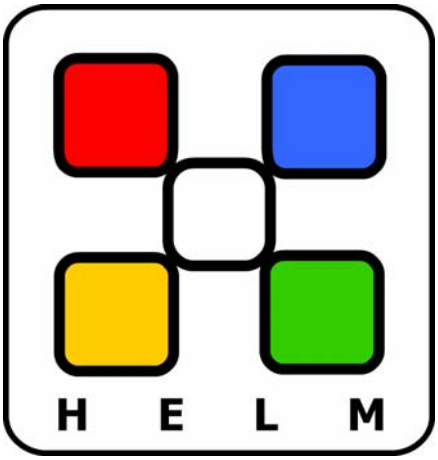

Helm™ Configuration Guide

How to configure Helm for the first time on your server

WebHost Automation Ltd
http://www.webhostautomation.com/
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About Helm and This Guide

The Helm Web Hosting Control System is an extremely powerful hosting automation solution for Windows 2000 and Windows .NET servers. Helm is developed by WebHost Automation Ltd, a United Kingdom-based corporation. Their main website is:

http://www.webhostautomation.com

Please take some time to read over this guide. Doing so will help you ensure that you configure Helm correctly on your server.

Setting up Services and Resources

The first thing you will want to do with Helm is to set up your services. Helm supports multi-server environments on a scale much larger than any other control panel. Because of this, there are a huge amount of setup combinations available within Helm. It would be impossible to document them all here, so the following is a generic example of a server setup you might choose in Helm.

There are two ways of setting up your initial services in Helm. If you haven't added any servers, services or resources yet, then the easiest way to do this is to use Helm's Setup Wizard.

Setup Wizard

In Helm, go to Home > System Settings > Setup Wizard:

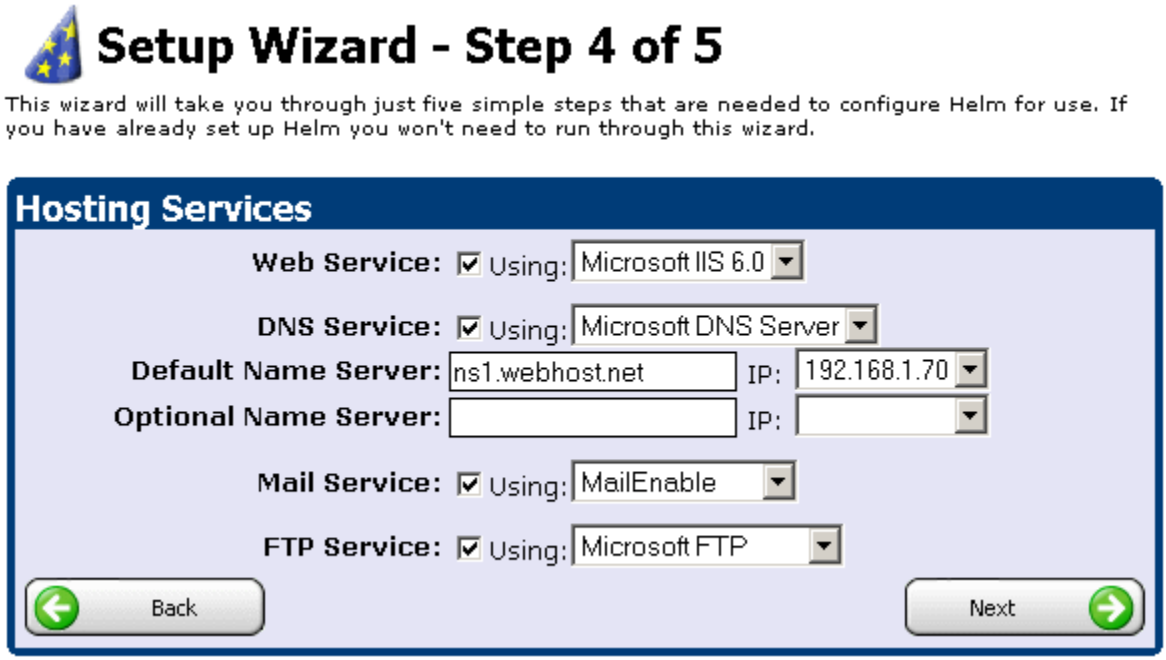
Follow the wizard through its 5 simple steps to complete Helm setup.

Step 1:- The introduction to the Wizard and its 5 steps.

Step 2:- You can enter a new administrator password to log into Helm here, and also the contact sales and support email addresses for your Helm administrator account.

Step 3:- You can select the server IP you wish Helm to communicate on here.

Step 4:- In this step, you need to choose the services you wish to offer. The four basic services you can set up are Web, DNS, Mail and FTP:



If you don't wish to set up a particular service at this time (for instance, mail), you can uncheck the corresponding box, and Helm won't create that service during the setup process.

- For the Web Service, you need to choose the version of IIS you are running on your server. Windows 2000 will run IIS 5, whilst Windows 2003 will run IIS 6 – so select the appropriate service from the dropdown box.

- For the DNS Service, you need to choose the DNS server you are running from the available list in the dropdown box. Helm fills in a dummy Default Name Server address which you can alter, along with its IP as necessary. If you have a secondary name server, you can enter it under the Optional Name Server field, along with its IP.

- For the Mail Service and FTP Service, you need to choose the relevant servers you are running from the available lists in the dropdown boxes.

Step 5:- This is just a summary page, detailing what will be created once you finish the wizard.

Once you click Next, Helm will set up the services you have chosen, along with their resources.

If, for some reason, the wizard doesn't complete correctly, then you will be prompted to go to the Self Diagnostic tool which will attempt to fix the issue – make sure you check the Check and Fix box if you want Helm to automatically fix any issues it comes across. Once done, all parts of the diagnostic should pass. You do not need to re-run the Setup Wizard again – you should now be able to start adding domains to Helm.

Bear in mind that only the basic service features have been set up. For instance, Helm does not automatically set up FrontPage Extensions or Secure Folders for you – you will need to configure

the Web Service details to do this. Similarly, if you want to configure any specific mail settings, you may want to change the Mail Service from the default settings Helm chooses, to custom choices you wish to make. Because the scope of Helm is so vast, it would be impossible for the Setup Wizard to select a group of settings that matches every user's server. This is why the settings that Helm chooses are left as open as possible for you to customise.

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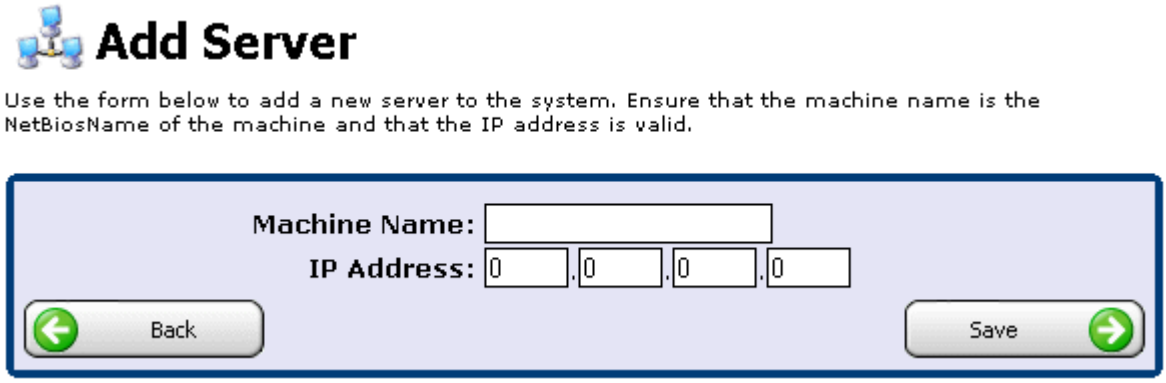
You may instead wish to ignore the Setup Wizard and set up each service and resource manually. This will take more time, however, so new users might feel more comfortable using the Setup Wizard so they can quickly begin using Helm.

