



**ProfileUnity™
with FlexApp™ Technology**

***Quick Start &
Evaluation Guide***

Introduction

This guide has been authored by experts at Liquidware in order to provide information and guidance concerning the evaluation process and normal use cases of ProfileUnity and ProfileUnity FlexApp.

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Overview

This Quick Start and Evaluation Guide for ProfileUnity with FlexApp is designed to focus your efforts on the most valuable and consistently used functionality that can apply to a wide range of organizations. It is not meant to demonstrate the depth of the solution's customizable feature capabilities as these are quite significant and comprehensive.

It is strongly recommended that you read this guide in its entirety before you begin your evaluation. In order to get the best results for the evaluation, it is good idea to familiarize yourself with the special features and unique capabilities of ProfileUnity with FlexApp outlined in this guidebook.

This guide will get you started with a base configuration for profile portability, folder redirection with optional data migration, and FlexApp. How you configure the product depends in part on the exact features you wish to test for your environment. Also, you will need to test actual user profiles and data in order to evaluate many of the features, so be prepared with identified Windows user test candidates before installation and configuration.

Software Description

ProfileUnity is available as a standalone product and consists of three parts:

1. **Management Console** - provides one central location where administrators can configure persona management and user and machine policies.
2. **Client** - manages each user's settings and persona during their session.
3. **FlexApp Packaging Console (optional)** - allows administrators to configure and prepare any applications that will need to be configured for users and made available as a department installed application (DIA) through application layering.

ProfileUnity requires Microsoft Windows Active Directory (AD) to deploy its client files to the desktop and point the user to its configuration file.

Environment Access Rights

Before beginning your evaluation of ProfileUnity, make sure that you have an Administrator for your user environment available to install and configure the ProfileUnity with FlexApp software. Your admin should:

- Be a Windows Active Directory Domain Admin or have equivalent access,
- Have the ability to create Active Directory Group Policy Objects (GPOs), and
- Have VMware View Composer or Citrix Director/Composer access if part of your environment.

Requirements and Preparation Checklist

Task	Status ✓
Access Requirements	
1. Acquire AD Domain Admin access. <i>Ensure that you have Domain Admin rights or you can temporarily get access to have them.</i>	
2. Acquire access to NETLOGON folder of the domain controller. <i>Ensure that you have administrator access to save files (write permission) to the NETLOGON folder of the domain controller. <u>NOTE: If the NETLOGON folder is not desired, any other UNC or cloud storage path may be used that meets the following requirements: "Authenticated users" must have read access and there should be a replication strategy in place to avoid the possibility of the alternative server being down.</u> For those who plan to make use of cloud storage, please read Using Cloud Storage with ProfileUnity for more information on how to setup your cloud storage to work with ProfileUnity.</i>	
3. Able to create AD Group Policy Objects.	
4. Have VMware View Composer or Citrix Director/Composer access if part of your environment.	
Software and Documentation	
5. Download the software. <i>Visit http://www.liquidware.com/download to download a fully-functional version of ProfileUnity with FlexApp.</i>	
6. Download the Installation and Configuration Guide. <i>Go to the Liquidware Support Portal to find ProfileUnity product documentation. The ProfileUnity Installation & Configuration Guide covers system requirements, installation, and configuration of ProfileUnity.</i>	
7. Download the FlexApp Packaging Console Manual (optional). <i>Go to the Liquidware Support Portal to find product documentation. The ProfileUnity FlexApp Packaging Console Manual covers system requirements and installation of FlexApp along with packaging and updating applications. The FlexApp Packaging Console Guidance and Best Practices document is an extension of the FlexApp Packaging Console Manual, providing additional guidance around the overall application packaging workflow with respect to FlexApp.</i>	
System Requirements	
8. Requirements for the ProfileUnity Management Console. <i>The ProfileUnity Management Console should be installed on a machine running Windows Server 2008 R2 or higher. The ProfileUnity Management Console relies on a port for full Web access for administration, communication of the FlexApp Packaging Console, and for call back of inventory information from desktops. By default, the port is 8000, but it is fully configurable to any port number assigned. <u>Please see the ProfileUnity Installation and Configuration Guide for more software requirements.</u></i>	

