



Software Deployment and Update

User Guide

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Software Deployment and Update Overview

Software Deployment and Update (KSDU) automates the deployment and updating of software on managed Windows machines.

Deploying, updating and managing software is a required yet time consuming process for any IT professional. Without the ability to manage by policy, trying to stay in compliance with organizational and external regulatory requirements becomes a nightmare. **Software Deployment and Update** removes that burden by providing IT professionals with the ability to completely automate the deployment and update process of software on a scheduled basis across multiple domains and remote computers.

A comprehensive **Software Catalog** and user-defined profiles enable you to quickly deploy and update software applications to different populations of Windows-based servers, workstations and notebooks. There are no packages to maintain, command-line switches, versions to find, files to track. This is all maintained automatically within the **Software Catalog**.

The **Software Deployment and Update** module:

- Provides a **Master Catalog** of popular software titles and versions, already configured for silent installs.
- Organizes and deploys software titles and versions using a *local* **Software Catalog** that you control.
- Supports the creation of custom installers, including the use of answer files for unattended installations.
- Deploys and updates by software title and version on a recurring schedule.
- Uses profiles to deploy and update bundles of software titles by policy, to different populations of assigned machines.
- Can assign profiles by machine group, organization, or view.
- Can run pre-install and post-install agent procedures.
- Can uninstall software titles and cancel pending installs and uninstalls.
- Supports both auto approval and manual approval when a new version is available.
- Scans machines on a recurring basis for software and version profile compliance.
- Supports scanning of machines not connected to the internet.
- Provides alerts, dashboards, status views, reports, and logs to monitor software deployment and update activities.
- Designates a machine to act as a file source for downloaded files for other machines on the same LAN.



Functions	Description
Overview	Illustrates the stages of configuring and operating Software Deployment and Update, with links to the relevant pages and to online help.
Dashboard	Provides a dashboard view of Software Deployment and Update activities.
Deployment Analysis	Displays a sortable, filterable table of every software title and version installed on every machine managed by Software Deployment and Update.
Schedules	Reschedules tasks on Software Deployment and Update managed machines.
Status - By Machine	Identifies the software titles that are in compliance or out of compliance for a selected machine.
Status - By Software Title	Identifies the machines that are in compliance or out of compliance for a selected software title.
Pending Approvals	Approves the deployment of selected software to selected profiles.
Manual Deployment - By Machine	Manually deploys software to machines, by selected machine.
Manual Deployment - By Software Title	Manually deploys software to machines, by selected software title.
Manage	Specifies the software titles and versions to be deployed to machines by named profile.
Assign by Machine	Assigns profiles to machines.
Assign by Profile	Assigns machines to profiles.
Catalog	Defines a local Software Catalog by selecting software titles and versions from a Master Catalog. Optionally creates custom installers.
Application Settings	Sets defaults and other settings that apply to the entire module.
Alerts	Specifies the actions taken in response to Software Deployment and Update alert conditions.
Reboot Actions	Determines the reboot action, by machine, if an installer requires a reboot.
Setup	Provides a easy-to-use, interactive checklist for configuring Software Deployment and Update quickly.
File Source	Designates a machine to act as a file source for downloaded files for other machines on the same LAN.
File Source by Machine	Assigns machines to a designated file source machine.
Application Logging	Displays a log of Software Deployment and Update module activity.
Licensing	Displays license counts for Software Deployment and Update.

Software Deployment and Update Module Minimum Requirements

- 80 GBs of free space on the CloudActiv8 Server to accommodate the catalog of installers.
- This module requires the CloudActiv8 have internet access.

Requirements for Each Agent

- Agent version 6.2.0.0 or later
- Any CloudActiv8 supported Windows agent operating system can be used. See **Agent Requirements**

Getting Started

Overview

An **Overview** page illustrates the four main stages of configuring and operating **Software Deployment and Update**, with links to the relevant pages and to online help.

1. **Create** - Create your own *local Software Catalog* of silent installers from a **Master Catalog** of popular software titles. Optionally create your own custom installers.
2. **Assign** - Define profiles for automated deployment and assign machines to them. Profiles determine the software and versions to be deployed. Optionally set the **Deployment Options** for new versions of each software title.
3. **Scan** - When a machine is assigned to a profile a recurring scan schedule is assigned by default. Scanning determines a machine's compliance with its assigned profiles. An **Auto Run Scan** profile option runs the scan as soon as a machine is assigned to the profile. You can also scan a machine "on demand."
4. **Install** - A recurring install schedule is assigned by default when a machine is assigned to a profile. You can also deploy installers "on demand."

Setup

A **Setup** page provides an easy-to-use, interactive checklist for configuring **Software Deployment and Update** quickly. Selecting a task displays the appropriate page, with links to online help.

Master Catalog and Local Software Catalog

The **Catalog** page selects the software titles and versions deployed to the machines you manage.

Master Catalog

A **Master Catalog** contains a pre-defined set of popular, "silent-install" software titles and versions, organized by category. These software titles and versions are ready to use. Right click any software title in the **Master Catalog** and select the **Properties** option to read the application details for that software title.

Software Catalog

*Add a windows installer by dragging it from the **Master Catalog** to a folder in your own local **Software Catalog**.* In addition, you can create your own custom installers or import them from another CloudActiv8. Once added to your local **Software Catalog**, the software title and version is:

- Available to select in profile drop-down lists.
- Available to select in manual deployment drop-down lists.

Software added from the **Master Catalog** to your local **Software Catalog** no longer displays in the **Master Catalog**. Deleting software in your **Software Catalog** returns it to the **Master Catalog**.

Always Deploy Latest

If **Always Deploy Latest** is enabled for a software title in at least one profile, the latest version of the software title is automatically added to the local **Software Catalog**. See **Deployment Options** for more information.

Installer Properties

With each pre-defined or custom installer in your local **Software Catalog**, you can specify:

- Pre-install and post-install agent procedures
- Reboot required

For custom installers, additional parameters include:

- Name, description, version, language, installer file and command line arguments
- Scanning attributes used to detect the custom installer on machines



Test Deployments

A test deployment lets you test installers before you commit to deploying them. You can test deployment of individual installers or an entire profile. You can designate a particular agent machine as your default test machine.

Language CodePreferences

You can specify the set of language-specific installers you want displayed in the **Master Catalog**. **Language Neutral** installers are always shown. Language code preferences also determine the language codes displayed when defining a custom installer.

Reboot Actions

If an installer specifies a reboot is required, a **Reboot Actions** page determines the reboot action by individual machine.

Ignore Cabinet

You can choose to display the **Ignored** cabinet below the **Master Catalog** cabinet, by checking the **Show Ignored Cabinet in Master Catalog** checkbox on the **Application Settings** > General Settings tab. This enables you to trim the **Master Catalog** folder tree of folders, software titles or versions that are of no interest to you. To move a folder, software title or version back and forth between the **Master Catalog** and **Ignored** cabinets, right-click the item and select the **Ignore** or **Add Back to Master Catalog** option.

Download Locations

A software title and version is downloaded from the **Master Catalog**'s server to your CloudActiv8 Server only when you assign it to a profile for the first time, or when you deploy software to a machine manually. A software title always downloads from your CloudActiv8 Server to the agent machine.

Exporting / Importing Custom Installers

You can export and then import custom installers between CloudActiv8s. Exporting creates a file with a .ksdu extension. The ksdu file is a zip file containing the installer file and a document specifying all the attributes of the custom installer. Select the ksdu file when importing.



Conditionally Canceling Installs and Uninstalls

Installs and uninstalls can be conditionally canceled by a "pre-procedure". CloudActiv8 users may wish to cancel a pending install or uninstall if a condition is not met. For example, the end-user may be using the machine.

If a "pre-procedure" asks the end-user for permission to continue with the install or uninstall and the end-user says no, the "pre-procedure" can create one of the following global variables using the `getVariable()` command: `#global:AbortKSDUInstall#` or `#global:AbortKSDUUninstall#`, whichever is appropriate. Software Deployment and Update now includes a check for the appropriate global variable after the "pre-procedure" is run and cancels the pending install or uninstall if the variable exists. An agent procedure is assigned to a "pre-procedure" for an install or uninstall when adding or editing the installer in the local software catalog of the **Catalog** page.

Profiles, Assignment and Deployment

Automated Deployment

The **Manage** page defines profiles that specify a set of software titles and versions to be deployed to machines. Multiple profiles can be assigned to each machine. Changes to a profile affect all machine IDs assigned that profile. Attributes for each profile include:

- Auto approve
- "In development" status for profiles for testing
- Auto run scan
- Default deployment schedule

Attributes for each software title in the profile include:

- Version
- Always deploy latest version available
- Language

See **Deployment Options**

Manual Deployment

Independent of profiles, any software title and version in your local Software Catalog can be manually deployed to multiple machines, either by software title or by machine.

Setting Credentials



A credential is required to install software using **Software Deployment and Update**. This is the same credential set using Agent > Manage Agents.

Scanning

Software Deployment and Update schedules a recurring scan on a managed machine:

- The first time a profile is assigned to that machine, or
- The first time a software title is deployed manually to that machine, whichever occurs first.

A **Software Deployment and Update** managed machine is scanned for every software title and version listed in the **Master Catalog**.

Software Compliance

Scanning determines the compliance status of software titles and versions installed on a machine, as compared to the software titles and versions specified in profiles assigned to that same machine.

Baseline scans are also supported. Status information shows the version required by the profile and the version installed on the machine. Compliance status results include:

- Software on machine, not in profile
- Does not match profile
- Matches profile

Status compliance results can be selected by software title or machine.

Application Action

The **Application Action** menu in a profile determines the action to be taken for a software title and version.

- Scan only
- Scan, and update if installed
- Scan, deploy, and update

One Time Scans

The **Status - By Machine** and **Status - By Software Title** pages can schedule a one-time scan for one or more machines to update their **Scan Log** results. A one-time scan is scheduled independently of the recurring scan schedules already assigned to these machines. For example, if recurring scans are weekly, you may want to scan a machine immediately without waiting for the next scheduled recurring scan.

Recurring Scans

All machines are assigned a *run once* **Default Baseline Scan Schedule** and a *recurring* **Default Latest Scan Schedule** the first time they are assigned to a profile, using the **Application Settings** > Schedule tab.

