



ecora

**Ecora Patch Manager 3.2
Start-up Guide**

Introduction

Patch Manager is an IT patch management and security tool that automatically discovers and analyzes missing or installed patches for mission-critical platforms and applications. The software instantly analyzes the status of patch configurations, provides information about the latest versions of security patches and hotfixes, and allows administrators to deploy patches in groups, individually, or during off hours. Software security and consistency can be maintained across the enterprise with Ecora's Patch Manager.

Enterprise Solution

Patch Manager analyzes and deploys patches for:

- Windows NT 4 SP6a, Windows 2000, Windows 2003, Windows XP
- Windows NT4 SP6, Terminal Server Edition
- Microsoft Windows, international edition of supported OS: English, Spanish, German, Swedish, Japanese, French, Norwegian, Finnish, Danish, Dutch
- Internet Explorer 5.01 or later
- Internet Information Services 4.0, 5.0, 5.1, 6.0
- MS-SQL Server 7.0 or 2000
- Microsoft Desktop Engine (MSDE)
- Microsoft Exchange Server 5.5 or 2000
- Windows Media Player 6.4, 7.0, 7.1, 8.0, 9
- Microsoft Office XP and 2000 (SR1-a or later)
- Microsoft Data Access Component (MDAC) 2.5, 2.6, 2.7, 2.8
- Solaris 7 - 9 (SPARC) operating systems

Download the Software

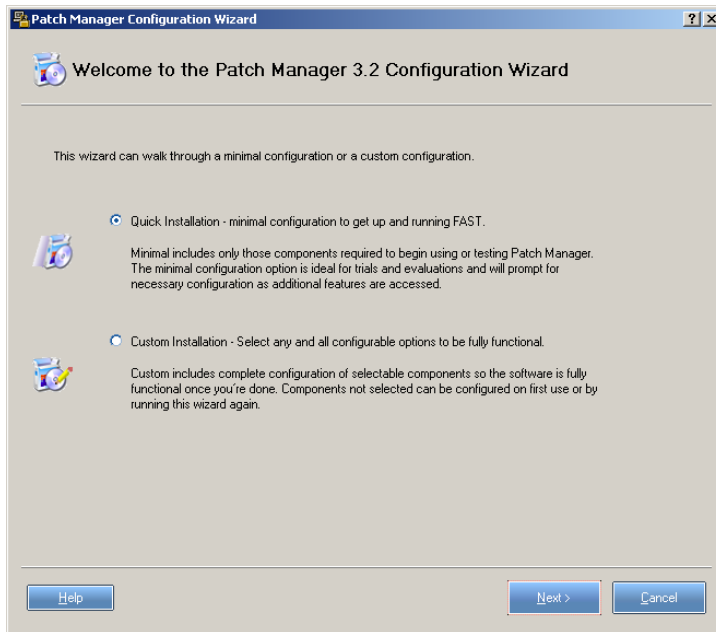
Ecora provides a free limited-time license for Patch Manager for your evaluation.

1. Access the Ecora website (<http://www.ecora.com>).
2. Click on **Support** and choose **System Requirements** from the drop-down menu.
3. Click on the link for **Ecora Patch Manager 3.2** and verify that you meet the [system requirements](#) before installing.
4. Click on [Support](#) area and choose **Member Login** from the drop-down menu.
5. If prompted, enter your login and password (you must register if you are not a member).
6. Click on the link to **Download** Patch Manager 3.2.
7. Click on **Open** (or Save and run the setup from the location you choose).
8. Follow the instructions in the installation wizard.


Install the Software

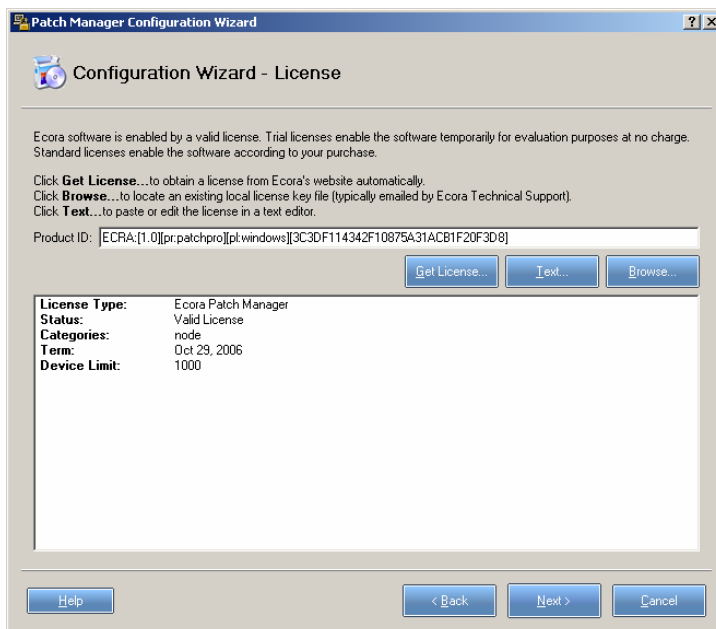
1. On the welcome page for the installation wizard, click **Next >**.
2. Read the license agreement and, if you agree, click **Yes**.
3. Read through the release notes and click **Next >**.
4. Accept or change the destination directory for installation and click **Next >**.
5. Leave the **Run Patch Manager** option checked and click **Finish**.

