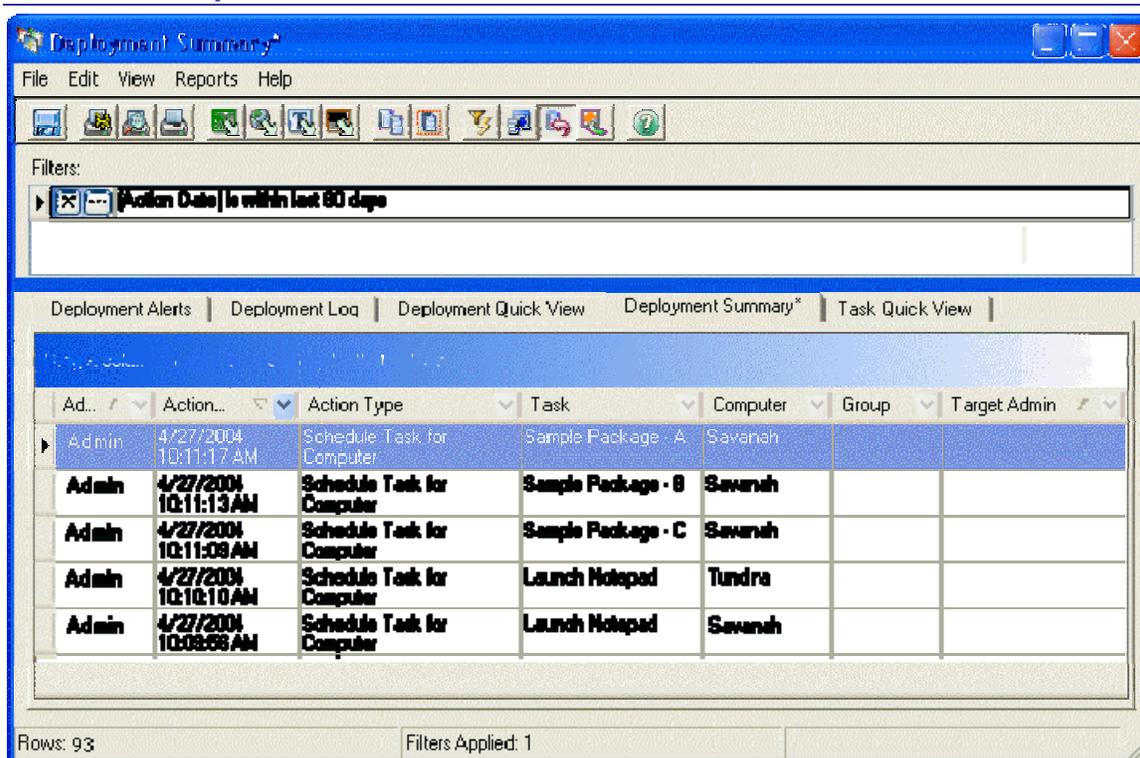
1. Select a report type using the **Reports** menu or by clicking one of the report icons in the toolbar.
2. Select a specific report from the resulting menu.
3. A report window is generated within which you can customize the results, export the report to a file, or print the report.

### 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:
  - 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.
  - 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, Policy Commander 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 Properties General tab

The Report Properties General tab displays information about the report that is currently open in the report window. This dialog box opens when you select **File | Properties** in the *generated report* window.

