ROSS PLATFORM MANAGER

User Guide

Version 3.11

Thank You for Choosing Ross

You've made a great choice. We expect you will be very happy with your purchase of Ross Technology.

Our mission is to:

1. Provide a Superior Customer Experience
    - offer the best product quality and support
2. Make Cool Practical Technology
    - develop great products that customers love

Ross has become well known for the Ross Video Code of Ethics. It guides our interactions and empowers our employees. I hope you enjoy reading it below.

If anything at all with your Ross experience does not live up to your expectations be sure to reach out to us at *solutions@rossvideo.com*.

David Ross
CEO, Ross Video
dross@rossvideo.com

Ross Video Code of Ethics

Any company is the sum total of the people that make things happen. At Ross, our employees are a special group. Our employees truly care about doing a great job and delivering a high quality customer experience every day. This code of ethics hangs on the wall of all Ross Video locations to guide our behavior:

1. We will always act in our customers' best interest.
2. We will do our best to understand our customers' requirements.
3. We will not ship crap.
4. We will be great to work with.
5. We will do something extra for our customers, as an apology, when something big goes wrong and it's our fault.
6. We will keep our promises.
7. We will treat the competition with respect.
8. We will cooperate with and help other friendly companies.
9. We will go above and beyond in times of crisis. *If there's no one to authorize the required action in times of company or customer crisis - do what you know in your heart is right. (You may rent helicopters if necessary.)*

Ross Platform Manager · User Guide

- Ross Part Number: **7900DR-004-3.11**
- Release Date: August 26, 2025. Printed in Canada.
- Software Issue: **3.11**

The information contained in this Guide is subject to change without notice or obligation.

Copyright

Patents

Patent numbers 4,205,346; 5,115,314; 5,280,346; 5,561,404; 7,034,886; 7,508,455; 7,602,446; 7,834,886; 7,914,332; 8307284, 2039277; 1237518; 1127289 and other patents pending.

Warranty and Repair Policy

Ross Video Limited (Ross) warrants its Ross Platform Manager systems to be free from defects under normal use and service a time period of 15 months from the date of shipment:

If an item becomes defective within the warranty period Ross will repair or replace the defective item, as determined solely by Ross.

Warranty repairs will be conducted at Ross, with all shipping FOB Ross dock. If repairs are conducted at the customer site, reasonable out-of-pocket charges will apply. At the discretion of Ross, and on a temporary loan basis, plug in circuit boards or other replacement parts may be supplied free of charge while defective items undergo repair. Return packing, shipping, and special handling costs are the responsibility of the customer.

This warranty is void if products are subjected to misuse, neglect, accident, improper installation or application, or unauthorized modification.

In no event shall Ross Video Limited be liable for direct, indirect, special, incidental, or consequential damages (including loss of profit). Implied warranties, including that of merchantability and fitness for a particular purpose, are expressly limited to the duration of this warranty.

This warranty is TRANSFERABLE to subsequent owners, subject to Ross' notification of change of ownership.

Extended Warranty

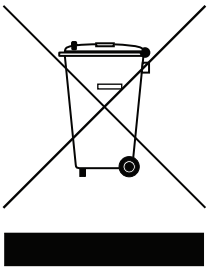
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Ross Platform Manager system, contact your regional sales manager.

Environmental Information

The equipment that you purchased required the extraction and use of natural resources for its production. It may contain hazardous substances that could impact health and the environment.

To avoid the potential release of those substances into the environment and to diminish the need for the extraction of natural resources, Ross Video encourages you to use the appropriate take-back systems. These systems will reuse or recycle most of the materials from your end-of-life equipment in an environmentally friendly and health conscious manner.

The crossed-out wheeled bin symbol invites you to use these systems.



If you need more information on the collection, reuse, and recycling systems, please contact your local or regional waste administration.

You can also contact Ross Video for more information on the environmental performances of our products.

Use of Hazardous Substances in Electrical and Electronic Products (China RoHS)

Ross Video Limited has reviewed all components and processes for compliance to:

“Management Methods for the Restriction of the Use of Hazardous Substances in Electrical and Electronic Products” also known as China RoHS.

The “Environmentally Friendly Use Period” (EFUP) and Hazardous Substance Tables have been established for all products. We are currently updating all of our Product Manuals.

The Hazardous substances tables are available on our website at:

http://www.rossvideo.com/about-ross/company-profile/green-practices/china-rohs.html

电器电子产品中有害物质的使用

Ross Video Limited 按照以下的标准对所有组件和流程进行了审查：

“电器电子产品有害物质限制使用管理办法”也被称为中国RoHS。

所有产品都具有“环保使用期限”（EFUP）和有害物质表。目前，我们正在更新我们所有的产品手册。

有害物质表在我们的网站：

http://www.rossvideo.com/about-ross/company-profile/green-practices/china-rohs.html

Company Address

Ross Video Limited
8 John Street
Iroquois, Ontario
Canada, K0E 1K0

Ross Video Incorporated
P.O. Box 880
Ogdensburg, New York
USA 13669-0880

General Business Office: (+1) 613 • 652 • 4886
Fax: (+1) 613 • 652 • 4425

Technical Support: (+1) 613 • 652 • 4886
After Hours Emergency: (+1) 613 • 349 • 0006

E-mail (Technical Support): techsupport@rossvideo.com
E-mail (General Information): solutions@rossvideo.com
Website: http://www.rossvideo.com

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Introduction

A Word of Thanks

Thank you for choosing the Ross Platform Manager as your product orchestration solution.

We are committed to providing you with the highest level of customer satisfaction possible. If, for any reason, you have questions or comments, please call Ross Video at +1-613-652-4886 or send us an e-mail at techsupport@rossvideo.com.

We hope that you visit our website www.rossvideo.com to stay up to date with ongoing software releases, join our customer forum and learn more about the complete range of Ross Video products.

Note that software maintenance and extended warranties are available for your system to protect and extend the life of your investment. Our sales team are more than happy to provide further information on the plans available. Members of our sales team promptly respond to e-mails sent to: solutions@rossvideo.com.

Again, thank you for your purchase of Ross Platform Manager from Ross Video. We are confident of your future pleasure with your choice.

Yours Sincerely,

Gabriel Duschinsky
Product Manager - Enterprise Management

gabriel.duschinsky@rossvideo.com

About This Guide

This guide contains the following chapters that cover the use of the Ross Platform Manager interconnection system:

1. "**Introduction**" summarizes the guide and provides important terms, conventions, and features.
2. "**Getting Started**" provides an overview of the Ross Platform Manager user interface.
3. "**Monitoring the System**" provides instructions on how to monitor the health of a Ross Platform Manager system.
4. "**User Preferences**" provides instructions on how to override the default language, time zone, and font sizes set by the Ross Platform Manager administrator.
5. "**Configuring System Properties**" provides instructions on how to configure a Ross Platform Manager system.
6. "**Managing a Product Key**" provides instructions on how to manage multiple product key licenses and feature activations from the Product Key Manager view
7. "**Managing a Target**" provides instructions on instantiating and authorizing a connection to a target.
8. "**Using the Device Tree**" provides instructions on using the Device Tree to view and access OGP devices and their UIs.
9. "**Managing a Deployment**" provides instructions on creating a deployment.
10. "**Managing DashBoard CustomPanels**" provides instructions on using DashBoard CustomPanels in Ross Platform Manager.
11. "**Configuring User Permissions**" provides instructions on how to set role-base user permissions for Ross Platform Manager users.
12. "**Configuring LDAP Authentication**" provides instructions on how to use LDAP to create Ross Platform Manager user accounts and roles.
13. "**Changing Your Password**" provides instruction on how to change your Ross Platform Manager account password
14. "**Managing Perspectives**" provides instructions on how to create global perspectives available to all Ross Platform Manager users.
15. "**Using the Log Explorer**" provides instructions on how to download and delete application data logs from Ross Platform Manager.

If you have questions pertaining to the operation of the Ross Video product, please contact us at the numbers listed in the section "**Contacting Technical Support**" on page 1–4. Our technical staff is always available for consultation, training, or service.

Documentation Conventions

This guide uses special text formats to identify parts of the user interface, text that a user must enter, or a sequence of menus and submenus that a user must follow to reach a particular command.

Interface Elements

Bold text identifies a user interface element such as a dialog box, a menu item, or a button. For example:

In the **Media Manager Client**, click **Channel 1** the **Channels** section.

User Entered Text

Courier text identifies text that a user must enter. For example:

In the **File Name** box, enter **`Channel01.property`**.

Referenced Guides

Italic text identifies the titles of referenced guides, manuals, or documents. For example:

For more information, refer to the section "**Twitter Configuration**" on page 3–6 in the ***Ross Platform Manager User Guide***.

Menu Sequences

Menu arrows identify a sequence of menu items that a user must follow to reach a particular command. For example: if a procedure step contains "**Server** > **Save As**," a user should click the **Server** menu and then click **Save As**.

Important Instructions

Star icons identify important instructions or features. For example:

✶ After installing Ross Platform Manager software, you must obtain Ross Platform Manager feature licenses from Ross Video Technical Support before users can access Ross Platform Manager features.

Getting Help

To access the Ross Platform Manager Online Help system, click the **Help** icon in the main toolbar. For help about the currently open panel, click the **Help** button in a panel title bar to view a help topic about the panel.

The Online Help system contains the following navigation tabs to locate and access Online Help topics:

- **Contents** — table of contents
- **Search** — full text search
- **Favorites** — preferred information storage and access

Ross Video also supplies a print-ready PDF file of the ***Ross Platform Manager User Guide*** on the Ross Platform Manager Software Installation DVD.

Contacting Technical Support

Technical Support is staffed by a team of experienced specialists ready to assist you with any question or technical issue.

Ross Video has technical support specialists strategically located around the globe to ensure a prompt response to technical inquiries. Our primary technical support center is located in Ottawa, Ontario, Canada. In addition, we have offices in The United Kingdom (London), Australia (Sydney), and Singapore with satellite locations in New York City, The Netherlands, and China. As we expand our presence globally, we are constantly evaluating other key locations to have a local technical support specialist in order to better service our customers.

North America

Our North America center located in Ottawa, Ontario, Canada and is open Monday to Friday 8:30 a.m. to 6:00 p.m. EST, with 24/7/365 on-call service after hours.

Our telephone number is: +1-613-652-4886

Toll free within North America: +1 844-652-0645

EMEA

Our EMEA center is located in Buckinghamshire, England, United Kingdom and is open Monday to Friday 8:30 a.m. to 5:00 p.m. GMT. After hours support is provided by our North America location.

Our telephone number is: +44 (0)1189502446

International toll free: +800 1005 0100

Emergency After-hours Support

Our telephone number is: +1-613-349-0006

Toll free within North America: +1 844-652-0645

International toll free: +800 1005 0100

Online

E-mail: techsupport@rossvideo.com

Website: use the link http://www.rossvideo.com/support/tech-support.html to open a support request.

Getting Started

Ross Platform Manager (RPM) is an enterprise grade software solution which acts as a gateway to your Ross Ecosystem. RPM aspires to provide customers with a unified approach to manage, coordinate, and securely access production control systems. RPM aims at improving operational efficiencies in an efficient, easy to use, and secure approach.

RPM provides the following capabilities.

1. Software Licensing
2. Software Orchestration and Configuration Management
3. AWS instance lifecycle management
4. Role Based Access Control for OpenGear devices

This chapter discusses the following topics:

- Open Ross Platform Manager
- Explore the Ross Platform Manager User Interface
- Using a Desktop Computer with Ross Platform Manager
- Entering Text for Right-to-Left Languages

Open Ross Platform Manager

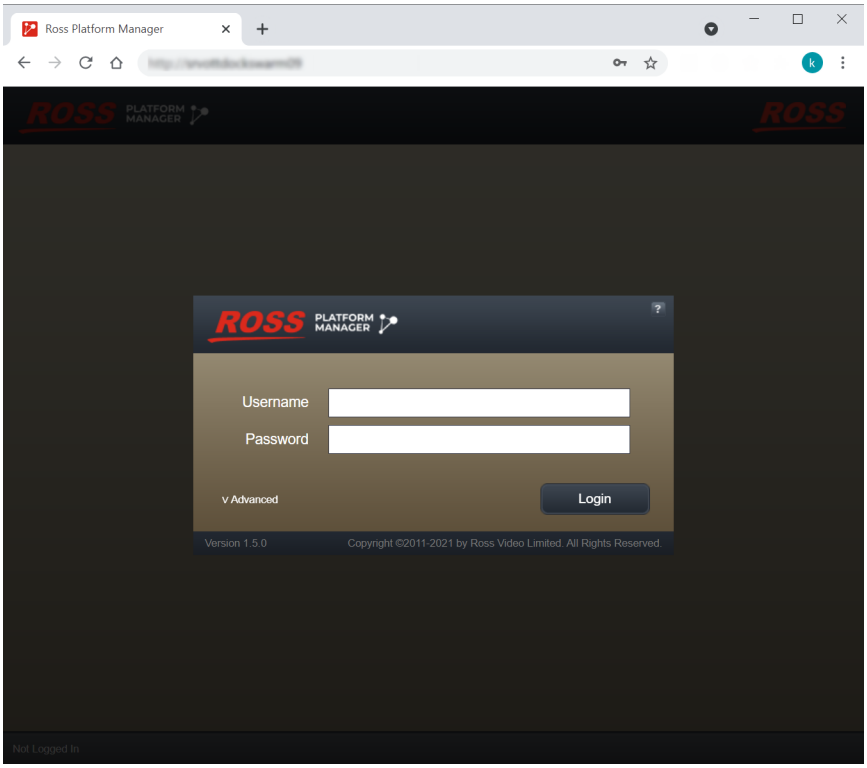
Ross Platform Manager is a web based application that you access through a web browser.

