RECAST SOFTWARE

Proof Of Concept

Last Modified on 10.27.23

Install and Configure SQL

Installing SQL is an optional step that can be skipped if you have a separate SQL instance that you will be using for your Recast Management Server database.

> **SQLExpress is used in these instructions for demonstration purposes**. It can serve as a temporary database at the Proof-Of-Concept stage, but its limited size will not support web dashboard and dashboard trends in a Recast Management Server deployment. The steps for installing and configuring a licensed version of SQL will be similar.

To install SQLExpress:

1. Download SQLExpress from Microsoft. When you begin installation, you will be presented with the installation type screen. Select **Basic** installation.
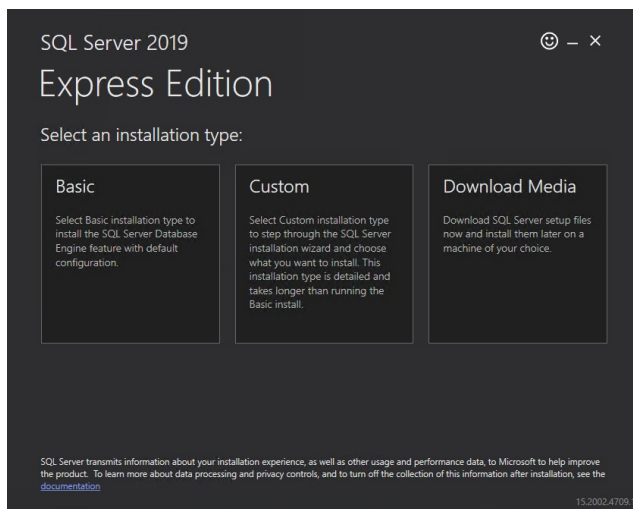
2. Accept the SQL Server License Terms.

3. Choose the install location and click **Install**.
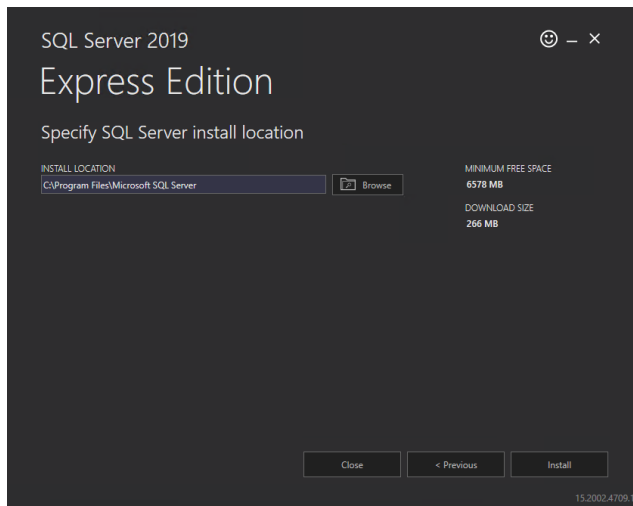
4. After installation completes, it is recommended that you install SQL Server Management Studio (SSMS). To download SSMS from the Microsoft site, see Download SQL Server Management Studio (SSMS) .
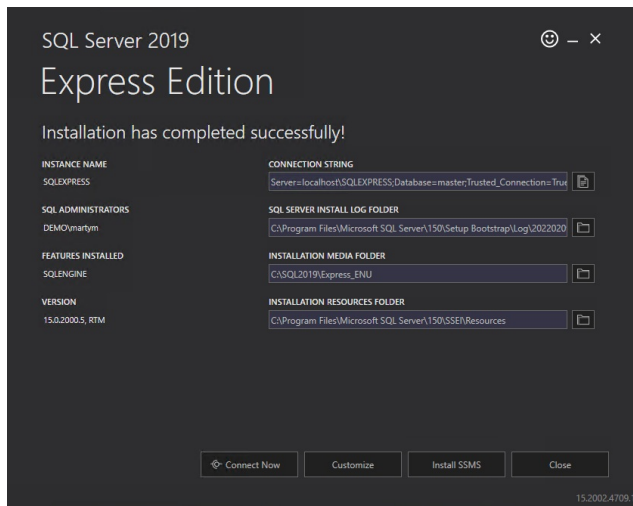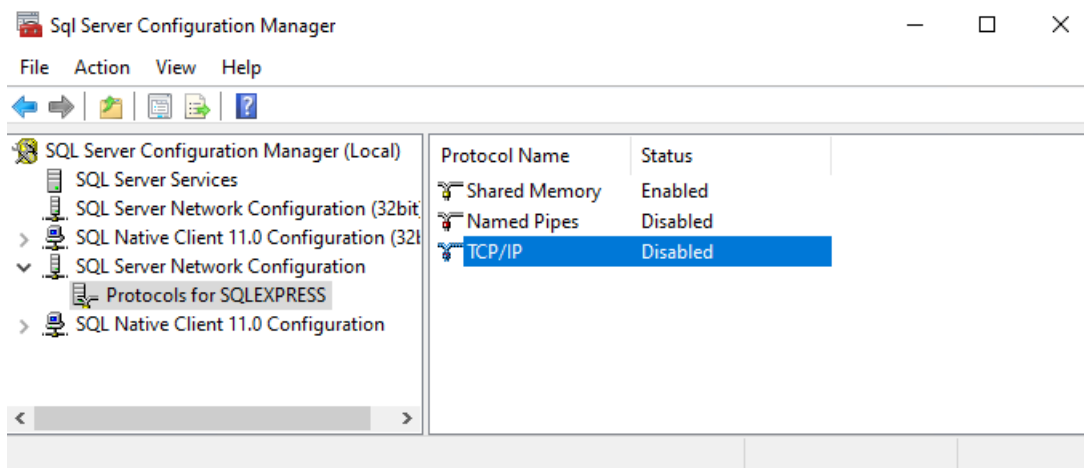

