

Shavlik Protect

Quick Start Guide



shavlik

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October 2011	VMware vCenter Protect 8.0	Initial release of the VMware vCenter Protect Quick Start Guide
September 2012	VMware vCenter Protect 8.0.1	Update product name and version, update cover graphics.
May 2013	Shavlik Protect 9.0	Rebrand to Shavlik Protect. Account for Nav pane and menu changes. Add Virtual Inventory feature.
April 2014	Shavlik Protect 9.1	Update Web links and system requirements.
September 2015	Shavlik Protect 9.2	Update to match user interface changes.

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WELCOME

Thank you for choosing Shavlik Protect, a unified IT management platform used for managing and protecting Windows-based machines and VMware ESXi hypervisors. Shavlik Protect provides you with one centralized and common interface that you can use to perform several essential IT management functions, including patch management, asset inventory, power management, antivirus, antispysware, Active Protection, virtualization management, IT management tools, extensive reporting, and more.

Shavlik Protect is available within two different product bundles.

- **Shavlik Protect Standard:** This is the basic product offering that includes patch management, asset inventory, and a limited number of scripts for IT management.
- **Shavlik Protect Advanced:** This is the full-featured product offering that includes patch management, asset inventory, antivirus & antispysware, power management, and full ITScripts capabilities.

To quickly get you up and running with Shavlik Protect we have created this quick start guide. To learn how to use the product simply follow the directions in this document.

Beyond This Quick Start Guide

If after using this quick start guide you are interested in learning even more about Shavlik Protect, please see the following Web page:

<http://www.shavlik.com/support/training-videos>

This Web page contains a number of video tutorials. The tutorials walk you through the product interface, showing you exactly how easy it is to use Shavlik Protect and how to get the maximum benefit from the product.

INSTALLING SHAVLIK PROTECT

Downloading Shavlik Protect

Shavlik Protect can be downloaded from the following Web page:

<http://www.shavlik.com/downloads/>

Installing Shavlik Protect

When you purchased Shavlik Protect or registered for the trial version, you received download instructions and one or more license keys. To install Shavlik Protect, simply follow the on-screen instructions. If you need assistance, please refer to the *Shavlik Protect Installation Guide* available at:

<http://www.shavlik.com/support/protect/documentation>

Activating Shavlik Protect

In order to use the full product you must activate it by entering the license key(s). Simply select **Help -> Enter/refresh license key** and follow the on-screen instructions. The license key is contained in the e-mail message sent to you by Shavlik.

Note: Without entering a license key, many of the important features in the product will be unavailable. If you have not already received a license key, please contact your sales representative.

USING SHAVLIK PROTECT

Agentless Patch Management Tasks

Tip: To view a video tutorial on this topic, click the video icon.



Performing a Patch Scan

Performing a scan is only a click away. The Shavlik Protect interface allows you to work with the application in several different ways. Quick and simple scans can be performed directly from the home page. More advanced scans can be enabled by creating unique machine groups and scan templates. For complete details on performing patch scans see **Agentless Patch Management Tasks > Performing Patch Scans** in the Help system.

Try it yourself:

1. On the home page, in the **Select/confirm targets** area, select **My Machine**.
2. In the **Select schedule** area verify that **Now** is selected, and in the **Select/confirm operation** area verify that **Security Patch Scan** is selected.
3. Click **Scan now**.

Note: The scan is performed using the credentials of the currently logged on user. Valid credentials must be specified when performing scans and deployments on other machines.

This will immediately begin a scan of your machine using the default scan template. During the scan process the latest patch data files are automatically downloaded and the **Operations Monitor** dialog shows the current status of the scan.

The screenshot shows the 'Shavlik Protect Operations Monitor' window. It displays a progress bar for step 4, 'Scan for patches', which is currently at 100% completion. The status bar below the progress bar shows '1 of 1 machine complete, 0 machines not scanned'. A table below the progress bar shows the scan results for the machine 'Win81TouchScr' with IP address '10.114.245.36'. The table has columns for 'Machine', 'IP Address', 'Missing SP Co.', 'Missing Patch Count', 'Patch Breakdown', 'EOL Products', 'Error Code', and 'Status'. The 'Status' column shows 'Successfully scanned'.