If you wish to setup Helm's services and resources manually, please see below.

Setting up Services Manually

It will take a little longer to manually set up services and resources, but it means you can fully customise each service as you add it. The following walkthrough assumes that you are setting up a completely new Helm install that has had nothing added to it previously:

1.) Before you can set up services, you need to add your server into Helm. Go to Home > System Settings > Servers and click Add New:

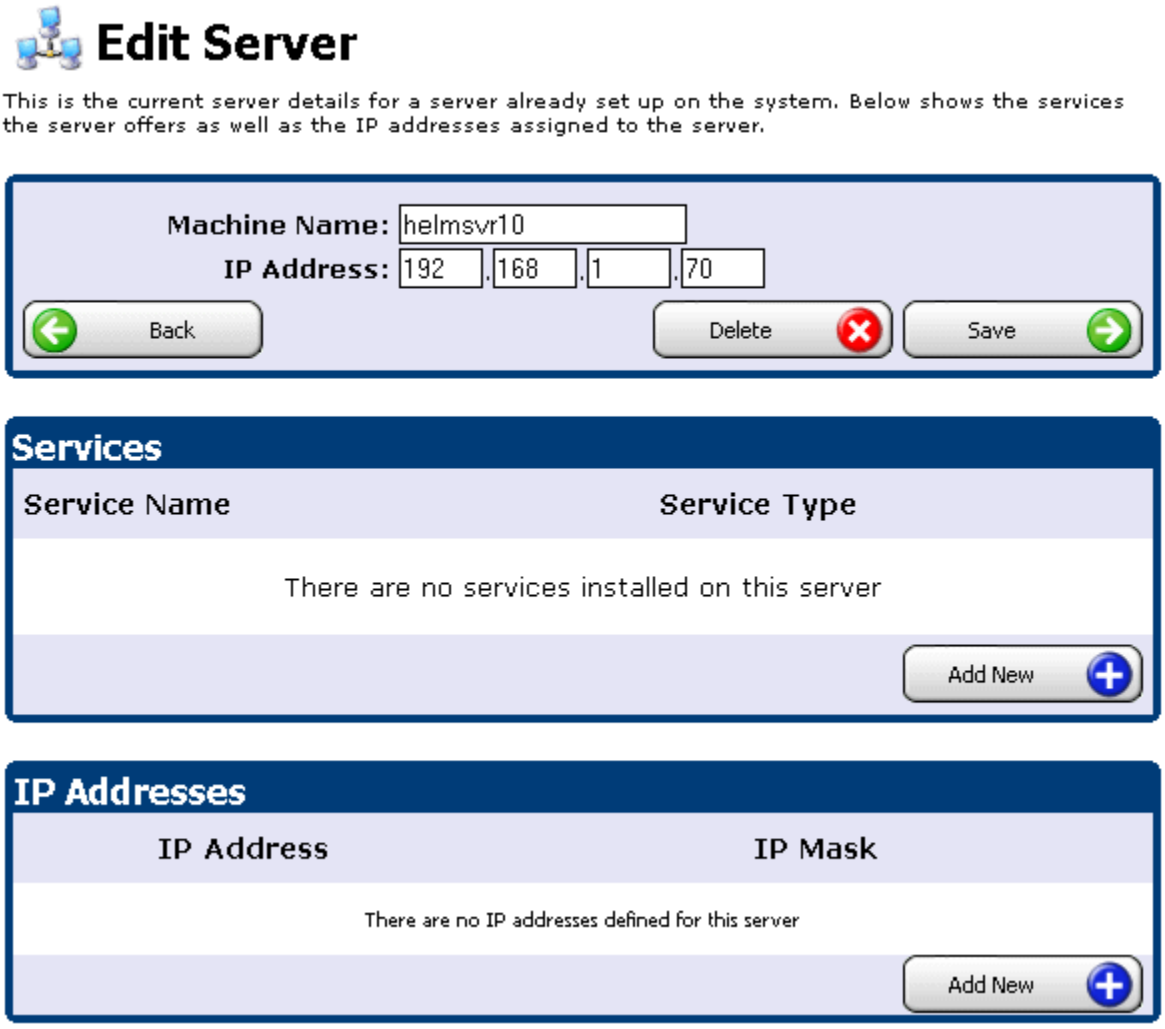


Ensure the server's name matches exactly the NetBIOS name of your machine. To find the NetBIOS name of your machine, you need to do the following:

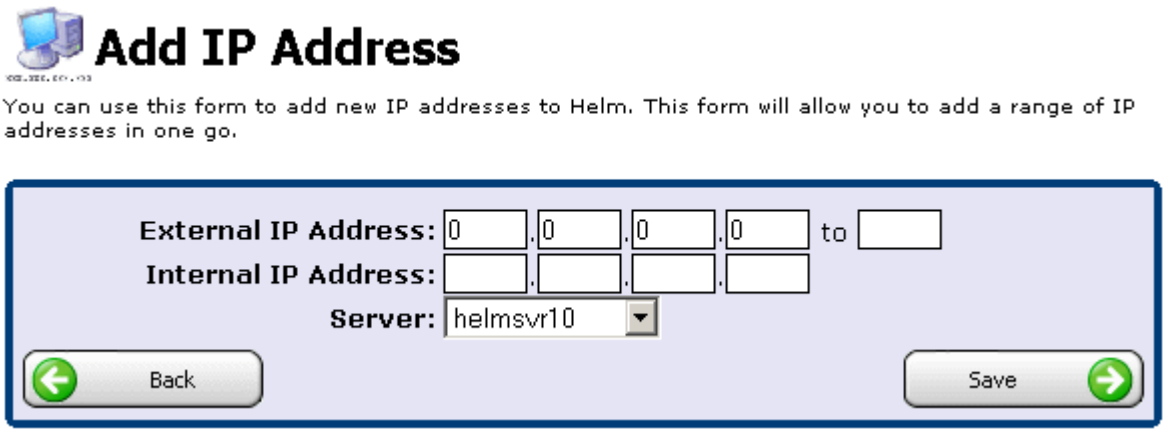
a.) Right click My Computer, and choose Properties.
b.) Choose the Computer Name Tab.
c.) The NetBIOS name is the name next to "Full computer name" - the first part only. So if the name is helmserver.domain.com you only need to enter the Server name of "helmserver" into Helm.

Now, enter the IP you wish Helm to communicate on and click Save.

2.) You now have a server set up in Helm. The last thing you need to do before setting up services is to add IPs to Helm (including the main server IP you previously entered).



Scroll to the bottom of the page to IP Addresses and click “Add New”.