Task	Status ✓
<p>9. Requirements for the ProfileUnity Client. <i>The ProfileUnity Client will run on a variety of physical and virtual user machines running Windows 7 and higher or Windows Server 2008 R2 and higher. The clients using FlexApp can be deployed as physical desktops or as either persistent or non-persistent virtual desktops. <u>Please see the ProfileUnity Installation and Configuration Guide for more software requirements.</u></i></p>	
<p>10. Requirements for FlexApp and the FlexApp Packaging Console(s). <i>Each FlexApp Package or Layer should be created on a virtual machine running the same operating system with the same bit level (32- or 64-bit) as the user machines on which it will be deployed. The FlexApp Packaging Console should not be installed on the same machine as the ProfileUnity Management Console. <u>Please see the ProfileUnity FlexApp Packaging Console Manual for more software requirements.</u></i></p>	
<p>11. Ensure that users have allocated network drive space. <i>Existing paths are fine. Suggested size for compressed profile store is 150 MB (15-50 average is typical).</i></p>	
<p>12. Ensure that you have ample network storage available per user for folder redirection. <i>For folder redirection of “My Documents” and any other files you wish to redirect, the storage required will vary greatly depending on quantity of user data per user.</i></p>	
<p>13. Allocated space for FlexApp Department Installed Applications (optional). <i>If you plan to test FlexApp Department Installed Applications (DIA) and create your own packages, central storage with a minimum of 20GB is suggested. FlexApp Packages or Layers can be provisioned on a persistent disk, VHD, VMDK, or cloud storage. After installing the FlexApp Packaging Console, you will notice several FlexApp packages are automatically included in your inventory list. Liquidware has pre-packaged some popular applications and made them available to all users for immediate use via cloud storage. Using Liquidware Apps allows for faster prototyping with Proof of Concepts during the evaluation process.</i></p>	
Suggested Environment Modifications	
<p>14. Set anti-virus exceptions for ProfileUnity. <i>If anti-virus programs are used in the environment, they can slow down user logon and logoff times while scanning ProfileUnity files and directories. Excluding these files and directories can speed up the logon and logoff process. See Liquidware ProfileUnity Knowledgebase article: Antivirus Slows Logon While Scanning of ProfileUnity Program Files and Directories</i></p>	
<p>15. Modify the logoff behavior of desktops using Citrix XenDesktop. <i>A common issue with desktops running Citrix XenDesktop is that machines are being shut down before logoff scripts have finished running. More specifically, some or all user Portability settings are not being saved because ProfileUnity Portability .7z files are missing from the network store after logoff since the logoff script was terminated early. See Liquidware ProfileUnity Knowledgebase article: ProfileUnity Logoff Script is Terminated Early on XenDesktop</i></p>	

Additional resources can be found here: <https://github.com/liquidwarelabs/ProfileUnity>

ProfileUnity Installation and Configuration

Please refer the *ProfileUnity Installation & Configuration Guide* for step-by-step instructions for configuring your environment and installing the ProfileUnity software.

Configuring Users and Computers in Active Directory

ProfileUnity uses Microsoft Active Directory (AD) and Group Policy Management for managing the users and computers configured to use the software and for activating the ProfileUnity Client without actually installing the agent on each of those individual physical or virtual desktops. Consequently, there are some administrative tasks outside of installing the ProfileUnity software where administrators need to configure some Active Directory and Group Policy settings. The ProfileUnity Management Console can automate configuring some of the Group Policy settings once the ProfileUnity Organizational Unit (OU) has been created, or you can choose to manually configure your AD settings.

Task	Status
Active Directory Settings	
1. Create a ProfileUnity Computer Organizational Unit. <i>This should have <u>blocked inheritance</u> set.</i> <i>Write name of test machine OU:</i>	
2. Create non-production test machines. <i>Create test pool and point to test machine OU or place test machines in the ProfileUnity OU.</i> <i>Write names of test machines:</i>	
3. Create non-production test users. <i>These users can be used in the ProfileUnity Management Console under Licensing Management later.</i> <i>Write names of test users:</i>	

Logging in to the Management Console for the First Time

For security purposes, please set the Management Console admin account password first. This admin account can be used manage access for other users and can be used to login if LDAP authentication fails.

