

Click 'Configuration Templates' > 'Profiles' > open a Windows profile > Click 'Add Section' > 'Procedures'

- You can add pre-configured patch procedures to a Windows profile and create a schedule
- The procedures are run on the devices to which the profile is applied, periodically as per the schedule
- EM ships with a set of pre-defined OS patch procedures. You can also create custom OS and third-party patch procedures as per your needs.
- Click 'Configuration Templates' > 'Procedures' to view, manage and create OS and third party patch procedures
 - See [this wiki](#) if you need creating Windows OS and third-party application patch procedures.
- This article explains how to add a Windows patch procedure to a profile and run it according to a schedule.

[Add a patch procedure to a profile](#)

[View procedure execution logs and results](#)

Add a patch procedure to a profile

- Login to ITarian
 - Click 'Applications' > 'Endpoint Manager'
 - Click 'Configuration Templates' > 'Profiles'
 - Click the 'Profiles' tab
 - Open the Windows profile applied to your target devices
 - Open the 'Procedures' tab
- OR
- Click 'Add Profile Section' > 'Procedures', if it hasn't yet been added

The 'Add' button lets you add and schedule a procedure which has been created in the 'Procedures' area.

Click 'Save' to apply your changes.

General Procedures

Procedures

Cancel Save

+ Add Move Up Move Down Remove

| <input type="checkbox"/> | ORDER | PROCEDURE NAME | DESCRIPTION | TYPE | SCHEDULE | ADDED BY | ADDED ON | LAST MODIFIED BY | UPDATED AT |
|-------------------------------------|-------|--|--|-----------------|----------|-----------------------------|------------------------|-----------------------------|------------------------|
| <input type="checkbox"/> | 1 | Patch maintenance | Maintains the latest patches to be updated on the Windows Endpoint | Patch | Never | herculespopular22@gmail.com | 2018/12/31 03:38:51 PM | | 2016/11/07 01:52:26 PM |
| <input checked="" type="checkbox"/> | 2 | New 3rd Party App Patches | | 3rd Party Patch | Never | herculespopular22@gmail.com | 2018/12/31 03:38:51 PM | herculespopular22@gmail.com | 2018/12/31 03:28:48 PM |
| <input type="checkbox"/> | 3 | Script to check all my drivers for updates automatically | This Script to check all my drivers for updates automatically | Script | Never | herculespopular22@gmail.com | 2018/12/31 03:38:51 PM | | 2018/04/27 06:30:19 PM |

Procedures are executed in numeric order. Select a procedure then use 'Move Up' or 'Move Down' controls to prioritize.

- Click 'Add' in the procedures settings screen

Field Workers Laptops



Add Profile
Section



Export Profile



Clone Profile



Delete Profile



Make Default

General

Procedures

Containment

Firewall

HIPS

Antivirus

Remote Control

Remote

Procedures

+ Add

Move Up

Move Down

Remove



ORDER

PROCEDURE NAME

DESCRIPTION

TYPE

SCHEDULE

ADDED BY

ADDED ON

Add Existing Procedure



Procedure name

Type approved procedure name to search among procedures

To create a new procedure please go to [Procedures](#)

Schedule Settings

Custom Schedule



Start date*

2019/12/06



Schedule

Never



Scheduled time



01



50

PM



☐ Run this procedure immediately when the profile is assigned to a new device

☐ Skip procedure if the device is offline

Add

Procedure Name – Select the patch procedure to add to the profile.

EM ships with three predefined patch procedures:

- Critical Patch Updates
- Security Patch Updates
- Patch Maintenance
- You can also create custom patch procedures, select which types of patches the procedure should install, reboot options, the alert settings to be used and so on.
- See 'Create a custom Windows OS patch procedure' in [this wiki](#) if you need help to create custom patch procedures.
- Type the first few characters of the procedure name and choose the procedure from the suggestions . Make sure you have already approved the procedure

Schedule Settings - Two options - 'Custom schedule' and 'Schedule on a maintenance window'.

- **Custom Schedule** - Set a time-slot for the procedure to run on devices.

Select the start date, time and frequency at which the procedure should run

If you select 'Daily', 'Weekly' or 'Monthly' then please specify end-time action for the procedure:

- No end settings - All procedures will run to completion.
- Run until - Chose a cut-off time from the calendar.*
- Run no more than - Specify for how long the procedure should run.*
- Run until the end of the closest maintenance window - The procedure will start at the time you set, but must finish by the end of the next maintenance window that runs.*

* Any procedure that does not finish by the cut-off time is aborted and all changes undone.

- **Schedule on a maintenance window**

- **Maintenance Window Type** - Choice of 'Daily', 'Weekly', 'Monthly' and 'Week of month'. See [this wiki](#) for help to create and manage maintenance windows.
- **Maintenance Window Name** - Shows a list of maintenance windows which have the frequency you chose in the 'Window Type' box above. Select the window you want to add to the procedure.
- **End Time Settings:**
 - No end settings - All procedures will run to completion.
 - Run until - Chose a cut-off time from the calendar.*
 - Run no more than - Specify how long the procedure should run.*

* Any procedure that does not finish by the cut-off time is aborted and all changes undone.

Execution Options

- **Run this procedure immediately when the profile is assigned to a new device** - The procedure will run on target devices as soon as the profile is applied to the device, in addition to any schedule.

