

Task 3: Configure Recast Management Server for Right Click Tools

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After installing your Recast Management Server, you'll need to [assign roles to users](#) and configure a [Recast Proxy](#) to manage tasks.

Assign Roles to Users

Add an Active Directory User or User Group in RMS

To add an AD user or user group:

1. In your Recast Management Server, navigate to **Administration > Permissions**.
2. In the Recast Users section, click **Add User** or **Add Group**.

Recast Users				
				Add User Add Group
Name	Identifier	Is Group	Actions	
Administrators	S-1-5-21-60014008-5001-1000-1247112508-1025	True		
Gwen Stacy	S-1-5-21-60014008-5001-1000-1247112508-1040	False		

3. In the window that opens, search for your AD name or AD user group and click the **Add** button.

NOTE: By default, the search is limited to the users or groups in the same domain as your Recast Management Server.



Use a wildcard (*) to facilitate your search

Wildcard examples:

John Connor returns strings that match exactly

John C* returns strings beginning with 'John C', such as **John Connor**, **John Connors**, and **John Cranston**

***Connor** returns strings ending with 'Connor', such as **John Connor** and **Carol O'Connor**

Support returns strings that include 'Support' plus whatever is on the left and right, such as **Customer Support Team** and **Enterprise Support Group**

Assign a User or Group a Role

Each user or user group must be assigned at least one role.

To assign a user a role:

1. On the **Permissions** page, click the Edit icon to the right of the user or group.

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Recast Users				
			Add User	Add Group
Name	Identifier	Is Group	Actions	
Administrators	3-1-3-21-400814400-000210010-1247321136-1153	True		
Gwen Stacy	3-1-3-21-400814400-000210010-1247321136-1153	False		

2. In the **Role Assignments** window that opens, under **Roles**, select a role to assign to the user/group.

To learn about the individual permissions granted by a role, see [View or Edit User Role Permissions](#).

3. Under **Assigned Roles**, enable **Limit this user to specific objects** and select a **Service Connection** to add a limiting rule that restricts user permissions to a set of devices (optional). To learn more, see [Limiting Rules](#).

Assigned Roles

LAPS

☒ Limit this user to specific objects:
Service Connection:
Choose a service connection

Save

4. Click **Save**.

NOTE: Beginning with [Recast Software Version 5.9.2502.2105](#), you no longer have to set a **Refresh Interval** to repopulate your limiting rules (formerly known as scopes). The [scheduled Discovery Sync](#) will keep your service connection data up to date.

NOTE: For Patching, the user account running the Recast Proxy requires the **TaskScheduler > StartTaskByName** permission in RMS prior to running the initial setup. You can grant the permission using the default **Administrator** role, or by creating a custom role.

Configure a Recast Proxy to Manage Tasks

A Recast Proxy can be used to manage a number of tasks within Right Click Tools, such as allowing access to web dashboards, scheduling Recast Builder actions and Kiosk Manager actions. You'll also require a Recast Proxy to collect warranty information with Insights.

To set up a proxy to manage tasks, you must authorize the proxy in the Recast Management Server (if necessary), create a Recast Proxy route, order the routes to match your priorities, and add service connections.

Authorize a Recast Proxy

By default, the Recast Management Server automatically authorizes any proxy installed in the same domain as the Recast Management Server. Proxies installed in other domains must be [approved manually](#), unless you've edited the default setting to [approve all proxies automatically](#).

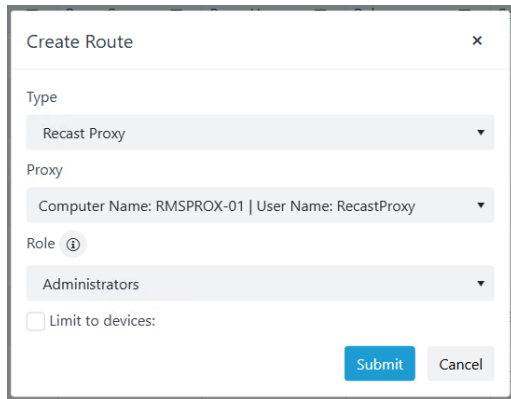
Create a Recast Proxy Route

To create a Recast Proxy route:

1. On the **Routes** page in your Recast Management Server, click **Create**.
2. In the **Create Route** window, set the route **Type** to 'Recast Proxy'.

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3. Select your proxy computer name with service account from the drop-down.
4. Set the **Role** to 'Administrators'.
5. Click **Submit**.



