

## Contents

Document history.....	1
Introduction.....	1
Prerequisite .....	1
Concept.....	2
Upgrade .....	3
Exploit the New solution .....	3
Appendix 1 – WSUS configuration.....	9

## Document history

This document is written in august 2010 by Jan Koch

## Introduction

The following guide contains a getting started guide if you're about to exploit the new and improved CMS Patch Management solution.

## Prerequisite

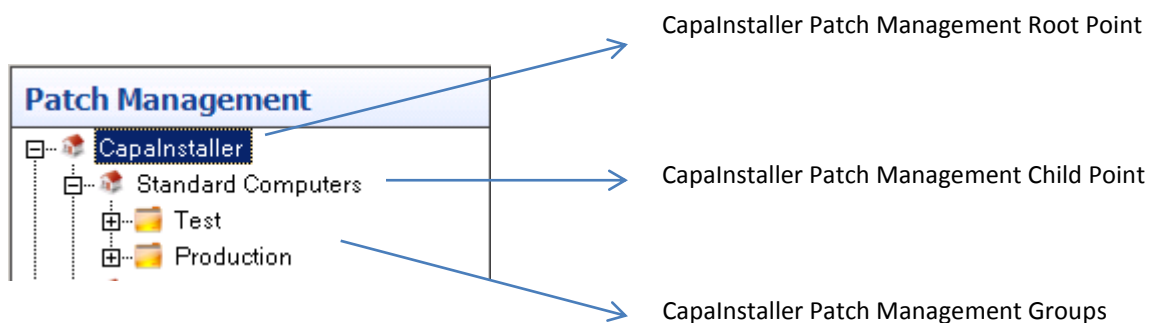
Before the integration between CMS and WSUS can be made WSUS has to be installed and configured. It is currently recommended to install WSUS 3.0 SP2. It is required to use the configuration specified in the appendix 1 – WSUS configuration.

## Concept

The CapaInstaller Patch Management implementation in CMS 4 was created at a time where staged deployment was a new and untested feature in the CMS family. Staged deployment has over time proved to be the solution and as a result of this the feature has now been implemented in the Patch Management solution.

Using the current implementation it is possible to create a “CapaInstaller Management Root Point” and multiple “CapaInstaller Management Child Points” with associates “CapaInstaller Patch Management Groups”.

There can only be one “Patch Management Root Point”. If you have upgraded the solution the default name is “CapaInstaller”.



The “Patch Management Root Point” is simply a placeholder for the CapaInstaller WSUS integration.

It is possible to create multiple “CapaInstaller Patch Management Child Points” depending on the need. If you have upgraded the solution a “CapaInstaller Patch Management Child Point” named “Standard Computers” is created automatically. For each “CapaInstaller Patch Management Child points” it is possible to create multiple “CapaInstaller Patch Management Groups” e.g. “Test” and “Production”

For a “CapaInstaller Patch Management Child Point” it is possible to create Patch approval rules. For further information see the product documentation or the example later on in this document.

For a “CapaInstaller Patch Management Child Point” it is possible to select which update categories and classifications that should be approvable. For further information see the product documentation or the example later on in this document.

For a “CapaInstaller Patch Management Groups” it is possible to create “Query based membership”. For further information see the product documentation or the example later on in this document.

## Upgrade

As described in the “concept” section the upgraded solution has a different gui however the core functionality is same. New computers will automatically be assigned (based on the previous assignment rules) and updates will automatically be approved (based on previous approval rules).

The following section contains a step by step upgrade guide.

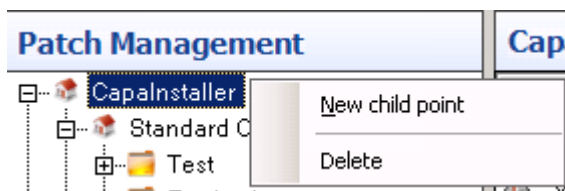
1. Install the latest CMS service update.
2. Select the Patch Management plugin and exploit the new solution

Be aware that after an upgrade it takes normally between 30 – 45 minutes before updates, categories, classifications etc. are synchronized from the WSUS database to the CMS database.