Auto run scan

If **Auto run scan when machines are added** is checked in a profile, a machine is scanned immediately after being assigned to that profile. This ensures at least one scan has occurred before a scheduled deployment.

Offline Scanner

Agents without internet access can be optionally configured to use an offline scanner to run Software Deployment and Update scans. Only connectivity to the CloudActiv8 Server is required. The offline scanner is refreshed nightly on the CloudActiv8 Server. Agent machines are individually configured to use the offline scanner using the **Offsite Scanner** tab on the **Application Settings** page. If a machine is configured to use the offline scanner, it downloads the latest offline scanner from the CloudActiv8 Server and scans using this file instead of downloading a similar file from the internet. If an agent has internet access, using the offline scanner is not recommended, since nightly updates to the offline scanner cause it to be downloaded by agents more frequently.

Deployment Options

Software Deployment and Update provides multiple configurations for managing the deployment of the latest version of each software title. Each of the configurations below depends on the combined settings for **Always Deploy Latest** and **Auto Approve**. These settings are set using the **Manage** page. *You can choose a different configuration for each combination of profile and software title.*

- **Auto approve the latest version** - Use this configuration if you are comfortable with deploying the latest version of the software as soon as it becomes available, without testing and approving the version first. The latest version is installed on machines using that profile the next time deployment is scheduled.
 - **Auto Approve** for the profile is *enabled*.
 - **Always Deployed Latest** is *enabled* for the specific software title in that profile.
- **Auto approve the selected version** - Use this configuration if you are comfortable with deploying a *selected* version of the software as soon as you add it to a profile, without approving the version first. You can test the installer before you add it to any profile. The selected software version is installed on machines using that profile the next time deployment is scheduled.
 - **Auto Approve** for the profile is *enabled*.
 - **Always Deployed Latest** is *disabled* for the specific software title in that profile.

- **Manually approve the latest version** - Use this configuration if you would prefer to test and approve the latest version first, before deploying it. Once the latest version becomes available it displays in **Pending Approvals**, along with the profile it's associated with. After the latest version is manually approved for that specific profile, the latest version is installed on machines using that profile the next time deployment is scheduled.
 - **Auto Approve** for the profile is *disabled*.
 - **Always Deployed Latest** is *enabled* for the specific software title in that profile.
- **Only be notified about the latest version** - Use this configuration if you do not want the latest versions stacking up, even in the **Pending Approvals** page. But you still want to be notified when a new version of the software is available. Once alerted using the **New Version In Local Catalog** alert on the **Alerts** page, you can manually schedule the deployment to selected machines at your convenience.
 - **Auto Approve** for the profile is *disabled*. Consider enabling auto approve for another software title within the same profile.
 - **Always Deployed Latest** is *disabled* for the specific software title in that profile.
 - Configure a **New Version in Local Catalog** alert to notify you when a new version of any software title in the *local software catalog* becomes available, using the **Alerts** page.

File Source Sharing

When a file source is enabled and a machine on the same LAN requests a download from the internet for the first time, files are downloaded to the file source machine, then copied to the requesting machine. From then on, the file does not need to be downloaded from the internet. Other machines—on the same LAN and using the same file source—copy the file from the file source machine. Doing so speeds delivery to multiple machines throughout the same LAN and reduces network bandwidth issues.

- File source shares apply to **Software Deployment and Update** software title downloads only.
- Machines can only be assigned to a file source machine if they are Windows-based and are members of the same organization and **partition ID** as the file source machine.
- Ensure machines have LAN access to the file source machine.
- The share on the file source machine is created automatically and assigned the machine's default access rights, which is typically read access for all users.
- The file source machine must have a credential set in the CloudActiv8 for assigned machines to access the file share. Assigned machines also require a credential set in the CloudActiv8 to install software titles.
 - If the credential set for a file source machine or an assigned machine is a local credential, then both the file source machine and all assigned machines *must use a local credential with the same username and password*.
 - Domain machines can use their unique domain credentials.

Confirming File Source Sharing

- You can confirm an assigned machine copied a downloaded file from the file source share if a **Download Method: XCOPY** log entry displays in the Agent > Agent Logs > Agent Procedure Log.

- Otherwise:
 - In a **SaaS** CloudActiv8, a **Download method: CLOUD_GET_URL** log entry displays.
 - In an **on premises** CloudActiv8, a **Download method: CloudActiv8_WRITE_FILE** or **Download Method: CloudActiv8_GET_URL** displays, depending on which download method is selected in **Application Settings**

Scheduling

- **Software Deployment and Update** introduces a new user interface feature called schedule patterns. A **schedule pattern** is a named, pre-defined, recurring schedule that displays in scheduling drop-down lists. This saves you the trouble of configuring the same recurring schedule repeatedly for different tasks.
- Default recurring schedules are defined, by schedule pattern, for deployments and scans.
- You assign a schedule pattern for deployment when a profile is created or maintained. The assigned schedule pattern only applies to machines *newly assigned* to that profile.
- Use the **Schedules** page to reschedule any *existing* recurring or run-once schedules, by machine.

Monitoring Software Deployment and Update

The following tools are provided to monitor **Software Deployment and Update** activities.

Alerts

Software Deployment and Update supports the following types of alerts:

- Auto Approval for Always Have Latest Version
- Deployment Complete
- Deployment Failed
- New Category
- New Software
- New Software Source
- New Version in Local Catalog
- Scan Complete
- Scan Failed
- Software Detected Not in Profile

Deployment Analysis

A **Deployment Analysis** page displays a sortable, filterable table of every software title and version installed on every machine managed by **Software Deployment and Update**. The table identifies the software titles that are in compliance or out of compliance.

Dashboard

The **Dashboard** page displays a dashboard view of **Software Deployment and Update** activities, including:

- Deployments - Last 24 Hours
- Software Status (By Machine)
- Alerts
- Top 5 Deployed Software

Logging

The **Application Logging** page displays a log entry of every CloudActiv8 user action performed in the **Software Deployment and Update** module.

Reports

The following reports are provided with **Software Deployment and Update**.

- Profile Status by Machine
- Recent Deployments
- Software Installed by Machine
- Machine Changes

Uninstalling Software



Software titles and versions can be uninstalled using the **Uninstall Now** button within the **Status - By Machine** and **Status - By Software Title** pages.

Uninstalled software titles are tracked by managed machine. A profile will not reinstall a software title, including newer versions, if it was previously uninstalled. You must explicitly install the software title by clicking the **Deploy Now** button.

Uninstall options include reboots, pre-procedures and post-procedures. Uninstall options are specified when adding or editing the installer in the local software catalog of the **Catalog** page. You can uninstall both:

- Ninite installers
- Custom installers - The user must specify the path, also referred to as the **Uninstall String**, used to uninstall the application. The user can also specify any required command line arguments within the **Command Line Arguments** field.


The Alerts page includes two uninstall alerts:

- **Uninstall Complete**
- **Uninstall Failed**

Dashboard

Software Deployment > Summary > Dashboard

The **Dashboard** page provides a dashboard view of **Software Deployment and Update** metrics and activities.

- Hover the cursor of any pie slice to see statistics for that pie slice.
- Click an pie slice to see a list the member objects that belong to that pie slice.
- A gear icon  on the right side of the page enables each user to configure the **Dashboard** elements he or she wants to display. Dashboard

metrics and activities include:

- **Deployments - Last 24 Hours** - The number and percentages of deployments by software title, in the last 24 hours.
- **Profile Status** - The number and percentages of machines assigned profiles reporting different types of profile status: Matches Profiles, Does Not Match, Missing Software, Unknown, Warning, Uninstalled.
- **Machine Assignments** - The number of and percentages of machines assigned or not assigned to a profile.
- **Alerts** - Lists overdue alerts and configuration alerts.
- **Top 5 Deployed Software Titles** - The top 5 installed software titles, by number and percentage.
- **Machine Credential Status** - The number and percentages of machines reporting different types of credential status: Passed, Pending, Failed and Unknown.
- **Uninstalls - Last 24 Hours** - The number and percentages of uninstalls, by software title, in the last 24 hours.
- **Top 5 Uninstalled Software Titles** - The top 5 uninstalled software titles, by number and percentage.
- **Licenses Used** - The number of **Software Deployment and Update** licenses used.



Deployment Analysis

Software Deployment > Summary > Deployment Analysis

The **Deployment Analysis** page displays a sortable, filterable table of every software title and version installed on every machine managed by **Software Deployment and Update**. Hover the cursor over a *compliance status icon* to see additional information. This table supports **selectable columns**, **column sorting**, **column filtering** and **flexible columns widths**. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

- The **Status - By Machine** page displays a similar table, limited to the software titles associated with a selected machine.
- The **Status - By Software Title** page displays a similar table, limited to the machines associated with a selected software title.

Actions












- **View History** - Displays a selected machine's task history.
- **Deploy Now** - Deploys a software title and version to the selected machine immediately. Use this option if a previous deployment failed, or if a software title and version need to be deployed before the scheduled deployment.
-  - Click this icon to display a list of standard options.
 - **Export** - Generates a CSV file of user data provided by the page that you can download. Options include **All**, **Selected**, **Current** Page.
 - **Refresh** - Refreshes the page.
 - **Reset** - Clears any filtered set on this page.

Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete  Agent online
 -  Agent online and user currently logged on.
 -  Agent online and user currently logged on, but user not active for 10 minutes  Agent is currently offline
 -  Agent has never checked in
 -  Agent is online but remote control has been disabled  The agent has been suspended
 -  An agent icon adorned with a red clock badge is a temporary agent.
- **(Operating System)** - Only Windows is supported with this first release.
- **(Compliance Status)**
 -  - Deployment or scan in process.

⊗ - Software on machine, not in profile. ✓ - Matches profile.

❗ - Does not match profile.

- **Machine** - The name for a managed computer in the CloudActiv8.
- **Org ID** - The unique identifier of an organization in the CloudActiv8.
- **Machine Group** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Software Title** - The name of the software.
- **Installed Version** - The version of software installed on the machine.
- **Profile Version** - The version of the software specified by the profile.
- **Language** - The language of the installer.
- **Profile Name** - The name of the profile.
- **Catalog Location** - The folder in the local software catalog the software title is located in.
- **Last Deployed Date** - The date/time software was last deployed to this machine.
- **Uninstalled Date** - The date/time software was uninstalled.
- **Last Scan Date** - The date/time the machine was last scanned.
- **Next Scan Date** - The date/time the machine is next scheduled to be scanned.
- **Next Deploy Date** - The date/time software is next scheduled to be deployed to this machine.
- **Baseline Scan Date** - The date/time a baseline scan was last run on this machine.
- **Last Deployed Start Date** - The date/time the last deployment started.
- **Last Scan Start Date** - The date/time the last scan started.
- **Status Message** - Status of the software title, version, and file size on this machine.
- **File Size** - The file size of the software title and version.

