DaaS 3.0

## Administrator Quick Reference Guide

Contents

Getting Started

This guide overviews the general components of your DaaS environment. For the complete administrator guide that provides in-depth documentation for all setup, configuration, and features of DaaS 3.0 see the Additional Help section at the bottom of this document.

Main Menu

The Main Menu contains all the options to configure and monitor your environment. The main menu is divided into the following sections:

Dashboard- This tile provides the at-a glance overview of the desktop Connections, the Connection State and the Capacity Allocation of your deployed desktops.
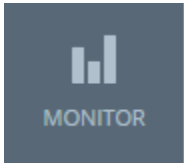
Monitor- This tile provides the dashboard view of the environment, an activity view that displays the last 24 or 48 hours, the previous week, and the previous 30 days of activity for Admin and Users alike.
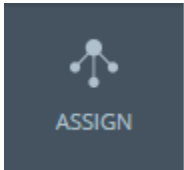
Assign- This tile is where you assign or place your new desktops into users and groups. For instance, a new helpdesk user can be placed into a helpdesk group within this section.
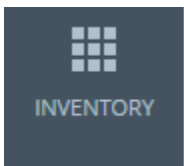
Inventory- This tile lists the Applications and Images available for your desktops. Your Preloaded Evolve IP desktop image will appear in this section.
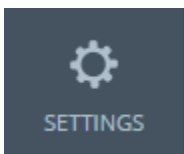
Settings- This tile provides the General Settings, Active Directory, Roles and Permissions, Locations, Getting Started, Utility VMs, and 2 Factor Authentication Settings for your organization.

There is a green play button located at the top right of the Settings page (see image below). The Getting Started tool provides an overview of the DaaS setup processes that you will need to complete and allows you to visualize your setup progress. Getting Started can also be reached from within the Settings tile.
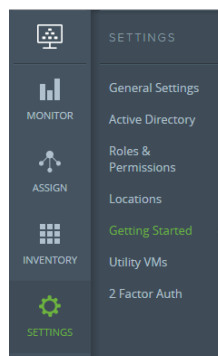
Active Directory Preparation

Authentication in the Evolve IP DaaS product is handled via Microsoft Active Directory. There are two accounts that need to be configured prior to the DaaS install. First, an LDAP bind account / service account is required for read only access to the AD. Second, a domain join account should be setup to automatically join new DaaS desktops to your corporate domain. Questions about this process can be discussed during the DaaS Implementation process. Go to Settings→Active Directory to access this configuration screen.

When you click the Register button under the Active Directory option, the Register Active Directory screen (shown below) will pop up.
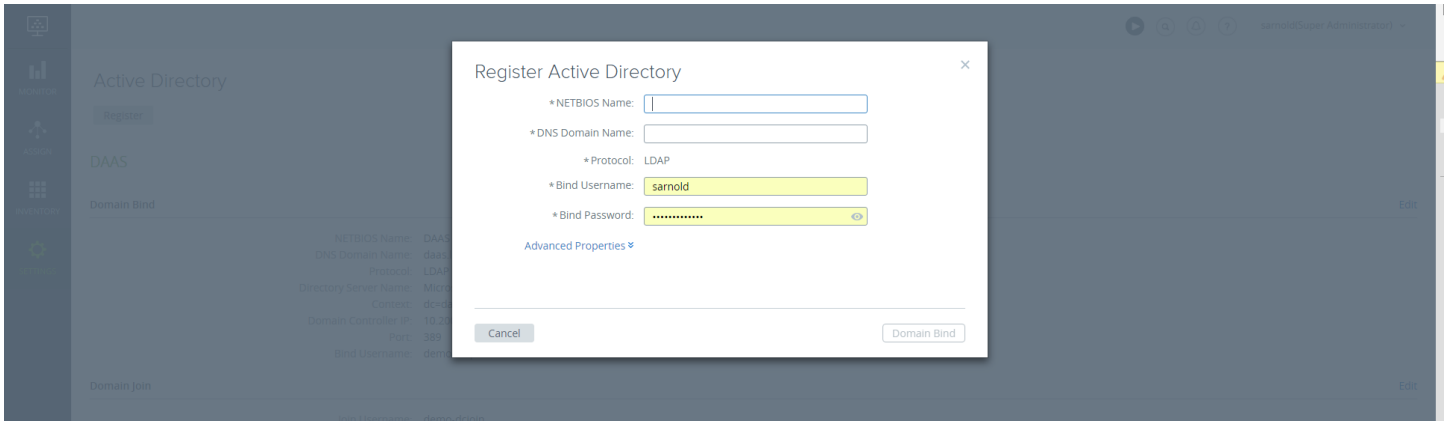
Gather the information below to register an existing domain. Make sure you have created the needed accounts & groups before registering the domain.

