

Insights with Recast Management Server

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Implementation Workflow for Insights with RMS

If you plan to collect warranty information, you'll need to install Right Click Tools Insights with Recast Management Server and Recast Proxy.

To install Insights, along with Patching, as add-ons to Right Click Tools, see our Multi-Product Implementation Guide.

Before beginning installation steps, make sure that Insights system requirements are in place.

Recommended workflow for Insights with device warranty reports

1. Download the following Recast application and components from the Recast Portal:

- Right Click Tools Insights
- Recast Management Server
- Recast Proxy

2. Install Recast Management Server with Recast Proxy on the primary Configuration Manager server or on its own server.

If you've already installed Recast Management Server with a Recast Proxy for another Recast product, there's no need to reinstall RMS and Proxy to add Insights.

3. Install Insights with Recast Management Server on your Configuration Manager server.

4. Install the Recast Agent application.

Once you've completed these tasks, you're ready to configure Recast Management Server for warranty information collection.

Install Recast Management Server with Recast Proxy

Recast Management Server software can be installed on its own server or on the primary Configuration Manager server.

Run the Recast Management Server Installer

After downloading Recast Management Server from the Recast Portal, run the installer and follow its prompts.

Recast Management Serve	er - Setup	×
	Welcome to the Recast Management Server Setup Wizard	
	The Setup Wizard will install Recast Management Server on your computer. Click Next to continue or Cancel to exit the Setup Wizard.	
?	Previous Next Cancel	

IIS

To configure IIS:

1. On the **IIS Configuration** page, change the **Server Name** only if the client is going to use a DNS alias.

2. Set the **IIS Port**. The default IIS Port is **TCP 444**, to prevent conflicts when Recast Management Server is installed on Configuration Manager servers. The IIS Port can be changed to 443, or any open TCP port, to suit your environment.

Recast Management Service	ver - Setup	×
IIS Configuration		
Server Name	DEMO-RMS-TEST.demo.recastsoftware.com	
IIS Port	444	
?	Previous Next	Cancel

Certificates

Recast Management Server requires a certificate for secure communication with Right Click Tools and any Recast Proxies.

To configure a certificate:

On the **Certificate Configuration** page, we recommend that you **Use an Existing IIS Certificate** issued by a trusted Certificate Authority (CA). If you choose to **Generate a Self-Signed Certificate**, you must import the Recast Management Server self-signed certificate to the Trusted Root Certificate Authorities store on devices running Right Click Tools, Recast Agent, or Recast Proxy.

Recast Management	Server - Setup			×
Certificate Configu	ration			
 Generate Self-Sigr Use Existing IIS Ce 	ed Certificate rtificate			
DEMO-RMS-TEST.de	mo.recastsoftwa	are.com (071AB	634FE32B6894E0	525EF01F1E1D0
4				
?		Previous	Next	Cancel

CERTIFICATE NOTES:

- The certificate subject name (or a subject alternative name) should match the server name in the URL that Right Click Tools and Recast Proxies are pointed toward.
- Right Click Tools will prompt for any untrusted certificates and add them to an allowed list.
- The certificate can be changed later by editing the Binding in IIS Manager.

SQL Server

There are two types of permissions that will allow the Recast Management Server installer to automatically create the SQL database with all the necessary permissions:

- The user account running the installation can be assigned a SysAdmin role in the SQL instance. If the user account has permission to connect remotely, use the **Test SQL Connection** button to check connectivity to the SQL Server during the install. After the RMS installer creates the database, the SysAdmin permission can be removed.
- The computer account of the Recast Management Server can be granted **db_creator** permissions. In this case, check the **Skip SQL Connection Test** box.

Recast Management Server - Set	tup ×
SQL Configuration	٩
If you would like the installer to au add the user running setup to the This role can be removed after the	tomatically create the database and setup permissions, sysadmin role on the SQL server before clicking Next. installation finishes.
SQL Server Name CS-TE	EST-SQL.cs.recastsoftware.com
SQL Server Port 1433	
Test SQL Connection	Skip SQL Connection Test
0	Previous Next Cancel

SQL SERVER NOTES:

- The default SQL Server Port Number is 1433.
- Recast strongly recommends a fully licensed version of SQL to avoid the 10GB storage limitation of SQLExpress. SQLExpress use is only supported for POC implementations of Right Click Tools.