Configure the Software – QUICK

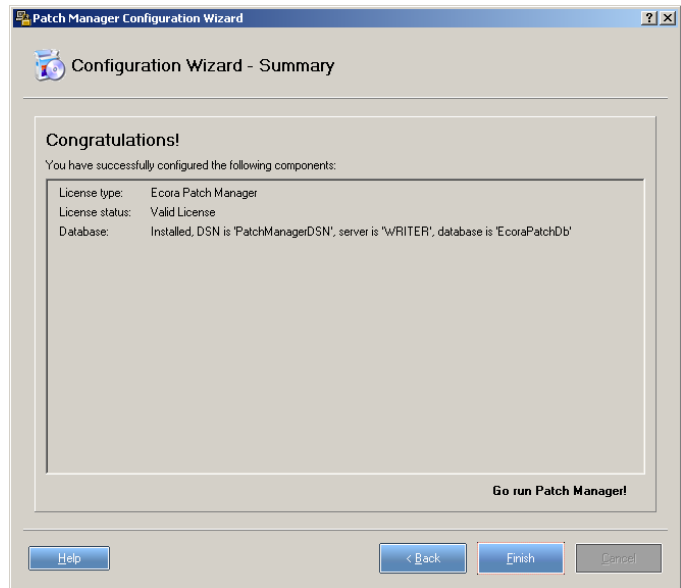
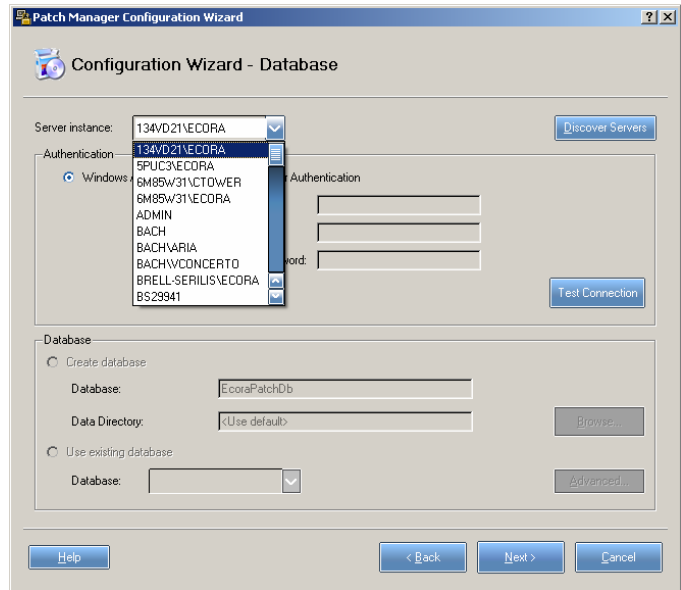


1. This first time you run the software, the configuration wizard walks you through setting up the software.
2. On the welcome page for the configuration wizard, select **Quick**, then click **Next >**.
3. If a proxy server or non-standard port is used to access the Internet, click in the **Proxy** checkbox and enter your settings.
4. The Product ID is highlighted in the dialog box that appears. Click **Get License**, login if prompted, verify that a valid license message appears in the pane below, and click **Next >**.
5. Choose whether or not to install MSDE or use an existing MSDE or SQL database.

 **Note:** MSDE is a 70MB download, so plan accordingly.



6. Click the **Discover Servers** button to detect a list of available servers, then select one from the drop-down list.
7. Click in the radio button to use either Windows or SQL authentication methods.
8. If you chose SQL authentication, enter a valid user account and the password twice.
9. Click **Verify** to ensure successful access to server (make corrections if necessary).
10. Click in the radio button to create a new database.
11. Enter a database name and path to the data directory in which to create and store database files (or use the **Browse...** button to locate a data directory).
12. Click **Next >**.
13. Review the configuration summary of what's been installed and click **Finish**.
14. Click **Scan** to get started!