To open Ross Platform Manager

1. Use one of the following supported web browsers to open the Ross Platform Manager web page provided by your Ross Platform Manager administrator:

   - Microsoft Internet Explorer® version 9 or greater
   - Mozilla Firefox® version 3.6 or greater
   - Google Chrome™ browser version 17.x or higher
   - Apple Safari® version 5.1.x or greater

   The **Login** panel opens.



2. In the **Login** panel, enter your Ross Platform Manager login credentials in the **Username** and **Password** boxes.
3. Click or tap **Login**.

   Ross Platform Manager opens.

✶ If a message indicates that the system is in maintenance mode, a system administrator must establish a database connection before you can log in as a Ross Platform Manager user.

✶ If a message indicates that the maximum number of concurrent users has been reached, it is because the allowance for your RPM subscription tier has been reached. Please contact your system administrator.

To close Ross Platform Manager

- On the main toolbar, click or tap the **Logout** icon.

Explore the Ross Platform Manager User Interface

The Ross Platform Manager user interface consists of a main toolbar and various types of workspace panels that open as required.

✶ Ross Platform Manager is a suite of tools that has many optional features. The Ross Platform Manager Online Help system describes all Ross Platform Manager features, but the options available to you depend on which features your organization has purchased and the user permissions that your Ross Platform Manager administrator has granted to your user account. If you want to use a feature that you learned about from the Help system but is not visible, contact your Ross Platform Manager administrator.

Main Toolbar

The icons in the main toolbar enable you to open workspace panels to access almost all features of Ross Platform Manager. The icons that you can access from the main toolbar depends on the features your organization purchased and the user permissions that your Ross Platform Manager administrator assigned to your user account. Ross Platform Manager tailors the main toolbar to display the features available on the following supported devices:

- **Desktop Computer** — for an overview of the desktop computer main toolbar, refer to the following section "**Main Toolbar**" on page 2–3.

Using a Desktop Computer with Ross Platform Manager

The Ross Platform Manager user interface consists of a main toolbar and various types of workspace panels that open as required. Each type of panel opens in a pre-designated position in the Ross Platform Manager layout. You can open, close, resize, or move individual panels.

Main Toolbar

The icons in the main toolbar enable you to open workspace panels to work with Ross Platform Manager features. The icons available in the main toolbar depend on the features your organization purchased and the user permissions that your Ross Platform Manager administrator assigned to your user account.

When you want more space on your screen for Ross Platform Manager panels, press **Ctrl+F11** to hide the main toolbar. Press **Ctrl+F11** once again to show a hidden main toolbar.

The main toolbar may contain the following icons:

Table 2.1 Desktop Computer Main Toolbar Icons

Icon	Name	Description
	CustomPanel Manager	Opens the CustomPanel Manager interface. For more information, refer to the chapter "**Managing DashBoard CustomPanels**" on page 10–1.
	Device Tree	Opens the Device Tree interface. For more information, refer to the chapter "**Using the Device Tree**" on page 8–1.
	Visual Workflow Manager	Opens the Visual Workflow Manager interface. For more information, refer to the section "**Using the Visual Workflow Manager**" on page 7–10.
	Browse Deployments	Opens the Deployment Manager interface. For more information, refer to the chapter "**Managing a Deployment**" on page 9–1.
	Releases	Opens the Release Manager interface. For more information, refer to the section "**Adding a Product to the Release Manager**" on page 9–2.
	Browse Targets	Opens the Target Manager interface. For more information, refer to the chapter "**Managing a Target**" on page 7–1.
	Browse Configuration Snapshots	Opens the Snapshot Manager interface. For more information, refer to the section "**Taking a Snapshot of a Ross Platform Target**" on page 7–9.
	Product Key Manager	Allows you to open the Product Key Manager. For more information, refer to the chapter "**Managing a Product Key**" on page 6–1.
	License Reporting	Allows you to open License Analytics interface in either By Feature view or By Host view, as well as the Product Key Summary interface. For more information, refer to the section "**Viewing License Analytics**" on page 6–18.
	Configuration	Opens the Configuration interface. For more information, refer to the chapter "**Configuring System Properties**" on page 5–1.

Table 2.1 Desktop Computer Main Toolbar Icons

Icon	Name	Description
	Change Password	Enables you to change your Ross Platform Manager password. For more information, refer to the chapter "**Changing Your Password**" on page 13–1.
	Perspectives	Enables you to switch to a different perspective, or to manage perspectives. For more information, refer to the section "**Managing Perspectives**" on page 14–1.
	Log Explorer	Opens the Log Explorer interface. For more information, refer to the chapter "**Using the Log Explorer**" on page 15–1.
	Help	Opens the Online Help system.
	Logout	End your current session and log out of Ross Platform Manager.

Panel Positions and Perspectives

When accessed from a desktop computer, the Ross Platform Manager user interface layout consists of the main toolbar and eight panel positions. Each panel position can contain various types of Ross Platform Manager panels. When panel positions are unoccupied, Ross Platform Manager optimizes the layout by expanding open panels to fill all available space.

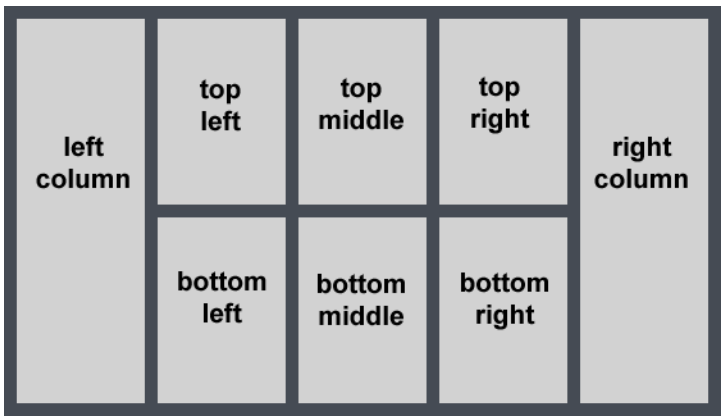


Figure 2.1 Arrangement of the Eight Panel Positions

A user perspective is a customized view of the Ross Platform Manager user interface. It is a mapping of Ross Platform Manager panel types to positions in the user interface layout.

Perspectives are especially useful for people who perform many different tasks in Ross Platform Manager. For example, an administrator may use one perspective for configuring Ross Platform Manager, and another perspective for monitoring Ross Platform Manager. All Ross Platform Manager users can create perspectives for their own use. Ross Platform Manager administrators can also create global perspectives available to all users.

✶ Panels may not always appear exactly where you expect. As you open and close panels, Ross Platform Manager adjusts the layout to optimize use of the available space.

Default Panel Positions

When you first use Ross Platform Manager, it opens certain types of panels in certain panel positions by default. Ross Platform Manager continues to use the default layout until you move a panel or open a saved perspective.

By default, Ross Platform Manager does not occupy all panel positions. Ross Platform Manager optimizes the layout by expanding open panels to fill all available space.

For More Information on...

- creating and managing perspectives, refer to the section "**Managing Perspectives**" on page 14–1.

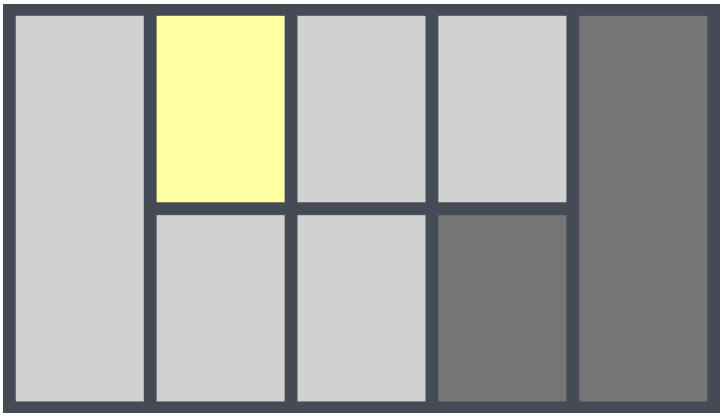
Move a Panel from One Layout Position to Another

You can move a panel to any of the available eight layout positions.

To move a panel from one layout position to another

1. Place the mouse pointer on the title of the panel to move, then click and hold the mouse button.
2. Drag the selected panel.

   The layout guide opens.



3. Drag the pointer over the layout guide to select the new position for your panel.

   As you drag the pointer over the layout guide, the current drop position for the panel turns yellow. Light gray positions indicate unoccupied positions. Dark gray positions indicate occupied positions that can accept additional panels.
4. Release the mouse button to place the panel at the selected position, highlighted in yellow.

   The panel opens at the selected position. When you select an occupied position, the panel opens as a new tab in the panel. After you have arranged panels to your liking, you can save the layout as a perspective.

For More Information on...

- saving a layout as a perspective, refer to the section "**Manage Perspectives**" on page 36–2.

Rearrange Panel Tabs Within a Layout Position

When a panel contains multiple panel tabs, you can rearrange the order of panel tabs within the layout position to customize the layout to suit your typical workflow.

To rearrange the order of panel tabs within a layout position

1. Place the mouse pointer on the title of the panel tab to move, then click and hold the mouse button.
2. Drag the selected panel tab within the tab row at the top of the layout position.

   As you drag the pointer over the tab row, a dotted rectangle indicates the current drop position for the selected panel tab. If the rectangle surrounds a tab name, the drop position is to the left of that tab.
3. When the dotted rectangle indicates the desired position, release the mouse button to drop the panel tab.

   You can also move a panel to a different layout position by dragging and dropping the panel name tab into the tab row of the destination panel. After you have arranged panel tabs to your liking, you can save the layout as a perspective.

Navigating within Panels

This section describes how resize and close panels and how to navigate within column-based panels.

To resize a panel

1. Hover the mouse pointer over an edge or corner of the panel until the resizing icon displays.
2. Click and drag the edge or corner to resize the panel.

✶ Ross Platform Manager does no save custom panel sizing as part of a perspective.

To close a panel

- Click the **Close** icon in the top right corner of the panel.

  When a layout position contains more than one open panel, only the current panel closes.

Entering Text for Right-to-Left Languages

When you enter text in Ross Platform Manager using a right-to-left language, text entry starts from the right of a text box and continues to the left as you enter text. Arabic is one of the most widespread right-to-left languages of modern times.

To enter text in a right-to-left language:

1. In the system settings for your desktop computer or mobile device, select a right-to-left language for the system language or input keyboard.
2. Click in a Ross Platform Manager text box.
3. Enter your text.

   Text starts from the right of the text box and continues to the left as you type. To return to left-to-right text entry, select a left-to-right language for the system language or input keyboard.

Monitoring the System

Ross Platform Manager system monitors enable you to quickly view the health of your Ross Platform Manager system. If your Ross Platform Manager falters, you can use system monitors to help diagnose the cause of the system fault. Along with monitoring the health of your Ross Platform Manager system, you can also monitor and control the users connected to your Ross Platform Manager system.

This chapter discusses the following topics:

- Monitor System Health
- User Defined System Monitors
- Monitor and Control Connected Users
- Manage the Ross Platform Manager SNMP Agent
- Managing the Audit Log

Monitor System Health

As a Ross Platform Manager administrator, you can monitor the health of your Ross Platform Manager system through the Configuration window of Ross Platform Manager.

✶ You cannot monitor Ross Platform Manager from a mobile device. The Configuration window is only accessible from a desktop computer.

To monitor system health

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

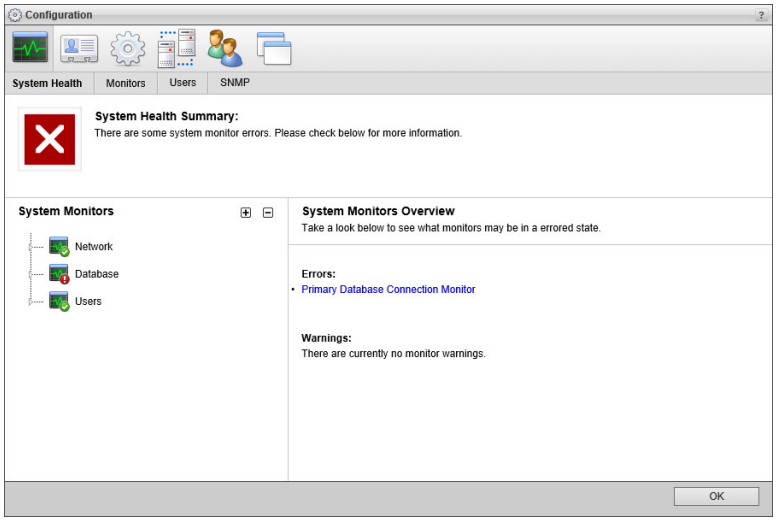
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **System Monitor** icon.

   The **System Monitor** panel opens.