- After the SQL database is created, set the database recovery model to simple to prevent storage issues.
- **Remote SQL Server**: The computer account of Recast Management Server will need db_owner permissions to create the database on the remote device. If the account running the Recast Management Server installer does not have permission to create a SQL database, the database administrator can pre-create the RecastManagementServer database and manually give the computer account db_owner permissions.
- Local SQL Server: The IIS AppPool\Recast Management Server account will need db_owner permissions to create the database on the local device. Alternatively, the database administrator can pre-create the database and give the IIS AppPool\Recast Management Server account db_owner permissions to the database. The IIS AppPool\Recast Management Server account db_owner permissions to the database. The IIS AppPool\Recast Management Server account db_owner permissions to the database. The IIS AppPool\Recast Management Server account db_owner permissions to the database. The IIS AppPool\Recast Management Server account db_owner permissions to the database. The IIS AppPool\Recast Management Server account will not exist until after the installation completes, so the permissions will need to be given after installation.

Import License

You can download and import your Recast licenses when installing Recast Management Server.

To download your Enterprise license:

- 1. On the Import License page, enter your Recast Portal email address and password.
- 2. Click **Download License**. The license information will appear in the right-hand column.

NOTE: If your server does not have internet access, click **Browse for License** to browse the filesystem for a license file that has been exported from the Recast Portal.

🏮 Recast Ma	anagement Server - Setup		×
Import	License		
Sign in with License. If yo Portal to exp	your Recast Software accoun ou do not have internet acces port a copy of your license an	t to download your s on this computer, d use the Add Licer	Recast RCT Enterprise visit the Recast Software use button to add it.
Email		Expiration	8/7/2022 12:00:00 AM
Password		Device Count	1500
	Download License		Browse for License
?		Previous	Next Cancel

Proxy

If the Recast Proxy is being installed on a server other than the Recast Management Server, install the Proxy separately after Recast Management Server installation.

NOTE: Proxy configuration is optional for Privileged Access where Active Directory or Entra ID objects are not used to target rules.

To configure the proxy during RMS installation:

On the installer's Proxy Configuration page, enter the service account Domain, Username, and Password and click

Test Credentials to verify service account details.

TIP: If you haven't already set up the required proxy permissions, remove any information from the text fields, select **Test ConfigMgr Connection** and the **Skip ConfigMgr Verification** checkbox, and click **Next**.

Recast Management Server - Setup
Proxy Configuration
A Recast Proxy is required for scheduling Kiosk Manager and Builder actions as well as Recast security scopes.
Domain demo.recastsoftware.com
User TestProxy
Password **********
Test Credentials Do Not Install Recast Proxy
User credentials valid
Previous Next Cancel

Domain

To configure your domain:

1. On the **Domain Configuration** page, enter the **Domain Name**.

2. Click **Test Domain Connection** to verify that the service account has access to read from your domain. The test should show **Success**.

Recast Management Server - Setup	×
Domain Configuration	
Enter and verify the information necessary to read from your Active Directory do	main.
Domain Name demo.recastsoftware.com	
Test Domain Connection	
Success	
Previous Next C	ancel

Configuration Manager

NOTE: Configuration Manager does not need to be set up for Privileged Access.

To set up your Configuration Manager for the proxy:

1. On the **Configuration Manager Configuration** page, enter the following information:

- Name of the site server that has your SMS Provider role
- Site Code
- Name of the SQL Server where your Configuration Manager SQL database is located
- SQL Database name

NOTE: You can skip the **Configuration Manager Configuration** page during Recast Management Server or Recast Proxy installation by removing any information from the text fields, selecting **Test ConfigMgr Connection** and the **Skip ConfigMgr Verification** checkbox, and clicking **Next.**

2. Click **Test ConfigMgr Connection** to check that the service account has access.

Recast Management Service	ver - Setup X
Configuration Manage	er Configuration
Enter and verify the information environment.	ation necessary to access your Configuration Manager
SMS Provider	CM1.corp.contoso.com
Site Code	СНQ
SQL Server	CM1.corp.contoso.com
SQL Database	ConfigMgr_CHQ
Test ConfigMgr C	onnection
Success	
0	Previous Next Cancel

MBAM

MBAM configuration is only required for a separate MBAM Server. If you are using the ConfigMgr-integrated BitLocker or AD, you can skip this section. MBAM also does not need to be configured for Privileged Access or Patching.

To configure MBAM:

- 1. Tap Click Here to Configure MBAM.
- 2. Add your **Administration URL** and **SQL Server** information.
- 3. Click **Test MBAM Connection** to verify that the service account has access to MBAM.