Field	Example	Notes
Name	DAAS	NETBIOS name of the domain to be registered
Domain Suffix	daas.local.com	
Protocol	LDAP	LDAP or LDAPS
Port	389	Typically 389 or 636. This must be opened in your firewall.
Domain Controller IPs	10.1.1.1	This is optional
Context	dc=daas,dc=local,dc=com	
Domain Bind Account	CN=daasldap,CN=Users	Used for LDAP bind/query. This account can be read only.
Domain Bind Account Password	********	
Joining Account Name	user1	This account needs to have privileges to do unlimited domain joins.
Joining Account Password	********	
Super Admin Groups	CN=DaaSAdmins, OU=groups	This group has access to the admin portal. Must be at least one user setup here to access the admin portal.
User Groups	CN=DaaSUsers,OU=groups	This group has access to the desktop portal.

Domain Registration

1. Refer to your Evolve IP Account Access QRG for your specific log-in credentials. Ask your project manager if you need this information.
2. Open browser, load the provided URL for the DaaS Admin Portal / Enterprise Center and enter your log-in credentials. A dialog box with the Terms of Service will pop up, click **I agree** and Submit to accept. *It will only come up the first time and only if your system admin configured a Terms of Service URL*.
3. The Domain Bind section is the first field under the Active Directory view. Enter the needed information. Click **Domain Bind.** If you need to access this information in the future, go to Settings -> Active Directory.
4. The Domain Join section is directly underneath Domain Bind. Enter required information and Click **Save.** A message will display confirming that your domain registration was successful. After saving, all future access will be handled via the DaaS admin portal login screen.

Configuration

The Settings tile provides access to General Settings. Active Directory, Roles & Permissions, Locations, Getting Started, Utility VMs and 2 Factor Authentication.

Networks, the DaaS domain configuration, Session Timeout, User Portal Configurations, quota information, admin roles and multi-factor authentication. The general tab contains settings to control timeouts, all the defaults can be accepted on this page. Additional definitions of the various configuration areas can be found to the right, the domains page is the most frequently used function as it controls the groups that are seen by the DaaS system.

General Settings

Network
This section provides a list of your networks that are being used.

Default Domain
This section is where you register your domain(s) and edit domain information.

Session Timeout
Lists the timeout settings for the Client and the User Portal.

User Portal Configuration
This section is where you list your Help Desk email address, Trouble Ticket System URL, and the External Style Sheet URL.

HTML Access
If you use Blast, this section controls if you delete credentials of the broker session after a HTML connection is closed.

Contact Info
This section is where you list the Admin and Technical contacts for your organization.
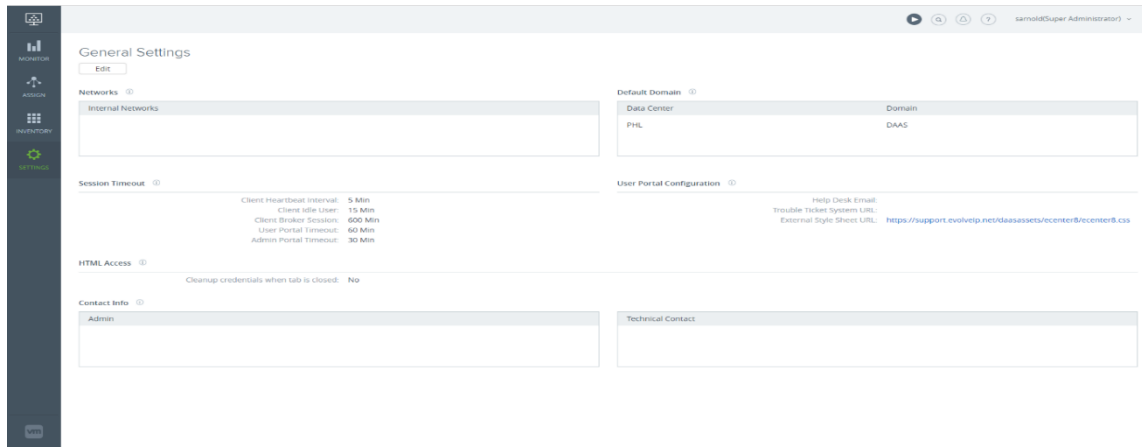
Using and Updating Images

To create desktop pools, you first create an image and then deploy the image into the pool. Images help define different desktop configurations. Two images are included with every account and one image will be preloaded for you during installation. If you need additional images beyond the two that are included and the one that is initially deployed for you, please contact your CTA.