Enter an external IP or IP range, and if appropriate, the internal IP that masks it. If nothing masks it, leave the "Internal IP" field blank. Then select the server that the IP is to be assigned to, and click Save.

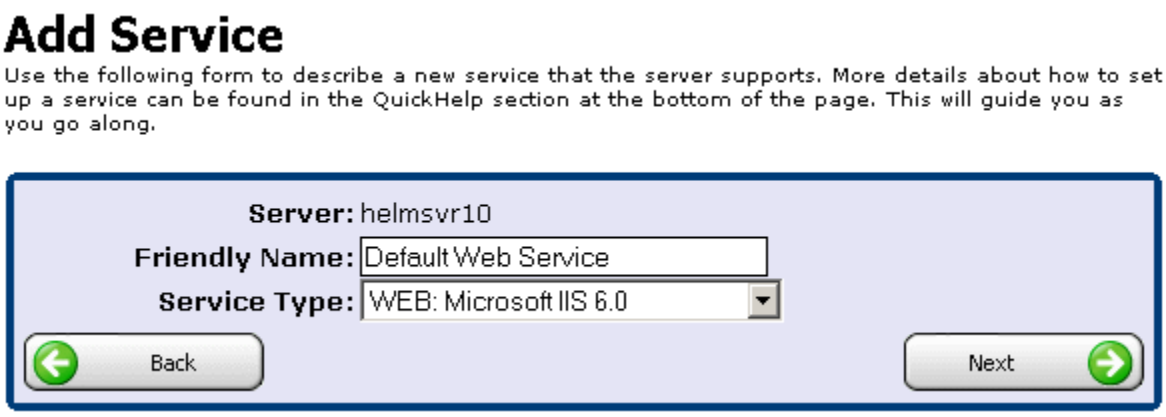
This can be repeated for all of the IPs that are assigned to your server. Once done, return to:

Home > System Settings > Servers

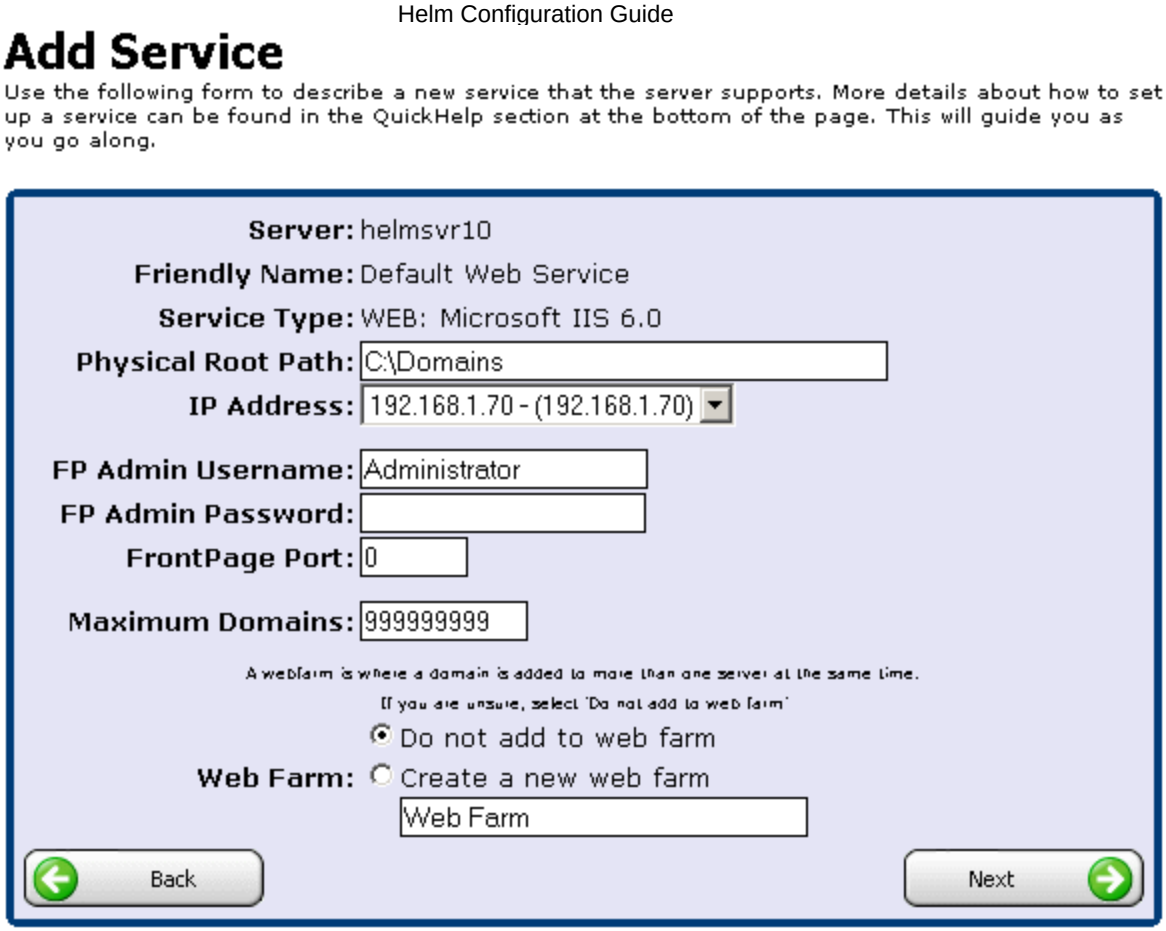
3.) Now you need to start adding the services you wish to offer. The below example will cover the addition of 4 basic services: IIS, FTP, DNS and Mail.

Web Service (IIS)

Firstly, a web service will be added. Choose Add Service, and you will be asked to choose a name for your service, and the service type. Here, "Default Web Service" is chosen, and the IIS 6.0 web service is selected from the dropdown box. Note:- IIS 6.0 is needed for Windows 2003 machines, whilst Windows 2000 machines need to choose the IIS 5.0 service.



Click Next, and you will be prompted to configure the web service further. An explanation of each editable field is below.



Physical Root Path:- Here you can specify the location you wish to store your resellers'' domains – simply change the path to suit your needs.

IP Address:- You can specify the IP address that you want the web service to use here. You can host domains on this IP which is shared, and also offer dedicated IPs to domains if you have them available, and wish to do so.

FP Admin Username/Password/Port:- If you are offering FrontPage Extensions to your resellers, you can set up the details here, as specified elsewhere in this guide.