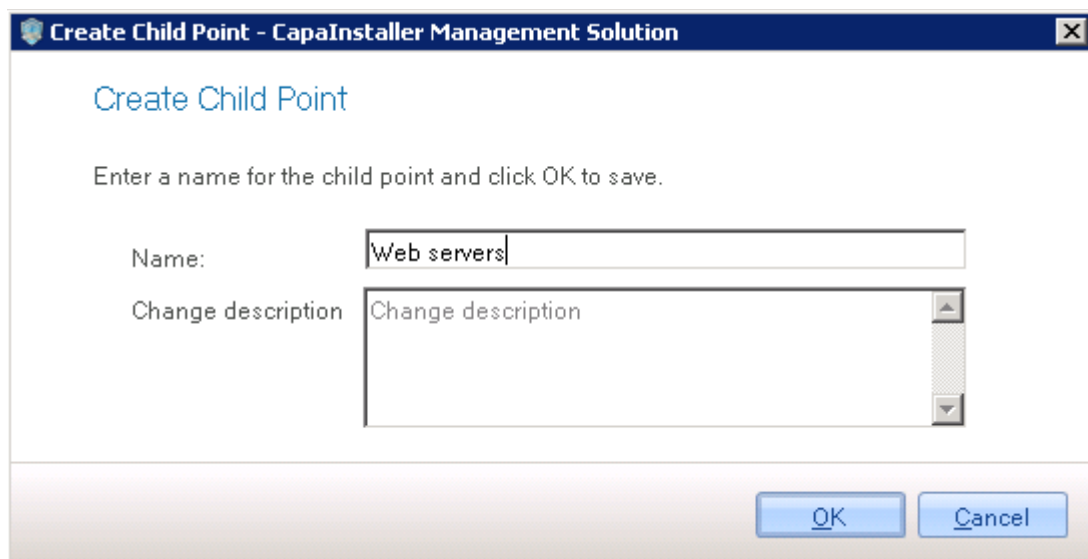
## Exploit the New solution

The following section contains a step by step guide if you’re about to setup the CapaInstaller Patch Management solution to support e.g. you’re web servers.

1. Create a New Patch Management Child Group. Right click on the CapaInstaller Patch Management Root Point



Select “New child point”:

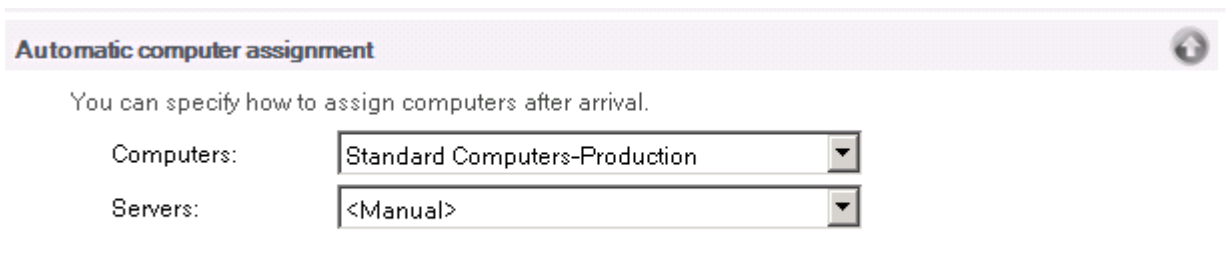


2. Right click on newly create child point and select “New Group”. Create appropriate groups e.g. Test and Production.

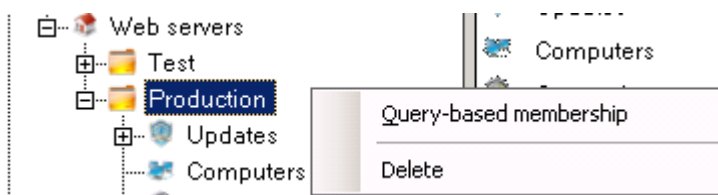


3. Define membership.

Computers and Server can automatically be assigned to a group using the general option implemented. Select “Tools – Options – Patch Management”.



However in this case there are different server categories (Web servers, Exchange servers etc.) so this option is not use full. Instead right click on the newly created production group and select “Query based membership” and select a query that identifies you’re web servers (Queries are made using the Report and Queries solution)



Locate the test servers and add them manually to the test group (drag and drop). In an upgrade scenario chances are that all clients are added automatically to the production group. If you want to assign servers/computers to groups based on Query-based membership simply unassign the units and wait for the query to be executed (handled by the patch management service). The Query-based groups will automatically be updated every 10 minutes.