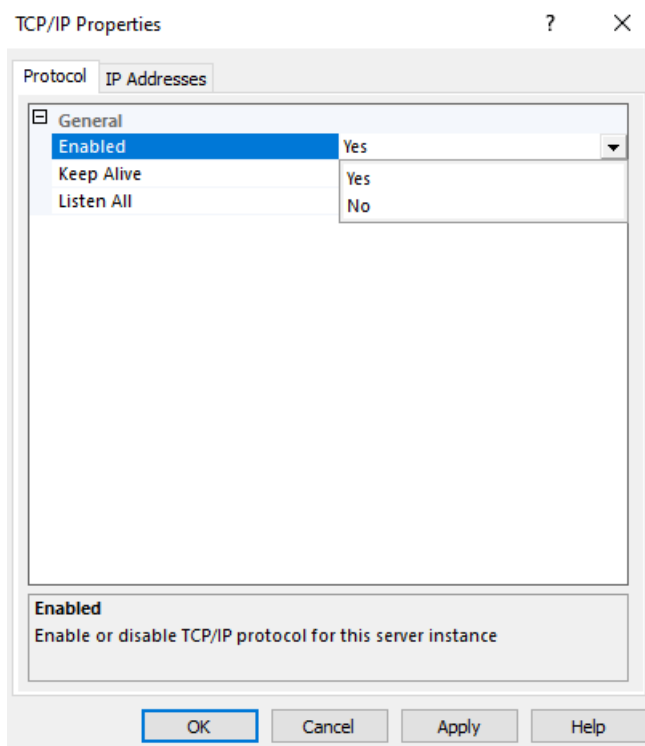To change the network configuration:

1. Open SQL Server Configuration Manager.

2. Select **SQL Server Network Configuration** and double-click on **Protocols for SQL Express**.
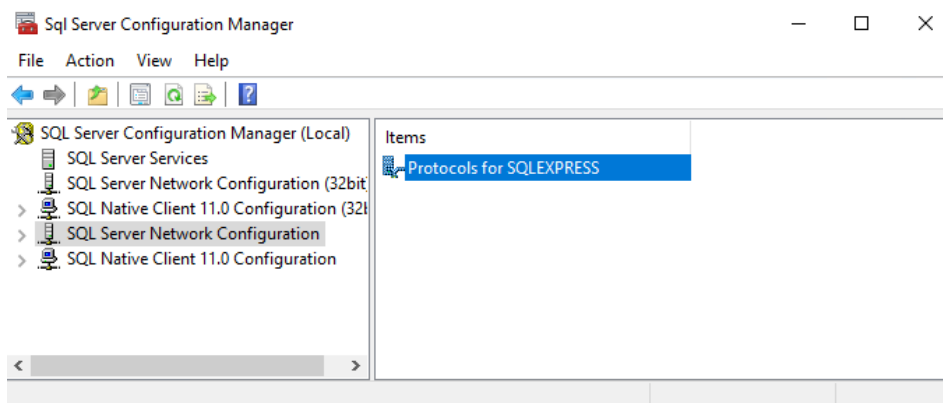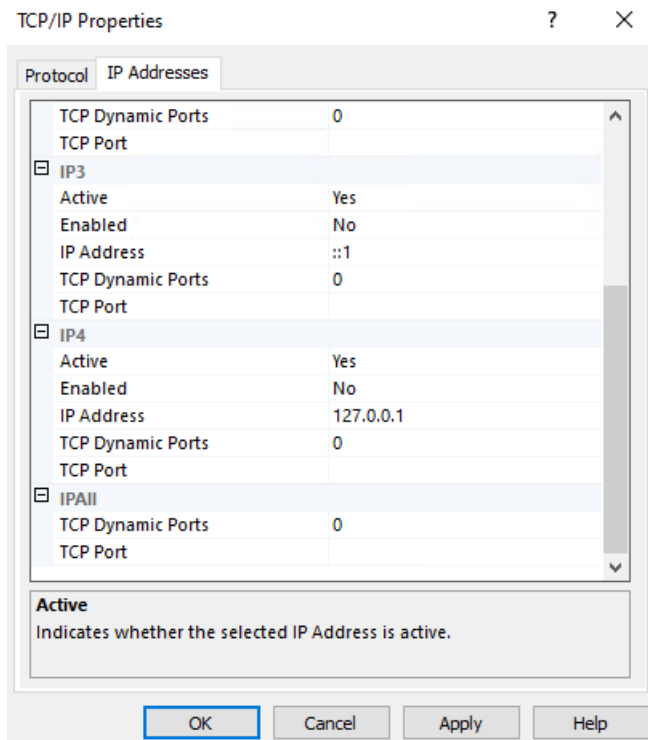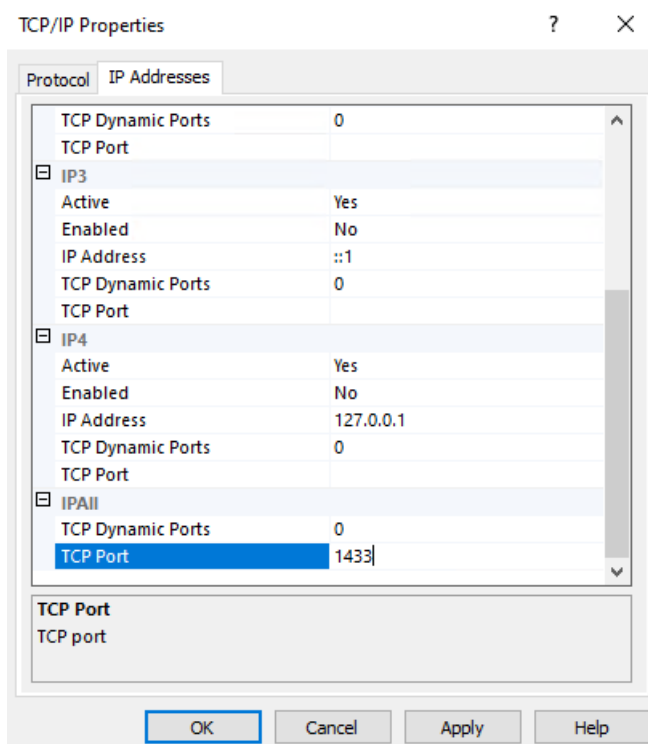