Schedules

Software Deployment > Summary > Schedules

The **Schedules** page *reschedules* tasks on **Software Deployment and Update** managed machines. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.














Types of tasks that can be rescheduled include:






- **Recurring Scheduled Scans** - All machines are assigned a *run once* **Default Baseline Scan Schedule** and a *recurring* **Default Latest Scan Schedule** the first time they are assigned to a profile, using the **Application Settings** > Schedule tab.
- **One Time Scheduled Scans** - The **Status - By Machine** and **Status - By Software Title** pages can schedule a one-time scan for one or more machines to update their **Scan Log** results. A one-time scan is scheduled independently of the recurring scan schedules already assigned to these machines. For example, if recurring scans are weekly, you may want to scan a machine immediately without waiting for the next scheduled recurring scan.
- **One Time Scheduled Deployments** - When a machine is assigned to a profile it uses the profile's *default schedule pattern* to schedule recurring deployments. Each deployment in a profile's recurring deployment schedule displays on the **Schedule** page as a **one-time deployment** that can be *rescheduled*, by machine.

Actions

- **Reschedule** - Reschedules a scheduled task. Each type of recurrence—Once, Daily, Weekly, Monthly, Yearly—displays additional options appropriate for that type of recurrence. Includes start and end dates for the recurrence. Settings include:
 - **Distribution Window** - Reschedules the task to a randomly selected time no later than the number of periods specified, to spread network traffic and server loading. For example, if the scheduled time for a task is 3:00 AM, and the distribution window is 1 hour, then the task schedule will be changed to run at a random time between 3:00 AM and 4:00 AM.
 - **Skip if offline** - If checked and the machine is offline, skip and run the next scheduled period and time. If blank and the machine is offline, run the task as soon as the machine is online again. Applies only to recurring schedules, a 'Once' schedule always executes the next time the agent is online.
 - **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-network or vPro and another managed system on the same network.
 - **Exclude the following time range - Applies only to the distribution window.** If checked, specifies a time range to exclude the scheduling of a task within the distribution window. Specifying a time range outside of the distribution window is ignored by the scheduler.
- **View History** - Displays an item history related to a scheduled task.
- **Delete Schedule** - Deletes a scheduled task.
- **Refresh** - Refreshes the page.

Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete
 -  Agent online
 -  Agent online and user currently logged on.
 -  Agent online and user currently logged on, but user not active for 10 minutes
 -  Agent is currently offline
 -  Agent has never checked in
 -  Agent is online but remote control has been disabled
 -  The agent has been suspended
 -  An agent icon adorned with a red clock badge is a temporary agent.
- **(Task Status)**
 -  - Pending
 -  - In Process
 -  - Completed
 -  - Error

- **(Operating System)** - Only Windows is supported with this first release.
- **(Item Type)**
 -  - **Install Now**
 -  - **Install Software in Profile**
 -  - **Baseline Scan**
 -  - **Latest Scan**
 -  - **Uninstall**
- **Name** - The name of the task. Comprises the machineID.groupID.orgID plus the type of task scheduled:
 - Latest Scan
 - Latest Scan (Recurring)
 - Baseline Scan
 - install profile apps from <ProfileName>
 - install app <ApplicationName>
- **Schedule Description** - The **schedule pattern** for the task.
- **Last Ran** - The date/time the task last ran.
- **Next Run** - The date/time the task is scheduled to run.
- **Message** - Status of the task.
- **Machine.GroupID** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.
- **Profile Name** - The name of the profile.

Archived Alerts

Software Deployment > Summary > Archived Alerts

The **Archived Alerts** page displays the alerts that are archived from the **Dashboard** page. The

Application Settings page sets the number of days to wait before archiving an alert.

Status - By Machine



Software Deployment > Status > By Machine

The **Status - By Machine** page identifies the software titles that are in compliance or out of compliance for a selected machine. The **Scan Log** results on the right side of the page identifies the version and *compliance status* of all software installed on a machine that is included in your **Master Catalog**. Hover the cursor over a *compliance status icon* to display a tooltip description. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

One Time Scans

The **Status - By Machine** and **Status - By Software Title** pages can schedule a one-time scan for one or more machines to update their **Scan Log** results. A one-time scan is scheduled independently of the recurring scan schedules already assigned to these machines. For example, if recurring scans are weekly, you may want to scan a machine immediately without waiting for the next scheduled recurring scan.

Recurring Scans

All machines are assigned a *run once* **Default Baseline Scan Schedule** and a *recurring* **Default Latest Scan Schedule** the first time they are assigned to a profile, using the **Application Settings** > Schedule tab. Scheduling a recurring latest scan using this page overrides the default recurring latest scan schedule.

Auto run scan

If **Auto run scan when machines are added** is checked in a profile, a machine is scanned immediately after being assigned to that profile. This ensures at least one scan has occurred before a scheduled deployment.

Machine Actions

- **Schedule Scan**
 - **Baseline Scan** - Schedules a baseline scan on selected machines. A baseline scan serves as a benchmark for comparison with the latest scan. See **Software Deployment - Machine Changes**.
 - **Latest Scan** - Schedules a latest scan on selected machines. The latest scan is compared with assigned profiles to determine a machine's compliance with specified software.
 - Schedule a *run once* or *recurring* **Latest Scan** or a *run once* **Baseline Scan** using the following options.
 - ✓ **Distribution Window** - Reschedules the task to a randomly selected time no later than the number of periods specified, to spread network traffic and server loading. For example, if the scheduled time for a task is 3:00 AM, and the distribution window is 1 hour, the task schedule will be changed to run at a random time between 3:00 AM and 4:00 AM. (R)
 - ✓ **Skip if offline** - If checked and the machine is offline, skip and run the next scheduled period and time. If blank and the machine is offline, run the task as soon as the machine is online again. Applies only to recurring schedules, a 'Once' schedule always executes the next time the agent is online.
 - ✓ **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-LAN or vPro and another managed system on the same LAN.
 - ✓ **Exclude the following time range - Applies only to the distribution window**. If checked, specifies a time range to exclude the scheduling of a task within the distribution window. Specifying a time range outside of the distribution window is ignored by the scheduler.

- **Run Scan Now**
 - **Baseline Scan** - Runs a baseline scan on selected machines immediately.
 - **Latest Scan** - Runs a latest scan on selected machines immediately.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**.
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the page.

Machine Table Columns

- **Org ID** - The unique identifier of an organization in the CloudActiv8.
- **Machine Group** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Machine.GroupID** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.

Scan Log Actions

- **Deploy Now** - Deploys selected software titles and versions to a selected machine immediately.
- **Uninstall Now** - Uninstalls a selected software title from a selected machine immediately. Uninstalled software titles are tracked by managed machine. A profile will not reinstall a software title, including newer versions, if it was previously uninstalled. You must explicitly install the software title by clicking the **Deploy Now** button. Uninstall options can include reboots, pre-procedures and post-procedures. These uninstall options are specified when adding or editing the installer in the local software catalog of the **Catalog** page.
- **View History** - Displays a selected machine's task history.
- **Refresh** - Refreshes the page.

Scan Log Table Columns

- **(Operating System)** - Only Windows is supported with this first release.
- **(Compliance Status)**
 - 🟡 - Deployment or scan in process.
 - ⊗ - Software on machine, not in profile. ✅ - Matches profile.
 - ❗ - Does not match profile.
- **Software Title** - The name of the software.
- **Installed Version** - The version of software installed on the machine.



- **Profile Version** - The version of the software specified by the profile.
- **Language** - The language of the installer.
- **Profile Name** - The name of the profile.
- **Catalog Location** - The folder in the local software catalog the software title is located in.
- **Last Deployed Date** - The date/time software was last deployed to this machine.
- **Uninstalled Date** - The date/time software was uninstalled.
- **Last Scan Date** - The date/time the machine was last scanned.
- **Next Scan Date** - The date/time the machine is next scheduled to be scanned.
- **Next Deploy Date** - The date/time software is next scheduled to be deployed to this machine.
- **Baseline Scan Date** - The date/time a baseline scan was last run on this machine.
- **Last Deployed Start Date** - The date/time the last deployment started.
- **Last Scan Start Date** - The date/time the last scan started.
- **Status Message** - Status of the software title, version, and file size on this machine.
- **File Size** - The file size of the software title and version.

Status - By Software Title

Software Deployment > Status > By Software Title

The **By Software Title** page identifies the machines that are in compliance and out of compliance for a selected software title. The **Scan Log** results on the right side of the page identifies the *compliance status* of all software installed on a machine that is in your **Master Catalog**. Hover the cursor over a *compliance status icon* to see a tooltip description. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

One Time Scans

The **Status - By Machine** and **Status - By Software Title** pages can schedule a one-time scan for one or more machines to update their **Scan Log** results. A one-time scan is scheduled independently of the recurring scan schedules already assigned to these machines. For example, if recurring scans are weekly, you may want to scan a machine immediately without waiting for the next scheduled recurring scan.

Recurring Scans



All machines are assigned a *run once* **Default Baseline Scan Schedule** and a *recurring* **Default Latest Scan Schedule** the first time they are assigned to a profile, using the **Application Settings** > Schedule tab. Scheduling a recurring latest scan using this page overrides the default recurring latest scan schedule.

Auto run scan

If **Auto run scan when machines are added** is checked in a profile, a machine is scanned immediately after being assigned to that profile. This ensures at least one scan has occurred before a scheduled deployment.


Software Title Actions

- **Refresh** - Refreshes the page.

Software Title Table Columns














- **(Operating System)** - Only Windows is supported with this first release.
- **Software Title** - The name of the software.
- **Source** - The catalog provider of the software.
- **Version** - The version of the software title.
- **Language** - The language of the installer.