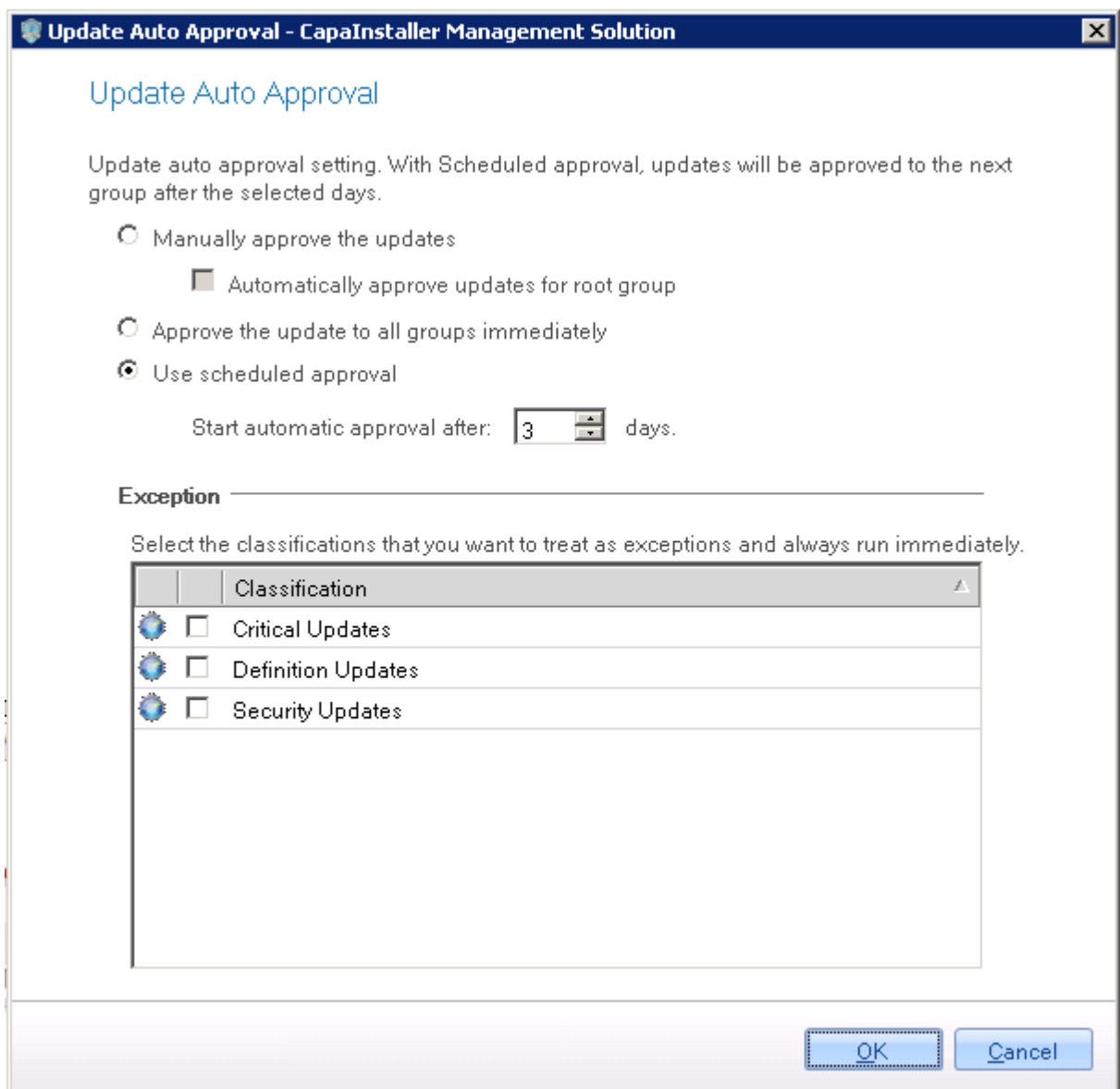
4. Approve updates for the Web servers.

This task can either be completed automatically or manually.

To define automatically approval rules right click on “Web servers” and select “Approval rules”



From this form it is possible to define that updates are approved manually or automatically.