Recast Management Server	rer - Setup	×
MBAM Configuration		
Enter and verify the informa	tion necessary to access your MBAM environment.	
Administration URL		
SQL Server		
Compliance Status DB	MBAM Compliance Status	
Recovery & Hardware DB	MBAM Recovery and Hardware	
Test MBAM Conn	ection	
(?)	Previous 🜍Install C	ancel

Initiate RMS Installation

Once you have filled in all the necessary information, click **Install** at the bottom of the **MBAM Configuration** page.

When the installation is complete, open the Recast Management Server by navigating to https://ServerFQDN:Port in a web browser (Chrome, Edge, or Firefox are recommended).

When asked to sign in, enter the username and password for the account used to install the Recast Management Server.

Installation Log Location

To check the installation logs for Recast Management Server and Recast Proxy (when installed together), navigate to C:\Users\<user account running the install>\AppData\Local\Temp

NOTE: The log is named something like Recast_Management_Server_2022*****.log

Install Insights with Recast Management Server

Installing Insights with Recast Management Server and Recast Proxy allows you to collect the warranty data that populates device warranty reports.

Insights must be installed on your Configuration Manager server after you've installed Recast Management Server with Recast Proxy. See the Insights Implementation Workflow for an overview of deployment and configuration steps.

During installation, Insights completes the following tasks:

- Imports SQL Server Reporting Services (SSRS) reports, Power BI Report Server (PBRS) report sets, and Power BI desktop report sets
- Imports client settings to extend the hardware inventory
- Creates a Configuration Manager application for Recast Agent
- Via Configuration Manager methods (API), creates warranty details to allow the warranty date to be stored in the ConfigMgr database

Prerequisites

- For a remote SSRS/PBRS reporting point, the Configuration Manager Primary Site Server's computer account requires SysAdmin permissions on each remote database during the installation. These permissions can be removed after Insights is installed.
- We recommend setting a static port on the remote SSRS/PBRS servers. If there are multiple reporting points, configure them all to use the same port, as only a single port can be defined during installation.

Run the Insights Installer

To install Insights:

- 1. Download and run the Insights installer.
- 2. Under Recast Management Server Configuration, enter the Server Name and Server Port.
- 3. Click Test Connection. When connected, click Next.
- 4. Make sure Recast Management Server is not installed remains unchecked.
- 5. Click Install.

Endpoint Insights	-		×
Recast Management Server Configuration			
Server Name om 1. corp. cortoso. com Server Port 444 Test Connection Recast Management Server is not installed Successfully connected to RMS. Click Install to continue			
	Install	Cance	1

6. Enable **Allow Telemetry data** to allow the collection of the operating system version, the ConfigMgr version, and the SQL Server version during Insights Setup (optional). Click **Next**.

🚯 Endpoint Insights	-		×
Diagnostic and Telemetry Data			
Recast's Endpoint Insights product collects usage data from the System	to help in	prove	
the software service and its user experience. This analytics information in	cludes the	•	
operation system version, the Configuration Manager version, and the SO	QL Serve	r	
version. You may opt-out from sharing the analytics information by un-c	hecking t	he box	
below.			
Allow Telemetry data	Next	Cancel	

NOTE: Once Insights Setup is complete, Insights does not continue to collect usage data.

7. On the **Import License** page, enter your Recast Portal credentials, or browse to a previously downloaded license file.

NOTE: The **Import License** page will not appear if licensing was configured during Recast Management Server installation.

8. Click Install.

Import	t License			
have internet acc the Add License	ur Recast Software account to down cess on this computer, visit the Rec button to add it.	cast Software Portal to expo	t a copy of your licens	e and use
have internet acc the Add License	rr Recast Software account to down cess on this computer, visit the Re- e button to add it. License is Valid. Click Inst	all to continue	rt a copy of your licens	e and use
have internet acc the Add License Email	ar Recast Software account to down cess on this computer, visit the Re- button to add it. License is Valid. Click Inst	all to continue Expiration:	6/12/2023 12:00	e and use
Email Password	r Recast Software account to down cess on this computer, visit the Rev button to add it. License is Valid. Click Inst	and your recast Empoint cast Software Portal to expo all to continue Expiration: Device Count:	6/12/2023 12:00 500	e and us

The Insights System Checks will run and report any issues with installing Insights in your environment.