Scan Log Actions

- **Schedule Scan**
 - **Baseline Scan** - Schedules a baseline scan on selected machines. A baseline scan serves as a benchmark for comparison with the latest scan. See **Software Deployment - Machine Changes**.
 - **Latest Scan** - Schedules a latest scan on selected machines. The latest scan is compared with assigned profiles to determine a machine's compliance with specified software.
 - Schedule a *run once* or *recurring* **Latest Scan** or a *run once* **Baseline Scan** using the following options.
 - ✓ **Distribution Window** - Reschedules the task to a randomly selected time no later than the number of periods specified, to spread network traffic and server loading. For example, if the scheduled time for a task is 3:00 AM, and the distribution window is 1 hour, then the task schedule will be changed to run at a random time between 3:00 AM and 4:00 AM.
 - ✓ **Skip if offline** - If checked and the machine is offline, skip and run the next scheduled period and time. If blank and the machine is offline, run the task as soon as the machine is online again. Applies only to recurring schedules, a 'Once' schedule always executes the next time the agent is online. 
 - ✓ **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-LAN or vPro and another managed system on the same LAN.
 - ✓ **Exclude the following time range - Applies only to the distribution window.** If checked, specifies a time range to exclude the scheduling of a task within the distribution window. Specifying a time range outside of the distribution window is ignored by the scheduler.

- **Scan Now**
 - **Baseline Scan** - Runs a baseline scan on selected machines immediately.
 - **Latest Scan** - Runs a latest scan on selected machines immediately.
- **Deploy Now** - Deploys a selected software title and version to selected machines immediately.
- **Uninstall Now** - Uninstalls a selected software title from selected machines immediately. Uninstalled software titles are tracked by managed machine. A profile will not reinstall a software title, including newer versions, if it was previously uninstalled. You must explicitly install the software title by clicking the **Deploy Now** button. Uninstall options can include reboots, pre-procedures and post-procedures. These uninstall options are specified when adding or editing the installer in the local software catalog of the **Catalog** page.
- **View History** - Displays a selected machine's task history.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the page.

Scan Log Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete  Agent online
 -  Agent online and user currently logged on.
 -  Agent online and user currently logged on, but user not active for 10 minutes  Agent is currently offline
 -  Agent has never checked in
 -  Agent is online but remote control has been disabled  The agent has been suspended
 -  An agent icon adorned with a red clock badge is a temporary agent.
- **(Operating System)** - Only Windows is supported with this first release.
- **(Compliance Status)**
 -  - Deployment or scan in process.
 -  - Software on machine, not in profile.  - Matches profile.
 -  - Does not match profile.
- **Machine** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.
- **Org ID** - The unique identifier of an organization in the CloudActiv8.
- **Machine Group** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Software Title** - The name of the software.
- **Installed Version** - The version of software installed on the machine.

- **Profile Version** - The version of the software specified by the profile.
- **Profile Name** - The name of the profile.
- **Catalog Location** - The folder in the local software catalog the software title is located in.
- **Last Deployed Date** - The date/time software was last deployed to this machine.
- **Last Scan Date** - The date/time the machine was last scanned.
- **Next Scan Date** - The date/time the machine is next scheduled to be scanned.
- **Next Deploy Date** - The date/time software is next scheduled to be deployed to this machine.
- **Baseline Scan Date** - The date/time a baseline scan was last run on this machine.
- **Last Deployed Start Date** - The date/time the last deployment started.
- **Last Scan Start Date** - The date/time the last scan started.
- **Status Message** - Status of the software title, version, and file size on this machine.

Pending Approvals

Software Deployment > Status > Pending Approvals

The **Pending Approvals** page approves the deployment of selected software to selected profiles. Once approved, the new software version will be installed on machines using those profiles the next time deployment is scheduled.

Software Title Actions

- **Test Deployment** - Installs the selected version of the software title on a selected machine. The selected machine defaults to the **Default Test Agent for Windows** set using the **Application Settings** > General Settings tab.
- **Refresh** - Refreshes the page.

Software Title Table Columns

- **Software Title** - The name of the software.
- **New Version** - The version of the software title in your local **Software Catalog**.
- **Language** - The language of the installer.
- **File Size** - The file size of the software title and version.
- **Date Added** - Date/time the version was added to the **Master Catalog**.



Associated Profiles Actions

- **Approve** - For a selected software title and version, approves deploying it to selected profiles.
- **Reject** - For a selected software title and version, rejects deploying it to selected profiles.
- **View Software** - Lists software titles and versions in a selected profile.
- **View Machines** - Lists machines assigned to a selected profile.

Associated Profiles Table Columns

- **Profile** - The name of the profile.
- **Description** - The description of the profile.
- **Software Title** - The name of the software title.
- **Current Version** - The version currently specified for that software title in that profile.
- **Schedule Pattern** - The **schedule pattern** for the task.
- **Software** - The number of software titles in the profile. Click to list the software titles and versions in a selected profile.
- **Machines** - The number of machines assigned the profile. Click to list the machines assigned a selected profile.
- **Status Message** - Status of the software title, version, and file size on this machine.

Manual Deployment - By Machine

Software Deployment > Manual Deployment > By Machine

The **Manual Deployment - By Machine** page manually deploys software to selected machines. Two lists on the right side of the page identify:

- The software assigned to the profile used by the selected machine.
- The software not assigned to the profile used by the selected machine.


The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

Actions



- **Deploy to Machines** - Selects one or more software titles from the local software catalog and installs it immediately.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the page.



Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete Agent online
 - Agent online and user currently logged on.

Agent online and user currently logged on, but user not active for 10 minutes Agent is currently offline

Agent has never checked in  Agent is online but remote control has been disabled  The agent has been suspended




An agent icon adorned with a red clock badge is a temporary agent.

- **(Operating System)** - Only Windows is supported with this first release.
- **Org ID** - The unique identifier of an organization in the CloudActiv8.
- **Machine Group** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Machine Group ID** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.
- **(Set Credential Status)**



- Credential not set







- Credential set and passed  - Credential set and failed

Actions

- **Deploy Now** - Deploys selected software titles and versions to a selected machine immediately.
- **Refresh** - Refreshes the page.

Software Assigned to a Profile

- *Table Columns*
- **(Operating System)** - Only Windows is supported with this first release.
- **(Task Status)**
 -  - Pending
 -  - In Process  - Completed
 -  - Error
- **Software Title** - The name of the software.
- **Profile Version** - The version of the software specified by the profile.
- **Installed Version** - The version of software installed on the machine.
- **Language** - The language of the installer.
- **Source** - The catalog provider of the software.
- **Profile** - The name of the profile.
- **Catalog Location** - The folder in the local software catalog the software title is located in, if applicable.
- **Status Message** - Status of compliance.
- **File Size** - The file size of the software title and version.

Software Not Assigned to a Profile

Actions

- **Deploy Now** - Deploys selected software titles and versions to a selected machine immediately.
- **Refresh** - Refreshes the page.

Tables Columns

- **(Operating System)** - Only Windows is supported with this first release.
- **Software Title** - The name of the software.
- **Catalog Version** - The version of software in the **Master Catalog**.
- **Language** - The language of the installer.
- **Source** - The catalog provider of the software.
- **Catalog Location** - The folder in the **Master Catalog** the software title is located in.
- **Installed Version** - The version of software installed on the machine.
- **File Available** - If checked, the file is available to deploy.
- **File Size** - The file size of the software title and version.

Manual Deployment - By Software Title

Software Deployment > Manual Deployment > By Software Title

The **Manual Deployment - By Software Title** page manually deploys selected software to selected machines. A list on the right side of the page shows the machines the software can be deployed to. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

Software Title Actions

- **Refresh** - Refreshes the page.



Software Title Table Columns













- **Software Title** - The name of the software.
- **Source** - The catalog provider of the software.

- **Catalog Version** - The version of software in your local **Software Catalog**.
- **Catalog Location** - The folder in the local software catalog the software title is located in, if applicable.
- **File Available** - If checked, the software title and version is available to deploy.
- **File Size** - The file size of the software title and version.

Machine Actions

- **Deploy Now** - Deploys a selected software title and version to selected machines immediately.
- **Refresh** - Refreshes the page.

Machine Table Columns

- **Check-in** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete
 -  Agent online
 -  Agent online and user currently logged on.
 -  Agent online and user currently logged on, but user not active for 10 minutes
 -  Agent is currently offline
 -  Agent has never checked in
 -  Agent is online but remote control has been disabled
 -  The agent has been suspended
 -  An agent icon adorned with a red clock badge is a temporary agent.
- **(Operating System)** - Only Windows is supported with this first release.
- **Org ID** - The unique identifier of an organization in the CloudActiv8.
- **Machine Group** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Machine.GroupID** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.
- **Installed Version** - The version of software installed on the machine.
- **(Set Credential Status)**
 -  - Credential not set
 -  - Credential set and passed
 -  - Credential set and failed

Manage

Software Deployment > Profiles > Manage

Automated Deployment

The **Manage** page defines profiles that specify a set of software titles and versions to be deployed to machines. Multiple profiles can be assigned to each machine. Changes to a profile affect all machine IDs assigned that profile. Attributes for each profile include:

- Auto approve
- "In development" status for profiles for testing
- Auto run scan
- Default deployment schedule

Attributes for each software title in the profile include:

- Version
- Always deploy latest version available
- Language

See **Deployment Options**.

Manual Deployment

Independent of profiles, any software title and version in your local Software Catalog can be manually deployed to multiple machines, either by software title or by machine.

Setting Credentials

A credential is required to install software using **Software Deployment and Update**. This is the same credential set using Agent > Manage Agents. 

Folder Trees

Publishing a Profile

The middle pane contains two folder tree cabinets.

- **In Development** - Profiles belonging to the **In Development** cabinet do not display throughout the rest of the **Software Deployment and Update** module. This enables you to prototype profiles before publishing them for general use.
- **Published** - Profiles in the **Published** folder tree can be used throughout the rest of the **Software Deployment and Update** module.

To change a profile from an **In Development** profile to a **Published** profile, drag the profile from the **In Development** folder tree to the **Published** cabinet folder tree. You can also publish a profile by unchecking the **In Development** checkbox while editing the profile. To place a published profile back into development, drag the profile from the **Published** folder tree to the **In Development** cabinet folder tree.

You can also place a published profile back into development by unchecking the **In Development** checkbox while editing the profile.