Configure the Software – CUSTOM

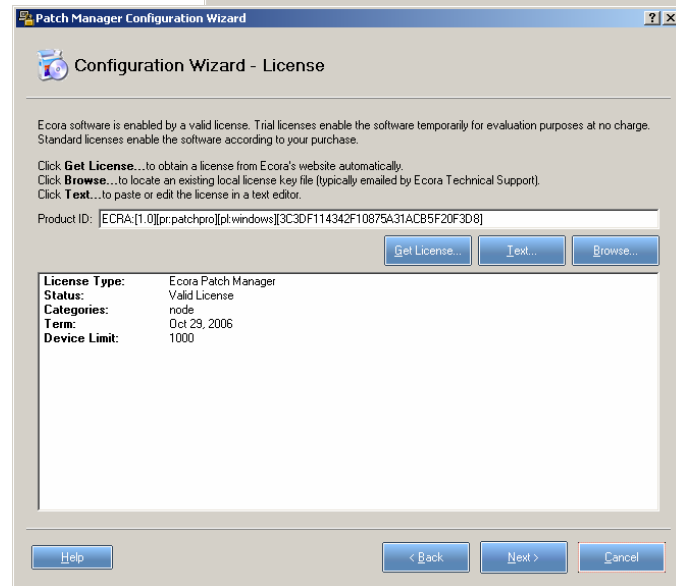
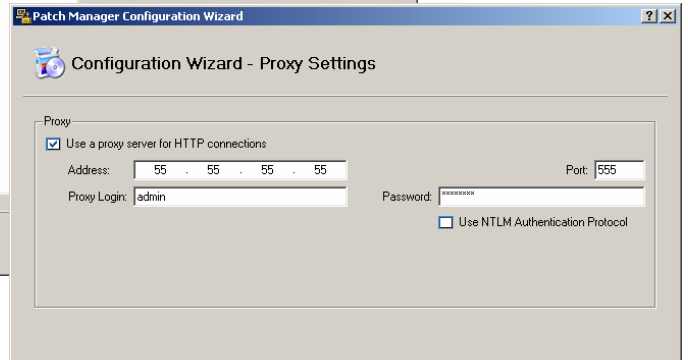
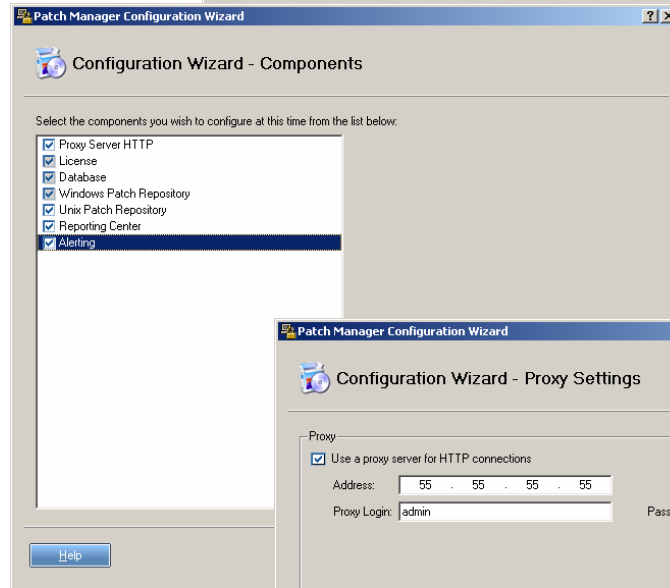
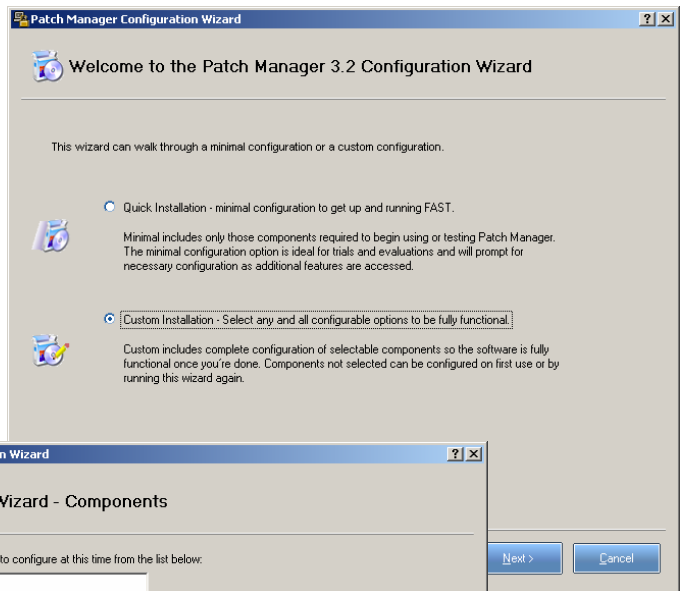
1. This first time you run the software, the configuration wizard walks you through setting up the software.
2. On the welcome page for the configuration wizard, select **Custom**, then click **Next >**.
3. Select each option you wish to configure by clicking in the associated checkbox, then click **Next >**.