Machine	IP Address	Missing SP Co.	Missing Patch Count	Patch Breakdown	EOL Products	Error Code	Status
Win81TouchScr	10.114.245.36	0	19		1		Successfully scanned

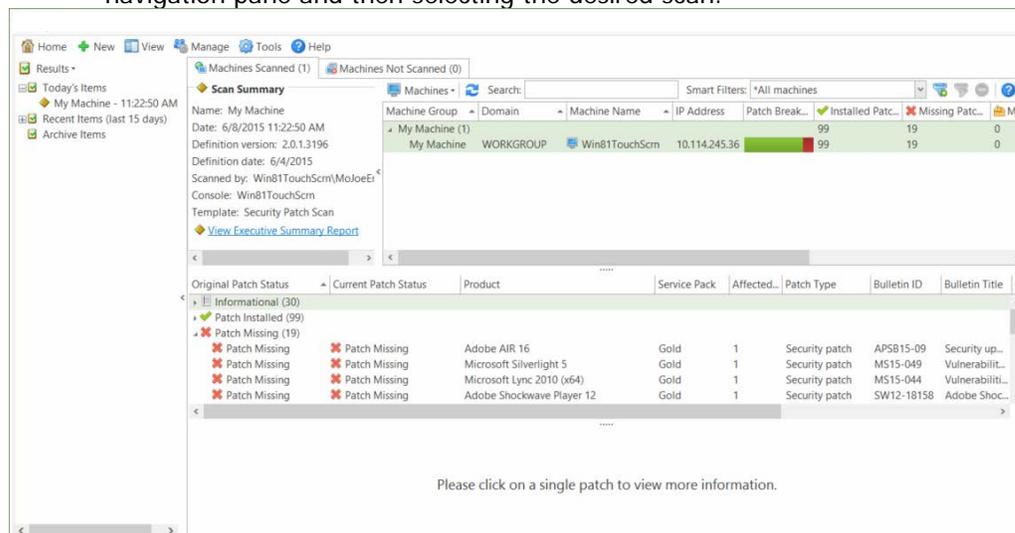
4. Review the scan results by clicking the **View results** link.

Note: For information on performing scheduled scans, see the tutorial available at: <http://www.shavlik.com/support/training-videos>.

Reviewing Scan Results

You can access scan results a couple of different ways:

- You can view the results for a scan you just performed by clicking the **View results** link from within the Operations Monitor.
- You can view the results for prior scans by selecting **Results** at the top of the navigation pane and then selecting the desired scan.



This view is called Scan View and provides detailed information about a scan.

1. In the top-right pane, select the machine you just scanned.
2. In the middle pane you can view a variety of information, including:
 - The number of service packs that are missing
 - The number of patches that are missing
 - The number of patches that are installed
 - The products (applications) that were scanned on the machine
 - The number of patches that are missing for each of the scanned products
3. In the bottom pane you can view detailed information about any patch you select in the middle pane.
4. For more information on interpreting scan results, press **F1** to view the Help system.

Complete information on interpreting patch scan results is available within the Help system at **Agentless Patch Management Tasks > Interpreting Patch Scan Results (Scan View)**.

5. To view scan results using Machine View, select **View > Machines**.

Complete information on using Machine View is available within the Help system at **Common Tasks > Using Machine View**.

Deploying Patches

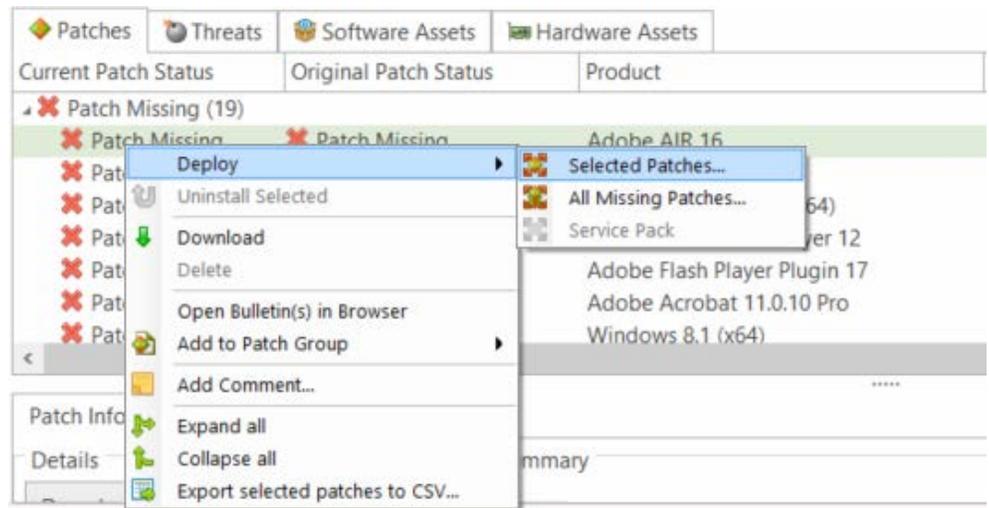
Once you've identified a missing patch that you'd like to deploy, simply right-click the patch and then deploy the patch to the selected machine. You can choose to deploy with the default deployment template, or you can create your own custom deployment template. Patches can be deployed immediately, at a specified future time, upon next reboot, or can be copied to remote machines for manual deployment at a later time. Missing patches can also be automatically deployed upon completion of an immediate or scheduled scan.