Begin by clicking on Inventory then Images.
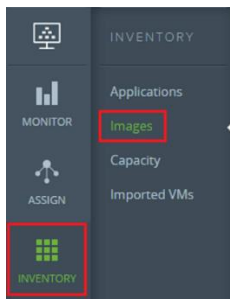
Step 1 – You will already have an image in your inventory that you will use to customize the desktop. Under status you will see Offline or Published.


Offline means that the image is powered on, not available to provision desktops, and is able to be customized as your desktop image by logging into it.

Published means the image is powered off, sealed, and ready to be used to provision desktops.

While the image is in a Published status, before you convert it to Offline status you have the option to take a backup. To do this select the Image open ellipses and select backup now.
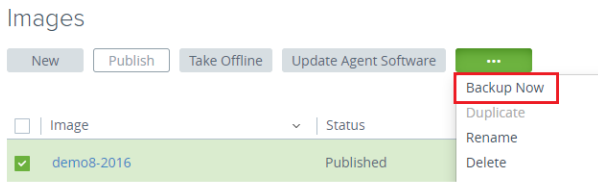

This will generate a vCenter snapshot of the image in its present state that you can use as your original image or rollback to in the event your image stops functioning as intended.
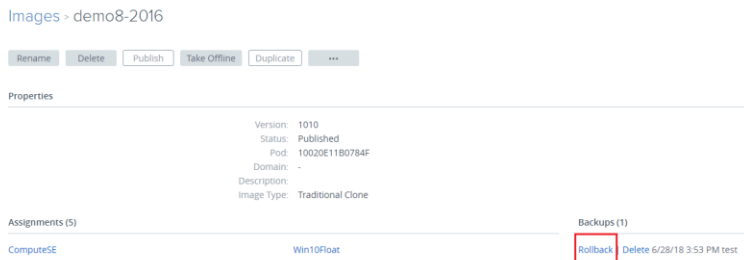
Step 2 – If the status is Offline, click on the image name. When the image is accessible to you, you will see an IP address listed under the Properties section of the Image. Once you see the IP address listed, as long as you are in a location that has connectivity to your VDC in Evolve IP's datacenter, you can select the IP address which will download an RDP session. Note: When you power up the image to make your customizations it can take up to 15 minutes before the IP address is presented. This is normal and a function of the sysprep process.
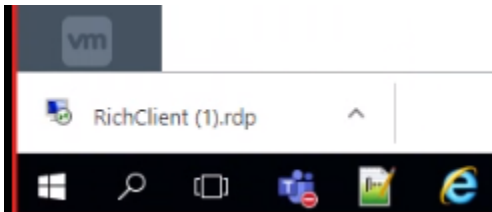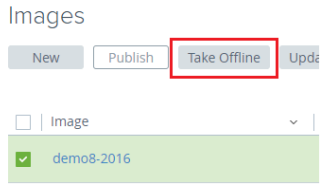

Open the RDP session download and Click the connect button.
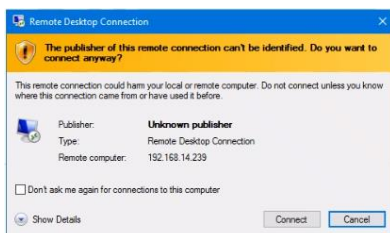
 It will ask for username and PW. Use the credentials provide to you by Evolve IP to access the desktop.

Step 2 (cont'd) - If the status is Published click "Take Offline " and then click OK.

Images

| New | Publish | Take Offline | Upda |

| | Image | ∨ |
| ☑ | demo8-2016 |

Then follow steps above to download the RDP session, open it and access the desktop.

You will connect to a Windows 10 desktop. You can now install applications and configure the desktop as needed.

Step 3 – Once completed you can now publish your image. To publish the image from the images page, select the image and select publish.