Proxy

4. If a proxy server or non-standard port is used to access the Internet, click in the **Use a proxy server for HTTP connections** checkbox.
5. Enter the IP Address of your proxy server.
6. Specify the port used by the proxy server.
7. Enter a valid login for the proxy server.
8. Enter a password for that login.
9. If your environment uses **NTLM authentication**, click in the checkbox for that protocol.
10. Click **Next >**.

Licensing


11. The Product ID is highlighted in the dialog box that appears. Click the **Get License...** button to get a license key for that ID.
12. Login to the website if prompted.
13. Verify that a valid license message appears in the pane below.
14. Click **Next >**.



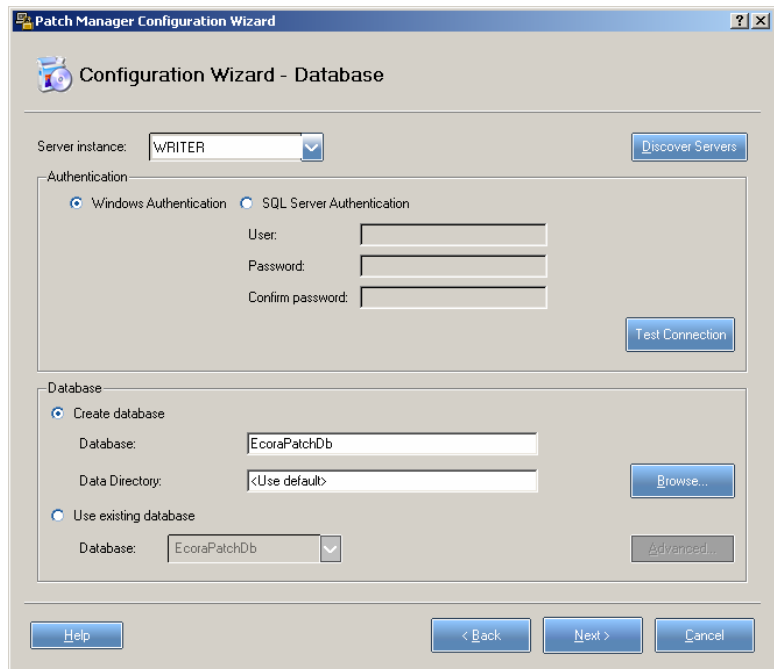
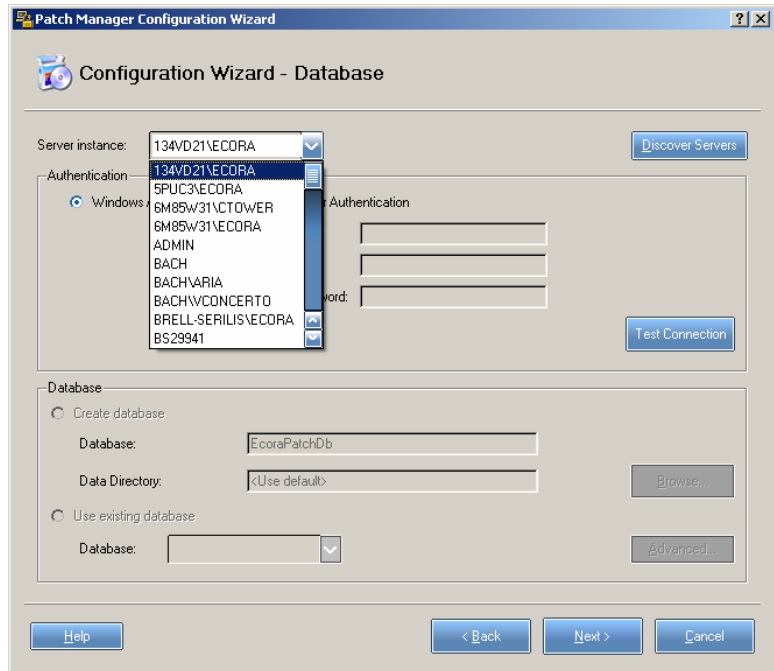
Create a Patch Database

The patch knowledge database is a relational database engine (MS-SQL or MSDE) with tables containing patch information, download locations, Ecora test notes, risk ratings, and everything else you need to make educated decisions about patching your environment.