Default Credentials for the First-Time Login: Username: admin
Password: (is blank)

After entering “admin” as your username and leaving the password blank, you will be prompted to change the password at the first logon.

There is a second level of authentication to the Management Console available through AD integration. With this feature, Domain Admins have default access to the ProfileUnity Management Console. This can be removed or modified to another AD group later by using the Administrative section of the Management Console.

During the configuration process, ProfileUnity offers the option to automatically configure Active Directory using the Computer OU that you setup before installation. However, you must be logged in as an Active Directory admin to the ProfileUnity Management Console for this option to work correctly. Therefore, we recommend that you logout from the ProfileUnity “admin” account and log back in using your Active Directory Domain Admin account credentials before using the Guided Configuration Wizard.

Using the Guided Configuration Wizard

To configure the production environment and the console, ProfileUnity has an easy-to-use Guided Configuration Wizard. The first time you login to the ProfileUnity Management Console, the Guided Configuration Wizard will be started for you to help you automate the setup of your environment for ProfileUnity.

Task	Status
Additional Environmental Configuration Settings	
<p>1. Set Deployment Path. <i>ProfileUnity needs access to NETLOGON or a common domain location where the client software and configuration files can be deployed.</i> <i>Write name of deployment path (ex. \\domain\netlogon\profileunity):</i></p>	
<p>2. Set User Profile Share. <i>ProfileUnity needs to know the root share path to your users’ home directories.</i> <i>Write name of user profile/home share (ex. \\fileservershare):</i></p>	
<p>3. ProfileUnity Management Console Server. <i>Write server name where Management Console is running:</i></p>	

Evaluation and Management Concepts

The following section on Evaluation will assist you in exploring and using some of the major features in ProfileUnity with FlexApp Technology including:

- Profile Portability
- Folder Redirection
- Data Migration
- Context Aware Filters
- Drive Mapping
- Printer Assignment
- FlexApp Layering – Departmental Installed Applications (OPTIONAL)

Please refer the [ProfileUnity Help Manual](#) for information on additional ProfileUnity features and configuration options that can be used to manage your user environment.

Profile Portability & Folder Redirection with User Authored Data Migration

These options were configured for you (if you chose them specifically) during the Guided Configuration. Login to a user account that ideally already has a user profile and that has some data saved in the Desktop and/or My Documents folder.

Logon as a test user that was included in your AD Group during ProfileUnity Integration.

1. Note that ProfileUnity should run at login. You will see a ProfileUnity splash screen at login and a progress bar. Depending on the profile size, ProfileUnity may run for as little as a few seconds or may take longer. If this process takes too long, then profiles can be tuned for optimal performance later.
2. Make some changes to your desktop environment. For example, change the color of the desktop, add a word to your spellchecker dictionary in your Word Processing software, or add a file to the desktop, etc.
3. Logoff: ProfileUnity will run at logoff, it is backing up your changes and saving them in a compressed state to the network.
4. Login to another desktop in the domain as the same user. Ideally log into a different version operating system (i.e. switch from Windows 10 to Windows 7 or vice versa). ProfileUnity will run at login and, again, you will see a splash screen indicating that the software is restoring your profile to the new machine and even dynamically accounting for differences in operating system versions. Test that the settings that you modified in the previous Windows session (in step 2 above) are restored in the new Windows session.
5. Browse to the user's network file storage (the same location that you identified in the guided configuration above). Note that a ProfileUnity folder should have been automatically created. This folder includes files that have been either redirected or made portable. The portability file contains a portion of your profile in a compressed state (with an incredible ratio of up to 50:1). This is not the profile in use; it is the profile in storage that is updated at logoff. The profile in use is in the native locations on your active Windows session.

6. Check your user account's network file storage path to find the redirected My Documents and Desktop folder (the default setting in the Guided Configuration). It is OK if all data is not yet in these folders, it will continue to transfer from the original legacy machine until it is complete. This transfer is handled by a special "Anytime Migration" feature of ProfileUnity that allows this process to happen in the background while users retain the ability to work on their desktops. Once all data has been migrated for these two folders, Folder Redirection will be turned on at the next login.