3. Select **TCP/IP**.

4. Change **Enabled** to 'Yes'.

5. Select the **IP Addresses** tab and scroll down to the **IPAll** section.

6. Add port 1433 as the TCP Port (this is the standard port for SQL).

7. You will need to stop and restart the service for changes to take effect. Return to the front page of the SQL Server Configuration Manager and right-click on the running SQL server instance. Select **Restart**.
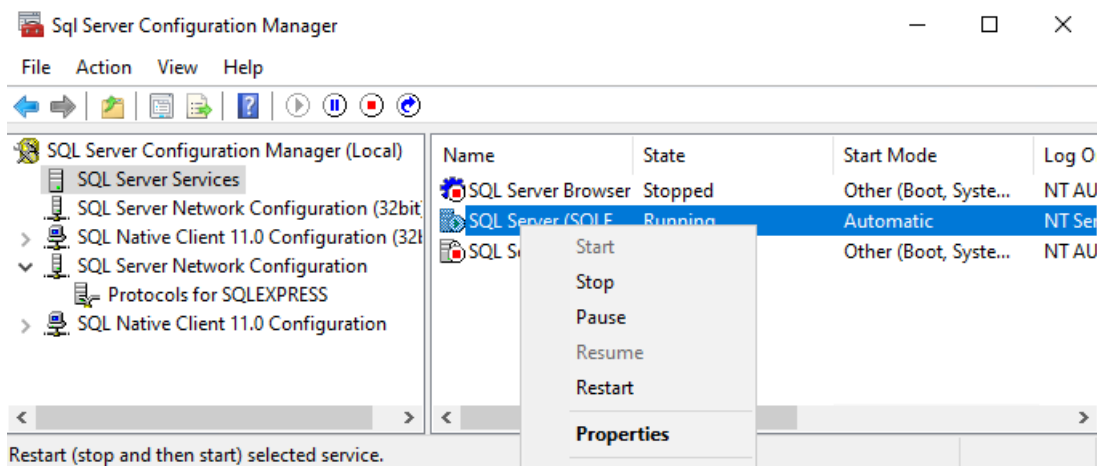
You are now ready to install the Recast Management Server.

Install Recast Management Server

After downloading Recast Management Server from the Recast Portal, open the installer by double-clicking on the .msi file.
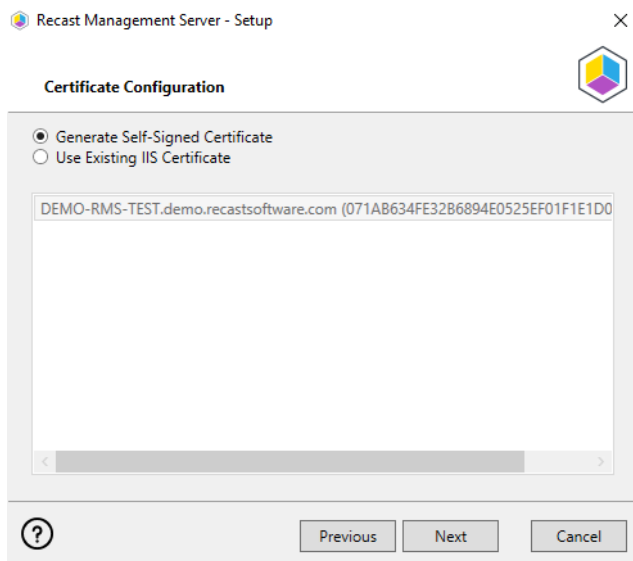
To install Recast Management Server:

1. When the Recast Management Server Setup Wizard opens, click **Next**.

2. On the **IIS Configuration** page, you'll see the **Server Name** where you are installing the Recast Management Server. You can also choose the **IIS port** you would like to use for communication in your environment. We default to 444 because if the RMS is installed on a ConfigMgr server, as 443 is already in use by ConfigMgr.
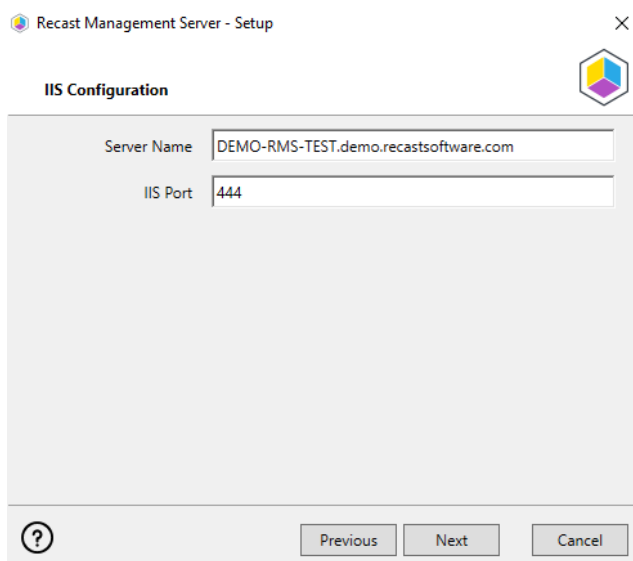