Try it yourself:

Patches can be deployed from either Machine View or Scan View. The Machine View process is illustrated here; the process within Scan View is very similar.

1. To get to Machine View, select **View > Machines**.
2. In the top pane, select the machine you just scanned.
3. In the middle pane, expand the **Patch Missing** list.
4. Identify a missing patch that you would like to deploy.
5. Right-click the missing patch and select **Deploy > Selected Patches**.

For example:



6. If prompted to assign default credentials, click **New**, specify administrative credentials for the machine, click **Save** and then click **Assign**.

Complete information on specifying and using credentials can be found in the Help system at **Installation and Setup > Supplying and Managing Credentials**.

7. On the **Deployment Configuration** dialog, make sure **Install immediately** is selected and then click **Deploy**.
8. Watch the **Operations Monitor** dialog for detailed information about each step being performed in the deployment process.

Assuming you used the default deployment template, the final step in the deployment will be to reboot your machine. While you are waiting for the reboot to occur, you can view the pending deployment task by selecting **View > Deployment Tracker**.

9. After your machine reboots, start Shavlik Protect again.
10. Within the navigation pane, in the **Results** list, select the deployment you just performed.

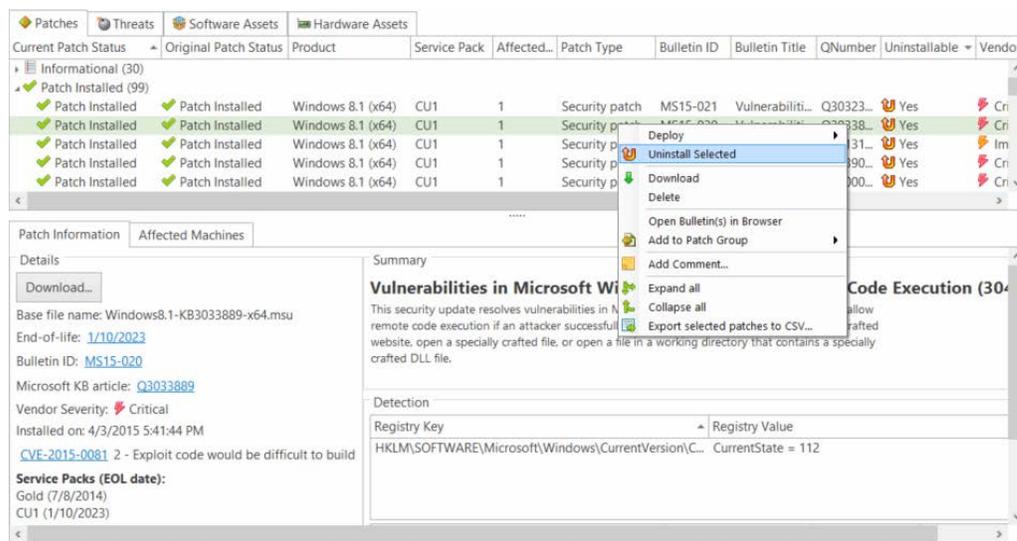
Details about the deployment are displayed on the right side of the window. The top pane displays a list machines involved in the deployment and shows how many patches each machine received. The lower pane provides information about how the patches were deployed.

For more detailed information, see **Agentless Patch Management Tasks > Deploying Patches** in the Help system.

Rolling Back Patches

Shavlik Protect provides the ability to uninstall selected patches. Not all patches can be uninstalled. The ability to “roll back” a patch is dependent upon the patch vendor. Only patches identified by the rollback icon  can be uninstalled.

You can uninstall a patch from Scan View or Machine View. You simply right-click the patch and then select **Uninstall Selected**. For example:



Generating Reports

Once you've completed a patch scan and deployment, you can generate any of a number of customizable reports to provide analysis of the state of your desktop and network security. Reports can be customized by scan date, machine group, or risk level. Once a report is generated, you can view, print, or save the report. You can also export the report to different formats or e-mail it to designated recipients. Shavlik Protect reports are robust, gathering all information stored in the console, not just the information generated in the most recent scan/patch implementation. This function allows administrators to track the history of all patch activity on each machine.

Try it yourself:

1. From the program menu select **Tools > Create report**.
2. In the **Select report to view** box select the report you want to generate (for example, **Executive Summary**).
3. Near the bottom of the **Reports** dialog click **Generate report**.

For detailed information about generating reports, see **Common Tasks > Reports** in the Help system.

Antivirus and Antispyware Tasks

You perform antivirus and antispyware tasks using agents. Simply create an agent policy and then install the agent on a machine.