If you wish to approve updates manually select “Manually approve the updates”. As an exception

here it is possible to “Automatically approve updates for root patch management groups”. In the current case it means that updates will automatically be approved for the Test group but they have to manually be approved for the Production group

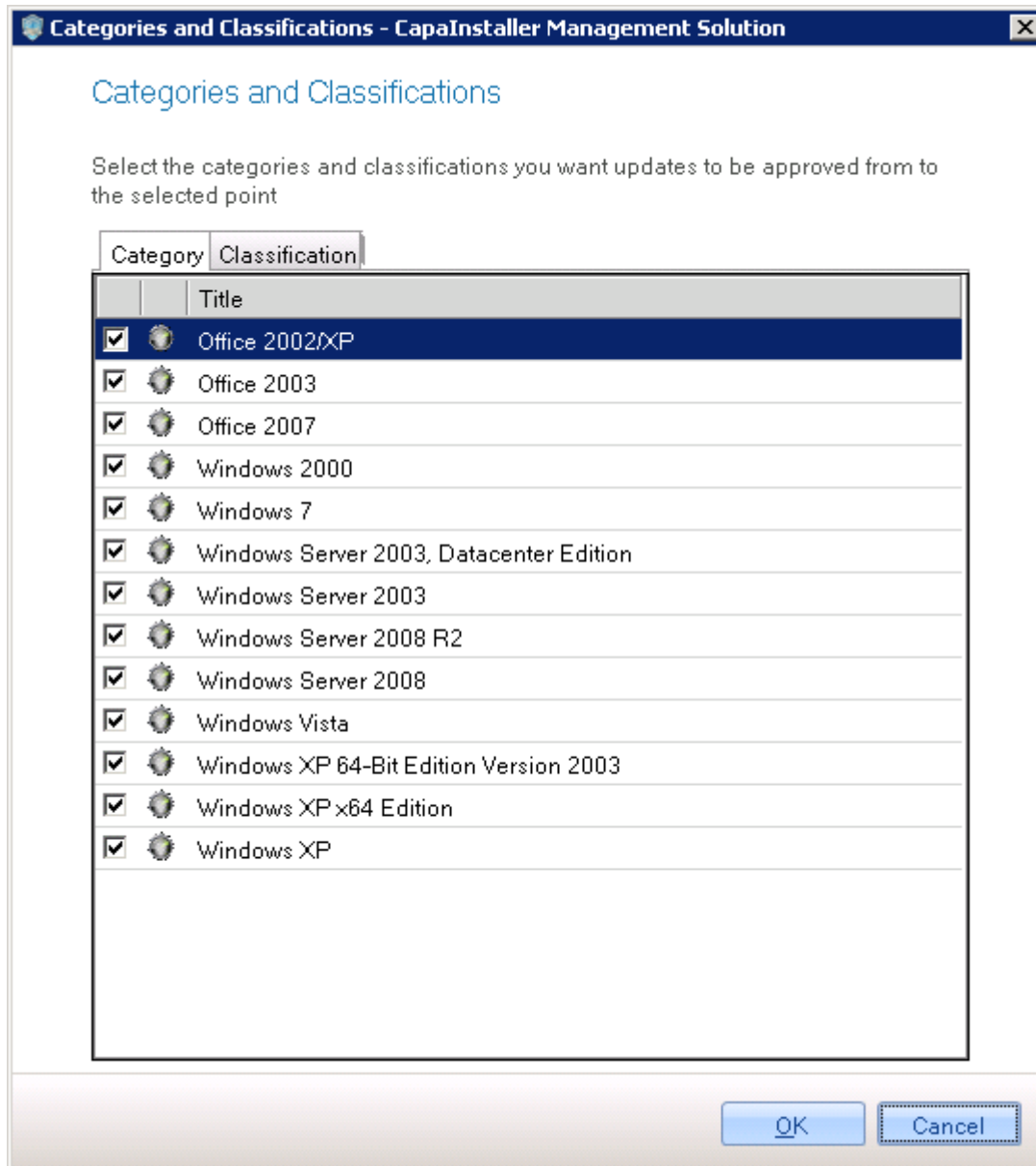
If you wish to approve updates automatically to all groups select “Approve the updates to all groups immediately”.