1. Choose whether or not to install MSDE or use an existing MSDE or SQL database.

 **Note:** MSDE is a 70MB download, so plan accordingly.

2. Click the **Discover Servers** button to detect a list of available servers, then select one from the drop-down list.
3. Click in the radio button to use either Windows or SQL authentication methods.
4. If you chose SQL authentication, enter a valid user account and the password twice.
5. Click **Verify** to ensure successful access to server (make corrections if necessary).
6. Click in the radio button to create a new database.
7. Enter a database name and path to the data directory in which to create and store database files (or use the **Browse...** button to locate a data directory).
8. Click **Next >**.



Create a Patch Repository

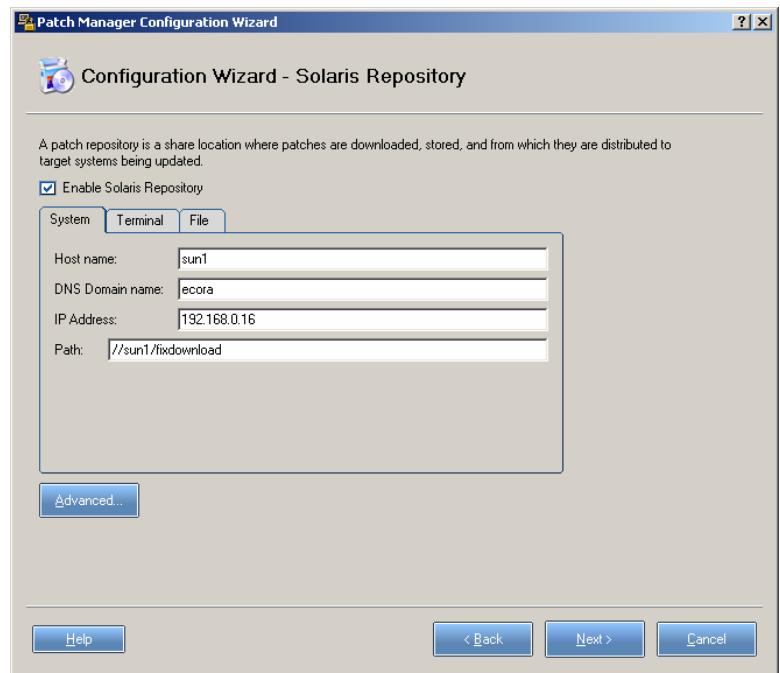
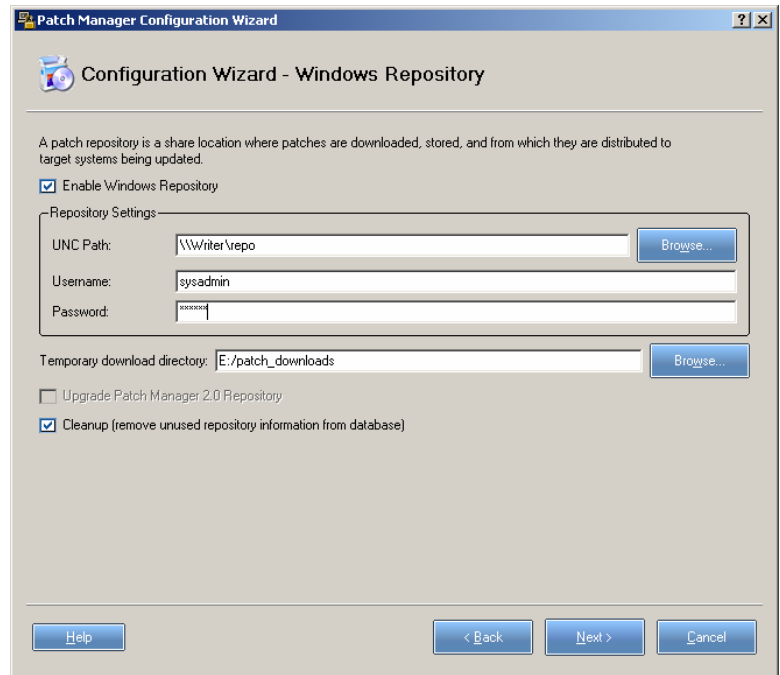
A repository is the location where patches will be downloaded and maintained. You **MUST** specify a Windows Repository to install the online Reporting Center and any Windows patches. If you intend to support any Unix systems with Patch Manager, you must specify a Unix Repository as well. In both cases, select locations with sufficient disk space to accommodate storing patches and service packs.