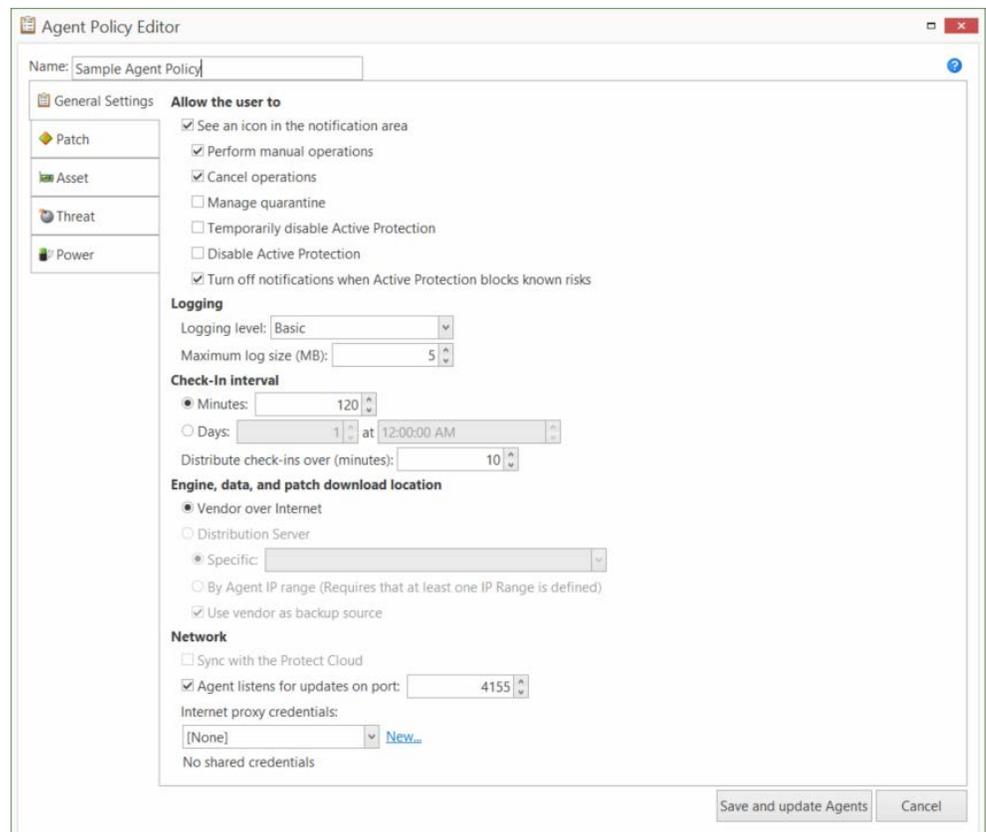
Important! Before using a threat task on agent machines, it is strongly recommended that you remove all other antivirus and antispyware programs that may be running on the agent machines. Using multiple threat programs on the same machine may cause serious performance issues.

Create an Agent Policy

To create a new Shavlik Protect Agent policy:

1. From the main menu select **New > Agent Policy**.

The **Agent Policy Editor** is displayed.



2. Type a name for the new agent policy.

Configure an Agent Policy

There are many different configuration options for an agent policy. For this example you will configure a policy with a simple patch task and a very basic threat task, using the default settings in most cases. You can also configure an agent policy to perform asset and power tasks but those features are not used in this example.

Tip: To view a video tutorial on this topic, click the video icon.



On the Patch Tab

Click **Add a Patch Task** and type a name for the task. For example, you might name it *Eval Patch Task*. The patch task options are displayed. Feel free to simply use the default values. You might consider clearing the **Deploy patches** check box on the **Scan and deploy options** sub-tab if you do not want all missing patches to be deployed later on when you test the agent. Do not click **Save and update Agents** just yet.

On the Threat Tab

Click **Add a Quick Scan Threat Task** and type a name for the task. For example, you might name it *Eval Threat Task*. The threat task options are displayed. Feel free to simply use the default values.

On the Exceptions Sub-Tab

Select **Always allow files**, type **winword.exe** and then click **Add**. This tells your threat task(s) and Active Protection that you always want Microsoft Word to be allowed to run. This is a very simple example of how to use the Always Allow and Never Allow lists. For more examples, click the **Examples** link.

On the Active Protection Sub-Tab

Make sure the **Enable Active Protection** check box is enabled.

Active Protection is a real-time service used to detect known and unknown threats before they infect an agent machine. It sits quietly in the background of a machine and monitors for attempts to change security configuration settings and values. If it detects an attempt to change a setting it can respond a number of different ways, depending on how it is configured. Feel free to simply use the default configuration.

Save the Agent Policy

In the bottom-right corner of the **Agent Policy Editor** dialog, click **Save and update Agents**.

Tip: To view a video tutorial on this topic, click the video icon.