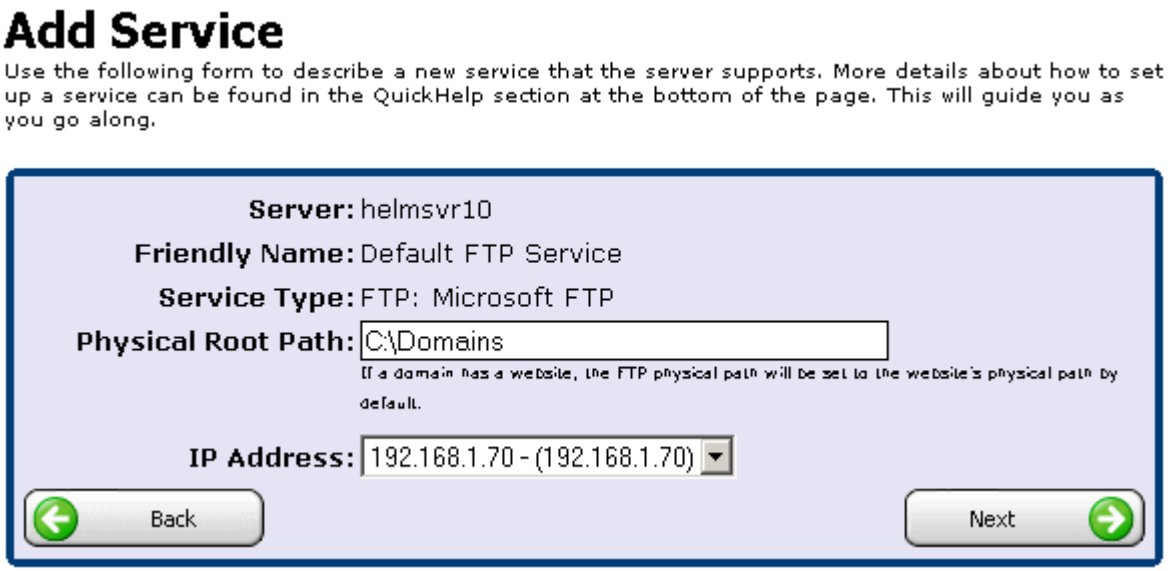
Maximum Domains:- You can limit the number of domains created on a server using this field.

Web Farm:- You can add domains to a web farm using this option. However, you should only use this option if you are familiar with web farms as the setup involving web farming can become quite complex. If you are unsure, choose "Do not add to web farm".

Once you have configured the services you want, click Next to confirm and then Next again to return to the main Services screen.

FTP Service

The next service to be added is the FTP Service. Similar to the first service, choose Add Service and then enter a relevant name (in this case, “Default FTP Service”) and the FTP server software you are using. In this example, Microsoft FTP is chosen. Click Next, and you will be prompted to configure the web service further. An explanation of each editable field is below.

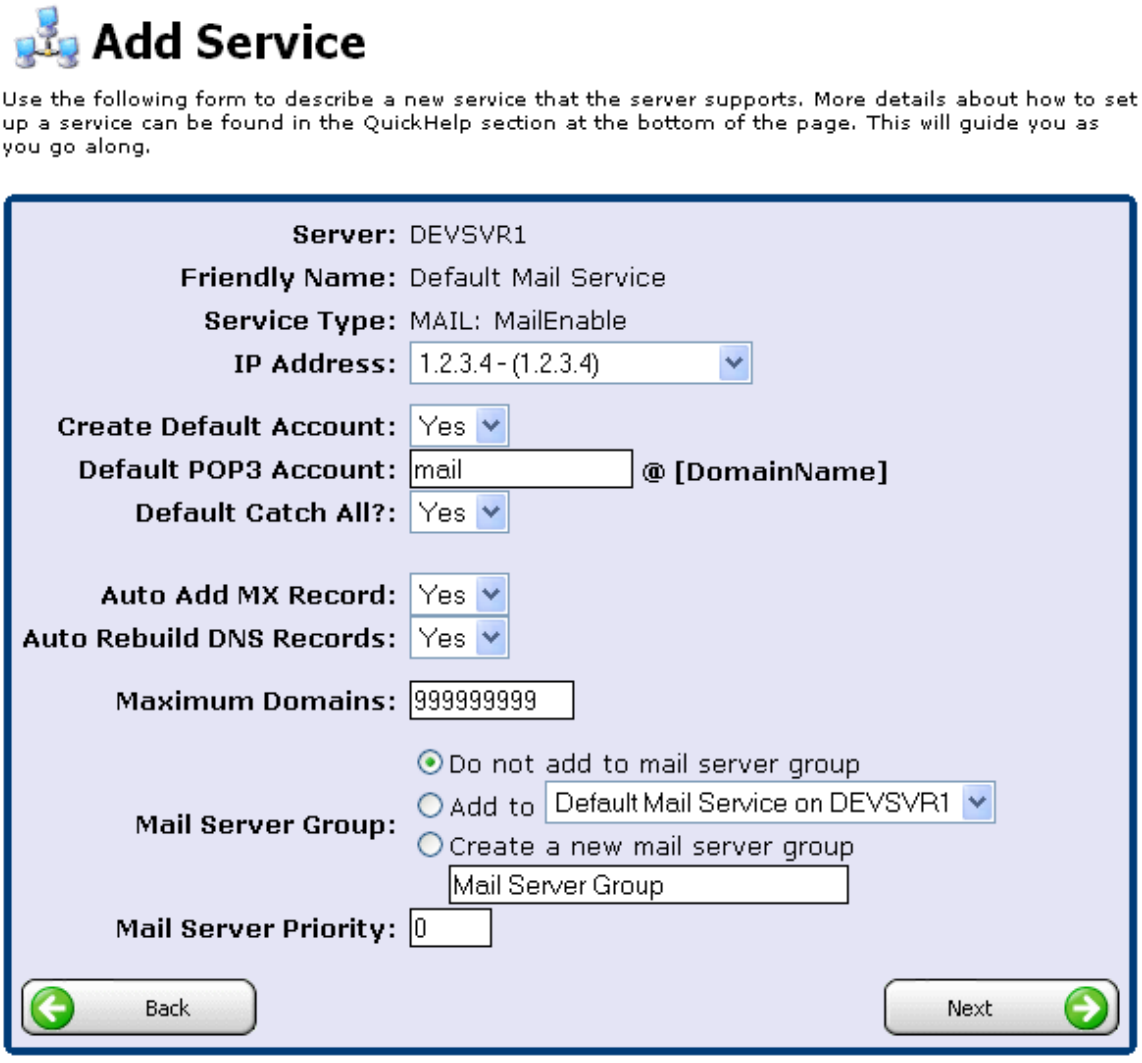


Physical Root Path:- Here you can specify the location you wish to store your resellers” FTP accounts – simply change the path to suit your needs. It is recommended you change this from the default setting to something more relevant, such as C:\Inetpub\wwwroot.

IP Address:- You can specify the IP address that you want the FTP service to use here.

Mail Service

The next service to be added is the Mail Service. As with the previous services, choose Add Service and then enter a relevant name (in this case, “Default Mail Service”) and the Mail server software you are using. Here, MailEnable is chosen. Click Next, and you will be prompted to configure the mail service further. An explanation of each editable field is below.



IP Address:- The IP address that the MailEnable service will communicate on.

Create Default Account:- If this is set to “No” then no POP3 account will be created when a domain is created. If set to “Yes”, a default account will be created when a domain is created. This will usually be mail@domain.com but can be altered in the next field to one of your choice.

Default POP3 Account:- Here you can select what the default POP3 account will be when it is created during the creation of a domain in Helm.

Default Catch All?:- Yes/No option for whether the POP3 account that is created will be a catch all account or not.

Auto Add MX Record/Auto Rebuild DNS Records:- With these two fields, specific records in the DNS Zone Editor in Helm will be rebuilt depending on the combination of options chosen.