Always Available

- **New**
 - **New Folder** - Creates a new folder under the selected cabinet or folder.
 - **Windows Profile** - See **New Windows Profile / Edit Profile**

When a Folder is Selected

- **Rename Folder** - Renames a selected folder.
- **Delete Folder** - Deletes a selected folder.

When a Profile is Selected

- **Edit Profile** - See **New Windows Profile / Edit Profile**
- **Copy Profile** - Copies a selected profile. Only the profile settings are copied. Machine assignments are not copied.
- **Delete Profile** - Deletes the selected profile.
- **Test Deployment** - Tests deployment of a profile to a selected machine. All software titles included in the profile will be installed on the selected machine. The selected machine defaults to the **Default Test Agent for Windows** set using the **Application Settings** > General Settings tab.

New Windows Profile / Edit Profile

Software Deployment > Profiles > Manage > New Windows Profile or Edit Profile

The **New Windows Profile** or **Edit Profile** window specifies the software titles to be deployed to machines. Changes to a profile affect all machine IDs assigned that profile.

See **Deployment Options** (page vi).

Header

- **Name** - The name of the profile.
- **In Development** - If checked, the profile is in development and not visible throughout the rest of the **Software Deployment and Update** module.
- **Description** - The description of the profile
- **Default Deployment Schedule** - Select a default recurring schedule pattern for deploying the profile to *newly assigned machines only*. Click the add icon to create a new recurring schedule pattern. Options to choose in the **Default Deployment Schedule** dropdown list:
 - **No Schedule** - If selected, the software is deployed immediately when an agent is added to the profile.
 - **Your Custom schedule pattern(s)** - if selected, the software is deployed at the time defined in your custom recurring schedule patterns. These patterns can be created and saved, if you click the **Add** icon next to the **Default Deployment Schedule** dropdown.
- **Auto run scan when machines are added** - If checked, a machine is scanned immediately after being assigned to this profile. This ensures at least one scan has occurred before a scheduled deployment.
- **Auto approve all software chosen that is marked as 'Always Deploy Latest' out to all machines associated in this profile** – If checked, auto approve is enabled for the profile

Actions

These same actions can also be performed using the right side of the **Manage** page.

- **Add** - Selects a version of a software program from the local **Software Catalog** and adds it to the profile.
- **Remove** - Removes a software program from the profile.
- **Always Deploy Latest** - Yes or No. If Yes, the latest version, when available, is either automatically deployed, or listed in **Pending Approvals**. See **Deployment Options** for more information. Defaults from the **Default Value for Always Deploy Latest** checkbox on the **Application Settings** > General Settings tab.
- **Application Action** - Specify the action to be taken for a software title and version. The default value is set using the **General Settings** tab of the **Application Settings** page.
 - Scan only** - Only determine if it's installed or not.
 - Scan, and update if installed** - Update it if it's already installed and requires an update.
 - Scan, deploy, and update** - Update it if it's already installed and requires an update. Install it if it is not already installed. This is the default and was the only behavior available in the previous release.
- **Refresh** - Refreshes the table.

Table Columns

- **(Operating System)** - Only Windows is supported with this first release.
- **Source** - The catalog provider of the software.
- **Category** - The category used to classify the software by the source provider.
- **Software Title** - The name of the software.
- **Description** - The description of the installer.
- **Version** - The version of the installer.
- **Language** - The language of the installer.
- **Catalog Location** - The folder in the local software catalog the software title is located in.
- **Always Deploy Latest** - If checked, the latest version, when available, is either automatically deployed, or listed in **Pending Approvals**. See **Deployment Options** for more information.
- **Reboot Required** - If checked, a reboot is required after the software is installed.
- **Action** - Specifies the action to be taken for a software title and version.

Assign by Machine




Software Deployment > Profiles > Assign by Machine










The **Assign by Machine** page assigns profiles to machines. You can also use this page to remove profiles from machines, set credentials, display the software titles in a profile and schedule a deployment of a profile to a machine.

Actions

- **Assign** - Assigns a selected profile to a machine.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the page.

Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete
 -  Agent online
 -  Agent online and user currently logged on.





-  Agent online and user currently logged on, but user not active for 10 minutes
  Agent is currently offline
-  Agent has never checked in
-  Agent is online but remote control has been disabled
  The agent has been suspended
-  An agent icon adorned with a red clock badge is a temporary agent.
- (Operating System)** - Only Windows is supported with this first release.
- Machine.GroupID** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.
- (Set Credential Status)**
 -  - Credential not set
 -  - Credential set and passed
  - Credential set and failed
- In a Profile** - If checked, the machine is assigned to at least one profile.
- Group Name** - The machine group and organization a machine is a member of in the CloudActiv8.
- Org ID** - The unique identifier of an organization in the CloudActiv8.

Profiles Assigned to this Machine

The right side of the page lists the profiles already assigned to a machine. You can manage each profile assigned to a machine using the action buttons in this section.

- Remove** - Unassigns a profile from the selected machine.
- View Software** - Displays the software titles included in a profile.
- Schedule Deployment** - Schedules a one-time deployment of the profile's software titles to the selected machine.
- Deploy Now** - Installs a profile's software titles to the selected machines immediately.
- Refresh** - Refreshes the page.

Table Columns

- (Compliance Status)**
 -  - Deployment or scan in process.
 -  - Software on machine, not in profile.
  - Matches profile.
 -  - Does not match profile.
- Profile Name** - The name of the profile.
- Profile Description** - The description of the profile.
- Software** - The number of software titles in the profile.
- Status Message** - The compliance status of the profile for the selected machine.

Assign by Profile

Software Deployment > Profiles > Assign by Profile

The **Assign by Profile** page assigns machines to profiles. You can also use this page to remove machines from profiles, set credentials, display the software titles in a profile and schedule deployment of a profile to a machine. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

Actions

- **Assign** - Assigns machines to a selected profile.
- **View Software** - Displays the software titles included in a profile.
- **Refresh** - Refreshes the page.

Table Columns










- **(Operating System)** - Only Windows is supported with this first release.
- **Profile** - The name of the profile.
- **Description** - The description of the profile
- **Software** - The number of software titles in the profile.

Profiles Assigned to this Machine

The right side of the page lists the profiles already assigned to a machine. You can manage each profile assigned to a machine using the action buttons in this section.

- **Remove** - Unassigns a profile from the selected machine.
- **Schedule Deployment** - Schedules a run once deployment of the profile's software titles to selected machines.
- **Deploy Now** - Installs a profile's software titles to selected machines immediately.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshed the table.

Table Columns

- **(Check-in Status)** - These icons indicate the agent check-in status of each managed machine. Hovering the cursor over a check-in icon displays the agent Quick View window.
 -  Online but waiting for first audit to complete  Agent online
 -  Agent online and user currently logged on.
 -  Agent online and user currently logged on, but user not active for 10 minutes  Agent is currently offline
 -  Agent has never checked in
 -  Agent is online but remote control has been disabled  The agent has been suspended
 -  An agent icon adorned with a red clock badge is a temporary agent.
- **Machine.GroupID** - A unique machine ID / group ID / organization ID name for a machine in the CloudActiv8.
- **Group Name** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Org ID** - The unique identifier of an organization in the CloudActiv8.
- **Last Scan Date** - The date/time the machine was last scanned.

Catalog

Software Deployment > Configure > Catalog

The **Catalog** page selects the software titles and versions deployed to the machines you manage.

Master Catalog

A **Master Catalog** contains a pre-defined set of popular, "silent-install" software titles and versions, organized by category. These software titles and versions are ready to use. Right click any software title in the **Master Catalog** and select the **Properties** option to read the application details for that software title.

Software Catalog

*Add a windows installer by dragging it from the **Master Catalog** to a folder in your own local **Software Catalog**.* In addition, you can create your own custom installers or import them from another CloudActiv8. Once added to your local **Software Catalog**, the software title and version is:

- Available to select in profile drop-down lists.
- Available to select in manual deployment drop-down lists.

Software added from the **Master Catalog** to your local **Software Catalog** no longer displays in the **Master Catalog**. Deleting software in your **Software Catalog** returns it to the **Master Catalog**.

Always Deploy Latest

If **Always Deploy Latest** is enabled for a software title in at least one profile, the latest version of the software title is automatically added to the local **Software Catalog**. See **Deployment Options** for more information.

Installer Properties

With each pre-defined or custom installer in your local **Software Catalog**, you can specify:

- Pre-install and post-install agent procedures
- Reboot required

For custom installers, additional parameters include:

- Name, description, version, language, installer file and command line arguments
- Scanning attributes used to detect the custom installer on machines

Test Deployments

A test deployment lets you test installers before you commit to deploying them. You can test deployment of individual installers or an entire profile. You can designate a particular agent machine as your default test machine.

Language CodePreferences

You can specify the set of language-specific installers you want displayed in the **Master Catalog**. **Language Neutral** installers are always shown. Language code preferences also determine the language codes displayed when defining a custom installer.

Reboot Actions

If an installer specifies a reboot is required, a **Reboot Actions** page determines the reboot action by individual machine.

Ignore Cabinet

You can choose to display the **Ignored** cabinet below the **Master Catalog** cabinet, by checking the **Show Ignored Cabinet in Master Catalog** checkbox on the **Application Settings** > General Settings tab. This enables you to trim the **Master Catalog** folder tree of folders, software titles or versions that are of no interest to you. To move a folder, software title or version back and forth between the **Master Catalog** and **Ignored** cabinets, right-click the item and select the **Ignore** or **Add Back to Master Catalog** option.

Download Locations

A software title and version is downloaded from the **Master Catalog**'s server to your CloudActiv8 Server only when you assign it to a profile for the first time, or when you deploy software to a machine manually. A software title always downloads from your CloudActiv8 Server to the agent machine.

Exporting / Importing Custom Installers

You can export and then import custom installers between CloudActiv8s. Exporting creates a file with a `.ksdu` extension. The `ksdu` file is a zip file containing the installer file and a document specifying all the attributes of the custom installer. Select the `ksdu` file when importing.