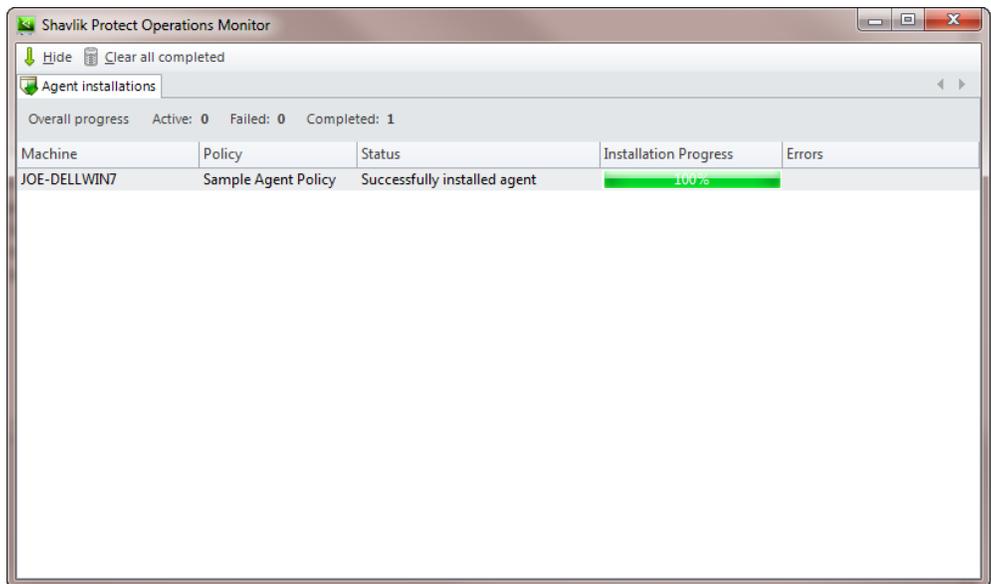


Install the Agent on the Console Machine

For simplicity, in this example you will install the agent onto your console machine. You can, of course, install the agent on any of the machines in your organization.

1. Go to Machine View by selecting **View > Machines**.
2. Select the machine you scanned previously (this should be your console machine).
3. Right-click the machine and then select **Agents > Install / Reinstall with Policy** and then select the agent policy you just created.

The Operations Monitor is displayed. It shows the status of the different steps involved in the installation process. For example:



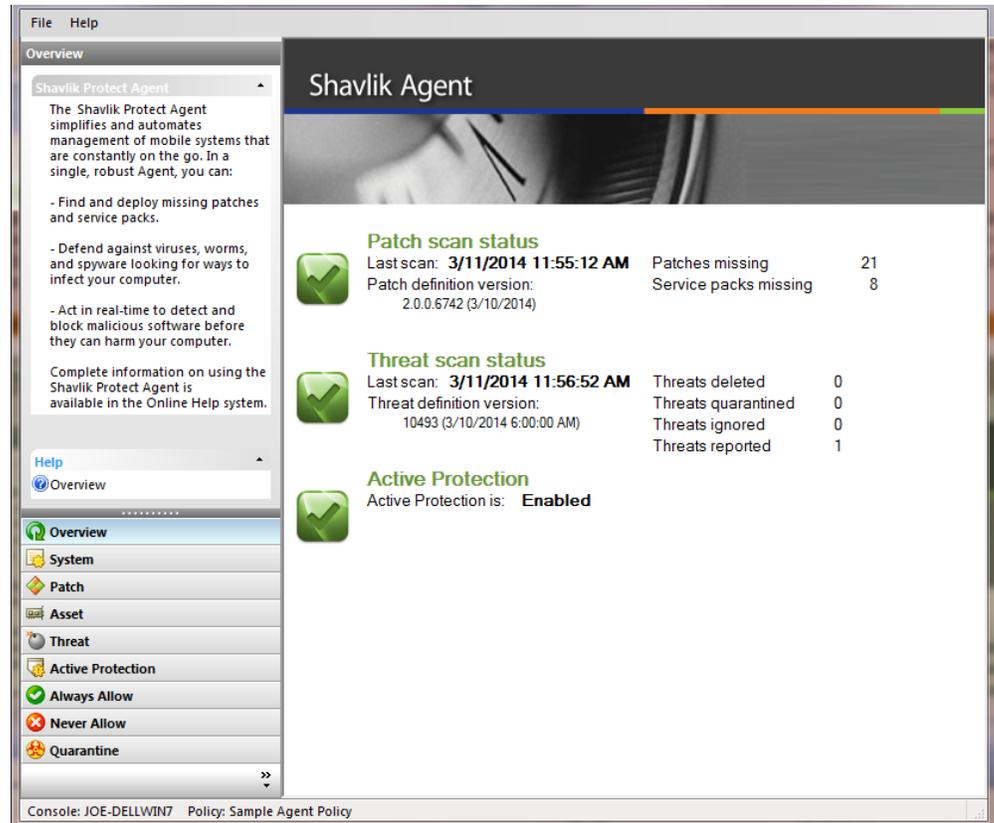
Using the Agent

The agent should now be installed on your console machine. You can launch the agent a number of different ways:

- Select **Start > All Programs > Shavlik Protect > Shavlik Protect Agent**
- Tap or click the Shavlik Protect Agent icon on the desktop
- Double-click the Shavlik Protect Agent service icon that resides in your machine's system tray



The Shavlik Protect Agent client program is displayed. For example:



1. In the button tray located in the lower-left corner, click **Patch**.
2. In the Active Function pane located immediately above the button tray, click the patch task you created earlier (e.g. Eval Patch Task).