Here's a simple rundown of what happens depending on which option is chosen:

Auto Add MX Record	Auto Rebuild DNS Records	Effect
On	On	Both the “mail” record + MX record get rebuilt each time a POP3 account is created.
Off	On	The MX record is not added when a domain is created, nor when a POP3 account is added. The “mail” record is rebuilt each time a POP3 is added.
On	Off	The MX record is added the first time (during the creation of the first POP3 account), but not subsequently. If it is manually removed from DNS Zone Editor, the “mail” record **doesn't** get rebuilt when a POP3 account is added.
Off	Off	The MX record isn’t built at all when a domain or POP3 account is added, and if removed from DNS Zone Editor, the “mail” record is not rebuilt either.

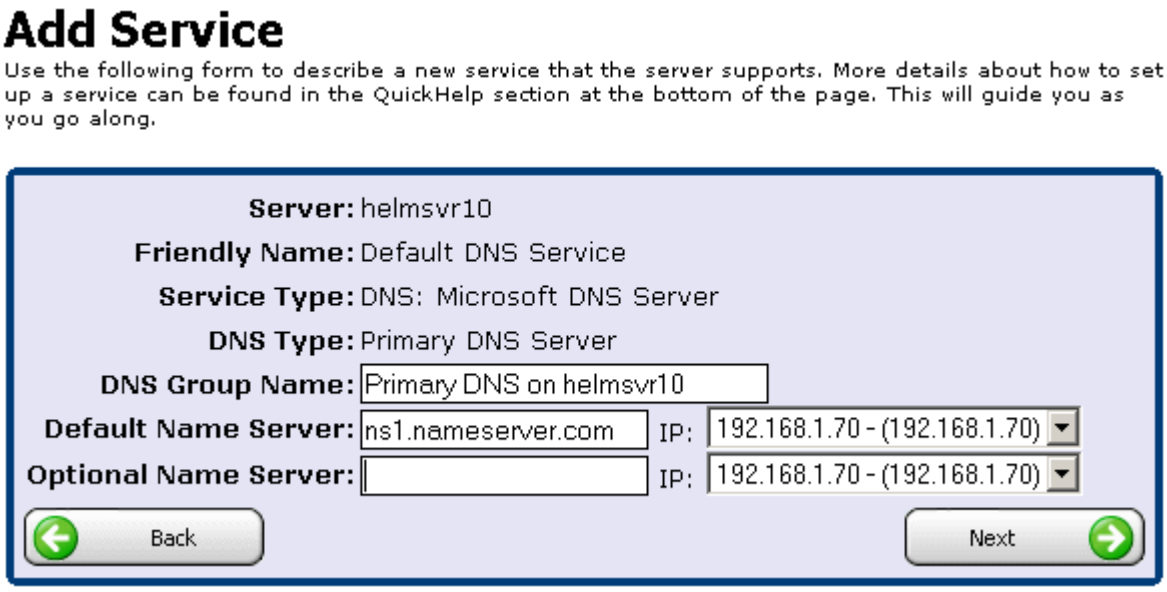
Maximum Domains:- The maximum number of mail accounts that can be created with this service.

Mail Service Group:- Here you can specify if you want to add the service to a mail server group. By default this is set to **not** add it to a group, so if you are not sure, leave it as default.

Mail Server Priority:- By default this is 0, but you can change the priority of the service here to different so that other mail services get tried first.

DNS Service

The final service added in this example is the DNS Service. As with the previous services, choose Add Service and then enter a relevant name (in this case, “Default DNS Service”) and the DNS server software you are using. Here, Microsoft DNS is chosen. Click Next, and the next screen will tell you that this will be the primary DNS server. Click Next again to get taken to the name server screen. Here you can choose the IP and name of your Primary and (optional) Secondary name servers:



DNS Group Name:- The friendly name for the “group” of DNS services, that the primary and any secondary service will get added to.

Default Name Server:- You can specify the name of your main name server and the IP address it uses here.

Optional Name Server:- You can specify the name of your secondary name server and the IP address it uses here.

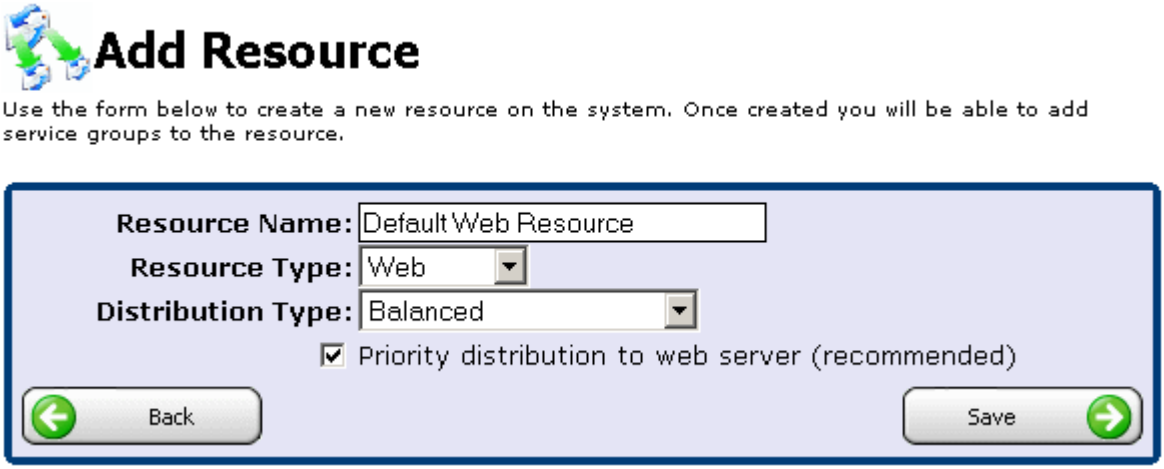
If you want to create a secondary DNS service, this can be created on another server within Helm, in a similar way.

Setting up Resources Manually

Now you have set up 4 main services, you need to be able to create *resources* in order to offer these services in your plans. A resource is simply a single service, or group of services, that you can use in your hosting plans to offer to resellers.

1.) To set up resources in Helm, go to: Home > System Settings > Resource Setup.

Now you need to add a resource for each service that you have created. For instance, you will need to create a web resource – so click Add New. You will be prompted to choose a name for the resource, the type of resource, and the distribution type of the resource.



In the above example, the resource name and type are fairly self-explanatory since it is a web resource that is being added.

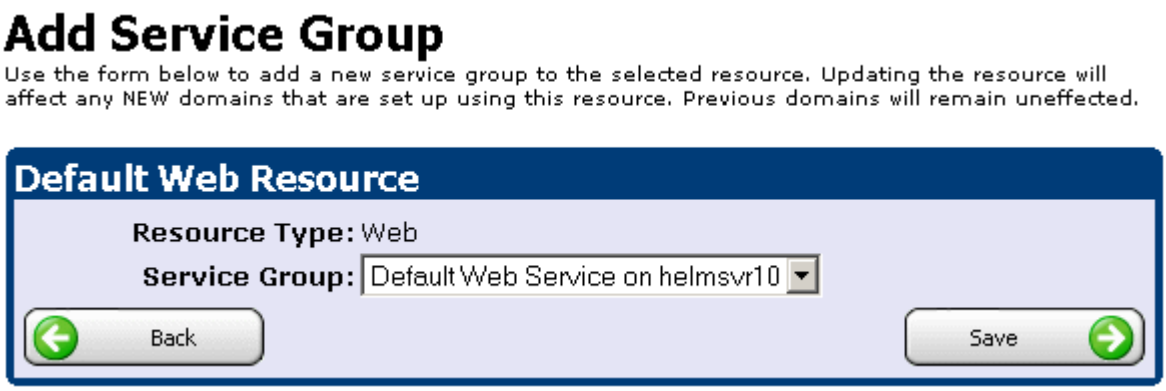
The distribution types are distinguished as follows:

Balanced Distribution: This allocates domains to the services by spreading them evenly across all of the services available in the resource. This is the most common and recommended distribution type to use if you are unsure.
Balanced with Bias Distribution: Each service can be provided with a "maximum number of domains" for that service (as can be seen in the details of the web service that was added earlier). This is useful where environments have mixed servers of various powers. The bias will allow smaller servers to have fewer domains distributed to them.
Random Distribution: This allocates domains to all of the services randomly. This will not take into account how much each service is already being used.
Random with Bias Distribution: This allocates domains to all of the services randomly whilst also taking into account the power of each server (number of domains it can handle). It will bias towards the bigger services – the ones with a larger number of "maximum domains".