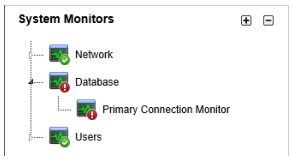
4. Click the **System Health** tab.

   The **System Health** tab opens.



   The **System Health** Summary field displays a description of the current overall state of the Ross Platform Manager system. The monitors in the **System Monitors** tree view report details about the state of the Ross Platform Manager system.

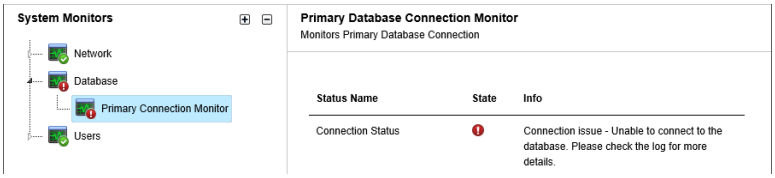
5. Double-click a **folder** in the **System Monitors** tree view to open the folder and display the monitors contained in the folder.



The icon in the lower right corner of System Monitors tree view nodes indicate the following health levels:

- — **Healthy**
- — **Warning**
- — **Error**

6. Click a monitor in the **System Monitors** tree view to view health details reported by the selected monitor.



User Defined System Monitors

Ross Platform Manager enables to add your own monitors to monitor the remaining storage space on a disk or the connectivity between your Ross Platform Manager system and a web site. The Monitors tab of the System Monitor panels enables you to add, edit, and delete user defined monitors.

To add a user defined monitor to the System Health tab

1. On the **Configuration** window toolbar, click the **System Monitor** icon.

   The **System Monitor** panel opens.

2. Click the **Monitors** tab.

   The **Monitors** tab opens.

3. Click **Add**.

   The **Create New System Monitor** page opens.

4. Use the **Monitor** list to select the type of monitor to add. The available monitor types are as follows:

   - **Disk Usage Monitor** — check a selected hard drive to make sure that the available storage does not fall below a set level.
   - **Internet Connectivity Monitor** — check that there is connectivity between the Ross Platform Manager system and a selected web site.

5. Click **Next**.

   Depending on the type of monitor you are adding, the **Add a Disk Usage Monitor** or **Add an Internet Connectivity Monitor** page opens.

6. Define the selected monitor as follows:

   Disk Usage Monitor

   a. In the **Name** box, enter a name for the monitor.

   b. In the **Interval** box, enter the amount of time to wait between checks of available hard disk space.

c. Use the list to the right of the **Interval** box to select **Minute(s)** or **Second(s)** as the time unit for the time entered in the **Interval** box.

d. Use the **Drive** list to select the Ross Platform Manager computer hard drive to monitor.

e. In the **Minimum Free Space** box, enter the minimum amount of disk space that the selected Drive must contain. The monitor reports an **Error** when the available space on a **Drive** drops below the set minimum disk space.

f. Use the list to the right of the **Minimum Free Space** box to select **Gigabyte(s)** or **Megabyte(s)** as the disk space unit for the amount entered in the **Minimum Free Space** After box.

Internet Connectivity Monitor

a. In the **Name** box, enter a name for the monitor.

b. In the **Interval** box, enter the amount of time to wait between connectivity checks for a web site.

c. Use the list to the right of the **Interval** box to select **Minute(s)** or **Second(s)** as the time unit for the time entered in the **Interval** box.

d. In the **URL** box, enter the web address (for example: http://www.rossvideo.com) of the web site that you want to check connectivity with the Ross Platform Manager system.

7. Click **Save**.

   Ross Platform Manager adds the new monitor to the **System Monitor Management** list.

To edit a user defined monitor

1. In the **System Monitor Management** list, select the monitor to edit.
2. Click **Edit**.

   Depending on the type of monitor you are editing, the **Edit Disk Usage Monitor** or **Edit Internet Connectivity Monitor** page opens.
3. Edit production monitor settings as required.
4. After completing the required monitor setting edits, click **Save**.

To delete a user defined monitor

1. In the **System Monitor Management** list, select the monitor to delete.
2. Click **Edit**.

   A confirmation message opens, asking whether you want to delete the selected monitor. To keep the monitor, click **Cancel**.
3. In the confirmation message, click **OK**.

   Ross Platform Manager deletes the selected monitor from the **System Monitor Management** list and the **System Monitors** tree view on the **System Health** tab.

Monitor and Control Connected Users

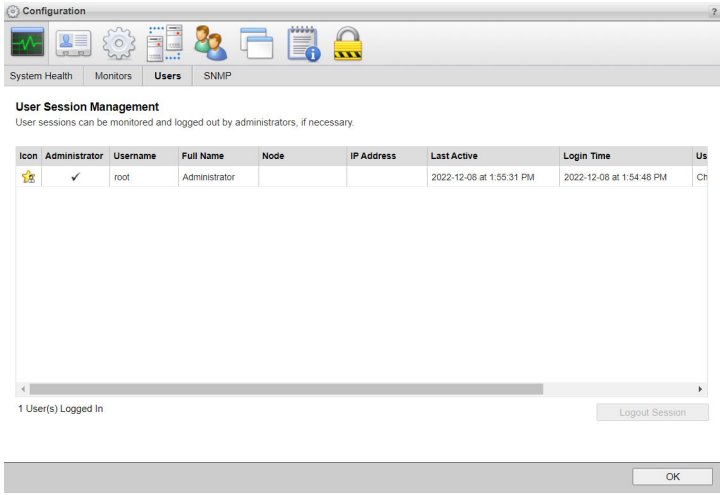
The Users tab of the System Monitor panel enables you to monitor and control the users connected to your Ross Platform Manager system.

To monitor users connected to a Ross Platform Manager system

1. On the **Configuration** window toolbar, click the **System Monitor** icon.

   The **System Monitor** panel opens.
2. Click the **Users** tab.

   The **Users** tab opens.



The **User Session Management** table displays the following information about the users connected to the Ross Platform Manager system:

- **Icon** — this column displays an icon that identifies the user logged into the Ross Platform Manager system.
- **Administrator** — this column displays a check mark for users that are Ross Platform Manager Administrators.
- **Username** — this column displays the Ross Platform Manager username of the user logged into the Ross Platform Manager system.
- **Full Name** — this column displays the first and last name of the user logged into the Ross Platform Manager system.
- **IP Address / Hostname** — this column displays the IP address and hostname of the computer that the user is using to work on the Ross Platform Manager system.
- **Last Active** — this column displays the date and time that the user last made a change to Ross Platform Manager.
- **Login Time** — this column displays the date and time that the user logged into the Ross Platform Manager system.

Delete User Sessions

When required, you can delete user sessions from your Ross Platform Manager system. Deleting a user session logs the selected user off of the Ross Platform Manager system. Ross Platform Manager saves user changes before logging the user off of the Ross Platform Manager system.

To delete a user session

1. In the **User Session Management** table, select the user session to delete.
2. Click **Delete User Session**.

   A confirmation message opens, asking whether you want to delete the selected user session. To keep the session running, click **Cancel**.
3. In the confirmation message, click **OK**.

   Ross Platform Manager deletes the selected user session and logs the user off of the Ross Platform Manager system.

Manage the Ross Platform Manager SNMP Agent

Ross Video uses two Simple Network Management Protocol (SNMP) agents to monitor the software and hardware of your Ross Platform Manager system. SNMP traps enable an agent to send unsolicited SNMP messages to the Network Management Station (NMS) to notify the station of significant events.

The Ross Platform Manager SNMP agent monitors the Ross Platform Manager system and reports significant events to your NMS as SNMP traps. Ross Platform Manager system hardware changes and errors are monitored by the Windows SNMP agent running on the Ross Platform Manager computer. The Ross Platform Manager SNMP agent forwards SNMP traps from the Windows SNMP agent to your NMS (**Figure 3.1**).

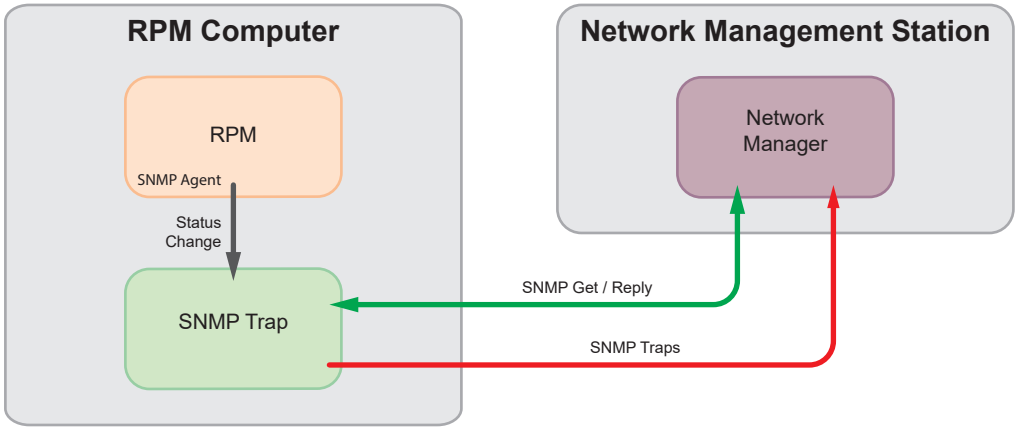


Figure 3.1 SNMP Connections

Configure the Ross Platform Manager SNMP Agent

The SNMP tab of the System Monitor panel enables you to configure the Ross Platform Manager SNMP agent to send SNMP trap messages to your NMS.

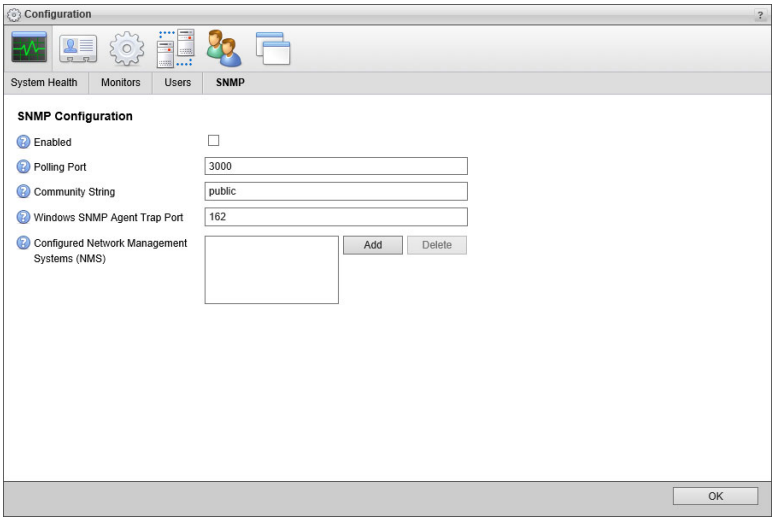
To configure the Ross Platform Manager SNMP agent

1. On the **Configuration** window toolbar, click the **System Monitor** icon.

   The **System Monitor** panel opens.

2. Click the **SNMP** tab.

   The **SNMP** tab opens.



3. Select the **Enabled** check box to send SNMP trap messages from the Ross Platform Manager SNMP agent to your NMS.
4. In the **Polling Port** box, enter the port number through which the Ross Platform Manager SNMP agent receives commands from and replies to the NMS.

5. In the **Community String** box, enter the password that allows your NMS to access the Ross Platform Manager SNMP agent on your Ross Platform Manager computer.

✶ When you change the **Community String** from `public` to your own password, you must enter your password on the NMS to allow access to your Ross Platform Manager computer.

6. In the **Windows SNMP Agent Trap Port** box, enter the port number that the Windows SNMP agent running on the Ross Platform Manager computer uses to send SNMP trap messages.

   The Ross Platform Manager SNMP agent forwards SNMP trap messages from the Windows SMNP agent to your NMS through the NMS Trap Port.

7. To send SNMP trap message from the Ross Platform Manager SNMP agent to one or more NMSs, add NMSs as follows:

   a. Click **Add** to the right of the **Configured Network Management Systems (NMS)** box.

      An **Alert** dialog box opens.

   b. Enter the IP address and port number (`<IP Address>:<Port Number>`) of an NMS to receive SNMP trap message from the Ross Platform Manager SNMP agent. For example:

      `10.0.2.160:3000`

   c. To add an additional NMS, repeat step **a** to step **b**.

Delete an NMS

When you no longer require an NMS, you can delete the NMS configuration.

To delete an NMS

1. In the **Configured Network Management Systems (NMS)** box, select the NMS to delete.
2. Click **Delete** to the right of the **Configured Network Management Systems (NMS)** box.

   An **Alert** dialog box opens.

3. Click **OK** to delete the NMS.

   Ross Platform Manager deletes the selected NMS from the **Configured Network Management Systems (NMS)** box.

Configure Your NMS for Ross Platform Manager

You must load the Ross Video and Ross Platform Manager Management Information Base (MIB) files into your NMS to enable it to interpret the SNMP trap messages it receives from a Ross Platform Manager SNMP agent. The Ross Platform Manager MIB file describes the SNMP trap messages sent by the Ross Platform Manager SNMP agent.

To load the Ross Video and OverDrive MIB files into your NMS

1. Get the **ROSS-VIDEO.mib** and **RWP-MIB.mib** files from one of the following locations:
   - Copy from the Ross Platform Manager system (`C:\Program Files\Ross Video\Ross Platform Manager\utilities\snmp`)
   - Download from the Ross Video web site (www.rossvideo.com)
2. Load the **ROSS-VIDEO.mib** file into your NMS.
3. Load the **RWP-MIB.mib** file into your NMS.