Wait for the patch scan to complete. You can review the results in the right-hand pane. Click **Overview** in the button tray to view the patch status of your machine.

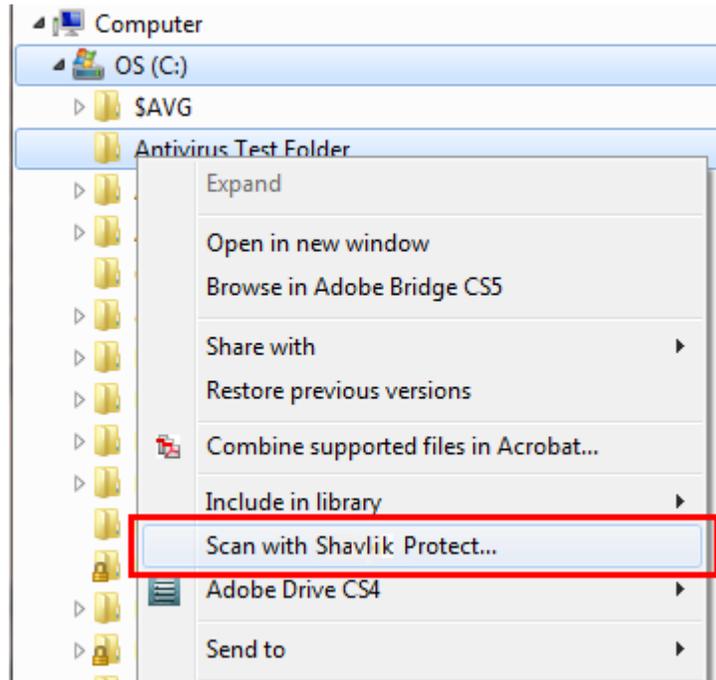
3. In the button tray, click **Threat**.
4. In the Active Function pane located immediately above the button tray, click the threat task you created earlier (e.g. Eval Threat Task).

Wait for the threat scan to complete. You can review the results in the right-hand pane. Click **Overview** in the button tray to view the threat status of your machine.

Results from agent-based patch tasks and threat tasks are also rolled up to the console and can be viewed using either Machine View or Threat Events View.

Performing AV Scans on Specific Files, Folders, or Drives

If an agent is configured with a threat task or if Active Protection is enabled, the user of the machine can initiate an antivirus scan on a specific file, folder, or drive on the machine. This is done by right-clicking the desired item within Windows Explorer and then selecting **Scan with Shavlik Protect**. For example:



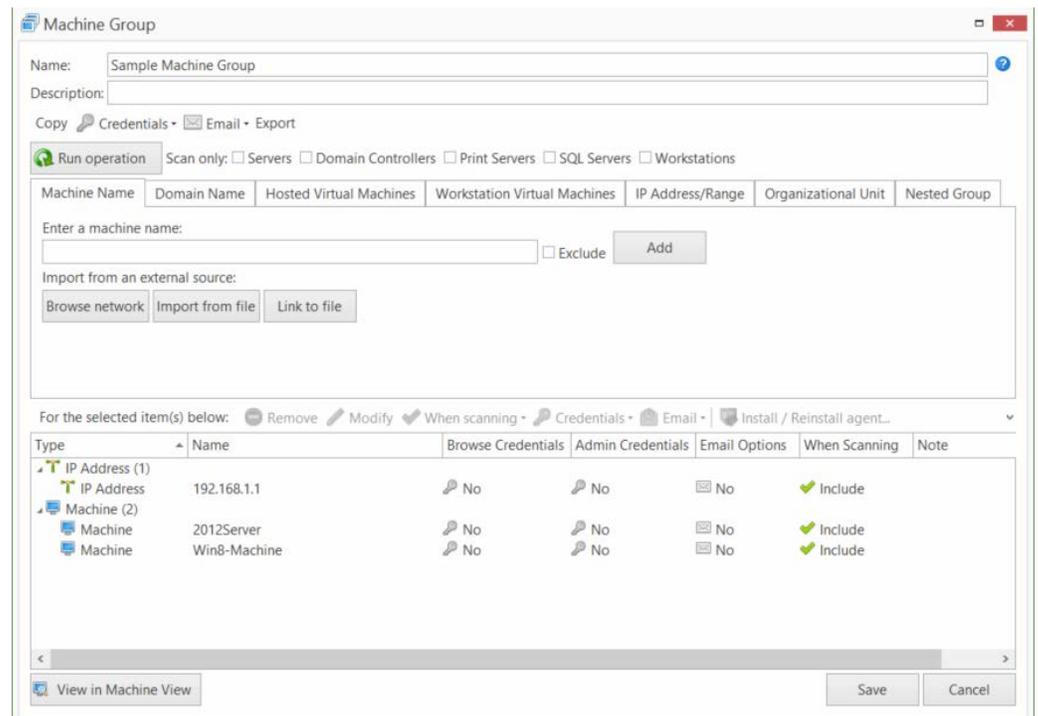
The results of the scan are displayed in the agent's threat log. The results are also reported to the console and available for viewing using either Machine View or Threat Events View.

