

KACE Unified Endpoint Manager

Getting Started Guide



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Quest Software Inc.

Attn: LEGAL Dept

4 Polaris Way

Aliso Viejo, CA 92656

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Legend

 **CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.**

 **IMPORTANT, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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About Unified Endpoint Management

Modern device management is the practice of combining cloud-based enrollment, management and security features to accomplish systems management goals, empowering users to be secure and productive on any device, anywhere – regardless of their location.

If you use KACE Cloud Mobile Device Manager together with the KACE Systems Management Appliance, you can take advantage of the new Modern Management approach for Windows and Mac computers. KACE Unified Endpoint Manager enables Modern Management of your Windows and Mac laptops – similar to how you manage iOS and Android mobile devices. This product provides license reconciliation to avoid double counting co-managed nodes for Windows and Mac devices and enables your KACE Systems Management Appliance to correctly interpret inventory imported from KACE Cloud Mobile Device Manager.

Device management types

Your organization typically uses one or more of the following ways of device management:

- **Modern Management:** Cloud- and profile-based management of computers, similar to mobile device management.
- **Traditional Systems Management:** Premise-based, traditional, deep, granular management for computers and servers, including discovery, scripting, software installation, patching, software asset management, vulnerability scanning, IoT devices (printers, projector, SNMP-enabled devices). Agent or agentless monitoring.
- **IoT:** Two types of device management:
 - Agentless SNMP-enabled devices like printers, projectors, network devices
 - Agent-managed POS, signage, SNMP enabled devices and Chromebooks

Device license types

Your managed devices utilize one of the following license types when it comes to endpoint management software:

Device type	Mobile	Modern	Traditional	IoT
Mobile device	X	X		
Server			X	
Windows device		X	X	
Linux device			X	X*
Desktop		X	X	

Device type	Mobile	Modern	Traditional	IoT
Laptop		X	X	
Chromebook				X
IoT agentless inventory (e.g., printers, projectors)				X
*IoT Embedded (e.g., Microsoft OS, Linux, Raspbian)			X	

Choosing a device management type

To identify which device management styles work for the users in your organization, review the following scenarios.

- **End users:**

- **Mobile employees:** They are not office-based and often travel for business. They do not require granular management, keeping their needs fairly simple. Everything is done through the cloud as opposed to connecting to an on-premises system. They use their laptops as mobile devices or tablets. KACE Unified Endpoint Manager can interact with Apple, Google, Microsoft's cloud services to help enroll, configure and manage the laptop.
- **Office-based users:** They are usually online more than mobile employees, and as such need much more granular, traditional management that involves software and IT asset management, patching, and other features. This is the preferred method for managing most laptops and desktops for that reason, particularly for those who prefer on-premises solutions, and have a history of working with Group Policy, Microsoft AD, patch management and other traditional management features.
- **Data center staff:** Modern Management is not an alternative for the users that work in a data center facility. Servers must be managed very granularly with limited access.

- **Administrators:** Each organization has an overall endpoint management style preference. In addition to the three end-user types listed above, there are different administrative needs to consider.

Domain	Modern	Preference	Traditional
Inventory	X	Either	X
Hardware Asset Management	X	Either	X
Enrollment (Apple, Google, Microsoft)	X		
Discovery			X
Cloud	X		
On-Premises			X
Subscription License	X		
Perpetual License			X
OpEx	X		
CapX			X
Over The Air	X		
Agent			X
Profile	X		
Scripting (E.g., software distribution, Powershell)			X
Active Directory			X
Group Policy			X
Software Asset Management			X
Patching			X

Getting started with KACE Unified Endpoint Manager

KACE Unified Endpoint Manager (UEM) provides license reconciliation to avoid double counting co-managed nodes for Windows and Mac devices and enables your KACE SMA to correctly interpret inventory imported from KACE Cloud MDM. Unified Endpoint Manager can be configured if you already use both of the following Quest products:

- **KACE Cloud Mobile Device Manager (MDM):** This cloud-based product allows you to easily manage and secure your mobile devices.
- **KACE Systems Management Appliance (SMA):** This virtual appliance is designed to automate device management, application deployment, patching, asset management, reporting, and Service Desk ticket management.

Required product components

There are three possible usage scenarios:

Currently using KACE Cloud MDM but not KACE SMA

1. Purchase KACE SMA product license and UEM Co-Managed Subscription through our [sales team](#).
2. Download KACE SMA and install the virtual appliance in your environment. KACE SMA exists as a virtual appliance and can be installed in your VMware, Hyper-V, or Azure environment. For setup instructions, visit the [KACE Systems Management Appliance technical documents](#) page.

Currently using KACE SMA but not KACE Cloud MDM

- Purchase KACE SMA product license and UEM Co-Managed Subscription through our [sales team](#).

Currently using both products, KACE SMA and KACE Cloud MDM

- Purchase a UEM Co-Managed Subscription through our [sales team](#).

Configuring KACE Unified Endpoint Manager

Once you have the required licenses and subscription:

1. On the Quest Support site, go to the [KACE Systems Management Appliance product page](#), and download the KACE Co-Managed SMA Add-on.
2. Log in to KACE SMA and install the downloaded `.kbin` file.