3. On the **Certificate Configuration** page, you have the option to **Generate a Self-signed Certificate** or **Use an Existing IIS Certificate** issued by a trusted internal Certificate Authority. You can select an existing certificate if you are sure it is an IIS Certificate with modern encryption. If you are not sure, have the installer generate a self-signed

certificate. With a self-signed certificate, when users connect their Right Click Tools to the Recast Management Server the first time they will be presented with a dialog box asking if they would like to trust the self-signed certificate. If they select 'Yes', they will not need to do any additional actions.
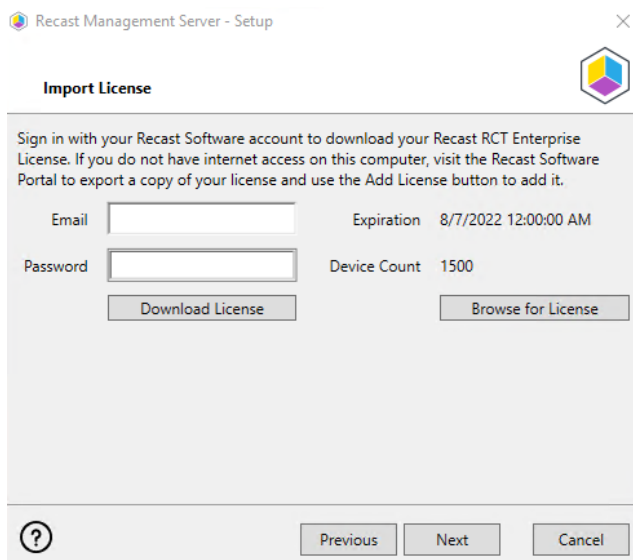

> **NOTE**: If your Recast Management Server is using a self-signed certificate, you'll need to import the certificate into the Trusted Root Certificate Authorities Store on all devices that will have Recast Agents. For instructions on importing a certificate to a local machine, see Certificate used by Recast Management Server is not trusted .

4. Set the SQL information from the SQL instance we installed earlier. If you used the default information from the install instructions above, your **SQL Configuration** page will look like the one below. Click **Test SQL Connection** to verify that you can connect to the SQL installation.
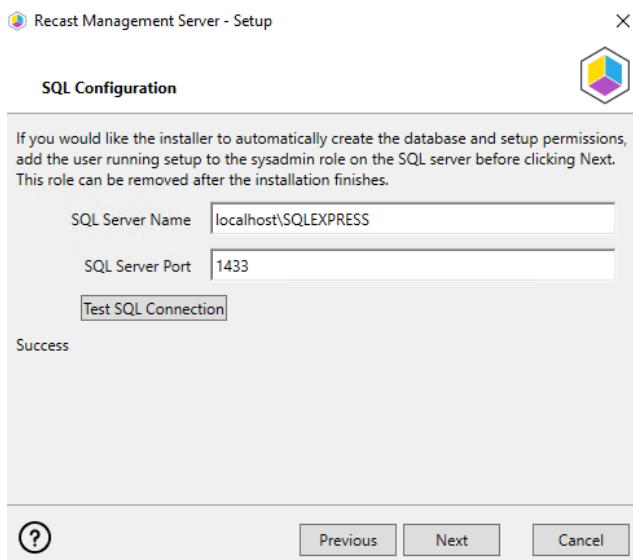
5. On the **Import License** page, you can either download the license file from https://portal.recastsoftware.com or enter your **Email** address and **Password** from the portal to load your license.
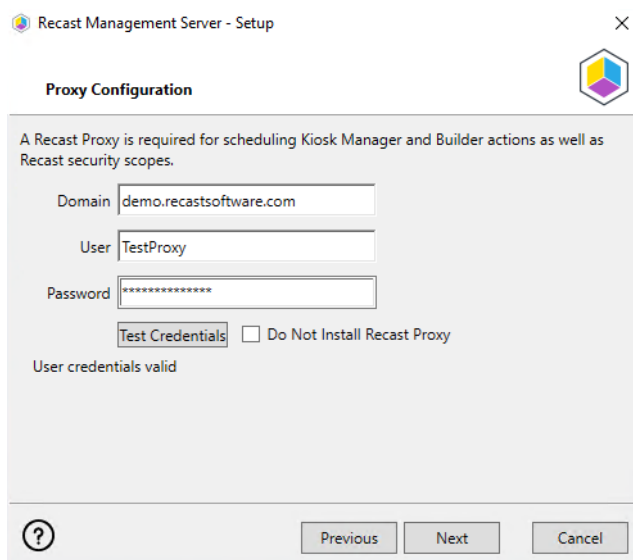
6. On the **Proxy Configuration** page, enter the Service Account information you would like to use for the Recast Proxy. The proxy must be installed for scheduling of Builder/Kiosk Manager actions, to have Right Click Tools actions run as a Service Account, or to access Web Dashboards in the Recast Management Server. It is recommended that you install Recast Proxy during your POC.