Conditionally Canceling Installs and Uninstalls

Installs and uninstalls can be conditionally canceled by a "pre-procedure". CloudActiv8 users may wish to cancel a pending install or uninstall if a condition is not met. For example, the end-user may be using the machine. If a "pre-procedure" asks the end-user for permission to continue with the install or uninstall and the end-user says no, the "pre-procedure" can create one of the following global variables using the `getVariable()` command: `#global:AbortKSDUInstall#` or `#global:AbortKSDUUninstall#`, whichever is appropriate. Software Deployment and Update now includes a check for the appropriate global variable after the "pre-procedure" is run and cancels the pending install or uninstall if the variable exists. An agent procedure is assigned to a "pre-procedure" for an install or uninstall when adding or editing the installer in the local software catalog of the **Catalog** page.

Software Catalog Folder Tree

Always Available

- **New**
 - **Folder** - Adds a new folder.
 - **Windows Installer** - See **Creating / Editing Custom Installers** (page xxix).
- **Add Master Catalog Installer** - Displays a list of all installers in the **Master Catalog** that you can sort or filter. Select one or more installers to add to the **Software Catalog**. Ignored cabinet items do not display in the **Add Master Catalog Installer** window. *Add a windows installer by dragging it from the **Master Catalog** to a folder in your own local **Software Catalog**.*
- **Import Installer** - Imports a custom installer by selecting a `ksdu` file. The `ksdu` file is created by exporting a custom installer from **Software Deployment and Update**.
- **(Filtering)** - Enter a string to filter the list of application names displayed in the **Software Catalog** tree or **Master Catalog** tree. The filter string must match the beginning text of application names exactly.

When a Folder is Selected

- **Rename Folder** - Renames a selected folder.
- **Delete Folder** - Deletes a selected folder.

When an Installer is Selected

- **Edit Installer** - The dialog displayed depends on whether a standard installer or custom installer is selected. See **Editing Standard Installers** and **Creating / Editing Custom Installers**.
- **Delete Installer** - Deletes an installer from the local **Software Catalog**.
- **Test Deployment** - Tests the deployment of a software title and version to a selected machine.
- **Export Installer** - Exports a selected custom installer to your local hard drive, creating a `ksdu` file.

Editing Standard Installers

SoftwareDeployment>Configure>Catalog >EditInstaller,whenastandardinstaller is selected

The **Edit Installer** dialog displays the following properties when a *standard* installer is selected for editing in your local **Software Catalog**.

Installer Details

- **Source** - The catalog provider of the software.
- **Name** - The name of the installer.
- **(Operating System)** - Only Windows is supported with this first release.
- **Version** - The version of the installer.
- **Description** - The description of the installer.

(Version Qualifier)

- **Application Default Settings** - If unchecked, any settings below this checkbox apply only to the particular version of the installer you are editing. If checked, these settings apply to all versions of the application.

Command-Line Arguments

- **Command Line Arguments** - Enter additional command line arguments. A "silent-install" command line argument is recommended.

Checkboxes are provided for common Ninite command line switches. These display when editing a Ninite installer once it is dragged over to the local software catalog within the **Catalog** page. Here are two command lines switches that frequently display.

- **Disable Shortcut Creation (/disable shortcuts)** - If checked, no shortcut on the desktop is created for this software title.
- **Disable Automatic Update (/disable auto update)** - If checked, auto update for this software title is disabled.

Deployment Settings

- **Pre Procedure** - Runs a specified agent procedure before the install. A pre-procedure can be used to conditionally cancel an install or uninstall. See **Conditionally Canceling Installs and Uninstalls** in the **Catalog** topic.
- **Post Procedure** - Runs a specified agent procedure after the install.
- **Reboot Required** - If checked, reboots the managed machine for the install. The **reboot action** depends on the machine.

Uninstall Settings

- **Pre Procedure** - Runs a specified agent procedure before the uninstall. A pre-procedure can be used to conditionally cancel an install or uninstall. See **Conditionally Canceling Installs and Uninstalls** in the **Catalog** topic.
- **Post Procedure** - Runs a specified agent procedure after the uninstall.
- **Reboot Required** - If checked, reboots the managed machine for the uninstall. The **reboot action** depends on the machine.

Creating / Editing Custom Installers

Software Deployment > Configure > Catalog > New Windows Installer or Edit Installer, when a custom installer is selected
The **New Windows Installer** or **Edit Custom Installer** window displays the following properties when a
custom installer file is added or edited in your local **Software Catalog**.

Installer Settings tab

Installer

- **Name** - The name of the installer.
- **Description** - The description of the installer.
- **Version** - The version of the installer.
- **Language** - The language of the installer. **Language Neutral** is the default. The drop-down list of supported languages is defined using the **Application Settings > Languages** tab.
- **Upload Installer File** - Select the installer file to upload. File types such as msi and exe file types must be added to the CloudActiv8 **Attachment Upload Whitelist** before creating an installer record using these files types.

- **Upload Answer File** - Select the answer file to upload. An answer file is a text file used to provide the answers to installer prompts in support of an unattended installation. The creation and format of an answer file is specific to the software title and version being installed.

Deployment Settings

- **Command Line Arguments** - Enter additional command line arguments. A "silent-install" command line argument is recommended.
- **Pre-Procedure** - If checked, runs a specified agent procedure before the install. A pre-procedure can be used to conditionally cancel an install or uninstall. See **Conditionally Canceling Installs and Uninstalls** in the **Catalog** topic.
- **Post Procedure** - If checked, runs a specified agent procedure after the install.
- **Reboot Required** - If checked, reboots the managed machine for the install. The **reboot action** depends on the machine.

Uninstall Settings

- **Uninstall String** - The path used to uninstall the software title. Supports environment variable notation if it exists on the target machine. For example: %ProgramFiles%
- **Command Line Arguments** - Enter additional command line arguments.
- **Pre-Procedure** - If checked, runs a specified agent procedure before the uninstall. A pre-procedure can be used to conditionally cancel an install or uninstall. See **Conditionally Canceling Installs and Uninstalls** in the **Catalog** topic.
- **Post Procedure** - If checked, runs a specified agent procedure after the uninstall.
- **Reboot Required** - If checked, reboots the managed machine for the uninstall. The **reboot action** depends on the machine.

Scan Items tab

The **Scan Items** tab specifies the criteria used to identify a custom install on a managed machine during a **Software Deployment and Update** scan. Multiple entries of all three types of scan items can be combined. All scan items listed must match during a scan for the software to be identified as installed.

- **Add Scan Item or Edit Scan Item**
 - **Scan Type** - File, Registry Key, Registry Value
 - **Scan Item**
 - ✓ **File** - The full path to the file, such as C:\Program Files\WinMerge\WinMergeU.exe. The scanner will accept, as the first part of the path, three different environment variables: %ProgramFiles%, %ProgramFiles(x86)%, and %ProgramW6432%. For instance:

%ProgramFiles%\WinMerge\WinMergeU.exe

- ✓ **Registry Key** - You can use either the long form of the registry hive name or the short form. For instance:
HKLM\SOFTWARE\CompanyName\WinMerge\Locale or
HKEY_LOCAL_MACHINE\SOFTWARE\CompanyName\WinMerge\Locale
- ✓ **Registry Value** - You can use either the long form of the registry hive name or the short form. For instance:
HKLM\SOFTWARE\CompanyName\WinMerge\Executable or
HKEY_LOCAL_MACHINE\SOFTWARE\CompanyName\WinMerge\Executable
- **Has Version Number**
 - ✓ If checked and **File** is selected, the scanner attempts to extract the version number from the EXE or DLL specified.
 - ✓ If checked and **Registry Value** is selected, the registry value must be a string data type. The scanner attempts to read the string of the registry value and return that string as the version number to the server.
- **Delete Scan** - Deletes the selected scan item.

Application Settings





Software Deployment > Configure > Application Settings

The **Application Settings** page sets defaults and other settings that apply to the entire **Software Deployment and Update** module.

General Settings tab

Click the **Edit** button to set the following:

- **Ninite Pro Installer/Scanner Installed** - Displays only if licenses must be purchased directly from Ninite. New licenses for **Software Deployment and Update** are managed by Ninite directly. **Software Deployment and Update** licenses purchased before May 31, 2015 are not affected by this change. If licenses are purchased from Ninite directly, users must download a **NinitePro.exe** file provided by Ninite. The file must be renamed to **NinitePro.txt**, then uploaded into **Software Deployment and Update** using the **Upload Installer File** lookup field. After the upload users can begin using **Software Deployment and Update** on as many agents as their Ninite Pro license allows.
- **Scheduled Items removed in (days)** - The number of days to display historical items on the **Schedules** page.
- **Archive alerts older than (days)** - Alerts older than the number of days specified are archived automatically each day at midnight. Archived alerts display on the **Archived Alerts** page. Click the **Archive Alerts** button to immediately archive alerts older than the number of days specified.
- **Default Test Agent for Windows** - The machine ID that displays by default in test deployment drop-down lists.
- **Show Ignored Cabinet in Master Catalog** - If checked, the **Ignored** cabinet displays below the **Master Catalog** on the **Catalog** page. This enables you to trim the **Master Catalog** folder tree of folders, software titles or versions that are of no interest to you.
- **Default Value for Always Deploy Latest** - If checked, when a software title is added to a profile in the **Manage > New Windows Profile / Edit Profile** window, the **Always Deploy Latest** checkbox is checked by default. See **Deployment Options** for more information.



- **Agents Download Installer From** - This option only displays in an **on premises** CloudActiv8.
 - **CloudActiv8 Write File** - The agent downloads the installer file from the CloudActiv8 Server.
 - **CloudActiv8 URL** - The agent uses http to download the installer file from the CloudActiv8 Server. Http is typically slower unless a web server such as Akamai is set up for the CloudActiv8 Server. Akamai may redirect an http request to a faster cached location to download from.
- **Default Application Deployment Behavior** - Specifies the default action to be taken for a software title and version added to a profile. The default action can be overridden by profile, software title and version on the **Manage** page.
 - **Scan only** - Only determine if it's installed or not.
 - **Scan, and update if installed** - Update it if it's already installed and requires an update.
 - **Scan, deploy, and update** - Update it if it's already installed and requires an update. Install it if is not already installed. This is the default and was the only behavior available in the previous release.
- **Action Report** - For software titles and versions set to **Scan Only** and **Scan & Update If Installed** within a profile, an **out of compliance** status  icon on the **Deployment Analysis** page can be changed to one of the following:
 - **Out of Compliance** - Reported as an out of compliance status  icon. No change. This is the default setting.
 - **Warning** - Reported as a warning status  icon.
 - **In Compliance** - Reported as an in compliance status  icon

Schedule > Schedule tab

- The Daily **Maintenance Schedule** runs every hour and cannot be changed. The daily schedule performs several tasks.
 - Updates catalog with new software
 - Removes processed scheduled items
 - Updates software in local storage

Actions

- **Daily Maintenance History** - Displays a log of past daily maintenance runs.
- **Configure Schedules** - Click to schedule the following items.
 - **Default Baseline Scan Schedule** - The baseline scan *schedule pattern* designates a recurring schedule to run a *one-time* baseline scan on machines that have just started being managed by **Software Deployment and Update**. A baseline scan serves as a benchmark for comparison with the latest scan. See **Software Deployment - Machine Changes** .