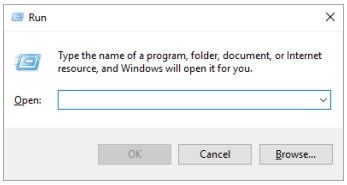
Configure the Windows SNMP Agent

To enable the Ross Platform Manager SNMP agent to forward hardware SNMP trap messages to your NMS, you need to configure an SNMP agent. You can use any type of SNMP agent.

To configure a Windows SNMP agent:

1. From the Windows Desktop, press **Windows Key+R**.

   The **Run** dialog box opens.

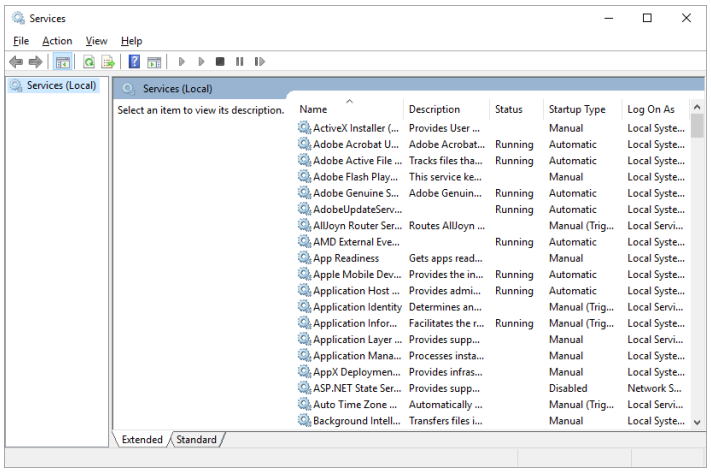


2. In the **Open** box, type the following application name:

   `services.msc`

3. Click **OK**.

   The **Services** window opens.

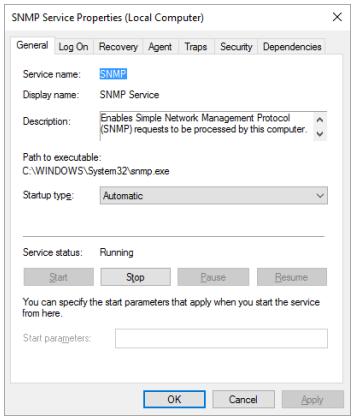


4. In the **Services** list, locate the **SNMP Service** service.

✶ If you cannot find the **SNMP Service** service in the **Services** list, install the **SNMP Service** on your Ross Platform Manager computer.

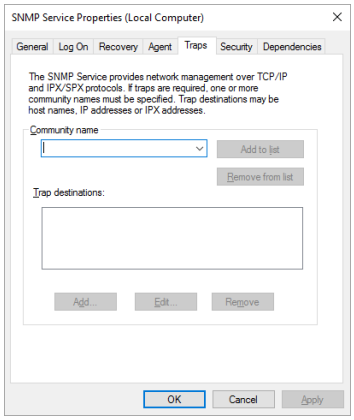
5. Right click the **SNMP Service** service and select **Properties** from the shortcut menu.

   The **SNMP Service Properties** dialog box opens.



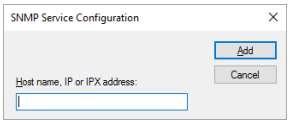
6. Click the **Traps** tab.

   The **Traps** tab opens.



7. In the **Community name** box, enter the password that you set for the **Community String** in step **5** of the procedure "**To configure the Ross Platform Manager SNMP agent**" on page 3–7.
8. Click **Add to list**.
9. In the **Trap destinations** section, click **Add**.

   The **SNMP Service Configuration** dialog box opens.



10. In the **Host name, IP or IP address** box, enter `localhost`.
11. Click **Add**.

    The **SNMP Service Configuration** dialog box closes.
12. In the **SNMP Service Properties** dialog box, click **OK**.

    The **SNMP Service Properties** dialog box closes.
13. In the **Services** window, click **Restart** for the **SNMP Service** service.
14. Use the **File** menu to select **Exit**.

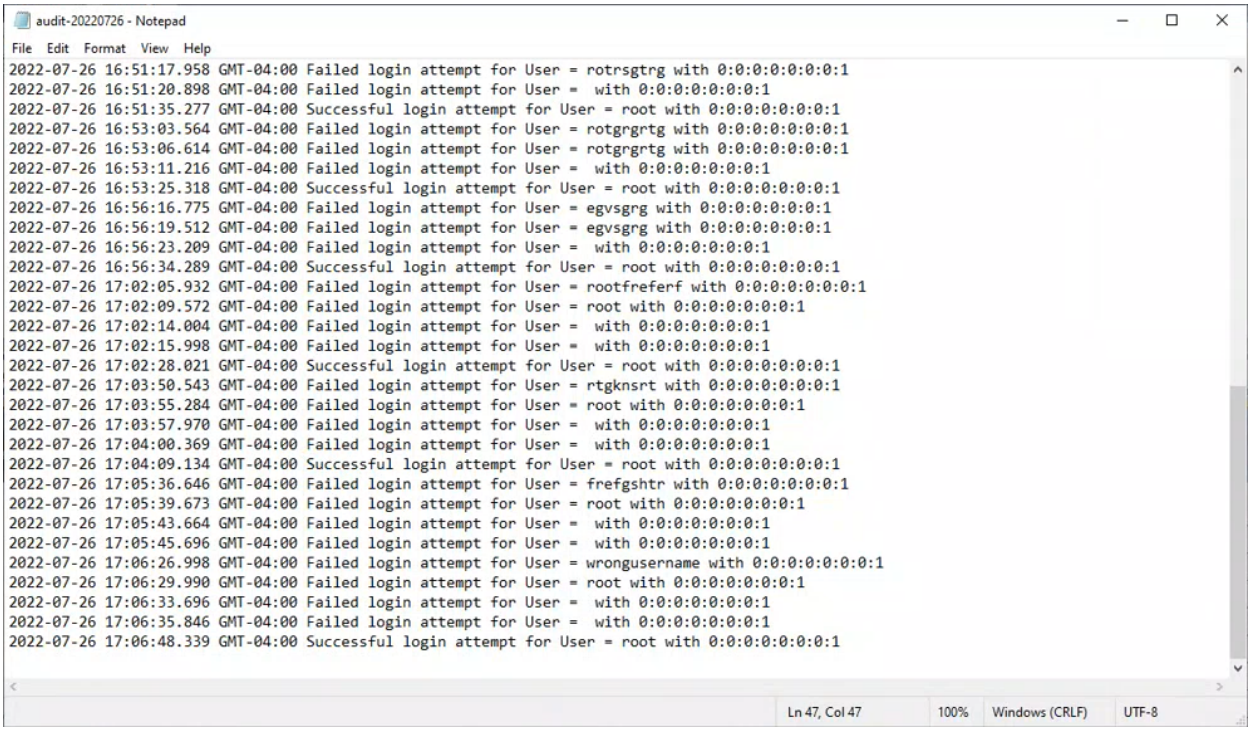
    The **Services** window closes.

Managing the Audit Log

Ross Platform Manager automatically records occurrences of failed login attempts, successful logins, maintenance mode logins, and new target creations. The record of these occurrences can be viewed via the audit log. By accessing this record, you can track user and IP address logins, allowing you to improve the security of your system by blocking IP addresses if needed. The audit log feature is automatically enabled.

To access the audit log

1. Follow the file path
   `C:/Program Files/Ross Video/Ross Platform Manager/workspace/.metadata/logs`



User Preferences

The Ross Platform Manager administrator sets the default language, time zone, and font sizes for the all of the Ross Platform Manager users on a Ross Platform Manager system. Ross Platform Manager users can use the User Preferences tab of the System panel to override the default language, time zone, and font sizes set by the Ross Platform Manager administrator.

This chapter discusses the following topic:

- Set User Preferences

Set User Preferences

Ross Platform Manager users can individually override the default Ross Platform Manager user interface language, time zone, and font sizes set by the Ross Platform Manager administrator for all users of a Ross Platform Manager system.

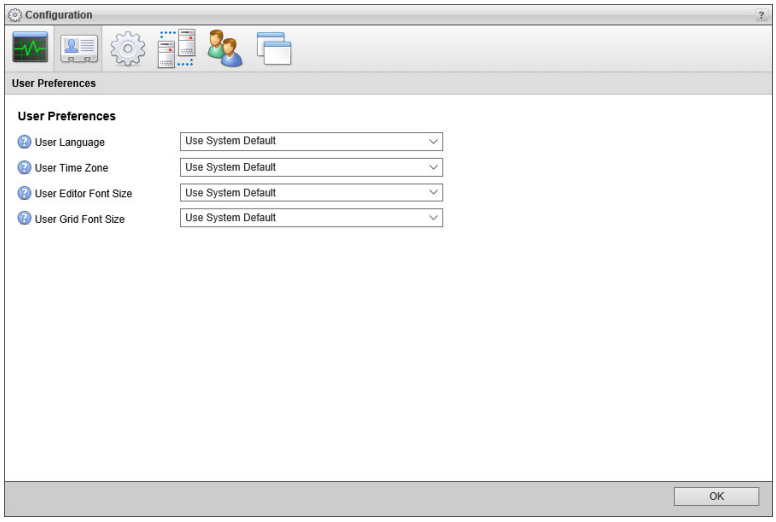
✶ You cannot user preferences from a mobile device, you must use a desktop computer to access the Configuration window.

To set the Ross Platform Manager UI language, time zone, and font sizes

1. The user preferences that you set depend on the credentials that you use to log in to the Ross Platform Manager web page.
   - **Administrator** — set the default Ross Platform Manager user interface language, time zone, and font sizes set for all Ross Platform Manager users. The default administrator login credentials are as follows:
     - **Username** — `root`
     - **Password** — `password`
   - **User** — set your own Ross Platform Manager user interface language, time zone, and font sizes that override the defaults set by your Ross Platform Manager administrator.
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Preferences** icon.

   The **User Preferences** panel of the **Configuration** window opens.



4. In the **User Preferences** tab, use the **User Language** list to select the user interface language that you want to use with Ross Platform Manager. Select **Use System Default** to use the language set by the Ross Platform Manager administrator.
5. Use the **User Time Zone** list to select the time zone which matches your physical location. Select **Use System Default** to use the time zone set by the Ross Platform Manager administrator.
6. Use the **User Editor Font Size** list to select the font size that you want Ross Platform Manager to display text in editor panels. You can select a font size from **6** to **32** points. Select **Use System Default** to use the editor font size set by the Ross Platform Manager administrator.

7. Use the **User Grid Font Size** list to select the font size that you want Ross Platform Manager to display text in panel grids. You can select a font size from **6** to **32** points. Select **Use System Default** to use the grid font size set by the Ross Platform Manager administrator.
8. Click **OK**.

   The **Configuration** window closes.

Configuring System Properties

This chapter provides instructions for configuring the general system properties of your Ross Platform Manager system using the following tabs on the System configuration panel:

- **Database** — connect Ross Platform Manager to the database that stores application data.
- **Utilities** — download the Offline License Tool and the OpenSSH Script, and change the orchestration path.
- **File Sync** — view a list of Ross Platform Manager nodes in the cluster and their file synchronization statuses.
- **Licensing** — license Ross Platform Manager features.
- **System** — set default preferences for users of a Ross Platform Manager system.

This chapter discusses the following topics:

- Configure Database Connectivity
- Activating a Product Key for Ross Platform Manager Software
- Reactivating a Product Key for Ross Platform Manager Software
- Deactivating a Product Key for Ross Platform Manager Software
- Configure Default System Settings
- Viewing File Synchronization Information
- Configuring the Orchestration Directory Path
- Configuring How DashBoard and Device Panels Open

Configure Database Connectivity

Ross Platform Manager administrators can use a desktop computer to configure Ross Platform Manager database connectivity settings through the Configuration window.

✶ You cannot configure Ross Platform Manager from a mobile device. The Configuration window is only accessible from a desktop computer.

Database connectivity settings enable you to set the database used by Ross Platform Manager and the user account that Ross Platform Manager uses to connect with the database. Supported database drivers are listed in **Table 5.1** below.

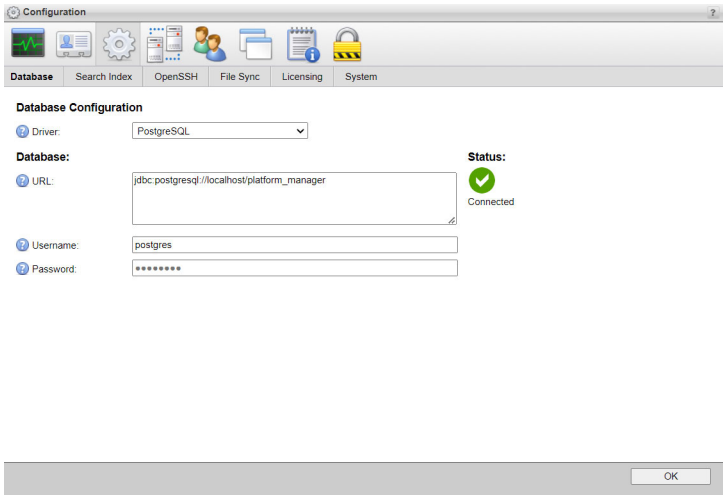
Table 5.1 Supported Database Drivers

Deployment Pattern	MySQL v5.7	MySQL v8.0	postGres v10-14	MariaDB
Single node	RPM v3.4 and down	RPM v3.5 and up	All	RPM v3.5 and up
Redundant	RPM v3.4 and down	RPM v3.5 and up	Not supported	RPM v3.5 and up

To configure database connectivity

1. Click the **Database** tab.

   The **Database** tab opens.