This information includes"

**Report Name:** The descriptive name of the report.

**Report Type:** Indicates whether this is a deployment, admin, or computer report.

**Last Modified by:** Lists the user name of the person who last modified or saved changes to this report.

**Last Modified on:** Displays the date when changes to this report were saved.

**Description:** Lists the text description of the report.

### 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**. Policy Commander 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**. Policy Commander 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:

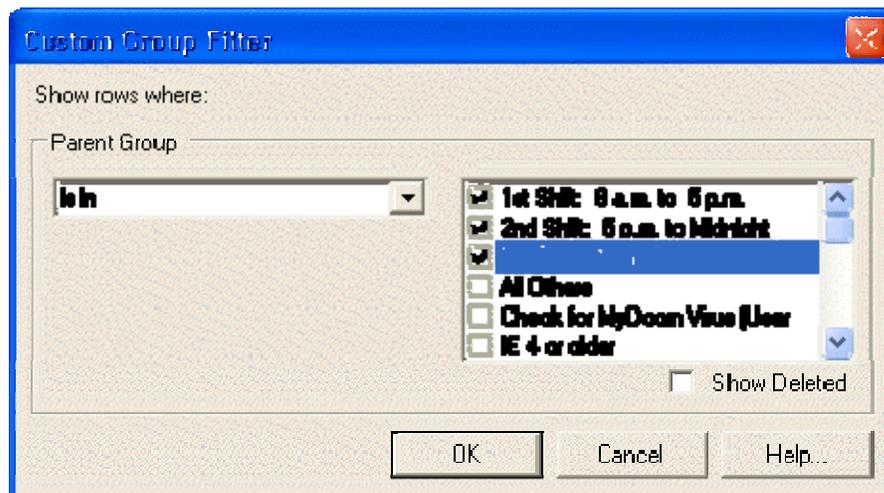
1. Click  next to the label in a column heading.
2. In the drop-down box, select **(Custom)**.
3. On the *Custom Filter* dialog box, set the criteria for the filter.

### 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, or users 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

- In the field on the left, 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.

### Show Deleted

- **Show Deleted:** With this option selected, the report includes items (computers, groups, Tasks, and so on) that were deleted from the Channel.
- **Show Deleted:** With this option cleared, the report does not include items that were deleted from the Channel.

### 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

### 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

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### Printing a Report

After generating a report, you can print it directly from the report window. Policy Commander 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.

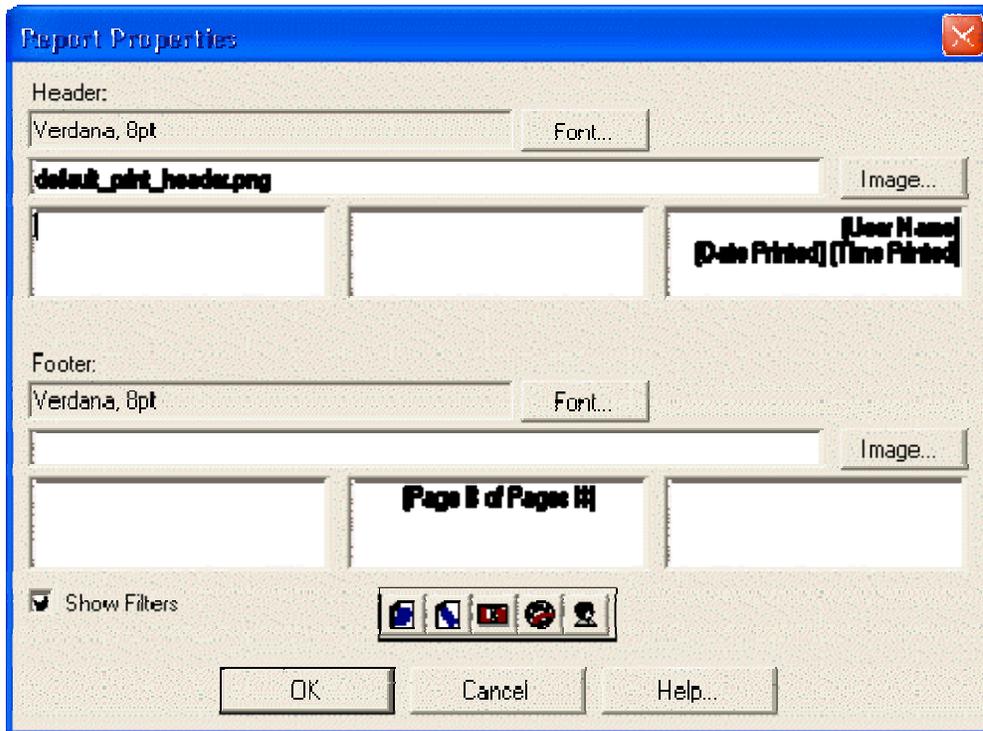


Go to the last page of the report.