Applies only to machines added to **Software Deployment and Update** after you change this setting. Click the plus icon  to create a new schedule pattern.
 - **Default Latest Scan Schedule** - The latest scan *schedule pattern* designates when machines with profiles are scanned on a *recurring schedule*. Applies only to machines added to **Software Deployment and Update** after you change this setting. Click the plus icon  to create a new schedule pattern.

Schedule > Schedule Patternstab

- **Add / Edit** - Creates or changes a schedule pattern. A **schedule pattern** is a *named*, pre-configured, recurring schedule that displays in scheduling drop-down lists. This saves CloudActiv8 users the trouble of configuring the same recurring schedule repeatedly for different kinds of tasks. Each type of recurrence—Daily, Weekly, Monthly, Yearly—displays additional options appropriate for that type of recurrence. Includes start and end dates for the recurrence. Settings include:
 - **Name** - The name of the schedule pattern.
 - **Use as default** - If checked, this schedule pattern displays by default in schedule pattern drop-down lists.
 - **Distribution Window** - Reschedules the task to a randomly selected time no later than the number of periods specified, to spread network traffic and server loading. For example, if the scheduled time for a task is 3:00 AM, and the distribution window is 1 hour, then the task schedule will be changed to run at a random time between 3:00 AM and 4:00 AM.
 - **Skip if offline** - If checked and the machine is offline, skip and run the next scheduled period and time. If blank and the machine is offline, run the task as soon as the machine is online again. Applies only to recurring schedules, a 'Once' schedule always executes the next time the agent is online.
 - **Power up if offline** - Windows only. If checked, powers up the machine if offline. Requires Wake-On-LAN or vPro and another managed system on the same LAN.
 - **Exclude the following time range - Applies only to the distribution window.** If checked, specifies a time range to exclude the scheduling of a task within the distribution window. Specifying a time range outside of the distribution window is ignored by the scheduler.
- **Delete** - Deletes a selected schedule pattern.

Languages tab

- **Add** - Adds a language code to the **Languages** tab. This tab determines the display of *language-specific* installers displayed in the **Master Catalog**. Language Neutral installers are always shown in the **Master Catalog**. Also determines the language codes displayed when defining a custom installer.
- **Delete** - Deletes a selected language code.

Offline Scanner

Agents without internet access can be optionally configured to use an offline scanner to run Software Deployment and Update scans. Only connectivity to the CloudActiv8 Server is required. The offline scanner is refreshed nightly on the CloudActiv8 Server. Agent machines are individually configured to use the offline scanner using the **Offsite Scanner** tab on the **Application Settings** (page xxx) page. If a machine is configured to use the offline scanner, it downloads the latest offline scanner from the CloudActiv8 Server and scans using this file instead of downloading a similar file from the internet. If an agent has internet access, using the offline scanner is not recommended, since nightly updates to the offline scanner cause it to be downloaded by agents more frequently.

The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

- **Refresh Offline Scanner** - Refreshes the offline scanner immediately. Clicking this button is only necessary if you know a change was made to the status of a software title and version within the last few hours, since the offsite scanner is refreshed nightly.
- **Use Offline Scanner** - Select machines that do not have connectivity to the internet and click this button.

Alerts

Software Deployment > Configure > Alerts

The **Alerts** page specifies the actions taken in response to the following **Software Deployment and Update** events.

- **Auto Approval for Always Have Latest Version** - Auto approval of any new version in any profile.
- **Deployment Complete** - After each successful install on each agent.
- **Deployment Failed** - After each successful install on each agent.
- **New Category** - A new software category is added to the **Master Catalog**.
- **New Software** - A new software title is added to the **Master Catalog**.
- **New Software Source** - A new software source provider is added to the **Master Catalog**.
- **New Version in Local Catalog** - A new version of a software title is available in your local **Software Catalog**. This alert is useful if you want to deploy the latest version of software titles manually after being notified. See **Deployment Options**.
- **Scan Complete** - After each successful scan on each agent.
- **Scan Failed** - After each failed scan on each agent.
- **Software Detected Not in Profile** - For each software title detected on a machine but not in any profile assigned to that machine.
- **Uninstall Complete** - After each successfully completed uninstall.
- **Uninstall Failed** - After each failed uninstall.

Actions

You can select multiple events and configure them at the same time.

- **Configure** - Configures responses to a selected event using a **Manage Alert** dialog.
 - **Create Alarm** - If checked, creates an alarm.
 - **Create Ticket** - If checked, creates a ticket.
 - **Create Popup** - If checked, creates a popup message displayed to CloudActiv8 users.
 - ✓ **Users** - Selects the CloudActiv8 users.
 - ✓ **Add to current list** - Adds selected CloudActiv8 users to those already selected.
 - ✓ **Replace list** - Adds selected CloudActiv8 users, replacing those already selected.
 - ✓ **Remove from list** - Removes selected CloudActiv8 users.
 - **Create Email** - If checked, emails recipients.
 - ✓ **Email Addresses** - Comma separate multiple addresses.
 - ✓ **Add to current list** - Adds selected email recipients to those already selected.
 - ✓ **Replace list** - Adds selected email recipients replacing those already selected.
 - ✓ **Remove from list** - Removes selected email recipients.

- **Create Inbox Message** - If checked, creates a CloudActiv8 user **Inbox** message.
 - ✓ **Users** - Selects the CloudActiv8 users.
 - ✓ **Add to current list** - Adds selected CloudActiv8 users to those already selected.
 - ✓ **Replace list** - Adds selected CloudActiv8 users, replacing those already selected.
 - ✓ **Remove from list** - Removes selected CloudActiv8 users.
- **Run Agent Procedure** - If checked, runs an agent procedure.
 - ✓ **Windows Machine** - Selects a machine to run the alert on.
 - ✓ **Windows Procedure** - Selects the agent procedure to run.
- **Clear Alerts** - Clears all parameter settings in selected alerts.

Reboot Actions

Software Deployment > Configure > Reboot Actions

The **Reboot Actions** page determines the reboot action, by machine, if an installer requires a reboot, as specified using the **Catalog** page. If a reboot action is not specified for a machine, the default reboot action is **Ask permission and do nothing if no response. Reboot if user not logged in**. When configuring each of the following reboot actions for a machine, additional parameters display as indicated.

- **Reboot immediately after update** - Reboots the machine immediately after a specific software title is installed or updated that requires a reboot.
- **Reboot after deployment** - Reboots the machine only after all software titles are installed during a deployment session, if any one software title requires a reboot. *Specify the day of the week and time to reboot, if a reboot is required.*
- **Warn user that machine will reboot, without asking permission** - Warns the user, waits N minutes for the user to finish up what they are doing and save their work. If no one is currently logged in, the system reboots immediately. *Specify the number of minutes.*
- **Skip reboot if user logged in** - Reboot is skipped after the install completes. Use this setting to avoid interrupting your users. If user is not logged in, reboot the computer.
- **Ask to reboot until reboot occurs. Reboot if user not logged in.** - Asks the user if it is OK to reboot now. If no one is at the computer or they answer no, the same message appears every N minutes repeatedly, until the system has been rebooted. If no one is currently logged in, the system reboots immediately. *Specify the number of minutes.*
- **Ask permission and reboot if no response. Reboot if user not logged in.** - Asks the user if it is OK to reboot now. If no one is at the computer, reboot the system. If no one is currently logged in, the system reboots immediately.
- **Ask permission and do nothing if no response. Reboot if user not logged in.** - Ask the user if it is OK to reboot now. If no one is at the computer, the reboot is skipped. If no one is logged in, reboot immediately. **This is the default reboot action if none is defined for a machine and a reboot is required.**
- **Do not reboot after update** - Does not reboot the system. *Optionally send an email.*

Additional Parameters

The following additional parameters are available for each reboot action.

- **Pre-Procedure** - If checked, runs a specified agent procedure before the install.
- **Post Procedure** - If checked, runs a specified agent procedure after the install.

Actions

- **Configure** - Configures a reboot action for one or more selected machines.
- **Remove** - Removes the reboot action for one or more selected machines. Selected machines return to using the default reboot action if a reboot is required.
- **Refresh** - Refreshes the page.

The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

Setup

Software Deployment > Configure > Setup

The **Setup** page provides an easy-to-use, interactive checklist for configuring **Software Deployment and Update** quickly.

Before you start using **Software Deployment and Update**, click each item in the lower panel to visit that page or dialog. A checkmark next to an item means you have selected that item at least once. It does not necessarily mean you have finished configuring that item.

Help links are provided for each item to guide you through your configuration.

If you would like to review general concepts before continuing, download a copy of the **Software Deployment and Update quick start guide**.

- Review Application Settings - Define your own schedules, supported languages and operating systems.
- Configure your Software Catalog
- Setup your Profiles
- Set Machine Credentials
- Assign Profiles to Machines

File Source

Software Deployment > Configure > File Source

The **File Source** page designates a machine to act as a *file source* for downloaded files for other machines on the same LAN. You select the file source machine first, then assign machines to it. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

File Source Sharing

When a file source is enabled and a machine on the same LAN requests a download from the internet for the first time, files are downloaded to the file source machine, then copied to the requesting machine. From then on the file does not need to be downloaded from the internet. Other machines—on the same LAN and using the same file source—copy the file from the file source machine. Doing so speeds delivery to multiple machines throughout the same LAN and reduces network bandwidth issues.