- a. In KACE SMA, go to **Settings > Appliance Updates**.
 - b. Under **Manually Update**, click **Browse**.
 - c. Navigate to the `.kbin` file.
 - d. Click **Update**.
3. Configure KACE SMA to sync with KACE Cloud MDM.

NOTE: If your KACE SMA is already integrated with KACE Cloud MDM, you do not need to complete these steps.

- a. Log in to KACE SMA.
 - Go to **Inventory > Discovery Schedules** and select **Choose Action > New**.
- b. Log in to KACE Cloud MDM.
 - i. Go to **Settings > Integrations > KACE SMA (K1000)**.
 - ii. Copy the **Tenant Name** and **Secret Key** information.

For complete information about KACE Cloud MDM, visit <https://docs.kacecloud.com/Content/Resources/Home.htm>.

- c. In KACE SMA, complete the **Discovery Schedule Detail** page.
 - i. Under the **Discovery Type**, select **External Integration**.
 - ii. Expand the **KACE Cloud Mobile Device Manager** section and provide the recorded Tenant Name.
 - iii. Create a new credential using the recorded Secret Key.

For detailed instructions, see the KACE SMA product help or visit the the [KACE Systems Management Appliance technical documents](#) page.

When Unified Endpoint Manager is configured in KACE Cloud MDM and KACE SMA, the number of devices that are using UEM Co-Managed Subscription is indicated in both products:

The screenshot displays the KACE Cloud Mobile Device Manager interface. The main window shows the 'Subscriptions and Licensing' page for 'Pizza Cabin LLC' in the 'United States' region. A table highlights 'Co-Managed Licenses' with 22 used, 3 available, and 25 total licenses. Below this, there are sections for 'Paid Subscriptions' and 'Trial Subscriptions' with their respective start and end dates and license counts.

The inset window shows the Quest KACE Systems Management Appliance status page. It lists various system details, including 'Managed Computers: 13/25', 'Monitored Servers: 0/25', and 'Co-managed Devices: 22', which is highlighted with a yellow circle.

Frequently asked questions

Where can I find my UEM Co-Managed Subscription Details once purchased and set up?

After applying the .kbin file:

- In **KACE Systems Management Appliance**: A new license count appears in **About > Co-Managed Devices**.
- In **KACE Cloud Mobile Device Manager**: The co-managed license can be found under **Settings > Subscriptions/Licensing**.

What happens if I have the KACE Co-Managed Systems Management Appliance Add-on and an incorrect license, or the other way around?

The KACE Co-Managed Systems Management Appliance Add-on includes explicit instructions to only use it if you have KACE Cloud Mobile Device Manager. Both the add-on and the KACE Systems Management Appliance 10.2 release or later are required. If co-managed devices in KACE Cloud Mobile Device Manager use up all their licenses, the appliance consumes a KACE Agent license. If those are exhausted, the appliance follows the standard procedure.

If my UEM Co-Managed Subscription doesn't seem to be working, who can I contact?

Please contact [Quest Support](#).

To whom do we escalate licensing issues?

Please contact [Quest Support](#).

Will bootstrap fail on the KACE Systems Management Appliance if KACE Cloud Mobile Device Manager runs out of seats? And if so, will this cause a potential disruption in agent communication?

KACE Systems Management Appliance behaves the same way as it would when it does not have enough standard agents. Agents always consume a license. Adding devices is enforced separately for each license type. When managed computer licenses are exceeded, agent-based systems cannot be added. When non-computer licenses are exceeded, no non-computer devices can be added. However, an exceeded count on one type does not prevent usage on the other. If co-managed devices on the KACE Cloud Mobile Device Manager use up all their licenses, the appliance should consume a KACE Agent license count. If those are exhausted, the appliance follows the standard procedure.

How do I troubleshoot Unified Endpoint Manager if my end user says it is not working?

When a KACE Cloud Mobile Device Manager device is provisioned to the KACE Systems Management Appliance, complete the steps below. You can provision a KACE Cloud Mobile Device Manager device by selecting **Choose Action > Provision > Agentless: Automatic** on the **Discovery Results** page, or by selecting **Auto-Provision** in the Discovery Schedule.

- Verify that only one instance of the device exists in the appliance inventory.
- On the **Device Detail** page, verify that the **Device Entry Type** is reported as **Agent** or **Agentless Device**.
- If the above two steps are not expected, delete the Agentless entry (assuming that it exists), and re-provision the device from the appliance **Discovery Results** page.

- Verify that the tenant the Discovery Schedule the device was created from has available co-managed licenses.
- If the tenant does not have co-managed licenses and a customer wants to purchase them, Quest Sales can assist them.

Where does Unified Endpoint Manager store log messages?

When an attempt to use a co-managed license from a KACE Cloud Mobile Device Manager tenant fails, an error along with the status from KACE Cloud Mobile Device Manager is logged in `kbox_log`.

How often does Unified Endpoint Manager negotiate product licenses?

License reconciliation occurs at device provisioning time and on regular KACE Systems Management Appliance Agentless inventory. Its frequency is determined by the Agentless inventory interval setting.

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Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product