Context Aware Filters Applied to Custom Drive Mappings

Context aware filters greatly control how features and configurations are applied within ProfileUnity. You can apply a configuration based on hundreds of criteria with a single filter or by "stacking" filters. For example, in a hospital setting, you may want users to be able to print on those printers near them. To accomplish this task, you can assign printer(s) based on the subnet, OU, or Computer Name that corresponds to where the Windows session is physically located.

The following section describes how to write a filter and configure it for a drive mapping.

Creating Context Aware Filters

Login to the ProfileUnity Management Console and choose the Filter Management tab from the navigation options on the left. Writing a filter is as simple as filling in the boxes and selecting your options on the screen. Make sure that you apply the filter you have written to a Windows machine you can subsequently login to, so that you can test this feature. Additional details about writing filters are available in the **ProfileUnity Help Manual** on the [Liquidware Support Documentation web page](#). Choose **Save** when you have written a filter based on values in your environment.



NOTE: Intuitive and detailed help is available throughout the product by clicking on the Life Ring icon in an active window or screen.

Applying a Filter to Custom Drive Mapping

Choose Configuration Management from the navigation options across the left side. Click on the **Edit** icon for the configuration that you're using.

Choose the "Drive Mapping" feature set module. Choose **Add a Drive Mapping Rule** button. Now, configure a drive mapping using your new custom filter. Assign a **Drive Letter** to the drive and specify the **UNC Path**. Choose **Save**.

New Drive Mapping Setting

Filter
No Filter - Apply this to all
No filters will be applied to this item.

Description

Action
Map
 Process Action After Login
 Disconnect Before Mapping
 Hide Drive

Drive Letter **REQUIRED**
A:

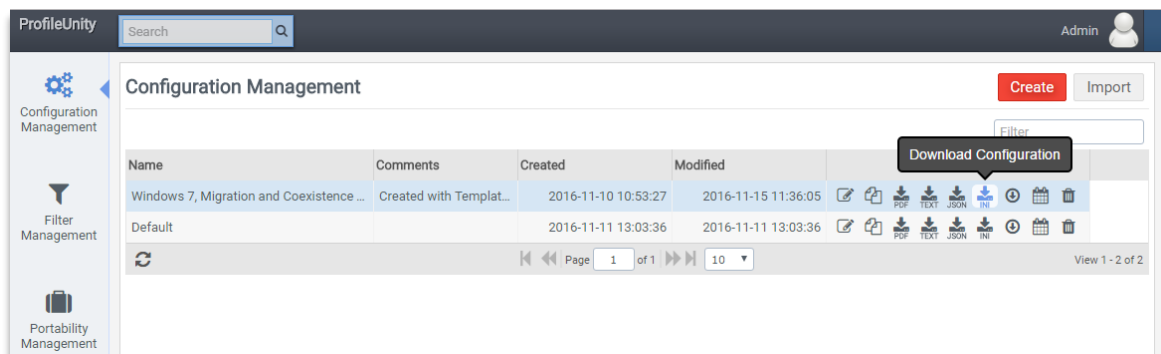
UNC Path **REQUIRED**
\\ATLFS02\@userid

Share Name
Home Directory

Save

Click the blue **Update** button on the Management Console to save all configuration module changes to the current configuration and return to the main Configuration Management list. In order for the Configuration changes to take effect in your user environment, the Configuration file needs to be downloaded or deployed to the Deployment Path where the ProfileUnity Client is also hosted. By default, this should be your NETLOGON file share. Select the Configuration to download from the Configuration Management list, and then select the **Download Configuration** icon to save the ProfileUnity configuration (an INI file) to your production/test environment.

PLEASE NOTE: Re-deploying or re-downloading configuration changes is an easily overlooked step for new users.

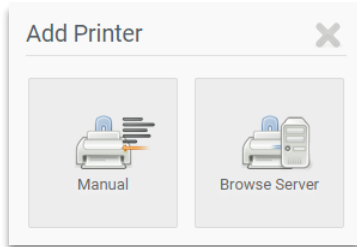


As a final step, test this filter and the Drive Mapping by logging in to the Windows machine/user to which you originally applied the filter, when first creating it. After ProfileUnity runs at login, navigate to Windows Explorer and verify that the drive mapped for the user when the filter was fulfilled.