- File source shares apply to **Software Deployment and Update** software title downloads only.
- Machines can only be assigned to a file source machine if they are Windows-based and are members of the same organization and **partition ID** as the file source machine.
- Ensure machines have LAN access to the file source machine.
- The share on the file source machine is created automatically and assigned the machine's default access rights, which is typically read access for all users.
- The file source machine must have a credential set in the CloudActiv8 for assigned machines to access the file share. Assigned machines also require a credential set in the CloudActiv8 to install software titles.
 - If the credential set for a file source machine or an assigned machine is a local credential, then both the file source machine and all assigned machines *must use a local credential with the same username and password*.
 - Domain machines can use their unique domain credentials.

Confirming File Source Sharing

- You can confirm an assigned machine copied a downloaded file from the file source share if a **Download Method: XCOPY** log entry displays in the Agent > Agent Logs > Agent Procedure Log.
- Otherwise:
 - In a **SaaS** CloudActiv8, a **Download method: CLOUD_GET_URL** log entry displays.
 - In an **on premises** CloudActiv8, a **Download method: CloudActiv8_WRITE_FILE** or **Download Method: CloudActiv8_GET_URL** displays, depending on which download method is selected in **Application Settings**.

File Source Actions

- **Add** - Adds a file source share. You are prompted to select a machine and specify a **Local Path** for the share. If the **Local Path** folder does not exist it is created automatically.
- **Remove** - Removes a file source share on a selected machine.
- **Test File Source** - Tests access to the file source share.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**.
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the page.

File Source Columns

- **File Source** - The machine ID/group ID of the file source machine.
- **Group** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Org** - The unique identifier of an organization in the CloudActiv8.
- **Local Path** - The local path of the file source share.

Associated Machine Actions

- **Assign** - Assigns a machine to a selected file source.
- **Remove** - Removes a machine from a selected file source.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**.
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the list of associated machines.

Associated Machine Columns

- **Machine.Group ID** - The machine ID/group ID using a file source.
- **Group Name** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Org** - The unique identifier of an organization in the CloudActiv8.

File Source by Machine

Software Deployment > Configure > File Source by Machine

The **File Source by Machine** page assigns machines to a designated *file source* machine. The list of machines displayed depends on the machine ID / group ID filter and the user's scope.

File Source Sharing

When a file source is enabled and a machine on the same LAN requests a download from the internet for the first time, files are downloaded to the file source machine, then copied to the requesting machine. From then on the file does not need to be downloaded from the internet. Other machines—on the same LAN and using the same file source—copy the file from the file source machine. Doing so speeds delivery to multiple machines throughout the same LAN and reduces network bandwidth issues.

- File source shares apply to **Software Deployment and Update** software title downloads only.
- Machines can only be assigned to a file source machine if they are Windows-based and are members of the same organization and **partition ID** as the file source machine.
- Ensure machines have LAN access to the file source machine.
- The share on the file source machine is created automatically and assigned the machine's default access rights, which is typically read access for all users.
- The file source machine must have a credential set in the CloudActiv8 for assigned machines to access the file share. Assigned machines also require a credential set in the CloudActiv8 to install software titles.
 - If the credential set for a file source machine or an assigned machine is a local credential, then both the file source machine and all assigned machines *must use a local credential with the same username and password*.
 - Domain machines can use their unique domain credentials.

Confirming File Source Sharing

- You can confirm an assigned machine copied a downloaded file from the file source share if a **Download Method: XCOPY** log entry displays in the Agent > Agent Logs > Agent Procedure Log.
- Otherwise:
 - In a **SaaS** CloudActiv8, a **Download method: CLOUD GET_URL** log entry displays.
 - In an **on premises** CloudActiv8, a **Download method: CloudActiv8 WRITE_FILE** or **Download Method: CloudActiv8 GET_URL** displays, depending on which download method is selected in **Application Settings**.

Actions

- **Assignment**
 - **Assign to File Source** - Assigns selected machines to a selected file source.
 - **Remove from File Source** - Removes selected machines from a selected file source.
- **File Source**
 - **Create Machine as File Source** - Adds file source shares on selected machines. You are prompted to specify a **Local Path** for the share. If the **Local Path** folder does not exist it is created automatically.
 - **Remove Machine as File Source** - Removes file source shares on a selected machine.
 - **Test File Source** - Tests access to file source shares.
- **Agent**
 - **Set Credentials** - Sets the credentials of the agent. A credential is required to install software. This is the same credential set using Agent > **Manage Agents**.
 - **Test Credentials** - Tests the credentials of the agent.
- **Refresh** - Refreshes the page.

Associated Machine Columns

- **Machine.Group ID** - The machine ID/group ID using a file source.
- **Group Name** - The machine group and organization a machine is a member of in the CloudActiv8.
- **Org** - The unique identifier of an organization in the CloudActiv8.
- **File Source** - The machine ID/group ID of the file source machine.
- **Local Path** - The local path of the file source share.

Application Logging

Software Deployment > Administration > Application Logging

The **Application Logging** page displays a log of **Software Deployment and Update** module activity by:

- **Event ID**
- **Event Name**
- **Message**
- **Admin**
- **Event Date**

If information has changed or been removed unexpectedly, check this page to determine what events and administrators may have been involved.

This table supports **selectable columns, column sorting, column filtering and flexible columns widths**.

Licensing

Software Deployment > Administration > Licensing

The **Licensing** page displays **Software Deployment and Update** licensing information.

- The number of licensing **Days Left** for each machine within the CloudActiv8 user's scope.
- The **Total Licenses** purchased, used and unused.

Licensing Guidelines

- A license is used when an managed machine is scanned or has an application deployed to it or has a profile assigned to it.
- Removing an agent from a profile frees up that license 30 days later.
- Deploying an application manually from **Software Deployment and Update**, outside of a profile, consumes a license for a 30 day period.

Software Deployment and Update Reports

The following data sets are available to support the creation of custom **Software Deployment and Update** report definitions and report templates. They are located in Info Center > Configure & Design > **Report Parts**.

- Software Deployment Status
- Deployment Analysis In addition, the following legacy "fixed format" report definitions are provided.

In This Section

Software Deployment - Profile Status by Machine
Software Deployment - Recent Deployments
Software Deployment - Software Installed by Machine
Software Deployment - Machine Changes

Software Deployment - Profile Status by Machine

Info Center > Reporting > Reports > Software Deployment - Profile Status by Machine

- Displays only if the Software Deployment and Update add-on module is installed.

The **Profile Status by Machine** report definition generates a report showing the compliance status of machines managed by **Software Deployment and Update**.

- **Display Options** - Detailed or Summary

Software Deployment - Recent Deployments

Info Center > Reporting > Reports > Software Deployment - Recent Deployments

- Displays only if the Software Deployment and Update add-on module is installed.

The **Recent Deployments** report definition generates a report listing recent deployments.

Time Range

- **Select the Time Range Type** - Filters by a fixed type of date range.
- **Number Of Days** - Applies only if Last N Days is selected time range type.
- **Custom Start DateTime** - Applies only if Fixed Range is select time range type.
- **Custom End DateTime** - Applies only if Fixed Range is select time range type.

Software Deployment - Software Installed by Machine

Info Center > Reporting > Reports > Software Deployment - Software Installed by Machine

- Displays only if the Software Deployment and Update add-on module is installed.

The **Software Installed by Machine** report definition generates a report showing the software titles installed on machines managed by **Software Deployment and Update**.

- **Display Options** - Detailed or Summary

Software Deployment - MachineChanges

Info Center > Reporting > Reports > Software Deployment - Machine Changes

- Displays only if the Software Deployment and Update add-on module is installed.

The **Machine Changes** report definition generates a report showing the software titles and version changes on machines managed by **Software Deployment and Update**.

Comparison Parameters

- **Compare with Machine's own Baseline Scan** - Displays all machine software changes found on each machine by comparing the information from the latest scan against the information from the baseline scan.
- **Compare to selected Machine ID** - Displays all machine software changes found on each machine by comparing the information from the latest scan against the scan from a *selected machine ID*. Use this function to identify differences in a group of machines when compared against the standard for the group.
- **Use Baseline Scan** - Enabled if **Compare to selected machine ID** is selected. If checked, the selected machine ID's baseline scan is used for comparison instead of the selected machine ID's latest scan.

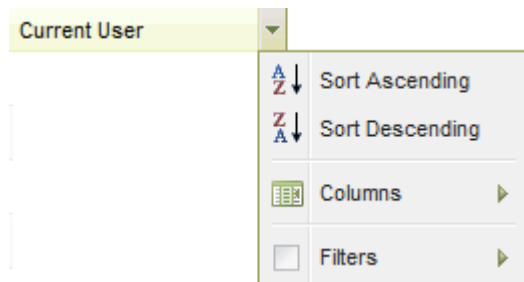
Display Options







- **Show Updates** - Machines with updated software.
- **Show Adds** - Machines with software added.
- **Show Removes** - Machines with software removed.
- **Show No Changes** - Machines with no software changes.
- **Show Unprofiled** - Machines with no assigned profiles.

Glossary

Data Table Column Options

Data tables in the CloudActiv8 typically provide the following column options.



- **Column Selection** - Click any column header drop-down arrow , then **Columns** to select which columns display in the table. Click the Sort Ascending  or Sort Descending  icons to sort the table by the selected column heading.
- **Column Sorting** - Click the Sort Ascending  or Sort Descending  icons to sort the table by the selected column heading.
- **Column Filtering** - Click the column drop-down arrow  to enter a filter value for that column. For example, enter **NS** to find all rows that start with **NS** in that column. Enter **NS%2** to find all rows that start with **NS** and end with **2** in that column. You can filter by multiple column filters if you like.
- **Flexible Column Widths** - Expand or collapse the width of each column by dragging the column header boundaries left or right.

On Premises

An **on-premises** hardware/software installation of the CloudActiv8 is maintained by a service provider and typically used only by the service provider. See **Software as a Service (SaaS)**

Software as a Service (SaaS)

Sharing the capabilities of a single instance of the CloudActiv8 is oftentimes called "Software as a Service". Service providers contract to access a CloudActiv8 hosted and maintained by a CloudActiv8 *tenant manager*. Service providers are allocated a unique *tenant partition* of a shared CloudActiv8 Server and database. Within their assigned partition, service providers can only see their own organizations, machine groups, agents, procedures, reports, tickets, and any other types of user-defined data. Service providers in a tenant partition have full access to most functions of the CloudActiv8 except system maintenance, which is the responsibility of the CloudActiv8 tenant manager.