Images > demo8-2016

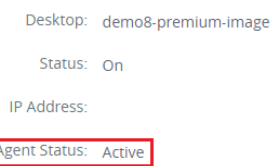| Rename | Delete | Publish |
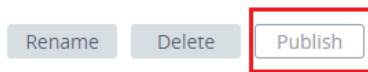
A new window will open. Check to ensure that the Agent Status is active. If it is active you may continue.   If the agent status is not active, open a support ticket with Evolve IP for assistance.
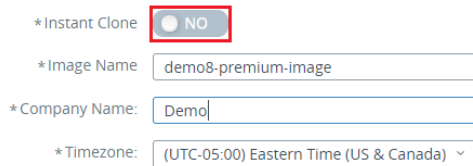
Under OS Properties:

Instance clone must be set to "No".

Image name will be greyed out

Leave the company name and time zone fields as is.

Desktop: demo8-premium-image
Status: On
IP Address:
Agent Status: Active

OS Properties

*Instant Clone   NO
*Image Name   demo8-premium-image
*Company Name: Demo
*Timezone: (UTC-05:00) Eastern Time (US & Canada) ∨

Under Admin credentials for the desktop:

Use the credentials provided by Evolve IP to populate the Username and Password fields. You need to enter the PW twice, once in the Password field and again the Verify Password field. Then click Publish.
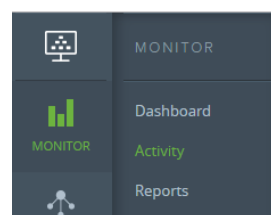
Admin credentials for the desktop:

* Username:

* Password:

* Verify Password:

Cancel   Publish

That will kick off the Publish process.

MONITOR

Dashboard

MONITOR   Activity

Reports

You can follow the publishing process progress under Monitor and Activity.

Once the process is completed, you will see you image back in the image inventory with a status of published.

**Desktop Customization Exceptions to be aware of:**

1. Any desktop icon that you want added for all users need to be placed in the C:\Users\Public\Desktop folder.

2. Any changes to the taskbar will not get applied to the other seats. *
3. Any changes to the Start menu will not get applied to the other seats. *
* End users will need to perform these steps on their own once their seat is deployed.

4. Do not remove any default Windows store applications. This will break the desktop. Upon request Evolve IP will run a command that will remove all of the store applications for you.

5. If the Office 365 suite needs to be added. Evolve IP will handle this step because shared activation is required by Microsoft.

Deploying Desktops

Begin by selecting the 'Assign' tile. Next click 'New' under Assignments.
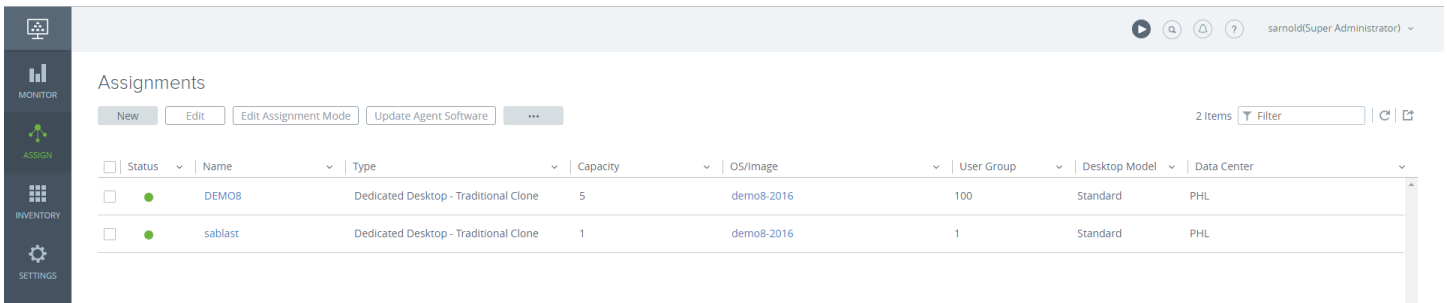
The New Assignment screen will appear. This allows you to deploy desktops or applications, choose the desktop option.
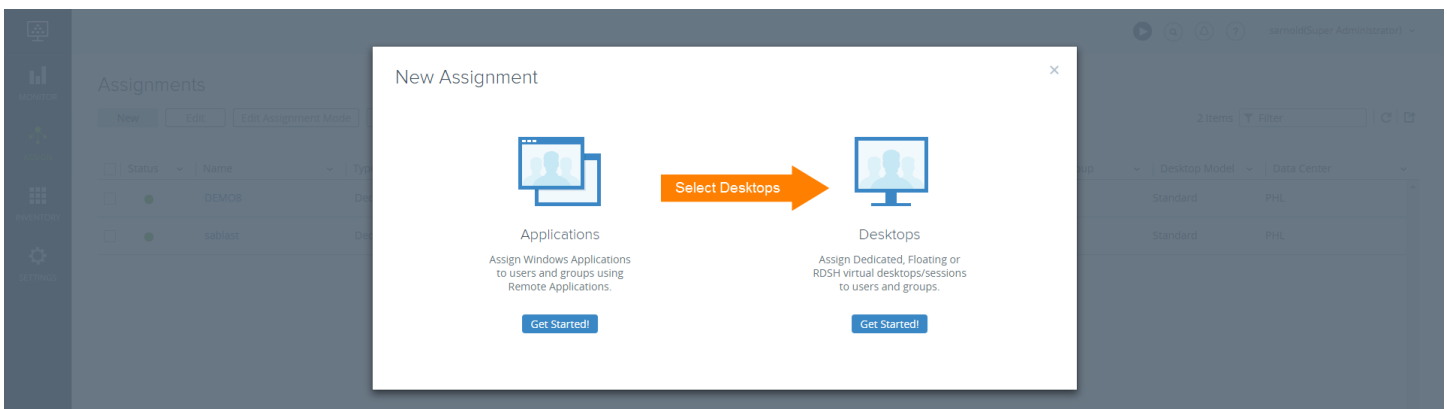
You will be taken to the Assign Desktops screen. There you will define both fixed and flexible attrubutes for your desktop. Fixed attributes include the type (standard, premium, ultimate) and domain. Flexible attributes include the image type, name, connection protocol, client type and capacity.