Printer Management

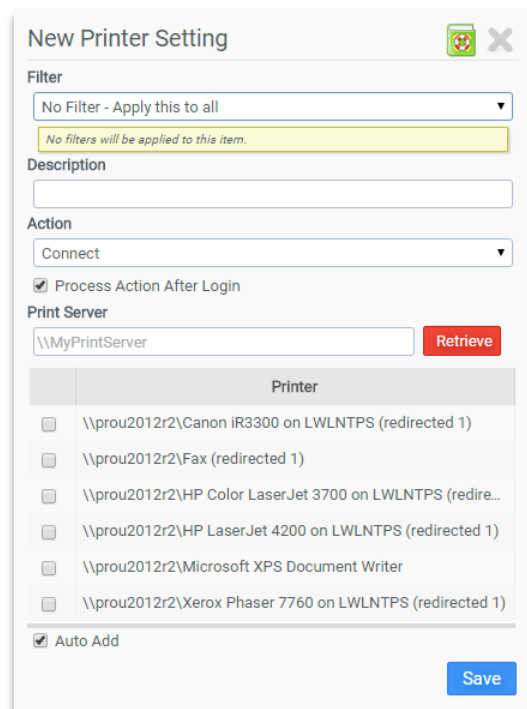
Login to the ProfileUnity Management Console. Choose Configuration Management from along the left. Click on the **Edit** icon for the configuration that you're using.

Choose the "Printers" feature set module. Choose **Add Printer Rule**. Then choose **Browse Server**.



Now you will see New Printer Setting window. Enter the name of a Print Server in your network and the printer list will be automatically populated through ProfileUnity's printer auto-discovery capabilities. You can apply a unique filter to "connect" the printer to a limited group of users or user, or use "No Filter" to apply the printer to all ProfileUnity users and machines. Choose **Save** when done.

NOTE: ProfileUnity and your Windows network supports Windows "Point- and-Print" driver technology so no drivers are needed for most popular printers that conform to this standard.



Click the blue **Update** button on the Management Console to save all configuration module changes to the current configuration and return to the main Configuration Management list. In order for the Configuration changes to take effect in your user environment, the Configuration file needs to be downloaded or deployed to the Deployment Path where the ProfileUnity Client is also hosted. By default, this should be your NETLOGON file share. Select the Configuration to download from the Configuration Management list, and then select the **Download Configuration** icon to save the ProfileUnity configuration (an INI file) to your production/test environment.

Login to a machine/user name in the filter group where the printer was applied and test the printer mapping per the configuration.

Application Layering with FlexApp

FlexApp Layering is an advanced feature within the ProfileUnity User Environment Management platform. It is a fully integrated solution that leverages profile settings and policies but can also be implemented independent of ProfileUnity's core User Environment Management features. FlexApp DIA enables Administrators to assign department-level applications to groups of users. FlexApp complements application virtualization solutions that use isolation, such as Microsoft App-V and VMware ThinApp. FlexApp application layering is also compatible with many desktop virtualization platforms, including Citrix XenApp/XenDesktop and VMware Horizon View. These environments can be kept ultra-secure by leveraging ProfileUnity's Application Rights Management features, which eliminates the need to make users full "Local Admins" in order to run or install applications.

Everything needed for FlexApp to run on the endpoint was configured for you in the Guided Configuration.

FlexApp DIA testing consists of implementing the FlexApp Packaging Console installed to well-managed desktops and provisioning FlexApp packages from the FlexApp DIA management feature set in the ProfileUnity Management Console.

Installing the FlexApp Packaging Console Software

Please refer the *ProfileUnity FlexApp Packaging Console Manual* for step-by-step instructions for installing the FlexApp Packaging Console to manage Department Installed Applications (DIA). This manual also covers how to package applications and configure them for deployment to users. In addition, it explains how to manage packaged layers using techniques such as cloning, extending packaged layers to include additional software, and patching or updating layers.

Liquidware provides a set of various pre-packaged applications, called Liquidware Apps, inside the FlexApp Packaging Console. These FlexApp packages were designed to get POCs off the ground faster since they are available for immediate use. Liquidware Apps can be used for testing or cloned and used in a more permanent basis in your environment.

Additional Resources for FlexApp

There are two additional resources on Liquidware's Support Portal to assist you in testing FlexApp in your environment and deciding how to structure your environment to take advantage of Application Layering.