2. Use the **Driver** list to select the database driver used to connect to the Ross Platform Manager Database.
3. In the **URL** box, enter the JDBC URL that connects your Ross Platform Manager system with the Ross Platform Manager Database. For example, for a database named Ross Platform Manager on PostgreSQL, use the following URL:

   `jdbc:postgresql://localhost/platform_manager`
4. In the **Username** box, enter the username that Ross Platform Manager uses to access the database.
5. In the **Password** box, enter the password associated with the username.

   For security purposes, dots replace the entered password.
6. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Activating a Product Key for Ross Platform Manager Software

Ross Video uses product keys to manage user licenses for Ross Platform Manager. You can obtain a Ross Platform Manager product key from Ross Video Technical Support.

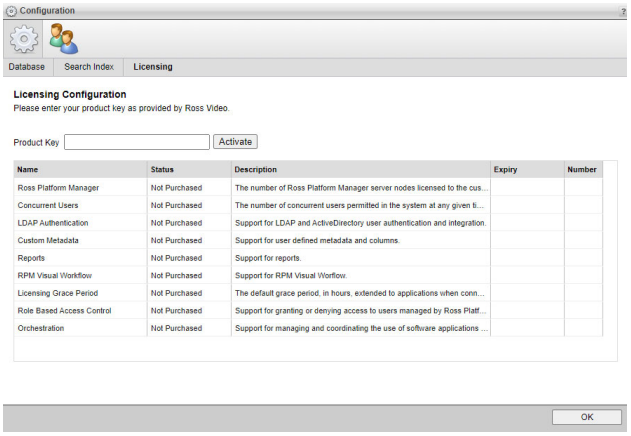
✶ When you activate a Ross Platform Manager software product key, your Ross Platform Manager computer must contact the Ross Video Activation Server.

To activate a Ross Platform Manager product key

1. Verify that the Ross Platform Manager computer is able to connect to the Internet.
2. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.
3. Click the **Licensing** tab.

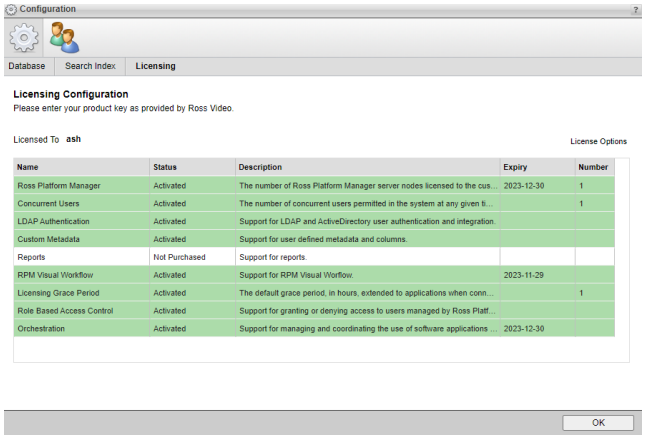
   The **Licensing Configuration** tab opens.



4. Obtain a Ross Platform Manager product key from Ross Video Technical Support.
5. In the **Product Key** box, enter the product key obtained from Ross Video Technical Support.
6. Click **Activate**.

   After activating the entered product key, an **Alert** dialog box opens requesting a web browser window refresh.
7. Click **OK**.

   The **Alert** dialog box closes and the **Licensing Configuration** tab updates to display the feature licenses associated with the activated product key.



The **Status** column displays one of the following states:

Background	Status	Description
Green	**Active**	The feature is active and available to Ross Platform Manager users.
Yellow	**Expires in # days**	The feature availability for Ross Platform Manager users expires in the displayed number of days.
Red	**Expired**	The feature has expired and is no longer available to Ross Platform Manager users.
Red	**Invalid MAC**	The feature license key is invalid for the active network interface card of the Ross Platform Manager computer.
White	**Not Purchased**	The feature is not accessible to Ross Platform Manager users, but it is available for purchase.

8. Click **OK**.

   The **Configuration** dialog box closes.

9. Refresh your web browser window.

   Ross Platform Manager adds icons to the toolbar for the newly activated features, making the features accessible to Ross Platform Manager users.

For More Information on...

- contacting Ross Video Technical Support, refer to the section "**Contacting Technical Support**" on page 1–4.

Reactivating a Product Key for Ross Platform Manager Software

After purchasing new features for a Ross Platform Manager system, the Ross Platform Manager product key requires a reactivation to make the purchased features available to Ross Platform Manager users.

To reactivate a Ross Platform Manager product key

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing Configuration** tab opens.

3. Click the **License Options** link.

   The **Product Key** field displays the currently activate product key.

4. Click **Reactivate**.

   After reactivating the product key, an **Alert** dialog box opens requesting a refresh of the web browser window.

5. Click **OK**.

   The **Alert** dialog box closes and the **Licensing Configuration** tab is updates to display with new feature licenses associated with the reactivated product key.

6. Click **OK**.

   The **Configuration** dialog box closes.

7. Refresh your web browser window.

   Ross Platform Manager adds icons to the toolbar for the newly activated features, making the features accessible to Ross Platform Manager users.

Deactivating a Product Key for Ross Platform Manager Software

When you want to move Ross Platform Manager software on another computer, you must first deactivate the Ross Platform Manager software on the current Ross Platform Manager computer.

To deactivate a Ross Platform Manager product key

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing Configuration** tab opens.

3. Click the **License Options** link.

   The **Product Key** field displays the currently activate product key.

4. Click **Deactivate**.

   After deactivating the product key, an **Alert** dialog box opens.

5. Click **OK**.

   The **Alert** dialog box closes and the product key shown in the **Product Key** box deactivates. You can use the deactivated product key to activate Ross Platform Manager software on another computer.

   Deactivating a product key un-licenses and removes Ross Platform Manager user access to all of the Ross Platform Manager features associated with the product key.

6. Click **OK**.

   The **Configuration** dialog box closes.

Configure Default System Settings

Ross Platform Manager administrators can control the following default settings for all of the users of a Ross Platform Manager system:

- language
- time zone
- font sizes
- length of time for user session timeout

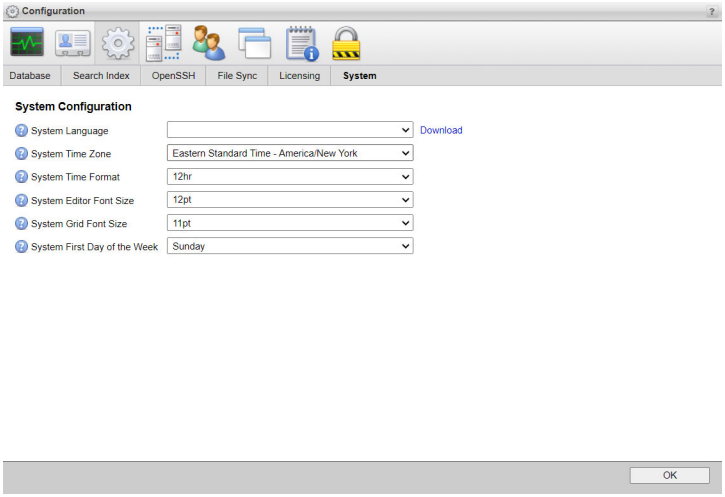
To set the default settings for a Ross Platform Manager system

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **System** tab.

The **System** tab opens.



3. Use the **System Language** list to select the Ross Platform Manager user interface language for all users of a Ross Platform Manager system. Ross Platform Manager users can use the **User Preferences** tab of the **System** panel to override the selected **System Language**.

   If you want to download a Ross Platform Manager language pack, follow these steps.

   a. Click the **Download** link.

      The **Download Selected Language Pack** and **Download Empty Language Pack** buttons display below the **System Language** list.

   b. Click **Download Selected Language Pack** to download the selected **System Language** to your computer as a Ross Platform Manager language pack file.

   c. Click **Download Empty Language Pack** to download a template that you can use to create a Ross Platform Manager language pack file.

4. Use the **System Time Zone** list to select the time zone which matches the physical location of the Ross Platform Manager computer. Ross Platform Manager users can use the **User Preferences** tab of the **Preferences** panel to override the selected **System Time Zone**.

5. Use the **System Time Format** list to select the time format that matches the Ross Platform Manager Server computer. Ross Platform Manager users can use the **User Preferences** tab of the **Preferences** panel to override the selected **System Time Format**.

6. Use the **System Editor Font Size** list to select the font size, **6** to **32** points, that Ross Platform Manager uses to display text in editor panels. Ross Platform Manager users can use the **User Preferences** tab of the **Preferences** panel to override the selected **System Editor Font Size**.

7. Use the **System Grid Font Size** list to select the font size, **6** to **32** points, that Ross Platform Manager uses to display text in panel grids. Ross Platform Manager users can use the **User Preferences** tab of the **Preferences** panel to override the selected **System Grid Font Size**.

8. Use the **System First Day of the Week** list to select the first day of the week that will be used in calendars and date pickers. Ross Platform Manager users can use the **User Preferences** tab of the **Preferences** panel to override the selected **System First Day of the Week**.

9. Use the **User Session Timeout** field to enter the desired amount of time in minutes that a user can be inactive before their session ends and they are logged out automatically.

Viewing File Synchronization Information

The File Sync tab in the System configuration panel allows the Ross Platform Manager administrator to view a list of the Ross Platform Manager nodes and their statuses. The File Sync tab (**Figure 5.1**) is made up of two tables:

- the Nodes table,
- and the Features table.

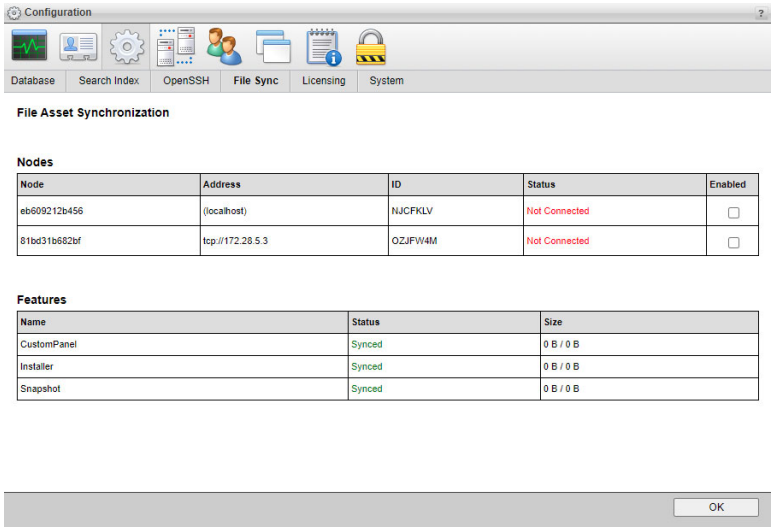


Figure 5.1 File Sync tab

File Sync Nodes Table

The Nodes table of the File Sync tab displays all of the nodes in the cluster. If a node is disconnected and removed from the cluster, it will also be removed from the Nodes table. For each node, the address, ID, and status will all be displayed in the table. There is also the Enabled column, which allows you to select whether or not file synchronization is enabled for a node.

To enable file sync for a node

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **File Sync** tab.

   The **File Sync** tab opens.

3. In the **Enabled** column of the desired node, select the check box.

   The **Status** column of the selected node updates to **Connected**, and files are now being synced between the selected node and other nodes in the cluster.

File Sync Features Table

The Features table of the File Sync tab displays all of the files that are being synced within the cluster, as well as their status and size. Note that these files will only be displayed in this table if Orchestration and/or CustomPanel features are licensed.

Configuring the Orchestration Directory Path

The default orchestration directory path is `~/horizon/`, but users can configure this path to meet their needs.

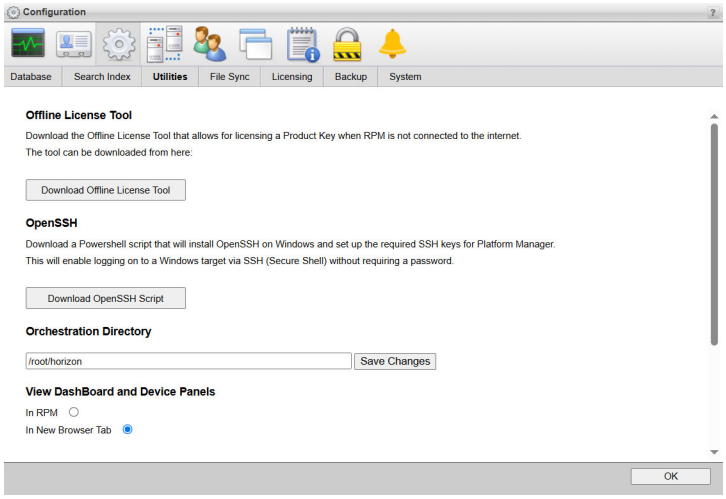
To configure the orchestration directory path

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Utilities** tab.