> The Service Account that you use for the Recast Proxy must have at least full read permissions to Active Directory and Configuration Manager, as well as the ability to read directly from the ConfigMgr SQL database, and the MBAM Database if it exists. See Proxy Service Account Permissions.

7. The next window will verify that your Proxy Service Account has permission to read from Active Directory. When you click **Test Domain Connection**, it should read **Success** when completed successfully.

8. The next window is verifying that your Proxy Service Account has permissions to read from your Configuration Manager installation. Note that your Service Account must have permission as at least a **Read Only Analyst** in Configuration Manager, and must be allowed to read from the ConfigMgr Database directly.

See Configure Permissions for the ConfigMgr SQL Database .

9. If you have STANDALONE MBAM in your environment, click on the greyed out screen to enter information about your MBAM installation. Otherwise, click **Install**.
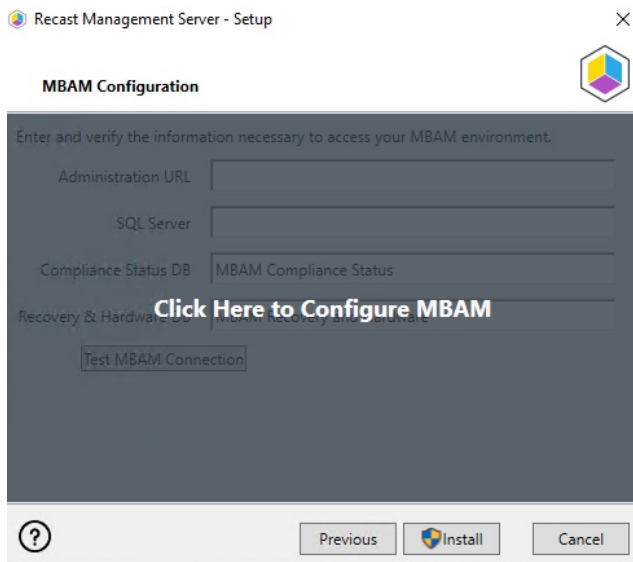
10. The MBAM Configuration window checks that your Proxy Service Account has permission to read from the MBAM database.

See Configure Permissions for the MBAM SQL Database .
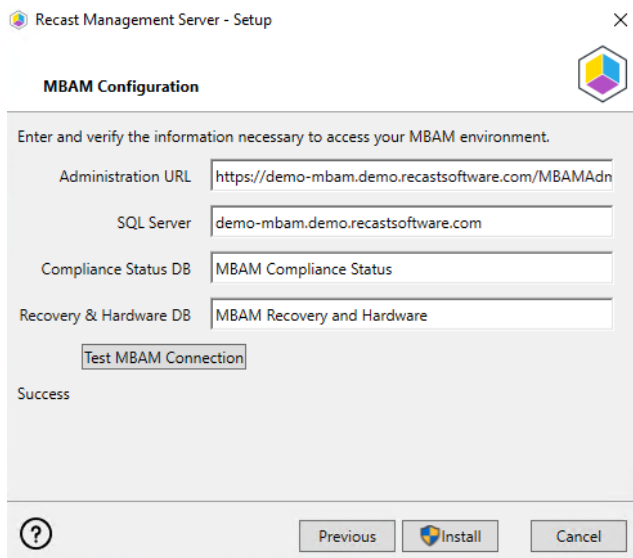
11. Click **Install** when the test is successful.

When Recast Management Server installation completes, you can click on the highlighted link to go to the Recast Management Server URL, or you can click **Finish** and paste the URL into your browser.

You are now ready to Configure your Recast Management Server .

Enable IIS

The Recast Management Server requires IIS, which should be installed automatically during Recast Management Server

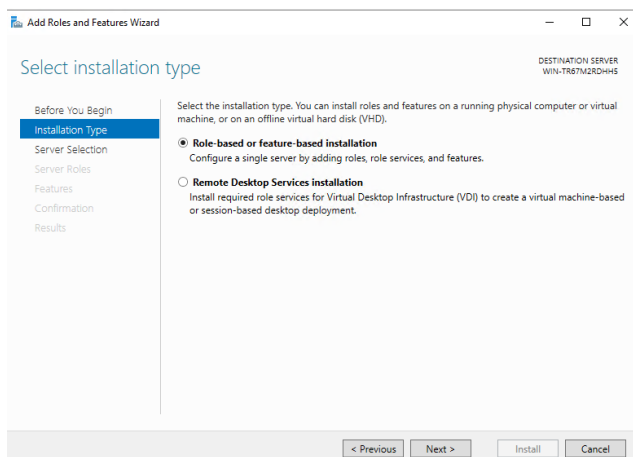installation. Otherwise, you can enable IIS manually in Server Manager.

To manually enable IIS, if necessary:

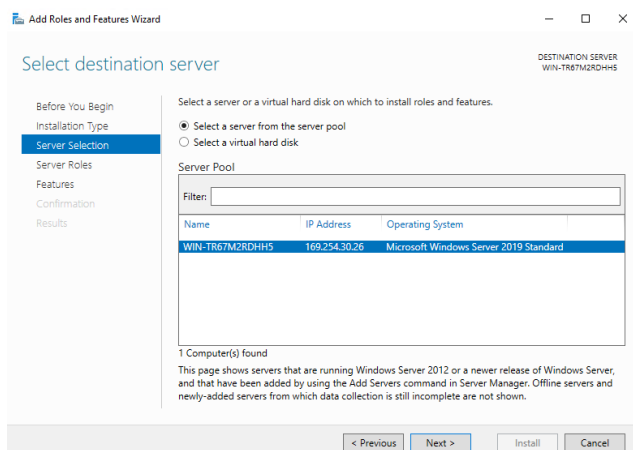1. Open **Server Manager** and navigate to **Manage** > **Add Roles and Features**.
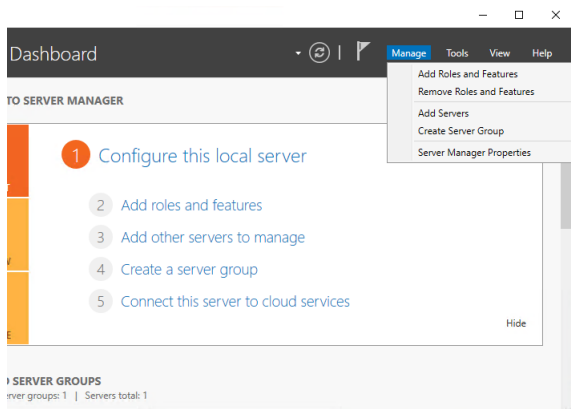
2. When the Add Roles and Features Wizard opens, click **Next**.
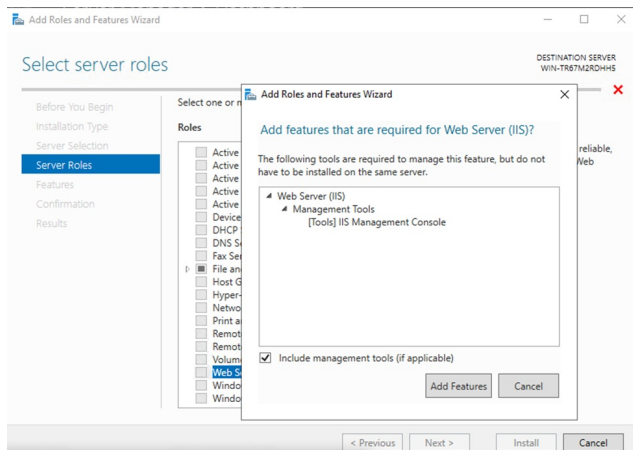
3. Select **Role-based or feature-based installation** and click **Next**.

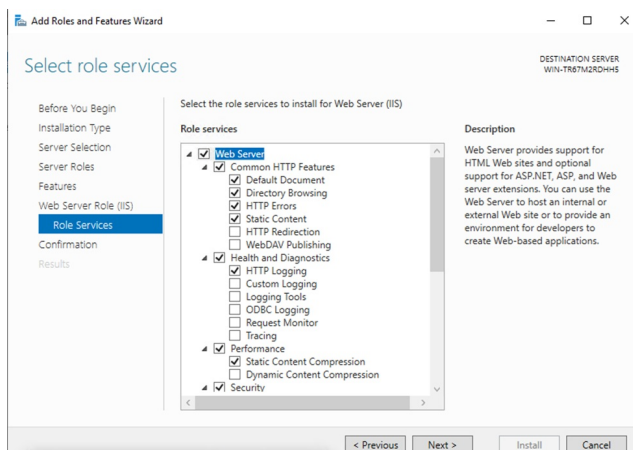4. Select your destination server and click **Next**.

5. In **Server Roles**, click **Web Server (IIS)**. Click **Add Features**.

6. Confirm that Web Server (IIS) is selected and click **Next**.

7. On the Web Server Role (IIS) page, click **Next**.

8. When the Role Services page opens, click **Next**. (The default settings are fine for our install.)
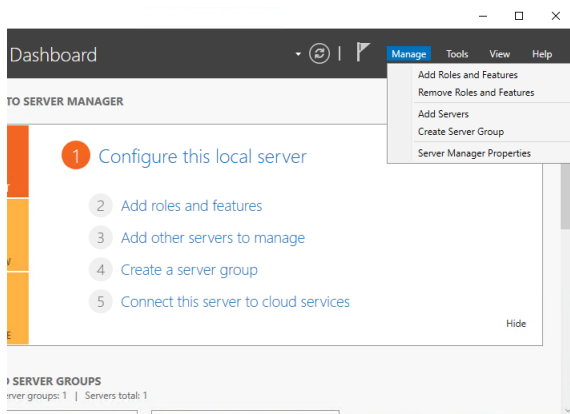

9. Confirm your installation selections and click **Install**.
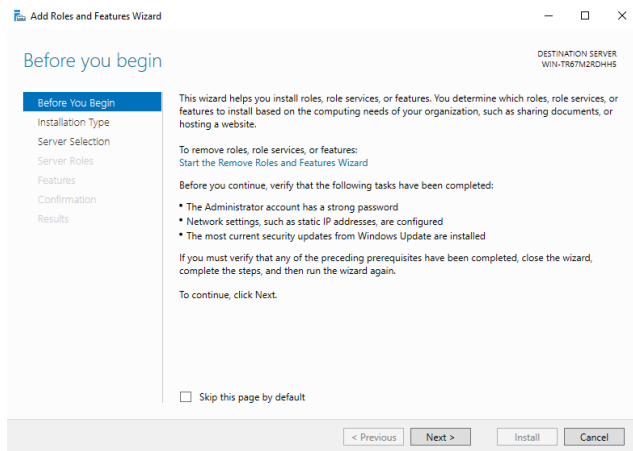
Enable .NET Framework