Windows


1. Click in the checkbox to **Enable** a Windows Repository.
2. Provide a UNC path to a local shared directory where the Windows patch repository will reside or use the **Browse...** button to locate a share.
3. Enter a **Username** and **Password** with access to the repository.
4. If desired, enter a local **Temporary Download Directory** where patches are downloaded and stored before being transferred to the repositories or use the **Browse...** button to locate the directory.
5. If desired, check the box for **Cleanup** to remove information about unused repositories from the database. Ecora suggests this option if you have changed repositories, but NOT if you are actively using multiple repositories.
6. Click **Next >**.

Unix


1. Click in the checkbox to **Enable Solaris Repository** (or skip to the next section).
2. Enter the hostname, DNS Domain name, and/or IP Address of system housing the Unix patch repository.
Tip: All three are not required - only the information necessary to resolve the system in your environment; perhaps only IP address, perhaps hostname and domain name.



3. Enter the Path to the Unix patch repository.

 **Note:** Patch Manager validates the repository by creating a file in the directory that is later checked. Therefore, the directory (NSF mount path) must be mounted during system configuration for that file to be created.


4. Click on the **Terminal** tab.
5. In the Terminal Connection area, select a Protocol from the drop-down list.

 *Read more about using [SSH](#).*

6. Enter a User name with which to connect to the repository.
7. Enter and confirm the Password for the user name.


8. Enter the valid Root password for the system. To collect data beyond the areas the login user can access the root password for the target system is required.

9. Retype the root password to confirm that it's correct.

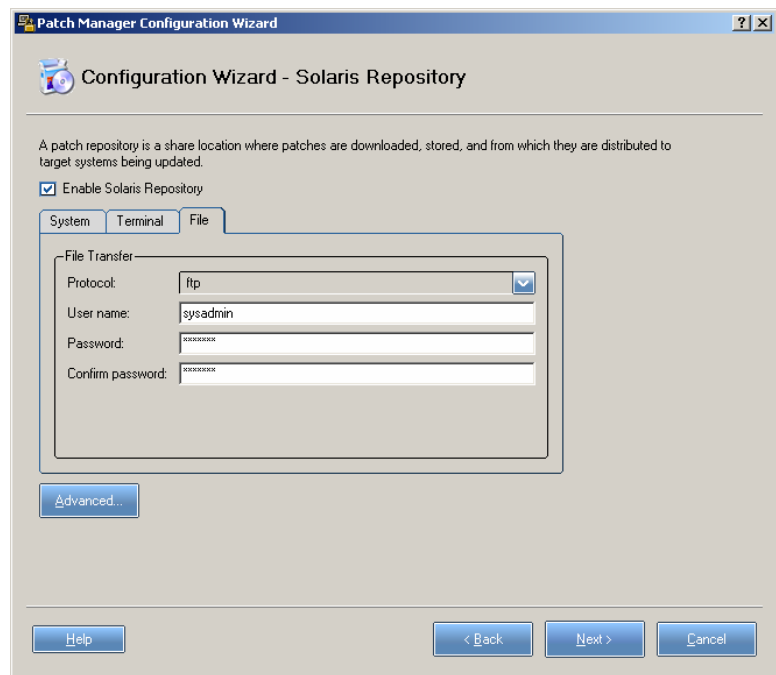
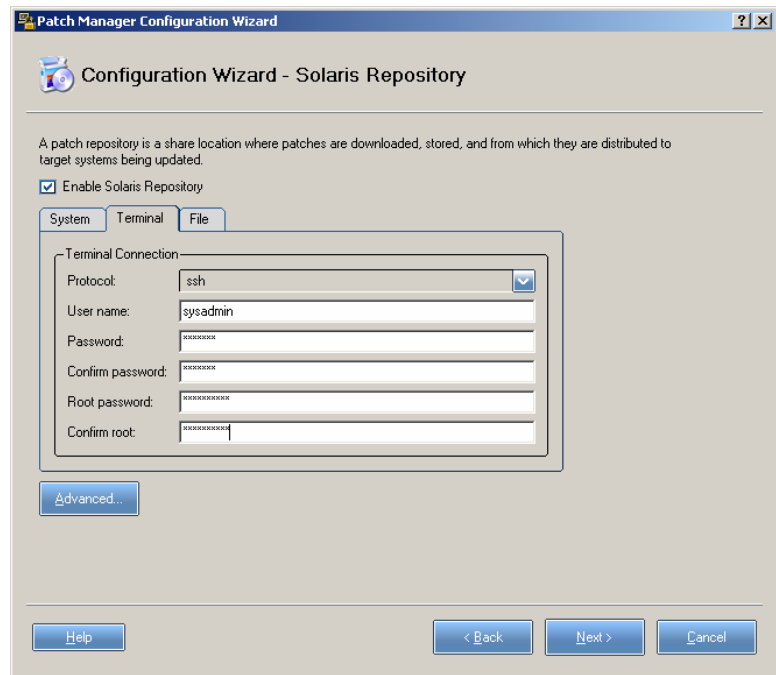
 **Tip:** The software can collect information to which the specified user account has access. Additional system information can be gathered if the login user account is a member of group sys on the target systems. To enable the software to collect all configuration information root password is required.