   The **Utilities** tab opens.

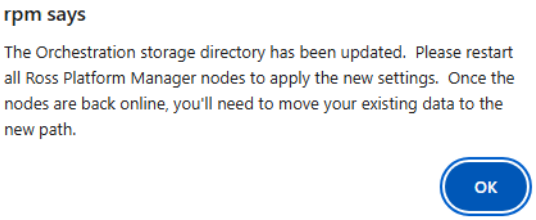


3. Enter the desired orchestration directory path in the **Orchestration Directory** field.

✶ Note that changes to the orchestration directory path will automatically apply to any linked Ross Platform Manager nodes.

4. Click **Save Changes**.

   The new orchestration directory path is saved, and a prompt displays instructing you to restart all Ross Platform Manager nodes to apply the new settings.



✶ Note that if an invalid path, or path without read and write permissions is entered, an error will display and the new path will not be saved.

5. Click **OK** on the prompt.

   The prompt closes.

6. Refresh all Ross Platform Manager nodes to restart them.

   The new orchestration directory path is now being used.

✶ Note that if any data (e.g., installers and snapshots) were stored in the previous orchestration directory, you will need to manually move them to the new path.

Configuring How DashBoard and Device Panels Open

The default way of viewing DashBoard and device panels is by opening them in a new browser tab, but users can change this to open within RPM if preferred.

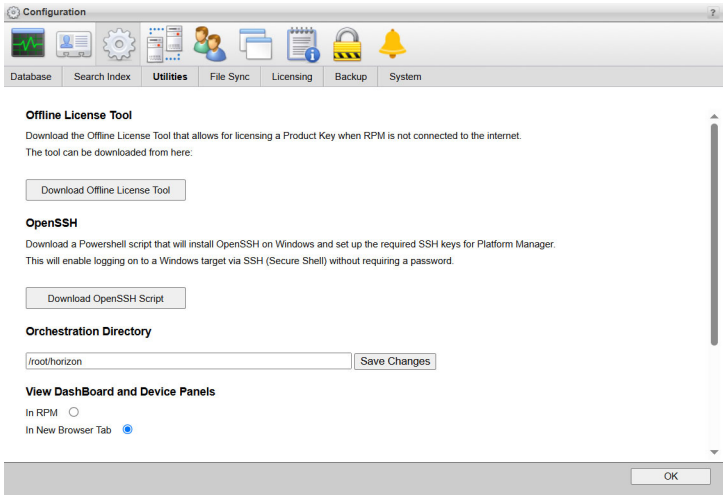
To configure how DashBoard and device panels open

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Utilities** tab.

   The **Utilities** tab opens.



3. Under View **DashBoard and Device Panels**, select the desired check box (either **In RPM** or **In New Browser Tab)**.

4. Click **OK**.

   The **Configuration** dialog box closes.

Managing a Product Key

Ross Platform Manager allows you to manage multiple product key licenses and feature activations from the Product Key Manager view. This workflow is available in multiple modes, whether the Ross Platform Manager is installed on a computer with Internet access or not.

This chapter discusses the following topics:

- Activating and Deactivating Product Keys
- Editing a Product Key's Notes
- Modifying Product Key Settings
- Setting Up License Expiry Notifications
- Managing Product Keys
- Generating a License Usage Report
- Understanding Dynamic and Static Licenses
- Viewing License Analytics

Activating and Deactivating Product Keys

To determine which procedure to follow for activating and/or deactivating a product key, you will need to know the license mode (Static or Dynamic), and if the computer that RPM is on has Internet access or not. Using this info, consult **Table 6.1** below and follow one of the appropriate procedures

Table 6.1 Procedure Types for Activating/Deactivating Product Keys

	Internet Access	No Internet Access
Static License	• Online Mode • Web Based OLA Mode	• Web Based OLA Mode
Dynamic License	• Online Mode • Web Based OLA Mode	• Web Based OLA Mode

For more information on Static and Dynamic licenses, see "**Understanding Dynamic and Static Licenses**" on page 6–17.

Activating a Product Key

There are two methods to activate your product key, based on your network setup:

- Online Mode
- Web Based OLA Mode

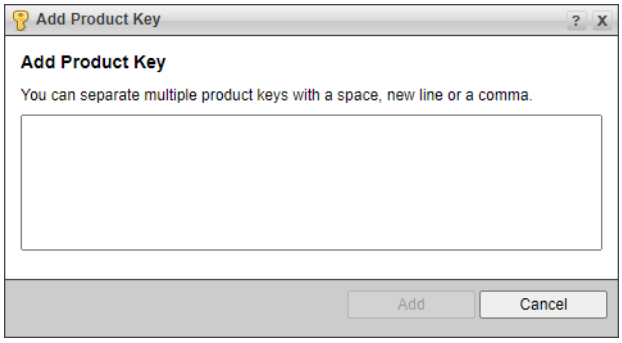
To determine which method is best to use, see the description under "**Activating and Deactivating Product Keys**" on page 6–2.

✶ Activation or deactivation files may only be used once.

To activate a product key (Online Mode)

1. Open **Ross Platform Manager**, and in the **Product Key Manager** click the  **Add Product Key** icon.

   The **Add Product Key** window opens.



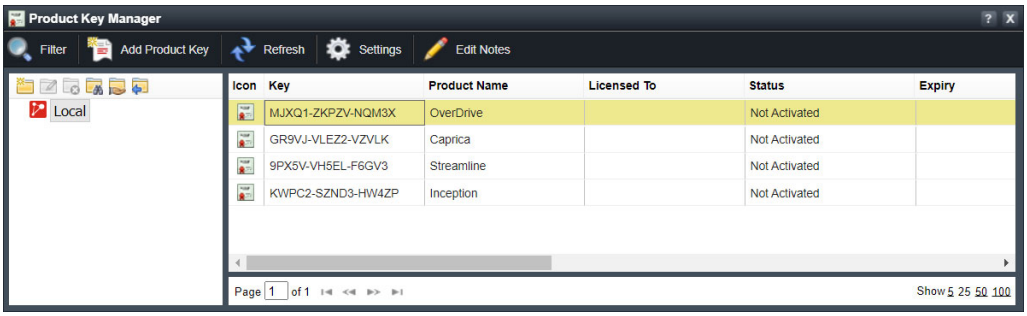
2. Paste the 15 digit product key provided by Ross video in the **Product Key** input field. You may add up to 100 product keys at once, separating each 15 digit product key with a delimiter (either a space, a new line, or a comma).

   Note: Ensure there is no delimiter after the final product key. A delimiter after the final product key will cause RPM to expect another product key to be added, and the **Add** button will not be usable.

3. Click **Add**.

   If any product keys entered are invalid, the message “Error while adding the following product keys” will be displayed, followed by a list of the invalid product keys.

   In the **Product Key Manager** you should see the product key(s) successfully added listed in the table, and the **Status** of **Not Activated** (in this example, MJXQ1-ZKPZV-NQM3X).

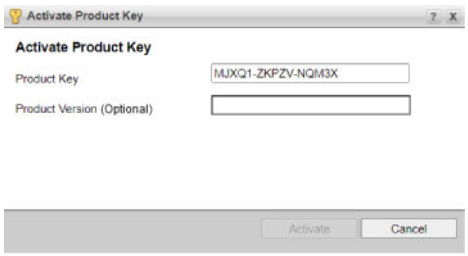


4. Double-click a product key just added in the **Product Key Manager** table.

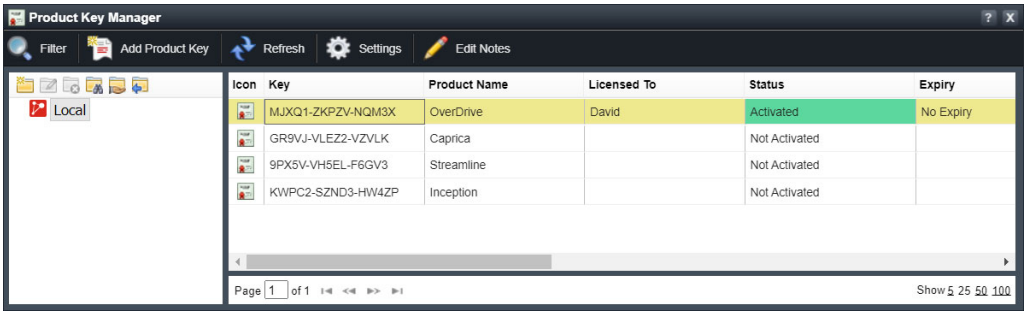
   The selected product key in the **Product Key View** opens.

5. In the **Product Key View**, while the appropriate product key is selected, click the **Activate** icon.

   The **Activate Product Key** dialog opens.



6. In the **Activate Product Key** dialog, enter the **Product Version** for the current product instance.
   Note that this is optional when activating a Static key
7. Click **Activate**.
8. In the **Product Key Manager**, verify that the product key status shows the new **Activated** status (highlighted in green).



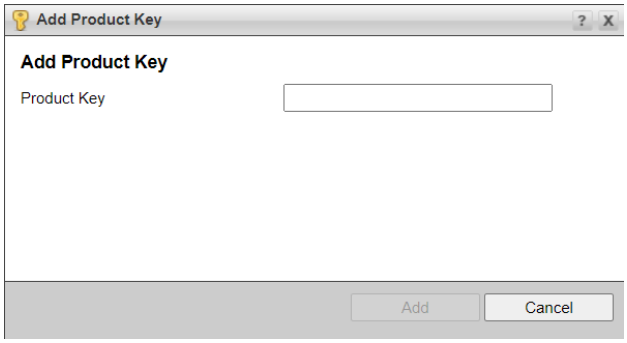
9. Repeat from step **4** of this procedure onwards for each remaining product key added in step **2**.

To activate a product key (Web Based OLA Mode)

✶ This procedure can be followed whether your Ross Platform Manager server is connected to the Internet or not. However, you will need to use a computer with Internet access to complete the activation.

1. Open **Ross Platform Manager**, and in the **Product Key Manager** click the **Add Product Key** icon.

   The **Add Product Key (Offline)** window opens.

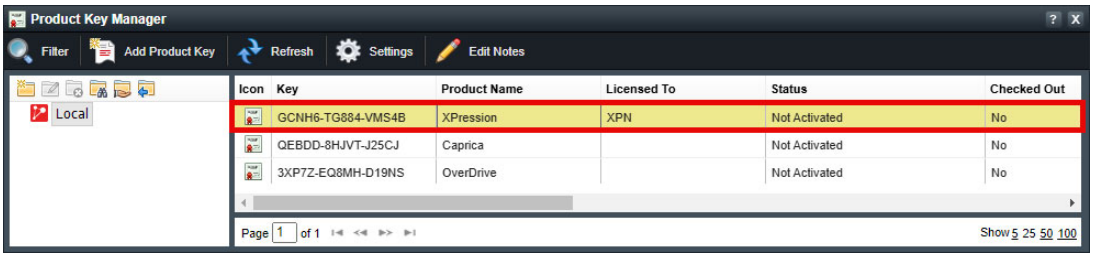


2. Paste the 15 digit product key provided by Ross video in the **Product Key** input field. You may add up to 100 product keys at once, separating each 15 digit product key with a delimiter (either a space, a new line, or a comma).

   Note: Ensure there is no delimiter after the final product key. A delimiter after the final product key will cause RPM to expect another product key to be added, and the **Add** button will not be usable.

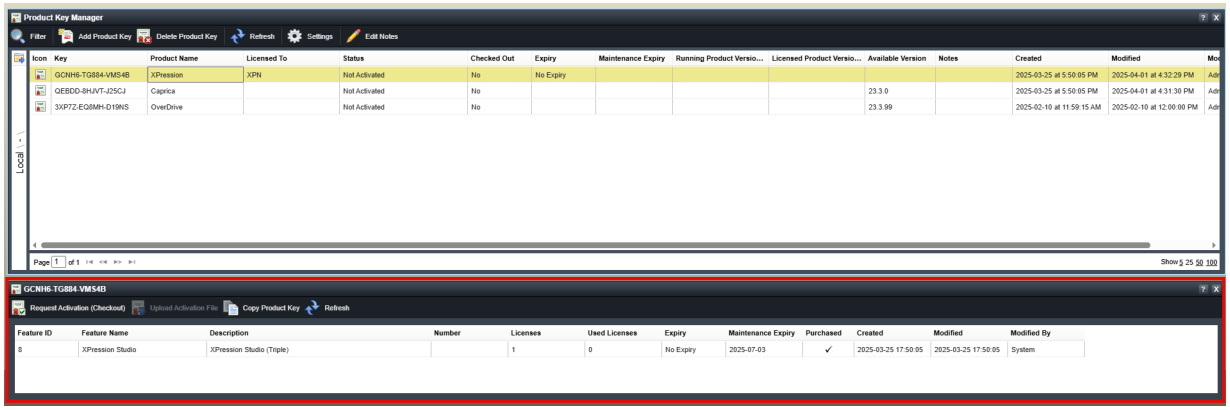
3. Click **Add**.

   In the **Product Key Manager** you should see the product key listed in the table, and the **Status** of **Not Activated**.

