

Getting Started with

RES ONE®

Automation

Management Portal

Version 10.2.0.0

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Chapter 1: Introduction

This document describes how to set up the RES ONE Automation Management Portal 10.2. It guides you through the installation steps and configuration essentials to quickly get a RES ONE Automation Management Portal up and running.

- For information about the functionality of the Management Portal, please refer to the **Help**, which is available after installing the RES ONE Automation Management Portal, by clicking the **Help** icon.
- For information about how to get started with RES ONE Automation, please refer to the **Getting Started with RES ONE Automation**.
- For information about the concepts behind Identity Broker, please refer to the **Getting Started with RES Identity Broker**.

1.1 About the RES ONE Automation Management Portal

The RES ONE Automation Management Portal is a web-based application and is the central point for scheduling Jobs in your RES ONE Automation environment. The Management Portal works alongside the Console.

1.2 RES Support

At RES, our core business is to help heighten productivity in your organization. RES Support helps us to achieve this goal, and has been embedded in the core principles of our company since it was founded. RES is dedicated to supporting everyone who uses or wants to use its proven products with RES Support, which elevates our enterprise solutions above and beyond technology.

Support - If you are experiencing difficulties with any of our products, you may find the solution in our Knowledge Base (**Success Center > Support**) or you can contact RES Support directly (**Success Center > Click Contact Us**).

Product Upgrades and Service Releases - To upgrade your product to the latest standard, you can install Product Upgrade Packs from <http://res.com> and Service Releases from the **Success Center > Downloads**.

Solution Assurance - To protect your investment, it is mandatory that you purchase one initial year of Solution Assurance with each license purchase. Solution Assurance unlocks access to Technical Support, Product Updates and Upgrades and the Knowledge Base. Solution Assurance is extended automatically, unless you specify otherwise. For more information: <http://res.com/support>.

Early Adopter Program - Participants of the Early Adopter Program are actively involved in taking RES solutions to the next level. The Early Adopter Program unlocks access to interim releases of our products. These releases are production-ready and allow you to test drive and explore new functionality.

RES Community - RES invites you to become part of our community to share best practices and tips with fellow IT professionals, find solutions and more (**Success Center > Q&A**).

Please visit the RES Success Center (<http://success.res.com>) for more information on Support.

Chapter 2: Installation

2.1 Prerequisites

Software installed on system	Prerequisites
RES ONE Automation	<ul style="list-style-type: none"> RES ONE Automation 10.2 The installation package and update Module for the Management Portal. These files can be downloaded at http://success.res.com, at the Downloads section.
.NET	<p>Microsoft .NET Framework 4.5.2 or higher</p> <p>Note: An active Internet connection is needed, in case the .NET Framework is not yet installed. The RES ONE Automation Management Portal Installer will download and install the framework via this connection.</p>
Operating System	<p>We recommend installing the RES ONE Automation Management Portal on a web server. For evaluation purposes, you can also install it on a workstation. We do not recommend installing it on a domain controller.</p> <p>Supported Microsoft Windows operating systems (on page 10)</p>
Database Client	<p>Database client used for the RES ONE Automation Datastore. AES-256 encrypted databases are also supported by the Management Portal.</p> <p>Supported Database systems (on page 12)</p>
Browser	<p>Supported browsers:</p> <ul style="list-style-type: none"> Microsoft Internet Explorer 10 or higher Microsoft Edge 15 or higher Mozilla Firefox 47 or higher Google Chrome 52 or higher Opera 12 or higher Safari 9.0 (Mac only) or higher <p>JavaScript enabled</p>

Web server	Prerequisites
Permissions	Administrator permissions
Internet Information Services (IIS)	IIS 7.5 or higher