If you wish to approve the updates to the root patch management group (Test) and afterwards in a scheduled manner to the Production group select “Use scheduled approval”. Here it is possible to define update categories that are approved for both test and production immediately.

The Patch Management service handles the approval process. The task is executed every 6 hour.

## 5. Define Categories and classification

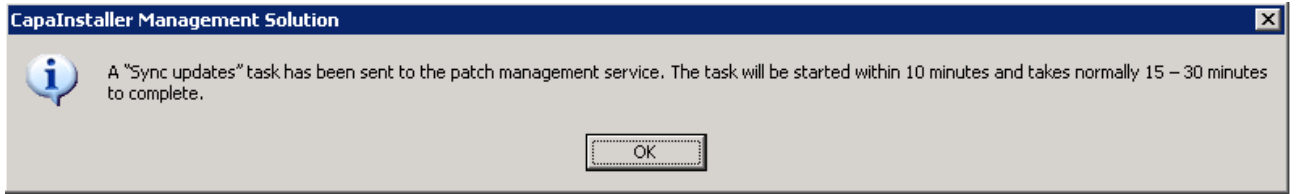
To define which update categories and classification that should be available for the point right click on “Web servers” and select “Categories and classifications”. Per default all categories and classification are unselected. This means that no updates will be synchronized before a configuration is defined.



- When Categories and classification has been selected information about updates has to be synchronized from the WSUS database to the CMS database. This task is handled by the Patch Management service and is executed every 6 hours. To speed up the process a GUI based trigger has been implemented. From the tool bar select "Sync updates"



The following form will be displayed



As stated the task will start within 10 minutes and normally complete in 15 -30 minutes.

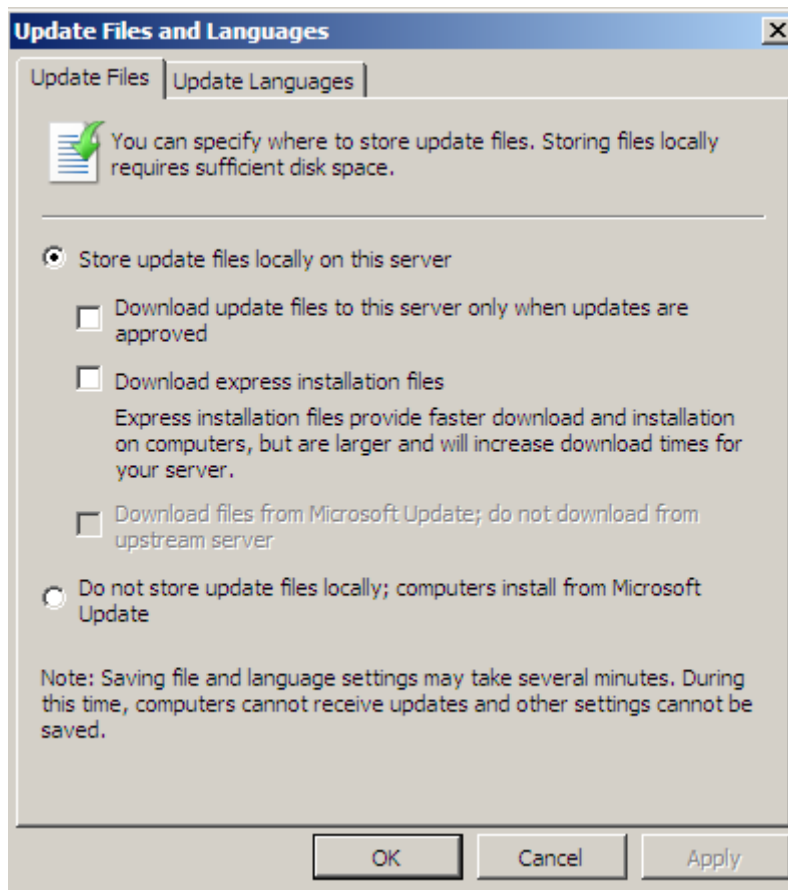
7. Install the agent on the Web servers and schedule the Hotfix Installer and Hotfix Inventory modules.

## Appendix 1 - WSUS configuration

The CMS integration has specific requirement to the WSUS server configuration. The following options has to be defined:

1. Option - Update Files and Languages.

Use the following configuration:



## 2. Options – Computers