10. Click on the **File** tab.

11. Select a Protocol from the drop-down list.

 *Read more about using [SSH](#).*

12. Enter a User name with which to transfer files.
13. Enter and confirm the Password for the user name.



14. ONLY if you wish to change optional settings (such as using alternate ports), click the **Advanced...** button.

15. Enter or select a Connection delay milliseconds. If supplied, the software waits this length of time after logging in before attempting to transmit anything to the target system.

16. Enter the User login prompt for the repository. If supplied, the software waits for this text to appear on the connection before attempting to log into the system. If nothing is specified, it immediately attempts to login once the connection is established.

17. Enter or select a Root connection delay in milliseconds. If supplied, the software waits this length of time after logging in before attempting to transmit anything to the target system.

18. Enter the Root login prompt. If supplied, the software waits for this text to appear on the connection before attempting to log into the system. If nothing is specified, it immediately attempts to login once the connection is established.

19. Specify the Connection Protocol Port number for terminal connections (0 uses the default for the selected protocol).

20. Specify the Connection Protocol Port number for file transfers (0 uses the default for the selected protocol).



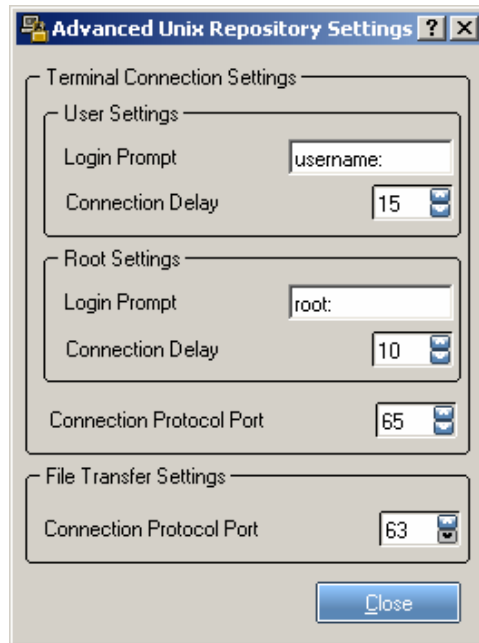
Tips: Entering a ZERO (0) value for any advanced settings will use the defaults. A non-zero value in any of the connection delays will cause the software to delay that amount of time after a login (or after issuing the "su" command in the case of root delay) before the software will execute any commands. The software follows the normal login procedure (send username, send password), then waits "n" milliseconds before returning "connection complete." A "non-zero" value in either of the prompt settings causes the software to, after the "normal" login procedure, search for the string entered as the users' prompt.



Read more about [terminal connections](#).

21. Click **Close**.

22. Click **Next >**.



Install the Reporting Center

The reporting center is a website interface created by Ecora to provide an intuitive way to query the Patch Manager database. The URL can be accessible to anyone in an environment who can access the share on which you choose to install the reporting center. CIOs or auditors can see a report of Policy Compliance across all systems, whereas an IT staff member might be more interested in the Patch History report for one machine. The Reporting Center must be installed on an IIS 5.0 server with Microsoft .Net Framework, v1.1 installed.

1. Click in the checkbox to install the **Reporting Center**.
2. Specify the target host. Enter the domain and system in the textbox or use the **Browse...** button to locate a host.
2. Enter a User Name and Password for accessing the target host.
3. Enter an email address from which reports will be sent.
4. Enter a valid SMTP server for mail exchange.
5. Click **Next >**.



Tip: The Reporting Center is located at URL: `iis_server/EcoraReportingCenter`; where "iis_server" is the server where you installed.