- **Skip procedure if the device is offline** - The procedure will be aborted if the device is not connected to EM at the time of execution. By default, procedures are queued for later if the device is not connected to EM. The task will run as soon as it comes online. Select this option if you do not want the task to be queued.
- Click 'Add' to add the procedure to the profile
- Repeat the process to add more procedures
- Procedures are run in order from top to bottom
- Select a procedure and click 'Move up' or 'Move down' to set the priority

View procedure execution logs and results

There are two places where you can view the results of a patch procedure:

- [Device List](#) - 'Devices' > 'Device List' > 'Device Management' > Open a Windows device > 'Logs' > 'Patch Logs' / 'Third Party Patch Logs' - Shows results for all patch procedures run on a selected device.
- [Procedures area](#) - 'Configuration Templates' > 'Procedures' > Open a procedure > 'Execution Log' - Shows all devices on which a selected procedure was run.

Device list – Shows patch procedure results on a single device

- Click 'Devices' > 'Device List'
- Click the 'Device Management' tab in the top-menu
 - Select a company or a group to view just their devices
- Or
 - Select 'Show all' to view every device enrolled to EM
- Click on any Windows device then select the 'Logs' tab in the device details interface
- Select the 'Patch Logs' or 'Third Party Patch Logs' sub-tab

This opens a list of all patch procedures run on the device along with their status (success/failure), their start/finish time and time of last status update.

- Click 'Details' in the row of a procedure to view specific results:

Endpoint Manager Device List

DASHBOARD >

DEVICES >

Device List

Bulk Installation Package

USERS >

CONFIGURATION TEMPLATES >

APPLICATION STORE >

APPLICATIONS >

SECURITY SUB-SYSTEMS >

SETTINGS >

Search group name

Show all

Default Customer

Fork Springs Regional Tr...

frontfork

Saddle and Pedals

Group Management **Device Management**

Enroll Device Remote Control Remote Tools Run Procedure

Search for devices

OS NAME ACTIVE COMPONENTS

DESKTOP...

DESKTOP...

DESKTOP-D80SVJJ
Owner: Herald

Manage Profiles Remote Control Remote Tools Run Procedure Install or Update Packages Refresh Device Information Reboot Export Security Configuration Delete Device More

Inventory File List Exported Configurations MSI Installation State Patch Management Antivirus Scan History Groups **Logs**

Alert Logs Monitoring Logs Script Logs **Patch Logs** Third Party Patch Logs Installation Logs Uninstallation Logs

| PROCEDURE NAME | STARTED AT | STARTED BY | LAUNCH TYPE | FINISHED AT | STATUS | LAST STATUS UPDATE | DETAILS |
|------------------------|------------------------|-----------------|-------------|------------------------|------------------|------------------------|---------|
| Patch maintenance | 2018/11/08 08:17:05 PM | Patch Procedure | Run Over | 2018/11/08 08:21:02 PM | Finished success | 2018/11/01 12:35:07 PM | Details |
| Security patch updates | 2018/10/31 12:35:00 PM | Patch Procedure | Scheduled | 2018/10/31 12:35:06 PM | Failed | 2018/10/31 12:35:06 PM | Details |

Log Detail Back

Statuses Tickets Back

| TIME | STATUS | ADDITIONAL INFORMATION |
|------------------------|------------------|---|
| 2018/11/08 08:21:02 PM | Finished success | PROCEDURE operation completed successfully. 1 patch(es) successfully installed. |
| 2018/11/08 08:17:23 PM | In progress | Title: 2018-09 Update for Windows 10 Version 1803 for x64-based Systems (KB4100347), KI |
| 2018/11/08 08:17:05 PM | In progress | Resolving Procedure is completed successfully. |
| 2018/11/08 08:17:05 PM | Started | Resolving Procedure is started. |

- The 'Tickets' tab shows tickets which were created as a result of a failed procedure.
 - Click the ticket link to open the ticket in service desk.

Procedures interface – Shows patch procedure results on all target devices

- Click 'Configuration Templates' > 'Procedures'.
- Click the name of the patch procedure under 'My Procedures' or 'Predefined Procedures' for which you want to view results, then click 'Execution Log' in the Procedure Details screen.
- This will open a list of all devices on which the procedure was run along with their status (success/failure), their start/finish time, and time of last status update.
- Click 'Details' in the row of a device to view specific results:

Endpoint Manager

Procedures

CONFIGURATION TEMPLATES

- Profiles
- Alerts
- Procedures**
- Monitors

Procedures

Search folder

- My Procedures
- Predefined Procedures
 - Application
 - C1 Integration
 - File Operations
 - Monitors
 - Network
 - Patch Deployment
 - Reports
 - System

Procedures

Create Import Procedure Export Procedure Clone

| PROCEDURE NAME | TYPE | STATUS |
|--------------------------|------------|----------|
| Critical patch updat... | Predefined | Approved |
| Install security and ... | Predefined | Approved |
| Patch maintenance | Predefined | Approved |
| Security patch upda... | Predefined | Approved |

Patch maintenance

Export Procedure Clone Run Delete Procedure

General Execution Options Restart Control Schedule **Execution Log**

| DEVICE NAME | STARTED AT | STARTED BY | LAUNCH TYPE | FINISHED AT | STATUS | LAST STATUS UPDATE | DETAILS |
|-------------|------------------------|-----------------------------|-------------|------------------------|------------------|------------------------|---------------|
| DESKTOP_... | 2018/11/08 08:17:05 PM | herculespopular22@gmail.com | Run Over | 2018/11/08 08:21:02 PM | Finished success | 2018/11/08 08:21:02 PM | Detail |

Log Detail

← Back

Statutes Tickets

← Back

| TIME | STATUS | ADDITIONAL INFORMATION |
|------------------------|------------------|---|
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 - Click the ticket link will open the ticket in service desk.

Further reading:

[How to enable or disable patch management in a Windows profile](#)

[How to configure and run procedures on managed devices](#)

[How to schedule and run procedures in a profile](#)

[How to install and manage patches on Windows devices](#)