Begin by selecting the desktop type. Unless otherwise instructed, select Dedicated.

Input the details for your organization's domain and leave the green join domain toggle set to Yes.

Under flexible attributes, the Assignment Name is the group or pool that you want this desktop to join. You can create a new assignment or add the desktop to an existing assignment.

For PCoIP desktops, change the default protocol to 'PCOIP' and change the Preferred Client Type to 'Horizon Client'.   Once you populate the capacity, click 'Next' and you will be taken to the Users step.

Adding a User to the Desktop

In Active Directory search and populate the name of the user that you want to assign to the desktop.
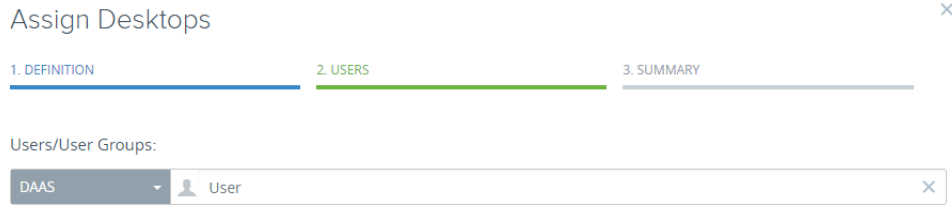
If you cannot locate the user try the Search Active Directory which will list your organizations entire AD list.
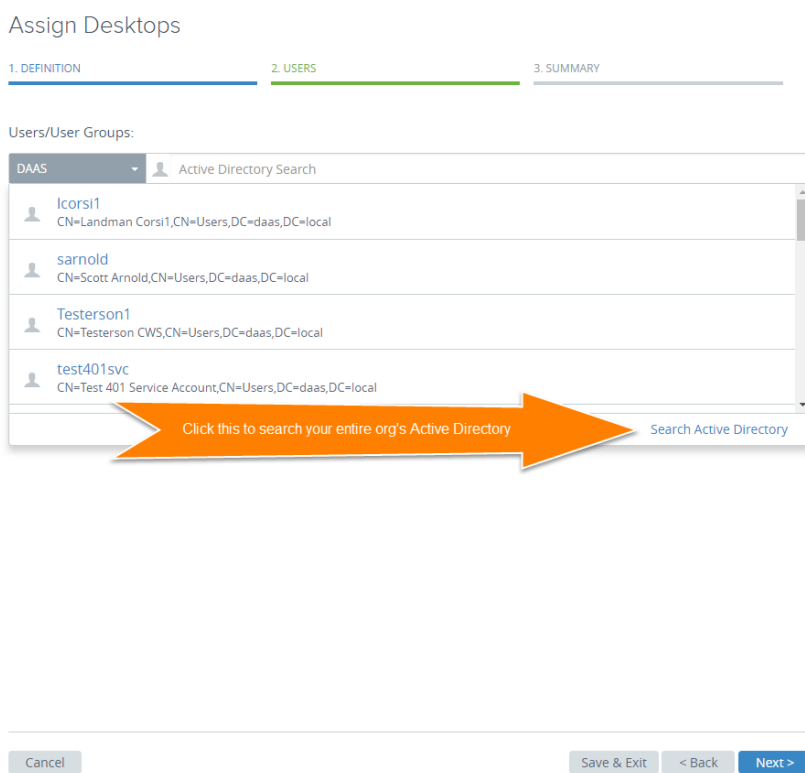
Select the user that you want to assign by clicking on their name. Click 'Next' and you will be taken to the Summary Screen.