2.) You can also specify whether you want Helm to distribute the services to the same web server. This means that if you would prefer your FTP account, database and mail account to be on the same server, then (assuming you have all of these services set up on the server you are

distributing to) by ticking the "Priority distribution to web server" box for each resource, Helm will make sure that your services all get set up on the same server.

3.) Once you have made your choices, click "Save" to save the resource. Now you need to add the relevant service group to the resource. Under Service Name on the same page, it will say "There are no services in this resource", so click Add New.



Helm will automatically pick up any web services that have been set up, and populate the Service Group dropdown box ready for you to select one. Choose the service you want to add, and click Save.

You can add multiple service groups to a resource; for instance, if you add three web service groups to a resource, Helm will choose between each of these services when it comes to adding a domain based on bias (which was chosen earlier). This is the same for FTP, Mail, etc. – if you want Helm to take care of spreading services over available servers, just add each service into the relevant resource.

Note:- The exception to this is DNS – you only need to add the primary DNS service to a resource. You should not add any secondary DNS services to the resource, as Helm will create zone files on the secondary DNS server(s) based on information from the service alone.

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Now your server, services and resources are set up, and you can always add more of each by following the above steps in the future. The next thing to do is to set up plans and packages for your resellers. This is covered in the Helm Administrator Guide which can be found in the documentation section of our site:

http://download.webhostautomation.net/Helm/docs/Helm%20Administrator%20Guide.pdf

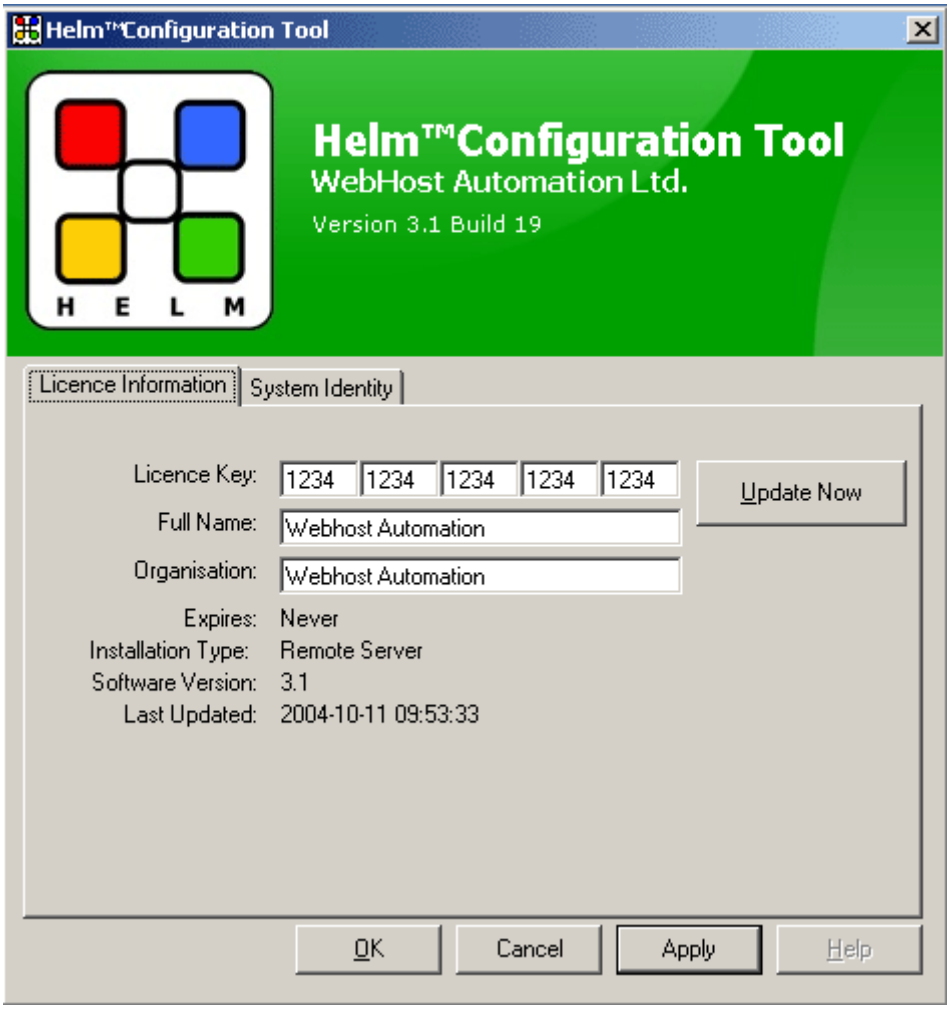
Configuring Remote Servers

Configuring remote servers for Helm is very straightforward.

For each remote server you wish to control, you will need to download and install Helm as a Remote Server. To do this, open up a web browser on the server you want to make a remote, and go to:

http://helm.download.webhostautomation.net/HelmSetup.exe

Download this to your server and run it. Put your licence key in, and when you get to the options choose **Helm Remote Server**. Once installed, you will see the Helm Configuration Tool shortcut on your desktop. Open it, and you will then see the following screen:



Click "Update Now" to confirm the licence key works correctly. **You must use a different licence key on each server**. If you previously had a control server and one or more remote servers and want to purchase more Helm licences, you will need to contact WHA to change your licence over to the new system so that the new licences you purchase work.

The only configuration you will now need to do is to ensure that:

- XML 4.0 SP2 is installed – you can get this here:

http://download.microsoft.com/download/9/6/5/9657c01e-107f-409c-baac-7d249561629c/msxml.msi

- All servers have File and Print sharing enabled on the NIC that is connected to the control server.
- All servers have the Remote Registry service started.
- The NT account that you set up in the Configuration Tool (by default – HELM_ADMIN) is added to the "Administrators" group on the remote machine(s) with the same password.