- [FlexApp Packaging Console Guidance and Best Practices](#) - The FlexApp Packaging Console Guidance and Best Practices document is an extension of the FlexApp Packaging Console Manual, providing additional guidance around the overall application packaging workflow with respect to FlexApp.
- [Base Image Creation Best Practices](#) - The Base Image Creation Best Practices Guide provides a refresher of common techniques for base image creation.

ProfileUnity Evaluation Checklist

As you progress through your evaluation, make sure you are able to accomplish the following tasks:

- Create a New Configuration**

All user and environment settings that control how ProfileUnity runs are contained in one or more Configuration files. A new configuration will be automatically created in the Guided Setup when you first install ProfileUnity. You can modify it at any time in the Management Console. You can also create multiple configurations to layer how settings are applied. For example, one configuration might map drives before the next configuration runs with other settings related to those mapped drives.
- Create a Filter**

Filters are a way to segment users based on real segmentation factors such as the department in which they work, physical desktop users vs. virtual machine users, etc. Use these filters to conditionally apply configuration settings.
- Create or Change a Portability Setting**

You can determine which parts of a user's profile is portable across multiple sessions by using registry rules and file system rules. ProfileUnity gives granular access to HKEY_CURRENT_USER and HKEY_LOCAL_MACHINE registry keys.
- Tune Portability Settings if Necessary**

Some default portability settings will grab folders that contain temp files or other items not necessary for user portability success. For example, the files under \Sun\Java\DeploymentCache may not be needed since they are temporary files and they can grow larger thus impacting the "zipping" of files and movement across the network to the save path location.
- Edit and Download a Configuration**

*Each configuration is stored in an INI file. The default location to store these is the NETLOGON File Share. A new configuration will be automatically created in the Guided Setup when you first install ProfileUnity and be pushed to the file share. The ProfileUnity Client uses these INI files to apply your settings with each user login. NOTE: When you edit a ProfileUnity configuration after the initial Guided Setup you will need to save this file to the same location as the NETLOGON File Share or your chosen alternate file share location. Click the **Download Configuration** icon next to your configuration name in the **Configuration Management** area for this purpose.*
- Test Application Restrictions in ProfileUnity**

Configure Application Restrictions to test Application Rights Management. An easy restriction to test would be to disallow Calculator from running (Calc.exe). Application Restrictions are practical when you want to limit usage of an app to a certain group of users. For instance, if an application is in the base image or if it is assigned by FlexApp at a machine level.
- Setup FlexDisk (VMDK) OPTIONAL**

FlexDisk is optional VMDK support for FlexApp Application Layering and ProfileDisk options. Otherwise, you can leverage lighter weight infrastructure requirements of VHD storage with FlexApp and ProfileDisk. If you have VMware vSphere/VMware ESX you may want to consider the FlexDisk VMDK option. VMDKs often perform better than VHDs and are more stable because they are not subject to network line speeds and interruptions.
- Package an Application for FlexApp DIA**

Use the ProfileUnity FlexApp Packaging Console to package applications or change metadata settings.
- Assign a FlexApp DIA application**

Use the FlexApp DIA configuration module to assign an application to a user, group, or other context aware setting. See filter above.

- ❑ **Create a New Management Console User Account**
Multiple IT administrators can use the same ProfileUnity Management Console. Create a new user account for another admin.
- ❑ **Use ProfileUnity's Inventory to View FlexApp DIA packages**
Explore the Inventory area of the ProfileUnity Management Console to get more system information.
- ❑ **Print a Summary of Your Configuration Settings**
Who is responsible for documenting all your user and environment settings? Choose a Configuration, Filter, or Portability Setting and select the Summary icon to print a report on all these settings and show it to them.

Further Evaluation

There are more than a dozen other core features that you can leverage by writing or editing a configuration for your organization's custom requirements. Refer to the full *ProfileUnity Help Manual* and/or ProfileUnity Knowledgebase located on the [Liquidware Support Portal](#) for advanced filter settings, numerous additional features and troubleshooting.

Thank You

Thank you for evaluating ProfileUnity with FlexApp. If you have any questions you may contact us at the email addresses below.

For Sales information: Sales@Liquidware.com

For Support: Support@Liquidware.com