Assign Desktops

×

1. DEFINITION **2. USERS** **3. SUMMARY**

Definition

Assignment Name:	Support
Default Protocol:	PCOIP
Preferred Client Type:	Horizon Client
Type:	Dedicated
Image Type	Traditional Clone
Data Center:	PHL
Desktop Model:	Basic
Pod:	10020E11B0784F
Domain:	DAAS
Join Domain:	Yes
Capacity:	1

Advanced Properties ⌄

Image

Image:	demo8-2016

Users

👤 DAAS / sarnold

Cancel   < Back   Submit
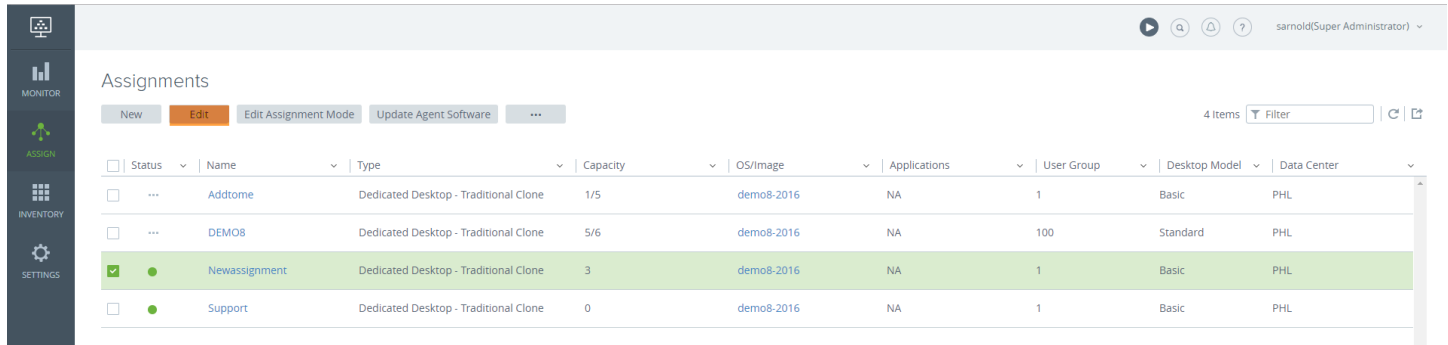
Click 'Submit' and your desktop will begin to build within the assignment.