You can manually enable .NET version 4.6.2 or later via Server Manager.
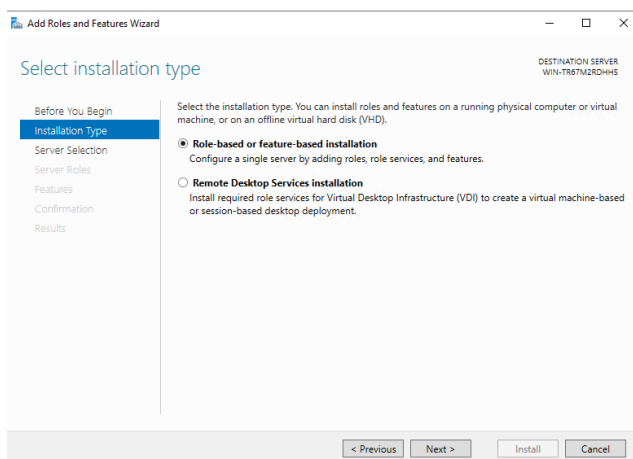
Steps to enable:

1. Open **Server Manager** and navigate to **Manage** > **Add Roles and Features**.
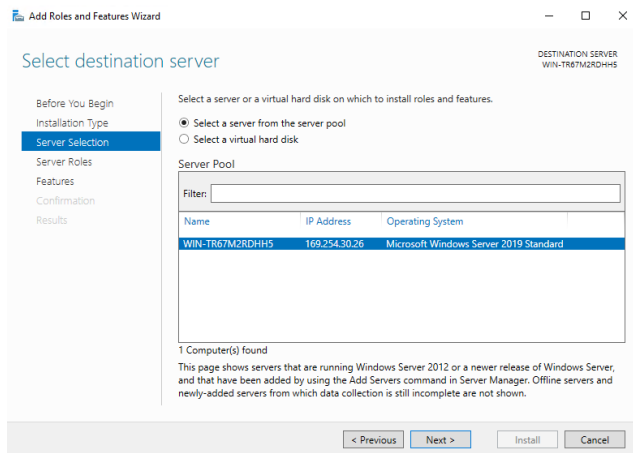
2. When the Add Roles and Features Wizard opens, click **Next**.

3. Select **Role-based or feature-based installation** and click **Next**.


4. Select your destination server and click **Next**.

5. On the **Select server roles** page, click **Next.**

6. On the **Select features** page, select **.NET Framework** > **.NET Framework 4.x** and click **Next**.

7. Confirm your installation selections and click **Install**.

Configure Recast Management Server

After installation, you'll need to configure your Recast Management Server. First, log into your Recast Management Server interface using the same account that you used to install the Recast Management Server.
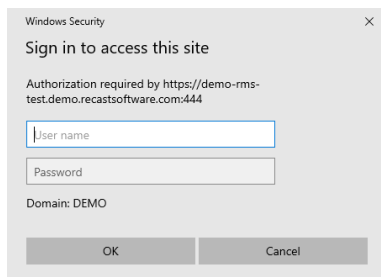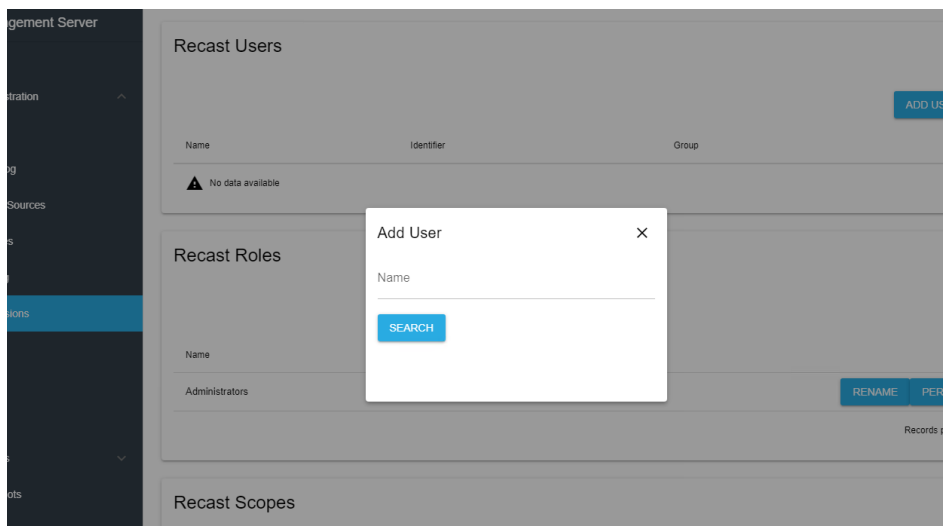

When you initially log in, the Recast Management Server homepage will appear.
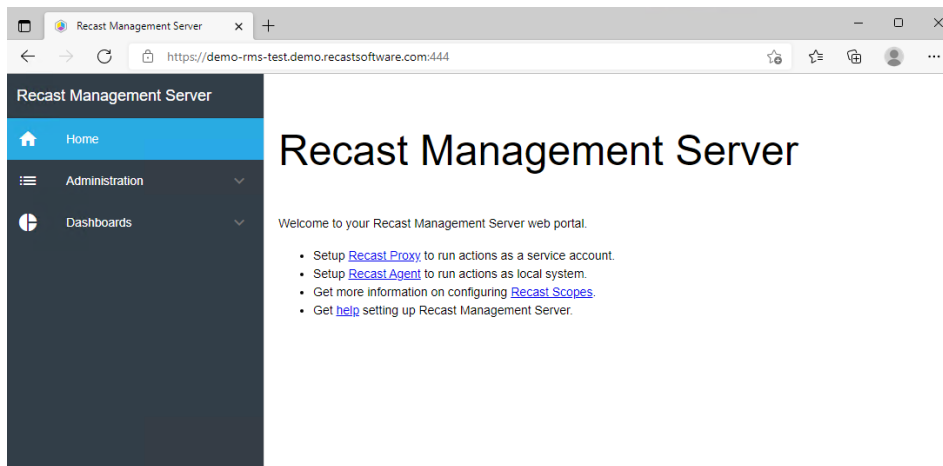
To add yourself as a user:

1. Expand the **Administration** section in the navigation panel and select **Permissions**.

2. In the **Recast Users** section, click **Add User**.

3. In the **Add User** dialog that opens, enter your user account as the **Name** and click **Search**.

4. Click **Add** to add the user to the Recast Management Server. The user will then appear in the **Recast Users** section.
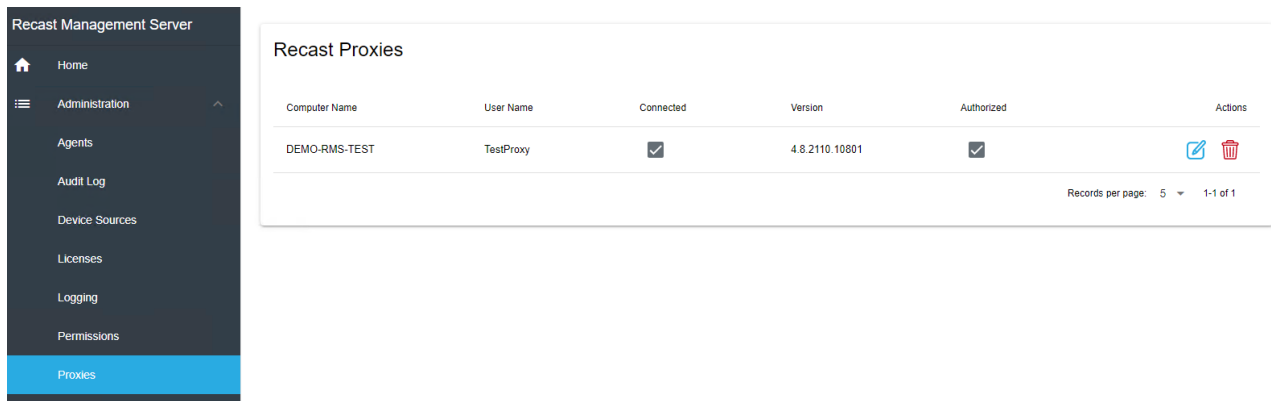

All users must be assigned a role or they will not have permissions within Right Click Tools or the Recast Management Server.

To assign yourself a role:

1. Click on the Edit icon (pencil) to the right of your name.

2. Under **Role Assignments**, select the **Administrators** role and click **Save**.

To check that your proxy is connected to the Recast Management Server:

1. Select **Proxies** in the navigation panel..

2. Check that the proxy that you installed is showing as 'Connected' and 'Authorized'.
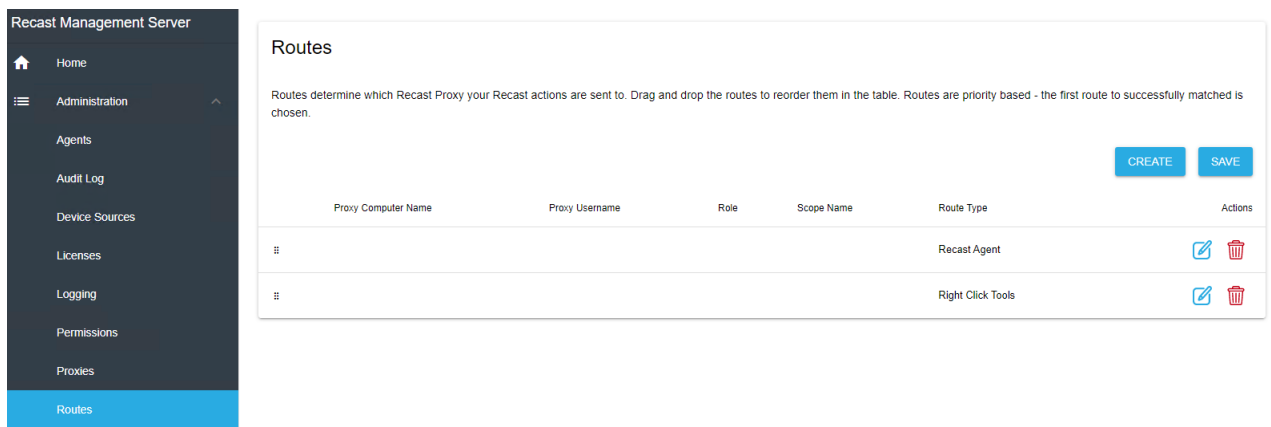

In order to configure the Recast Management Server so that the Recast Proxy can function, you'll need to add a route for the Proxy.

To add a Recast Proxy route:

1. Select **Routes** in the navigation panel. By default, you should see the Recast Agent and Right Click Tools routes listed in the table.

2. Click **Create**.

3. In the **Create Route** window, set the route **Type** to **Recast Proxy**.

4. Select the proxy that was installed on your RMS server.

5. Under **Role**, select **Administrators**.

6. Click **Create**.

After clicking create, you will see the changes that you made appear at the bottom of the Routes table. Click to **Save** this configuration.

Optional Step: If you would like to run actions as the Proxy Service Account, you can drag the Recast Proxy route from the bottom of the list to the top. This will ensure that the action is run as that service account.

You are now ready to install Right Click Tools.