EXPLORING THE MANY OTHER POWERFUL FEATURES OF SHAVLIK PROTECT

The topics discussed up until now are designed to get you up and running quickly with Shavlik Protect and get a feel for the core capabilities of the product. There are of course many, many other powerful features and we encourage you to explore them on your own.

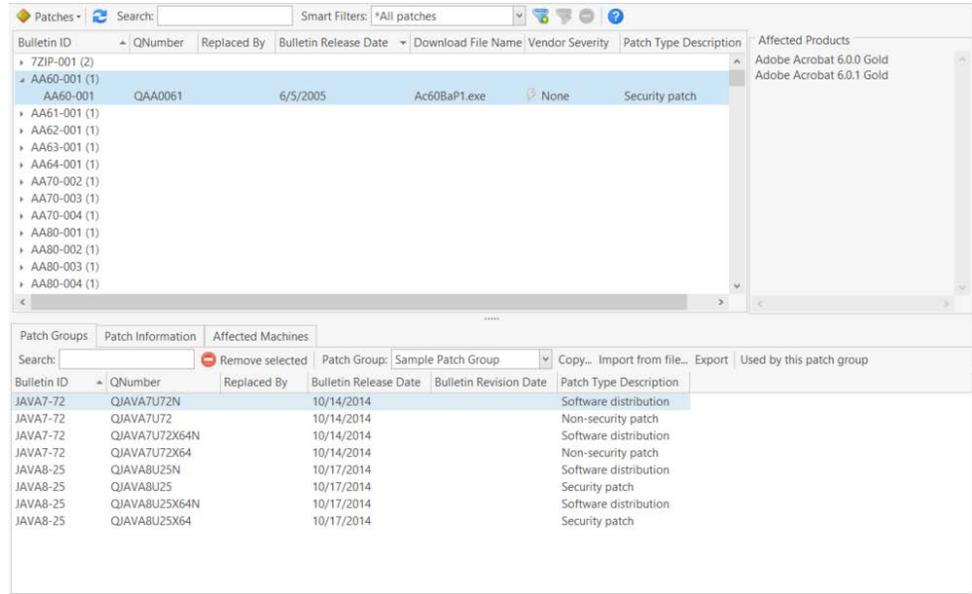
Machine Groups

Create a machine group and see how easy it is to manage the different physical machines, virtual machines, domains, and organizational units in your organization. For details, access the Help system and read the **Installation and Setup > Using Machine Groups** topics.