Editing Desktop Assignments

An assignment is a group of desktops based on the same image pattern with same specs and configurations. Also, each DaaS assignment is mapped back to an Active Directory group so administrators can easily manage users and security policies.
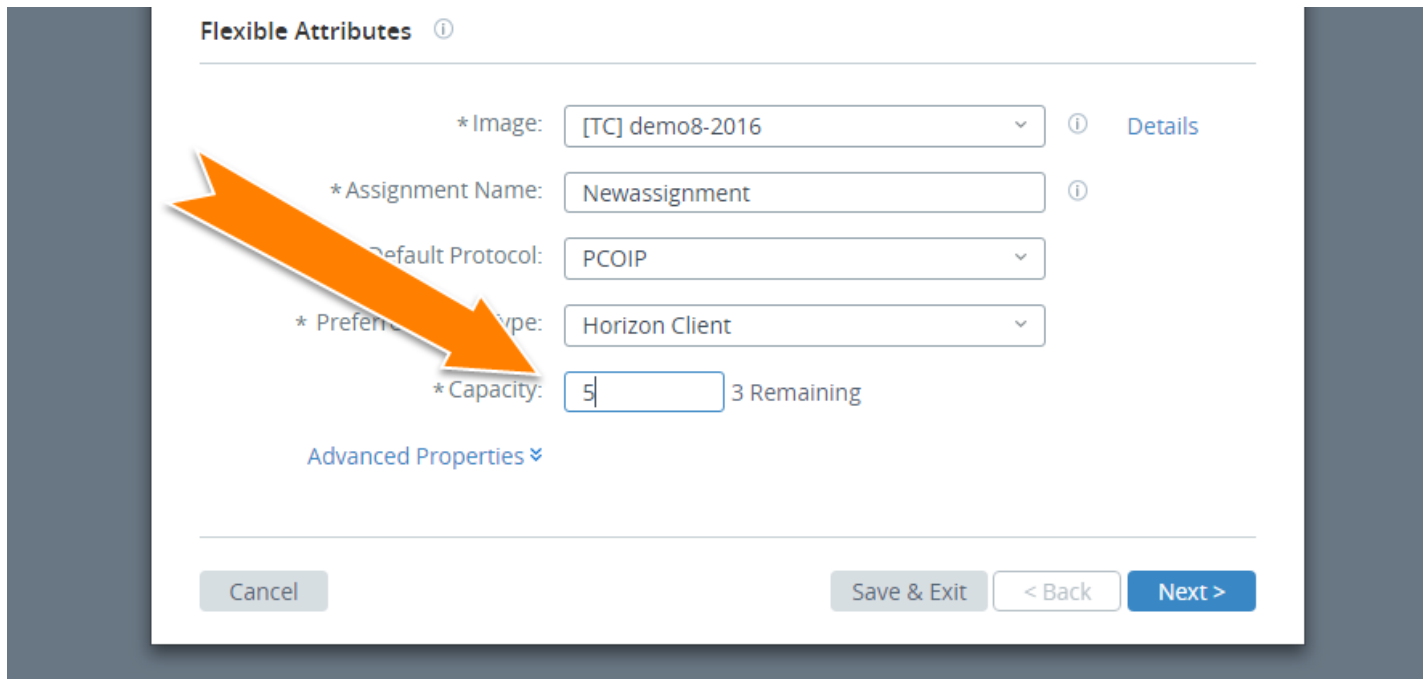
Editing a Desktop Assignment to add more desktops

1. On the Assignments page, select the assignment to edit and click 'Edit'.

2. To change the size, enter desired number of desktops.

3. Click 'Save and Exit'.

4. Your assignment will expand.

5. Assign a user to the new desktop following the same procedure described earlier in the guide.

Creating a New Assignment (Pool) of Desktops

1. Click on the Assign tile. Directly under Assignments click the 'New' button.
2. You will be taken to the Assign Desktops screen. Select the desktop type (dedicated), model, and select your domain. Select the image for the desktop that you want to deploy. The Assignment Name field is where you will give your pool a name. It is a good idea to have the name reflect the type of users in the assignment, for instance: Light User, Heavy User, Corporate, Sales, and Accounting.


3. Set the capacity of your assignment, change the default protocol to 'PCOIP' and change the Preferred Client Type to 'Horizon Client'. Once you populate the capacity, click 'Next' and you will be taken to the add users step. Follow the same process to add users described earlier in the guide and this will complete the process of configuring your assignment. Click "Submit" and your assignment will be deployed and visible within the Assign tile.