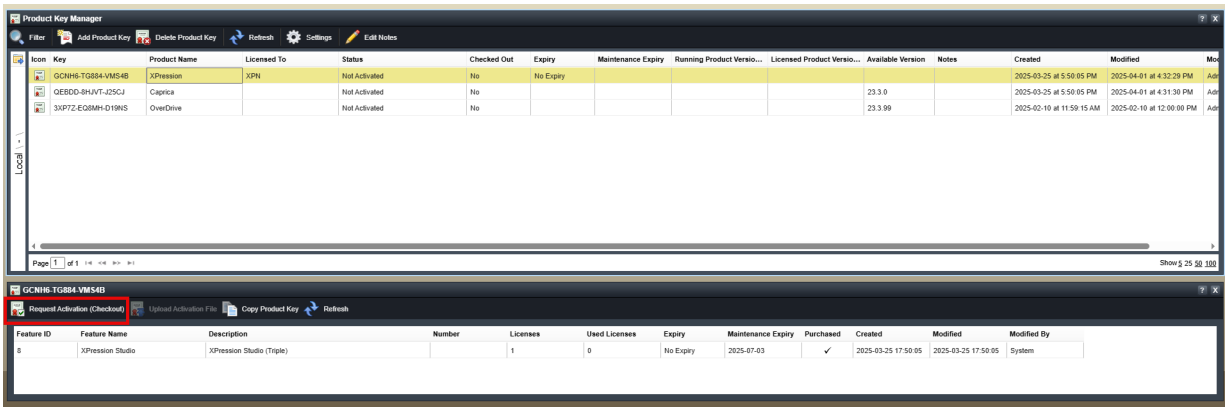


4. Double-click a product key just added in the **Product Key Manager** table.

   The selected product key in the **Product Key View** opens.



5. In the **Product Key View**, click the **Request Activation (Checkout)** icon.

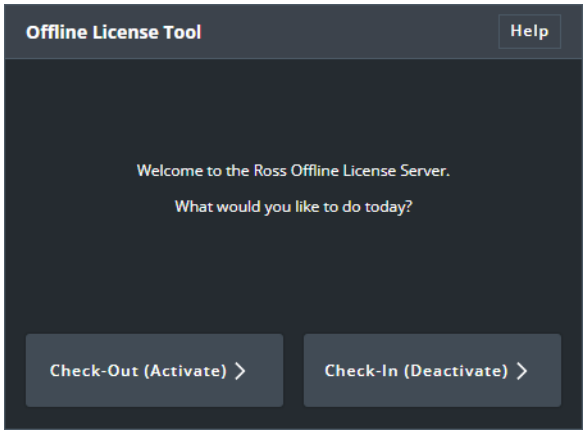


The **activation-request-<GMT timestamp>.json** file downloads.

6. If you are performing this procedure on a computer without Internet access, move the **activation-request-<GMT timestamp>.json** file to a computer with Internet access.

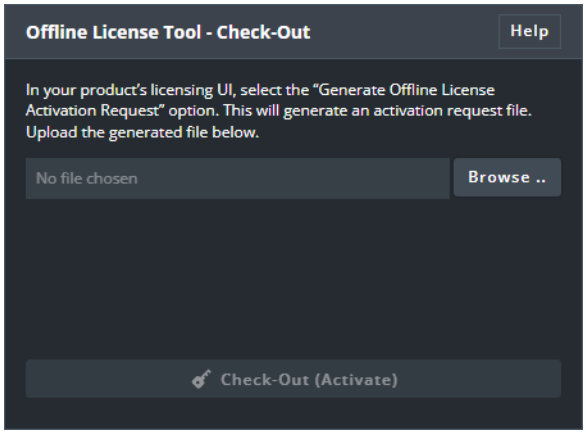
   If you are performing this procedure on a computer with Internet access, continue on to step **7**.

7. In your web browser, go to `https://ola.rossvideo.cloud/`.

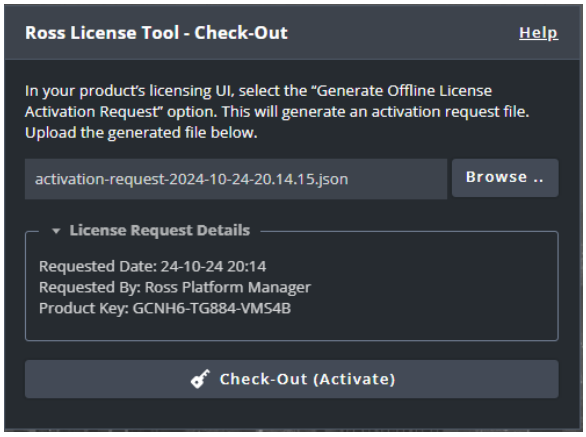


8. Click **Check-Out (Activate)**.

   The Offline License Tool opens the Check-Out dialog.

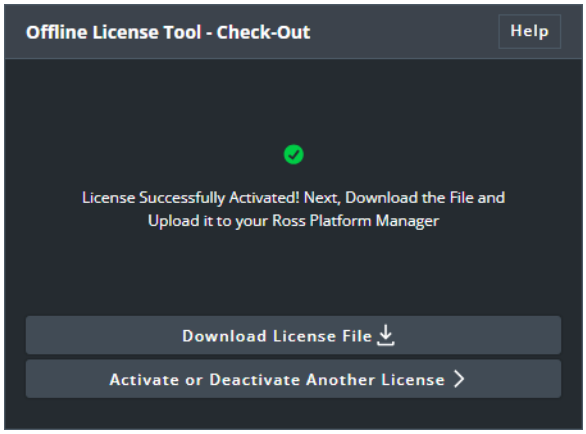


9. Click **Browse...** and select the **activation-request-<GMT timestamp>.json** file.



10. Click **Check-Out (Activate)**.

    The product key associated with the **activation-request-<GMT timestamp>.json** file is activated and a prompt to save the **activation response file** opens.



11. Click **Download License File**.

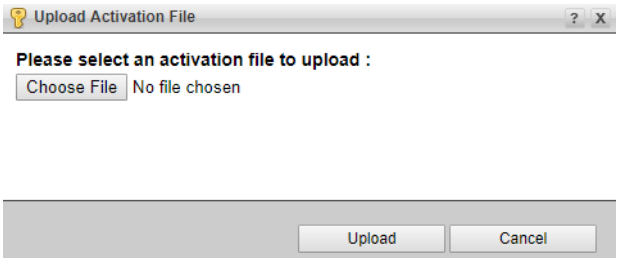
    The **activation response file** saves.

12. Open Ross Platform Manager and in the **Product Key Manager**, double-click the product key you are activating.

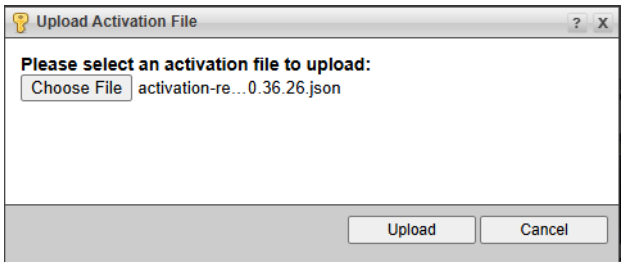
    The selected product key in the **Product Key View** opens.

13. In the **Product Key View**, click the  **Upload Activation File** icon.

    The **Activation File** dialog box opens.



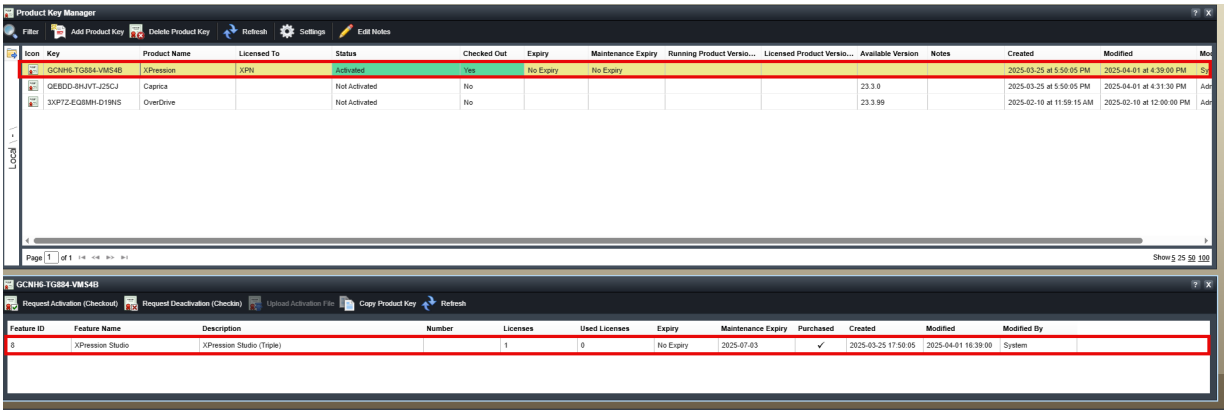
14. Select **Choose File**, and select the **activation response file** (the **activation-request-<GMT timestamp>.json** file) that the **Web Based OLA** generated.



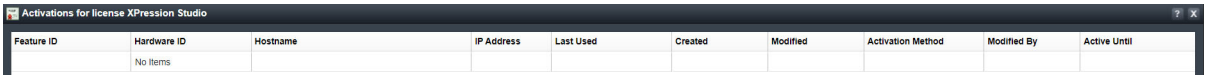
15. Click **Upload**.

    The **License Applied** alert opens.

16. Confirm that the product key is active by checking the license status in the **Product Key Manager** view (status will be highlighted in green), and verify that the Product Key View shows all of the licenses included with the product key.



    You can also double-click a license in the **Product Key View**, and it will open the activations for the selected license.



17. Repeat from step **4** of this procedure onwards for each remaining product key added in step **2**.

Deactivating a Product Key

There are two methods to deactivate your product key, based on your network setup:

- Online Mode
- Web Based OLA Mode

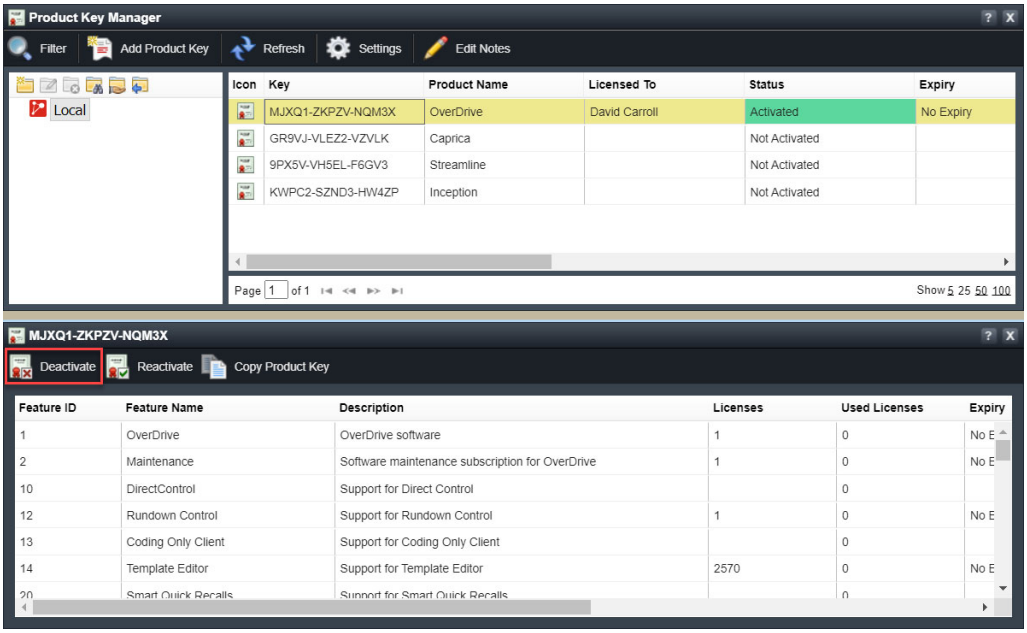
To determine which method is best to use, see the description under "**Activating and Deactivating Product Keys**" on page 6–2.

✶ Activation or deactivation files may only be used once.

To deactivate a product key (Online Mode)

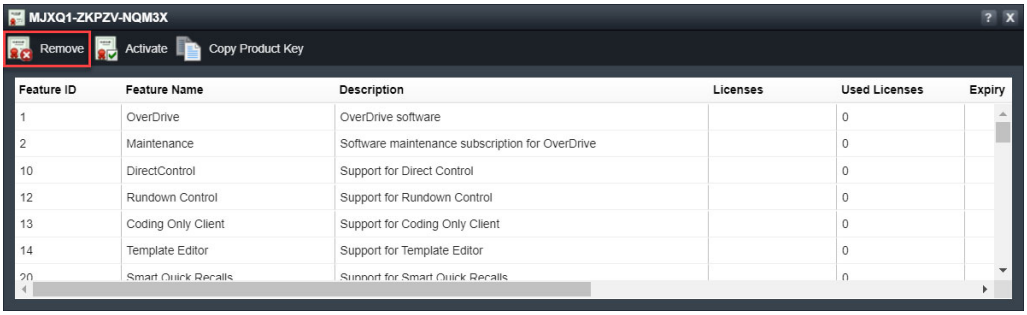
1. Open Ross Platform Manager, and open the **Product Key Manager**. Select the product key you would like to deactivate from the table and double-click to open the **Product Key View**.