🚯 Endpoint Insights			-		×
System Checks:					
	Site Server Verification				
•	Configuration Manager Version	Check			
	MIF Size Verification				
Note: Review the	log file for further details on the system	checks.			
<u>C.\</u>	Jsers\LabAdmin\AppData\Local\Temp\E	indpoint Insights.lo	g		
		Back	Next	Cancel	

If MIF Size displays as an issue, you can increase the MIF size. To learn more, see Change the Maximum File Size of a MIF.

9. On the options page, you can set the following Insight options.

- Select **Configure hardware inventory to import ER settings** to upgrade from Enhansoft Reporting to Recast Insights.
- Select **Create Application** to automatically create the Recast Agent application in Configuration Manager.
- Select Create Reports to create the reports that display data collected by Insights.
- De-select **Do not create RBA reports** only if your organization does not require role-based access on the Insights reports.
- Enter a **SSRS Reader Group** to give an Active Directory group access to read SSRS reports.
 - To leave the SSRS Reader Group field blank, click **No** when prompted.
 - You can add the SSRS Reader Group later by re-running the El setup.

10. Verify that the **Reporting Services Connection String**, **Report Folder** and **SQL Port** are correct for your environment. Click **Next**.

🗞 Endpoint Insights		-		×
Reporting Services Connection String:				
✓ http://cm1/ReportServer				
Report Folder:				
Endpoint Insights				
SQL Port: 1433				
Ba	ick	Next	Cancel	

11. De-select any report categories to exclude from this installation. Click **Next**.

Endpoint Insights		-		×
Please select the SSRS reports you wish to install:				~
I⊽ Select All	Back	Next	ca	ancel

When setup completes, configure Asset Intelligence in your Configuration Manager to ensure that all data is returned to Insights.

NOTE: Once Recast Management Server and Insights are installed, you may be tempted to kick off an Insights warranty scan on the RMS **Warranty** page. Because Insights relies on Recast Agent and Configuration Manager hardware inventory, you'll need to wait for Recast Agent software to be deployed to your end clients and for the next hardware inventory cycle to return inventory. The default hardware inventory setting within Configuration Manager is 7 days. It's recommended to reduce that to daily. For additional information, see ConfigMgr Inventory Cycle Recommendations.

Install Recast Agent for Insights

Installing Right Click Tools Insights creates a Configuration Manager application for Recast Agent. Using a Recast Agent with Insights creates additional hardware inventory classes on each machine. The extra classes populate related Insights reports.

That same Recast Agent can be used with other Recast Software applications and add-ons, such as Right Click Tools and Privileged Access. To learn more, see the Recast Agent Overview.

NOTES:

- If deploying 5000+ Recast Agents, follow the 503.2 IIS Error instructions before proceeding.
- If your Recast Management Server is using a self-signed certificate, you must first import the certificate into the Trusted Root Certificate Authorities Store on all devices that will have Agents.

To install the Recast Agent application for Insights:

1. Open the Configuration Manager console.

2. Navigate to **Software Library > Application Management > Applications**. A **RecastAgent** application will be created.

3. Deploy the Agent as you would any other application.

ftware Library	< Applica	tions 1 items					
🗇 Overview	Search	Search					
 Application Management 	lcon	Name	A	Deployment Types	Deployments	Status	
Applications		RecastAgent-4.8.2110.52	01	1	0	Active	
Expression and the second seco							
🛐 Packages							
Application Requests							
[]‡] Global Conditions							
🟓 App-V Virtual Environments							
Nindows Sideloading Keys							
App Configuration Policies							
Contract Updates							
Coperating Systems							
Windows 10 Servicing							
Desktop Analytics Servicing							
📫 Microsoft Edge Management							
Office 365 Client Management							
Scripts							
Assets and Compliance							
Software Library	Reca	stAgent-4.8.2110.5201					

NOTE: Recast Agents will take time to deploy and report their data back to the ConfigMgr database. By default, the hardware inventory cycle can take **up to 7 days**. Shortening the time to install and increasing the frequency of reporting back to ConfigMgr can shorten this time significantly.

Silent Install for Agent without Recast Management Server

If you are not connecting Recast Agents to Recast Management Server, use the **LICENSEPATH=** parameter to specify the license file to use for your Agent installation. This option will install the Full Agent on a device.

Example:

msiexec.exe /i "Recast Agent.msi" /qn LICENSEPATH=".\License\<their.license>"

NOTE: The license path can be a relative or full path.

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