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.

### **Printing Options dialog**

When printing from Policy Commander, you are prompted to select a default printer and set printing options.

- From the drop down list to the right of the **Name:** field, select the printer where you wish to print the content. You will see a list of the installed printers available from your computer. Details on the printer are displayed once you select the printer.
- Select the **Properties** button to define additional printing options based on the type of printer you selected in the **Name:** drop down list.
- Select the **Print to File** option if you wish to have the print job directed to a file rather than sent to the printer. When you print to file, the file is generated using the language of the printer selected. Install a "Generic / Text Only" printer if you wish to be able to read the text written to the file.
- Enter the number of copies you wish to print in the text box to the right of **Number of Copies:**.

Other options displayed in this dialog box may be unavailable if they do not pertain to this printing request.

## 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 Policy Commander 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 5500**

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)

## Glossary

### Channel

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A Channel is a hierarchical list of targets (computers and groups in your organization) and policies (and groups of policies) and it is a vehicle for assigning policies.

### Client

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The Client is an application that resides on target computers and provides the vehicle for enforcing policies installing. The executable file PTCLIENT.EXE is used to run the Client software.

When used with Policy Commander, the Client provides information to the Console about the target computer, its users, and licensing.

### Computer

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Computers are workstations or servers with the appropriate type of Policy Commander license assigned and the Policy Commander 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.

### Configuration Groups

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Configuration groups are populated automatically, based on configuration values or rules set by the administrator. Configuration groups are dynamic—as the configuration of target computers change, they are automatically placed in or removed from the appropriate groups. Computers cannot be manually added to Configuration Groups or their subgroups.

### current user

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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

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 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

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Groups in a Policy Commander 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

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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

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Policy Commander creates a Package when it compares two Policy Commander files or a stored Policy Commander 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

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A Package type of task in a Policy Commander Channel installs a Policy Commander file that you created.

## PFX file

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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

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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. Policy Commander 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.

## Policy

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A **policy** is an electronic representation of a computer configuration. It encapsulates everything needed to assess and enforce the compliance state of a computer, and is contained within a single file.

## Portable Windows Information (PWI) File

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The type of file Policy Commander uses to save a Picture definition (customized Picture options).

## registry

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The registry is where Windows stores several types of information: a user's desktop configuration; hardware specific information; and software information, including information such as OLE (object linking and embedding) and file associations that support drag and drop operations and shortcuts.

## Prism Self Installing File

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A self installing file is created when you save a Package as a Prism Self-Installing file with an EXE extension. It contains the files, registry keys, INI file lines, shortcuts, or text file sections that were added, changed, or deleted.

The Self-Installing file differs from a Package in that the Client is not needed on the target machine in order to install the file. Self-Installing files are most useful when you need to provide updates for a computer at a remote site or users who are not part of your company.

In the Editor window and the dialog boxes that let you open or save a file, a Self-Installing file has the  icon.

## Target

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Targets in a Policy Commander Channel are the computers and groups that will receive Policy Commander files from you. You can set up computers at any time, so they are in place when a rapid change is needed. Use Groups to reflect the structure of your user base.

## un-install file [Portable Windows Rollback (PWR)]

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Policy Commander creates an un-install file each time a Policy Commander file is installed on a computer. Each computer gets a unique un-install file. Having a unique un-install file ensures that Policy Commander only un-installs the registry settings, INI entries, files, and so on that were added or changed when the Policy Commander file was initially installed to the computer.

## User-defined Group

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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.

### **working directory**

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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.