The 'Create Route' dialog box contains the following fields and controls:

- Type:** A dropdown menu with 'Recast Proxy' selected.
- Proxy:** A dropdown menu with 'Computer Name: RMSPROX-01 | User Name: RecastProxy' selected.
- Role:** A dropdown menu with 'Administrators' selected. An information icon (i) is next to the label.
- Limit to devices:** An unchecked checkbox.
- Buttons:** 'Submit' (blue) and 'Cancel' (grey) buttons at the bottom right.

Reorder Routes

By default, new routes appear at the bottom of the table on the **Routes** page.

- To make actions run using a Recast Proxy route that is lower in the list, you must move that route above the Console Extension route in the table, as the first route to be successfully matched will be used.
- If you only need your proxy to populate [limiting rules](#), and you don't want to run any actions using that proxy, you can leave your proxy route at the bottom of the table.

Changes to the route order are saved automatically.

Add Service Connections

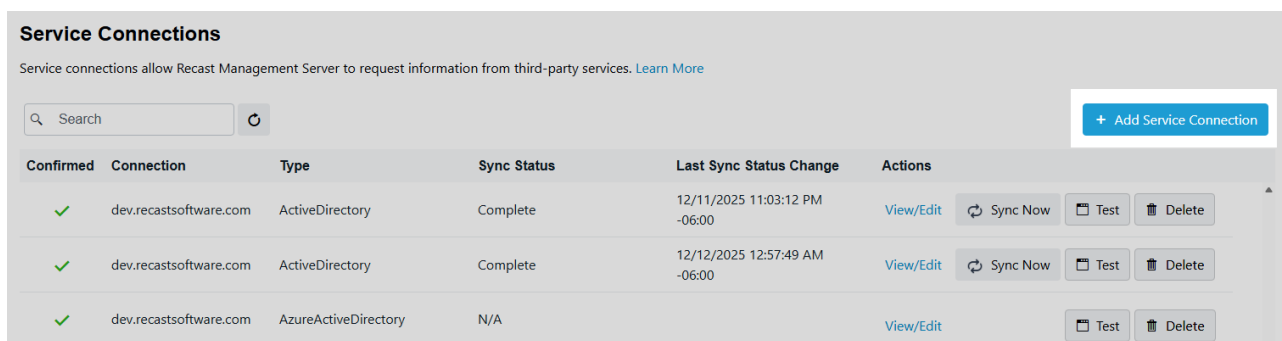
Add service connections in your Recast Management Server so that the Recast Proxy can query the third-party services.

Service Connection Types:

- ActiveDirectory: Required for Right Click Tools [web dashboards](#)
- AzureActiveDirectory (Entra ID): Required for Privileged Access and the [Entra ID BitLocker Recovery Keys tool](#)
- MEMCM (Microsoft Endpoint Manager Configuration Manager): Required for Patching and Right Click Tools [web dashboards](#)
- MBAM (Microsoft BitLocker Administration and Monitoring): Optional for [BitLocker web dashboard](#)

To add a service connection:

1. On the RMS **Service Connections** page, click **Add Service Connection**.



The 'Service Connections' page includes a search bar, a refresh button, and an '+ Add Service Connection' button. The table below lists existing connections:

Confirmed	Connection	Type	Sync Status	Last Sync Status Change	Actions
✓	dev.recastsoftware.com	ActiveDirectory	Complete	12/11/2025 11:03:12 PM -06:00	View/Edit Sync Now Test Delete
✓	dev.recastsoftware.com	ActiveDirectory	Complete	12/12/2025 12:57:49 AM -06:00	View/Edit Sync Now Test Delete
✓	dev.recastsoftware.com	AzureActiveDirectory	N/A		View/Edit Test Delete

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2. In the **Create New Connection** window, select a connection **Type**: ActiveDirectory, MEMCM, MBAM, AzureActiveDirectory (Entra ID), SMTP.

3. Name the new connection and add details associated with the connection type.

Service Connection Type	Required Details
ActiveDirectory	Domain
MEMCM (Configuration Manager)	SMS Provider, Site Code, Database Server, Database
MBAM	Admin URI, Database Server, Compliance Status Database, Recovery and Hardware Database
AzureActiveDirectory (Entra ID)	Tenant ID, Client ID, Client Secret
CopilotGateway	Azure Tenant of Copilot Users, Reconnect Interval (default is 60 seconds)
SMTP	'Require SMTP Server Authentication' enabled (default) If not using Recast Proxy account: SMTP Server Username, SMTP Server Password

4. Select a **Proxy Computer Name** and **Proxy User Name** from the drop-down lists, if required.

5. Click the **Confirmed** check box to ensure that the service connection is available for use.

6. Click **Submit**.

TIP: You can test the Recast Management Server's connection to third-party services by clicking the **Test** button on the **Service Connections** page.