Microsoft Windows features installed on Web server	Necessary features for Microsoft Windows Server 2008 R2	Necessary features for Microsoft Windows Server 2012 / 2012 R2
Microsoft .NET Framework	<ul style="list-style-type: none"> Version 4.5.2 or higher To support Microsoft Internet Explorer 10, install all available Microsoft Windows updates for .NET Framework 4.5.2 first. 	<ul style="list-style-type: none"> Version 4.5.2 or higher ASP.NET 4.5
Web Server (IIS)		
Web Server	<ul style="list-style-type: none"> Common HTTP Features Static Content Default Document HTTP Errors HTTP Redirection 	<ul style="list-style-type: none"> Common HTTP Features Static Content Default Document HTTP Errors HTTP Redirection
Application Development	<ul style="list-style-type: none"> ASP.NET .NET Extensibility ISAPI Extensions ISAPI Filters 	<ul style="list-style-type: none"> ASP.NET 4.5 .NET Extensibility 4.5 ISAPI Extensions ISAPI Filters
Health and Diagnostics	<ul style="list-style-type: none"> HTTP Logging Request Monitor 	<ul style="list-style-type: none"> HTTP Logging Request Monitor
Security	<ul style="list-style-type: none"> Basic Authentication Windows Authentication Client Certificate Mapping Authentication IIS Client Certificate Mapping Authentication Request Filtering 	<ul style="list-style-type: none"> Basic Authentication Windows Authentication Client Certificate Mapping Authentication IIS Client Certificate Mapping Authentication Request Filtering
Performance	<ul style="list-style-type: none"> Static Content Compression Dynamic Content Compression 	<ul style="list-style-type: none"> Static Content Compression Dynamic Content Compression
Management Tools	<ul style="list-style-type: none"> IIS Management Console Management Service 	<ul style="list-style-type: none"> IIS Management Console

2.2 Install the Management Portal

The first step is to install the RES ONE Automation Management Portal. You need to install the Management Portal on a web server. We do not recommend installing it on a domain controller.


- The installation will create the following branch in the IIS Manager: **RES > Automation**.
- For evaluation purposes, you can also install the Management Portal on a workstation.
- Because users can access the Management Portal from any location, it is best practice to secure access to it with administrative roles. If you do not, ALL users with an Active Directory account will be able to access it.

Procedure

1. Run the RES ONE Automation Installer and choose **Select and install components > RES ONE Automation Management Portal**, or run the RES ONE Automation Management Portal Installer separately. Launch it on the computer on which you want to install the Management Portal, for example your web server. This opens the **RES ONE Automation Management Portal Setup Wizard** window.
2. Follow the steps of the Setup Wizard.
3. By default, the Management Portal will be installed at `C:\Program Files\RES\Automation`. If you install the Management Portal at a custom location, the installation path can contain a maximum of 120 characters.
4. In the **Configure Secure Binding** step, specify the settings and select a server certificate to create an SSL binding for the Management Portal.
 - The hostname must be known on your internal and external DNS servers.
 - The Management Portal is secured with SSL by default. It uses the HTTPS protocol and port 443 (or another port that you specified).
 - With the option **Select installed certificate**, you can select a server certificate from a list that is populated with computer certificates from the **Personal** and **Web Hosting Certificate Stores**.
 - For testing purposes, the option **Generate Self-Signed Certificate** is offered on Microsoft Windows 8 and higher / Microsoft Windows Server 2012 and higher. RES recommends not using self-signed certificates in a production environment. The self-signed certificates require PowerShell 4.0 or higher.
5. In IIS, the installation creates the node **RES** and deploys the Management Portal as the web application **RES > Automation**. If you, for instance, install the Management Portal with a host name (alias) *resproducts*, the web application will be available at `https://resproducts.mydomain.com/automation`.
 - If the node **RES** already exists in IIS, this step is skipped and the actual installation begins.
6. At the end of the Setup Wizard, click **Finish**.

After the installation is finished, the RES ONE Automation Management Portal is installed and a shortcut to the URL is placed on your desktop to start the Management Portal. Alternatively, you can open the Management Portal via a browser and specify the web address including the path `"/automation"`.

When launching the Management Portal, it opens the **Setup > Environment** page to create a Datastore connection.

 **Notes**

- RES installation files are signed with certificates. Microsoft Windows tries to verify a certificate's validity before installing software products. This process (Certificate Revocation List (CRL)) is run to check to see if a certificate was revoked because it was expired or compromised. This process is not unique to RES and is something that happens for any product that contains a certificate and is run on Microsoft Windows (unless CRL is turned off which is not recommended by Microsoft). It is also possible under specific cases that a CRL check is done during process startup. A sign-in could potentially be delayed if the environment does not use a Corporate/Enterprise license and the user attempts to sign in immediately after the restart of the computer or the service, before the CRL check has been done.