The screenshot shows the 'Patch Manager Configuration Wizard - Reporting Center' window. It contains the following fields and options:

- Install Reporting Center
- Web server (Domain\System): `ecora\kalahdin` (with a 'Browse' button)
- Web Server Authentication:
 - User Name (domain\user): `admin`
 - Password: `*****`
- Mail settings:
 - Email address for sending reports: `reports@ecora.com`
 - SMTP server for Reporting Center: `localhost`

Buttons at the bottom: Help, < Back, Next >, Cancel.

Configure Alerting

Triggers and alert allow you to define conditions that result in actions. For example, you may choose to establish a trigger condition for a new patch or an analysis failure, then add an alert in the form of email notification if that condition (trigger) is met.

1. In the Alerting area, click in the **Enable** checkbox to enable monitoring.
2. Use the drop-down list to select an interval (in minutes- minimum 10 minutes) to set how often the software checks for the conditions you define.

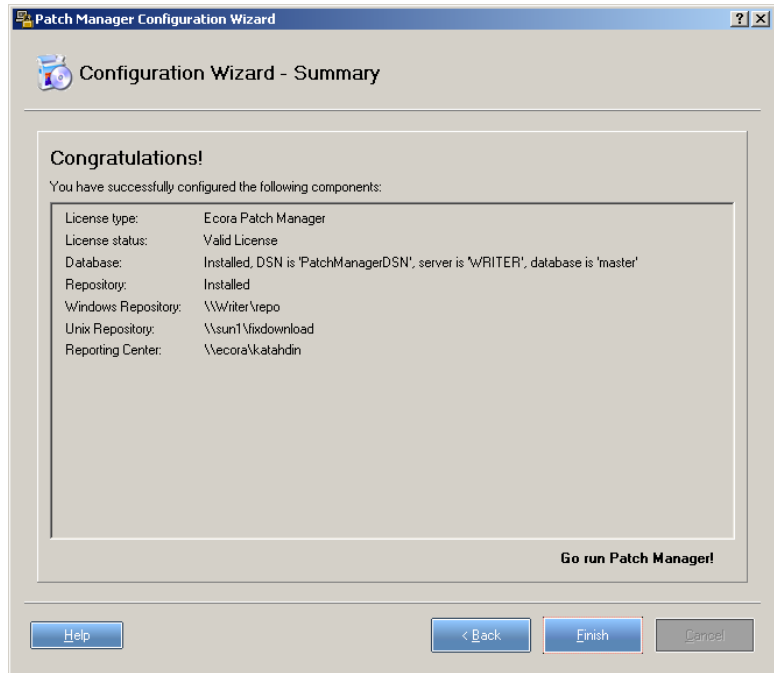
The screenshot shows the 'Patch Manager Configuration Wizard - Alerting' window. It contains the following fields and options:

- Alerting:
 - Enable
 - Interval: `10` minutes
- SNMP Alerts:
 - Enable
 - SNMP Manager: [empty]
 - Port: `162`
- Email (SMTP) Alerts:
 - Enable
 - SMTP Server: [empty]
 - Port: `25`
 - Max attachment size: `10240` KB
 - Email recipients: [empty]

Enable triggers created from templates

Buttons at the bottom: Help, < Back, Next >, Cancel.

3. In the SNMP Alerts area, click in the **Enable** checkbox to enable alerts via SNMP traps.
4. Enter the SNMP Manager name and Port number. The SNMP Manager can be the name of any server running an application capable of receiving SNMP traps.
5. In the Email (SMTP) Alerts area, click in the **Enable** checkbox to enable alerts via email.
6. Enter the SMTP Server name, Port number, and the Maximum Attachment Size (reports can get large), and a list of email recipients' email addresses.
 ⚡ **Tip:** The SMTP Server is generally your mail server in fully qualified domain name (FQDN) format (server-name.domain-name.nnn) or by full IP address.
7. Click in the checkbox to **Enable Triggers created from templates** if you wish to use provided triggers as editable examples.
8. Click **Next >**.
9. Review the configuration summary of what's been installed and click **Finish**.
10. Click **Scan** to get started!



Congratulations!

Patch Manager is installed, configured, and ready to GO!

Important Resources:

- If you are a first-time user, consider using Ecora's **Evaluation Guide** as a tour of the new features (<http://www.ecora.com/ecora/support/pm3eval-guide.pdf>).
- The **User Manual** is available in fully hyperlinked format in the **online help system** as well as in printable (PDF) format at (<http://www.ecora.com/ecora/support/pm3user-manual.pdf>).

Customer Support

Ecora Sales representatives are available to answer your questions about product features and pricing at 1.877.923.2672 or email sales@ecora.com.

Ecora technical support representatives are available to help resolve any technical issues at 1.877.923.2672 ext 771 or email support@ecora.com.