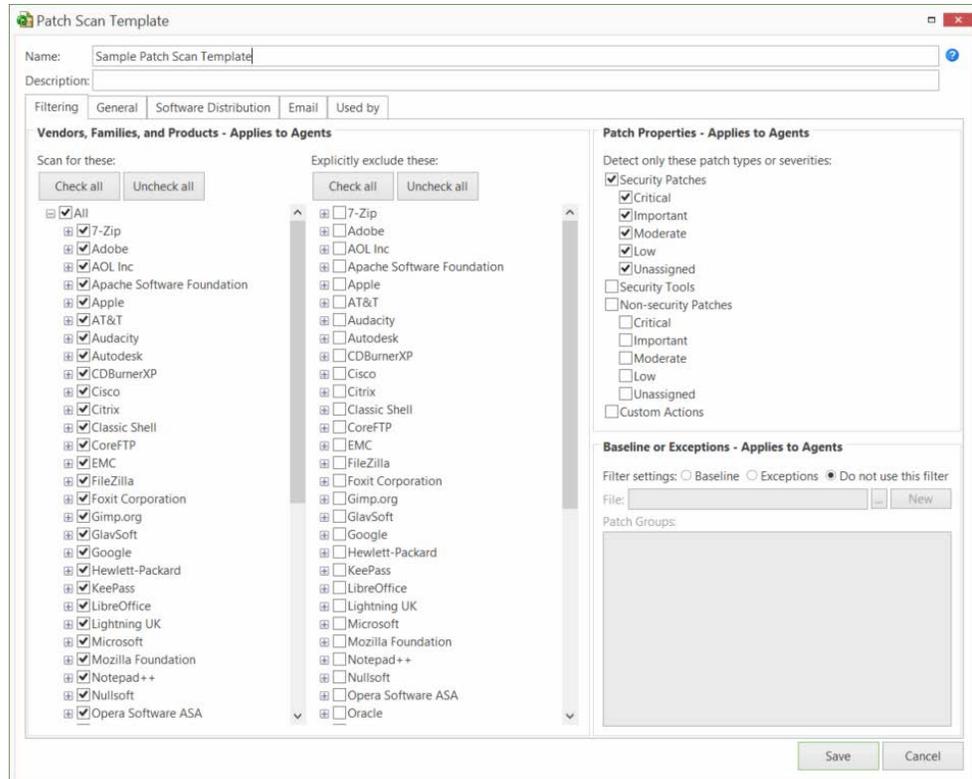
Patch Groups

Create a patch group and see how they can be used to control exactly which patches are scanned for and deployed to the machines in your organization. For details, access the Help system and read the **Agentless Patch Management Tasks > Using Patch View > Creating Patch Groups** topics.



Patch Scan Templates

Create a new patch scan template and learn about all the ways it can be configured in order to address your specific scanning needs. For details, access the Help system and read the **Agentless Patch Management Tasks > Patch Scan Templates** topics.



Tip: To view a video tutorial on this topic, click the video icon.



Asset Inventory Features

Create a new asset scan template and then use it in a scan to learn about your software, hardware, and virtual assets. For details, access the Help system and read the **Agentless Asset Inventory Tasks** topics.

Tip: To view a video tutorial on this topic, click the video icon.



Power Management Features

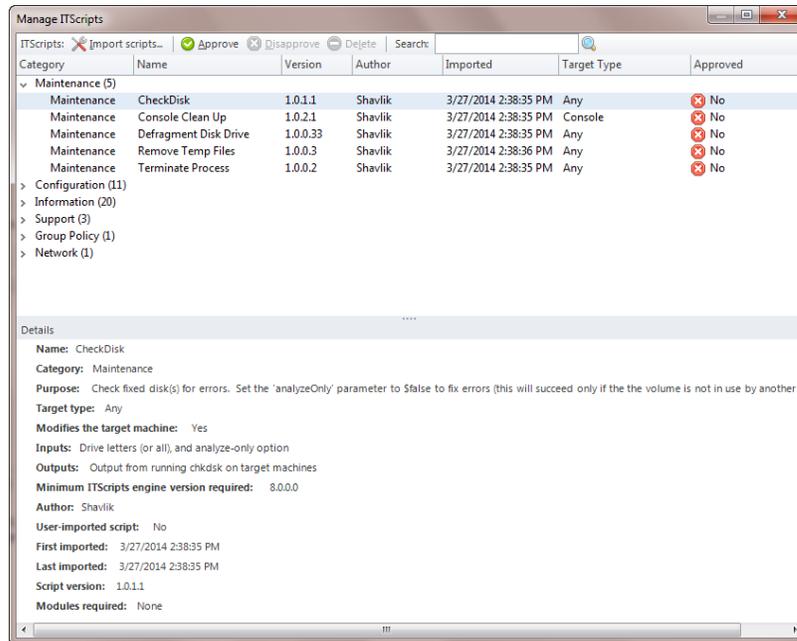
Read through the **Agentless Power Management Tasks** topics in the Help system to learn how you can use Shavlik Protect to prepare your machines for maintenance tasks and to reduce power consumption and operating costs. If you decide to test the reboot or shut down feature be sure to do so on a non-critical target machine.

Tip: To view a video tutorial on this topic, click the video icon.



ITScripts Feature

The ITScripts feature supports the use of PowerShell 4.0 and WinRM 2.0, enabling you to execute a variety of scripts on the console and on remote target machines. It also enables you to start a Windows PowerShell session between the console and a selected machine. For details see **IT Management Tools > ITScripts** in the Help system.



Tip: To view a video tutorial on this topic, click the video icon.



Virtual Inventory Feature

The Virtual Inventory feature is used to manage and track the vCenter Servers and the ESXi hypervisors (ESXi hosts) that are used in your organization. You can use the Virtual Inventory feature to:

- Add vCenter Servers and ESXi hypervisors to Shavlik Protect
- View basic configuration information about the vCenter Servers and the ESXi hypervisors
- Perform a scan of the managed and unmanaged ESXi hypervisors
- View the security bulletins that have already been installed on the managed and unmanaged ESXi hypervisors
- View the security bulletins that are missing on the managed and unmanaged ESXi hypervisors
- Deploy any missing security bulletins to the ESXi hypervisors

For details, access the Help system and read the **Installation and Setup > Managing Your vCenter Server and ESXi Hypervisors** topics.