1.) To enable File and Print Sharing, go to

Control Panel → Network Connections

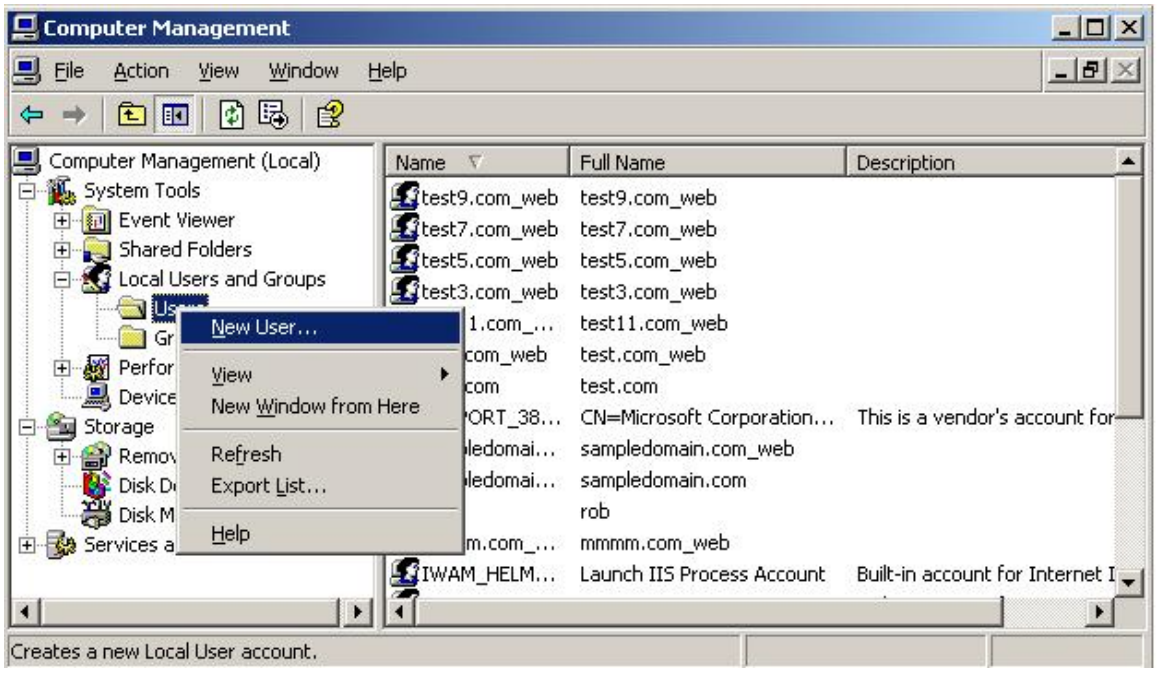
and right-click your LAN. Choose Properties, and then check the File and Print Sharing box.

2.) Now make sure the Remote Registry service is running on the remote server. On the remote server, go to:

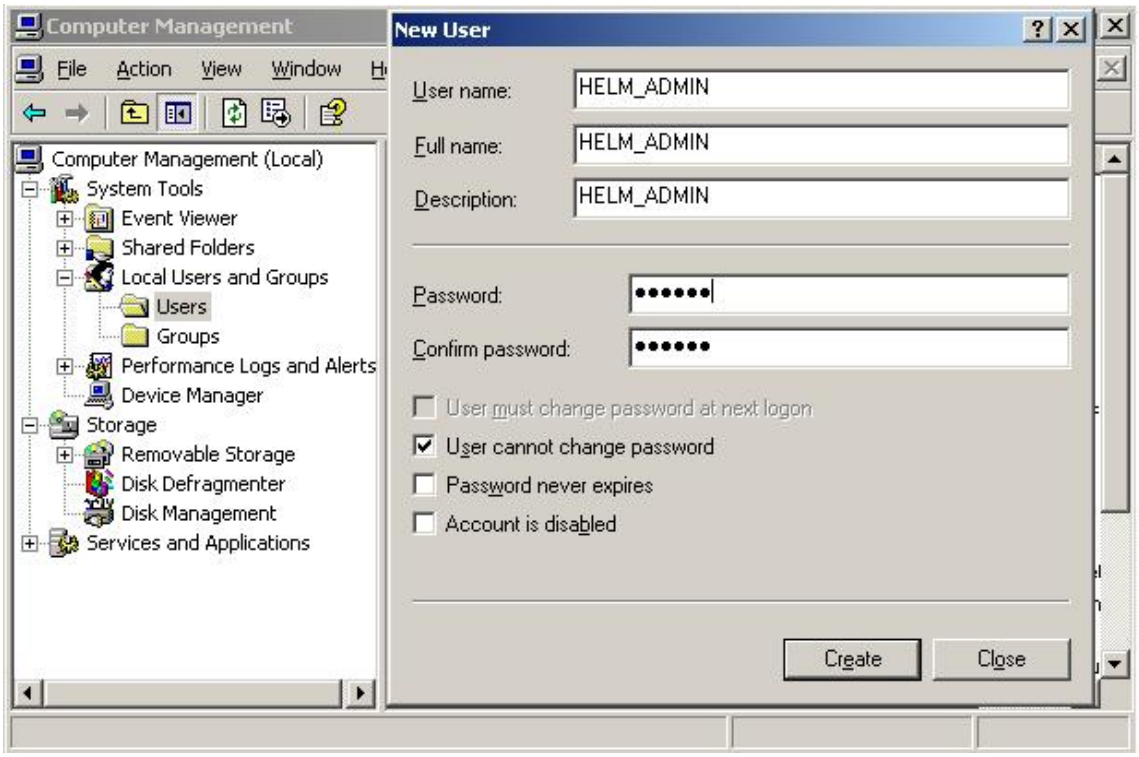
Control Panel → Administrative Tools → Services

and make sure the Remote Registry service is "Started".

3.) To add the NT account (HELM_ADMIN) to the remote machine, firstly open Windows Computer Management: right-click My Computer and choose "Manage". Expand the Local Users and Groups tree, and click Users. You will see a list of current NT users in the right pane. Right-click Users and choose "New User".

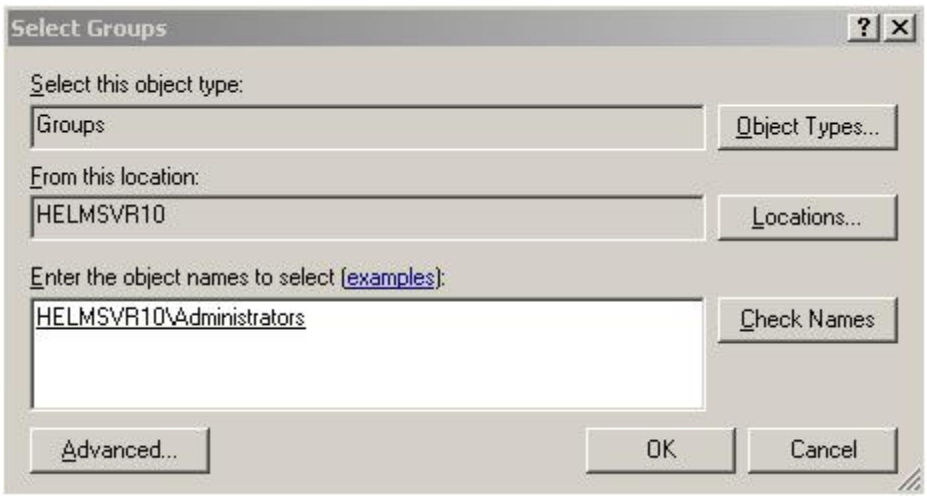


Enter the User name and Full Name as HELM_ADMIN and a description of the user (this can be whatever you like). For the password, enter the same password that is used for the HELM_ADMIN user on the control server, and confirm it. Click Create, and then click Close.