Deleting Desktops, Assignments and Images

1. Select the Assignment that you want to delete. Note that the assignment must not contain any desktops or it will not be able to be deleted until the desktops are deleted from the assignment. You need to unassigned or remove the user from the desktop before you can delete the desktop.
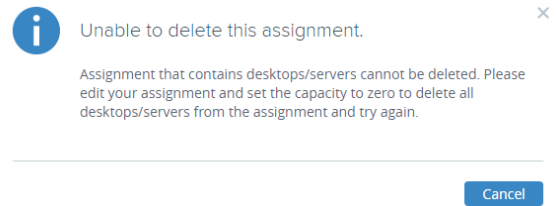
2. Select the checkbox by the desktop name. Once you check the box click on the grey button containing three dots and select Unassign. This will remove the user from the desktop. Once there is no user associated with the desktop, you can delete the desktop. When there are no desktops in the assignment, you can delete the assignment.
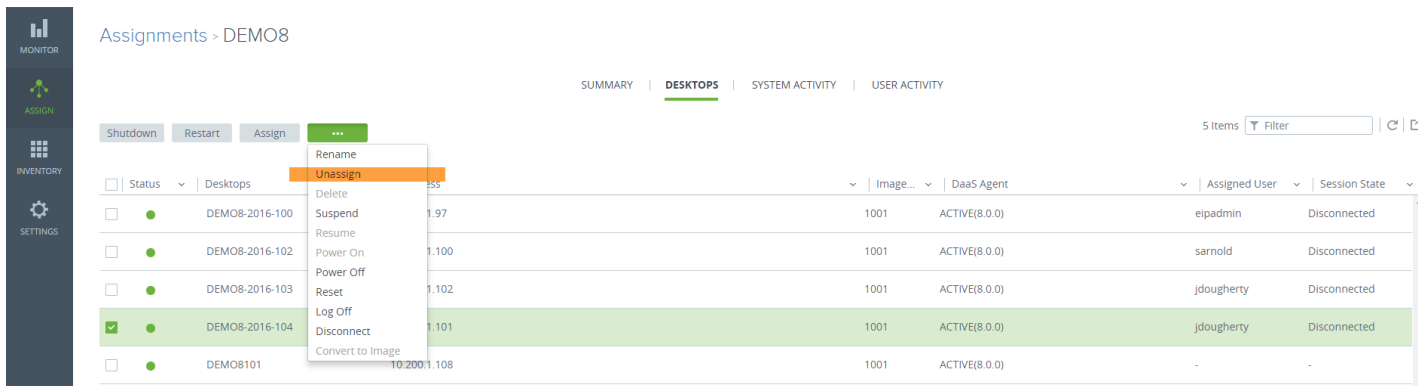
3. Select the checkbox by the assignment name. Once you check the box click on the grey button containing three dots and select Unassign.
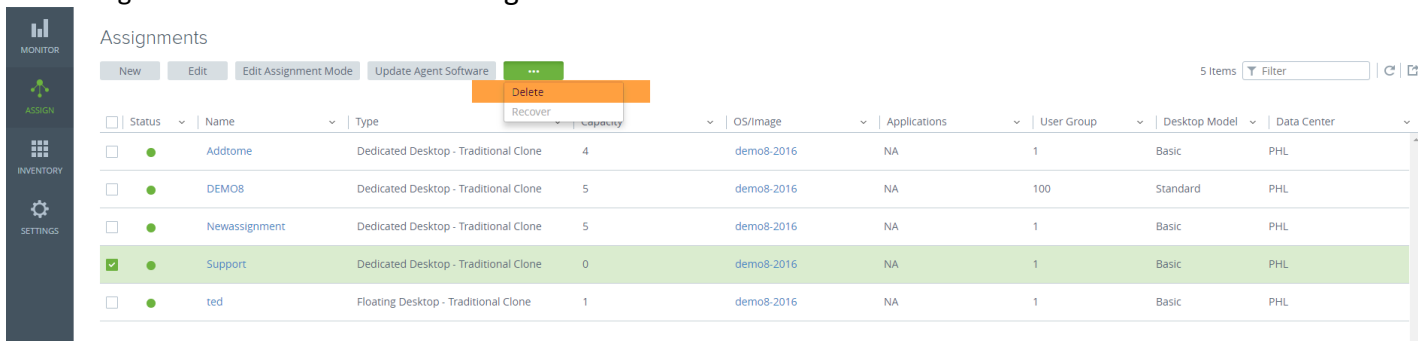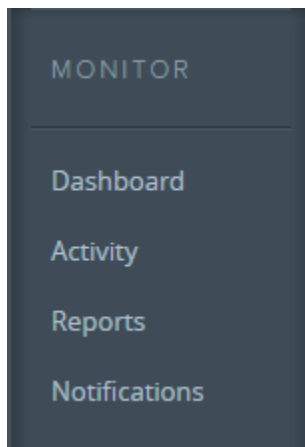
4. This will delete the assignment qnt. Click 'Delete'
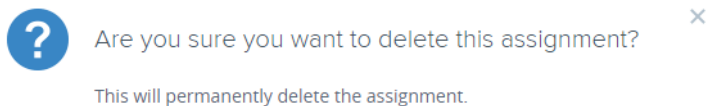
Monitoring

Use the Monitor icon to access desktop information, administrator and user activity, view reports detailing user and desktop mapping, and view notifications.

There are four selections available from the Monitor tile.

MONITOR

Dashboard

Activity

Reports

Notifications

- Dashboard Page shows statistical information about connections and desktop capacity allocation.

- Activity Page shows data regarding current and past events in the system.

- Reports Page shows mapping data for users and desktops in the system.

- Notifications Page shows information regarding system notifications.

View system and user activity for desktop and application assignments.

1. Click the Assign icon.
2. Click the name of an assignment of the list. The assignments detail page displays.
3. Click System Activity or User Activity at the top of the page.

The activity tab displays, showing a list of recent activity for the assignment. You can select from the Shown drop-down menu to adjust the time frame for the list, or filter, refresh, and export the list using the controls on the top right of the page.