On computers without Internet access, the CRL validation may cause a delay of, for example, 20-30 seconds before an installation starts. This is by design of Microsoft Windows. To avoid this delay to occur, make sure machines can connect to the Internet. If this is not possible, implement a (manual/automatic) distribution system to keep the publisher's certificate revocation lists up to date.

- If you want to use single sign-on, the IIS server must be located in the same domain as the people that use the RES ONE Automation Management Portal, or a trust must exist between multiple domains. Single sign-on requires the Windows feature Windows Authentication to be installed.

2.3 Connect to the Datastore

The next step is to connect to an existing Datastore. This Datastore stores all information related to RES ONE Automation. After a fresh installation of the RES ONE Automation Management Portal (no Datastore connection is available yet), the **Setup > Environment** page is automatically opened.

1. In the Management Portal at **Setup > Environment**, specify the following information:
 - **Database type:** the type of database server to which you want to connect.
 - **Database server:** the name of the relevant database server.
 - **Login/password:** the user name and password of the DBA account that has access to the database. When using Microsoft SQL Server and MySQL, it is possible to use a password containing special characters. The following special characters are escaped in the connection string: " ' ; { }
 - **Database name:** the name for the Datastore.
2. In the **Authentication** section, specify which authentication type should be used.
 - **Windows:** Authentication happens via the accounts configured in the RES ONE Automation Console. Only valid login accounts using Microsoft Windows Authentication or RES ONE Automation Authentication are able to access the Management Portal. Users with a domain (domain\user or user@domain) and local account are allowed to log in.
 - **Identity Broker:** Authentication is centralized via the Identity Broker. This component is aimed to 'broker' the authentication between the RES web application and the configured identity provider. See also **Getting Started with RES Identity Broker** for further information on installation and configuration.
3. Click **Test connection**. If the database connection is established, a message will be shown.
4. Click **Save** to connect to the Datastore using the specified configuration.

After the Datastore connection is set up, the Management Portal restarts automatically and connects to the Datastore.

Chapter 3: Compatibility Matrix RES ONE Automation Management Portal

This limited compatibility matrix only lists categories that are relevant for the Management Portal. For the full compatibility matrix, please refer to the RES ONE Automation Administration Guide.

Irrespective of this compatibility matrix, RES does not support versions of products for which End of Life (EOL) has been declared by their respective vendors.

3.1 Supported Microsoft Windows operating systems

Windows Server version	Edition
Windows Server 2016	Server 2016 Datacenter
	Server 2016 Standard
	Server 2016 Essentials
Windows Server 2012 R2	Server 2012 R2 Datacenter
	Server 2012 R2 Standard
	Server 2012 R2 Essentials
	Server 2012 R2 Foundation
Windows Server 2012	Server 2012 Datacenter
	Server 2012 Standard
	Server 2012 Essentials
	Server 2012 Foundation
Windows Server 2008 R2	Server 2008 R2 Datacenter
	Server 2008 R2 Enterprise
	Server 2008 R2 Standard
	Server 2008 R2 Web Edition
Windows Server 2008	(not supported by Agent+, Dispatcher and Management Portal)
Windows Server 2003 R2	(not supported by Agent+, Dispatcher and Management Portal)
Windows Server 2003	(not supported by Agent+, Dispatcher and Management Portal)

Windows version	Edition
Windows 10	Windows 10 Enterprise
	Windows 10 Enterprise LTSC
	Windows 10 Pro
	Windows 10 Education
Windows 8.1	Windows 8.1 Enterprise
	Windows 8.1 Pro
Windows 8	Windows 8 Enterprise
	Windows 8 Pro
Windows 7	Windows 7 Enterprise
	Windows 7 Professional
	Windows 7 Ultimate
	Windows 7 Home Premium
	Windows 7 Home Basic
	Windows 7 Starter
Windows Vista	(not supported by Agent+, Dispatcher and Management Portal)
Windows XP	(not supported by Agent+, Dispatcher and Management Portal)

3.2 Supported Database systems

Database type	Version
Microsoft SQL Server	2016
	2014
	2012
	2008 R2
	2008
	2005
Microsoft Azure SQL	
IBM DB2	10.5
	9.8
	9.7
	9.5
MySQL	5.6
	5.0
Oracle	12c
	11.2
	11.1