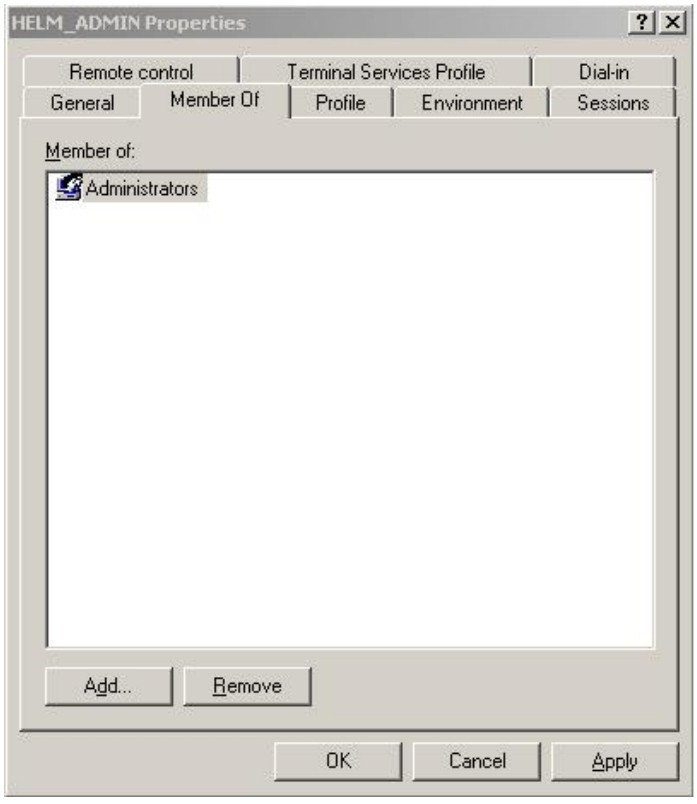


Now that the user is created, you need to grant it the appropriate Administrator permissions. Double click the user in the Users list, click the Member Of tab and choose Add. Now you need to add the "**Administrators**" group to that user, so in the text box type "Administrators" and click the Check Names button. The server should pick up the Administrators group correctly, so press OK.

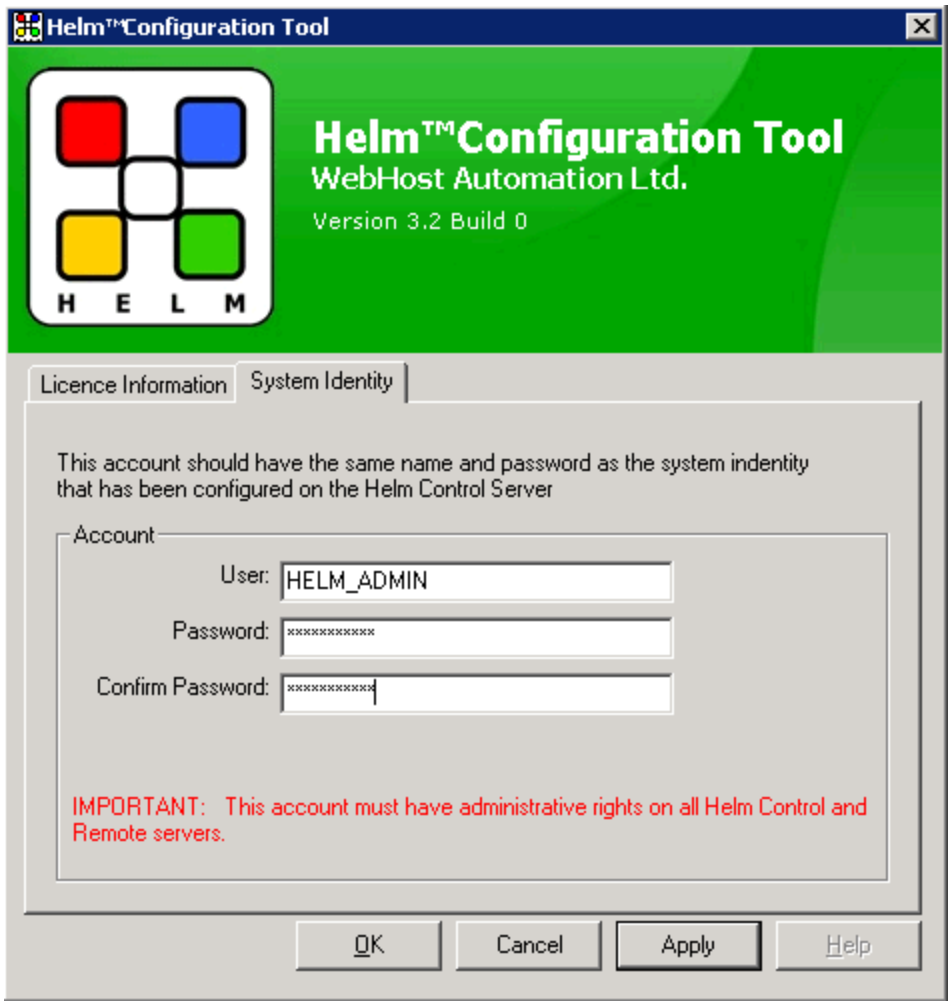
(NOTE:- Non-English operating systems may use something different to the "Administrators" group, e.g. "Administratoren", "Administradores", etc. In this case, use whichever is the correct group for your language.)



Once you have clicked OK, you will see that the user has the correct permissions added:



Now go back to the Helm Configuration Tool and click the "System Identity" tab. With a new remote server installation, all the fields will be blank. You need to enter the HELM_ADMIN user and password that you have just configured, as below:



Click OK to save the settings.

You now need to add the remote server into Helm. To do this, go into Helm and choose:

Home → System Settings → Servers

Choose “Add New” and enter the machine name and the IP of the server. Also check that the name of the server matches exactly the NetBIOS name of your machine. To find the NetBIOS name of your machine, you need to do the following:

1.) Right click My Computer, and choose Properties.
2.) Choose the Computer Name Tab.
3.) The NetBIOS name is the name next to "Full computer name" - the first part only. So if the name is **helmserver.domain.com** you only need to enter the Server name of **helmserver** into Helm.

Click Save to add the server. If you get a message saying “Unable to add new server – Limit reached.” you will need to purchase another Helm licence from either WebHost Automation Ltd. or a Helm Distributor.

Once added, you now need to add the relevant services you wish to configure on this server. For instance, if you are using the remote server to host websites, you will need to set up an IIS service. Similarly, you will need to set up DNS or Mail services if you want the remote server to offer those.

Now go to your Resources:

Home → System Settings → Resource Setup

You will already have resources set up for your other server. All you need to do now is add the services of your new remote server to the present resources.

Example: if you have just set up a new web service on your remote server, open up the web resource. Go down to the bottom and click “Add New” under Service Name. In the dropdown box you will see the new service you have added. Select this and choose “Save”. You will now see this new service grouped along with the original service you have set up. This means that if you now create a domain with a package that uses this resource, then assuming you are using server balancing, Helm will choose the appropriate server to create the domain on. Similarly, if the service you have just added is a mail service, Helm will choose the appropriate mail service to add the mailbox to.

Once done, simply update your plans and packages with the new resource (where appropriate) by going to “Resource Limits” for the relevant plan/package. You can then start using your remote server with Helm.