2. In the **Product Key View**, click **Deactivate**.



The deactivated **Product Key** is removed from the **Product Key Manager** corresponding **Product Key View**. The **Deactivate** and **Reactivate** icons are replaced by a **Remove** and **Activate** icon in the menu.

3. In the **Product Key View**, click **Remove**.



The product key is removed from the **Product Key Manager**, and the **Product Key View** closes.

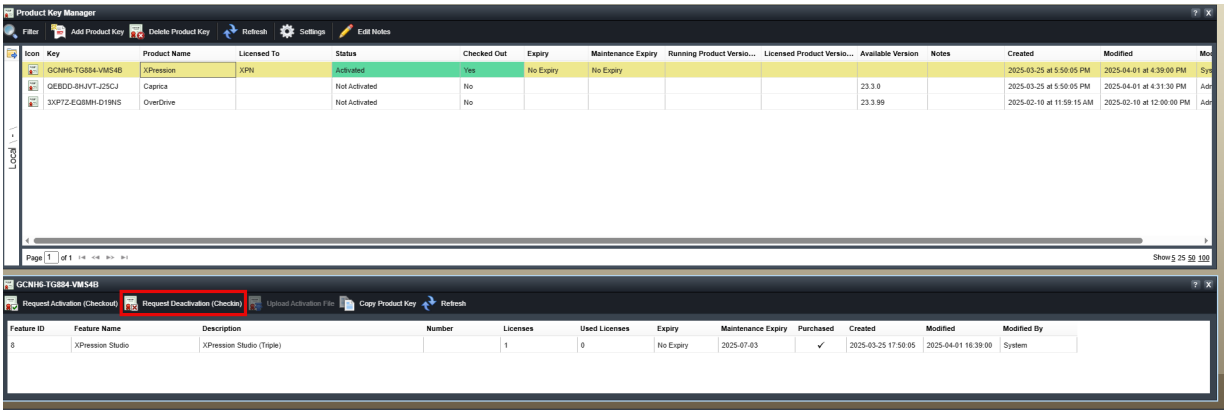
To deactivate a product key (Web Based OLA Mode)

✶ This procedure can be followed whether your Ross Platform Manager server is connected to the Internet or not. However, you will need to use a computer with Internet access to complete the deactivation.

1. Open Ross Platform Manager, and open **Licensing > Product Key Manager**.
2. Select the product key you would like to deactivate from the table and double-click to open the **Product Key View**.

   The **Product Key View** of the product key you selected opens.

3. In the **Product Key View**, click  **Request Deactivation (Checkin)**.

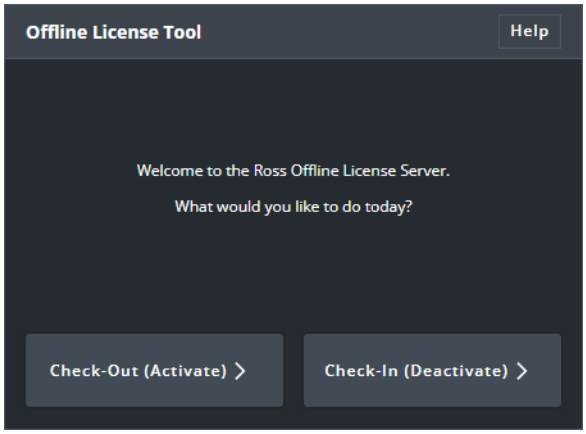


   The **deactivation-request-<GMT timestamp>.json** file downloads.

4. If you are performing this procedure on a computer without Internet access, move the **deactivation-request-<GMT timestamp>.json** file to a computer with Internet access.

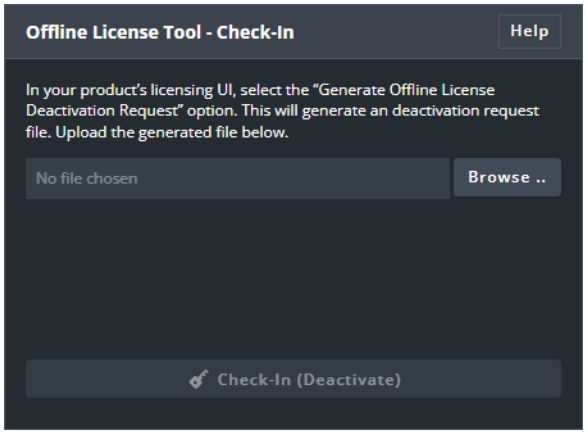
   If you are performing this procedure on a computer with Internet access, continue on to step **5**.

5. In your web browser, go to `https://ola.rossvideo.cloud/`.

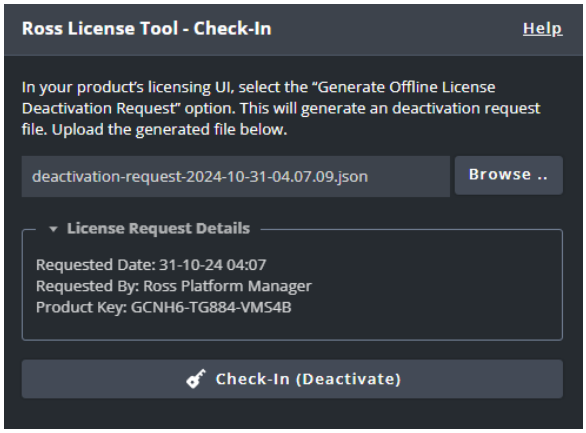


6. Click **Check-In (Deactivate)**.

   The Offline License Tool opens the Check-In dialog.

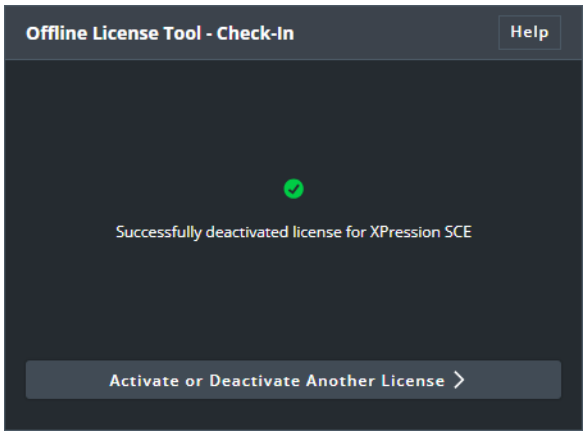


7. Click **Browse...** and select the **deactivation-request-<GMT timestamp>.json** file.



8. Click **Check-In (Deactivate**).

   The product key associated with the **deactivation-request-<GMT timestamp>.json** file is deactivated and a **Success** message displays.



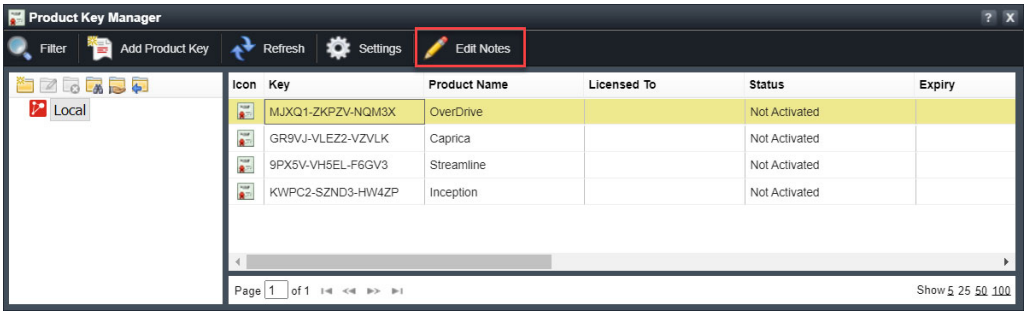
9. Open Ross Platform Manager and in the **Product Key Manager** table you can confirm that the license **Status** is **Not Activated**. You can then double-click to open the license in the License Key Manager, and click the **Remove** icon if you wish to remove the license from the list.

Editing a Product Key's Notes

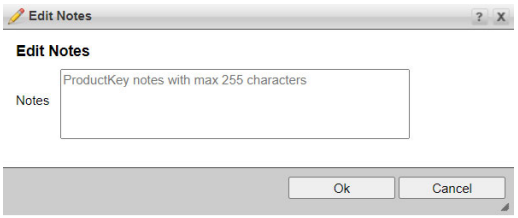
The Notes column in the Product Key Manager can be used to display any information that may be relevant or helpful to make note of for each product key.

To edit the notes of a product key

1. Open Ross Platform Manager, and open the **Product Key Manager**.
2. Select the product key you would like to edit the note of from the table.
3. Click **Edit Notes** in the main toolbar.



The **Edit Notes** dialog box opens.



4. Enter the desired information into the **Notes** field. You may enter up to 255 characters.
5. Click **Ok**.

   The **Edit Notes** dialog box closes, and your note has been saved to the selected product key. The note will display when the mouse is hovered over the **Notes** column.

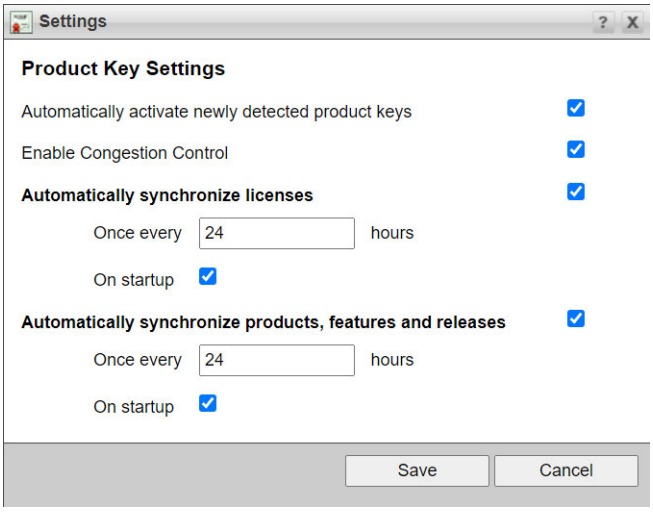
Modifying Product Key Settings

You can choose the default settings for product keys, including selecting the settings for activations, reactivations upon version change, and synchronization.

To modify the product key settings

1. In the **Product Key Manager** window, click the **Settings** icon on the main toolbar.

   The **Product Key Settings** dialog box opens.



2. For the Product Key Settings, you can configure the following options according to your preferences:

Setting	Description
Automatically activate newly detected product keys.	Select this check box if you would like newly added product keys to activate automatically.
Automatically reactivate product keys when version changes.	Select this check box if you want product keys to reactivate automatically when the version changes.
Automatically synchronize licenses.	Select to synchronize licenses. Set the following options: • For the **Once every** < > **hours** entry field, enter a value (in hours) for how often you would like the Ross Platform Manager to synchronize licenses. **Note:** Ross Platform Manager must be able to connect to the Ross Activation server, and this is not possible when running in offline mode. • **On Startup** - select this check box if you want to synchronize licenses upon startup.
Automatically synchronize products, features and releases.	Select this option to automatically synchronize products, features, and releases once every 24 hours. • **On Startup** — select this check box if you want to synchronize features upon startup.

3. Click **Save**.

Setting Up License Expiry Notifications

To avoid any interruptions to the use of your licensed products, it is important to renew all licenses on time. Using the RPM license expiry notification system can help you ensure that an expiry date is not missed. Once you configure the outgoing mail server and add recipients to the mailing list, designated users will receive notifications when a license is expiring soon or has already expired.

To make use of the license expiry notifications system, follow the procedures in the following sections below:

- Configuring the Mail Server
- Managing Recipients
- Configuring the Schedule

Configuring the Mail Server

Before license expiry notifications can be sent to users, the outgoing mail server must be configured. The procedure below details the steps necessary to properly configure the mail server, as well as how to send out a test e-mail to verify that the setup has been successful.

To configure the mail server

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

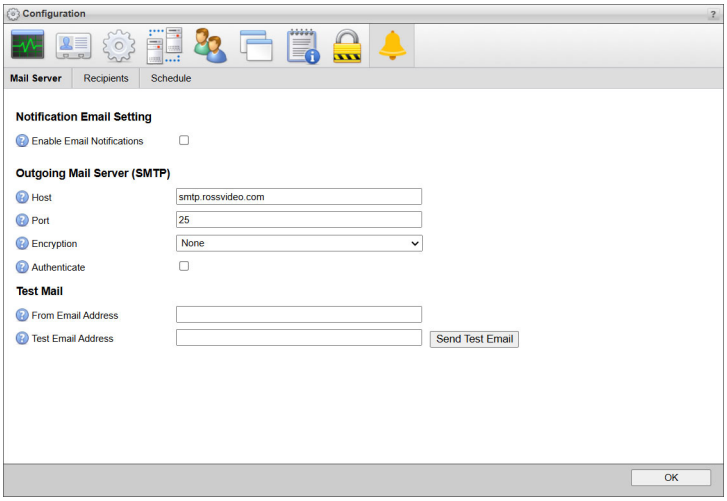
   - **Username** — `root`
   - **Password** — `password`

2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Notifications** icon.

   The **Notifications** panel opens.



4. On the **Mail Server** tab under **Notification Email Setting**, select **Enable E-Mail Notifications.**
5. Under **Outgoing Mail Server (SMTP)**, configure the following settings:

   - **Host** — Enter the host name for the outgoing mail server.
   - **Port** — Enter the port number for the outgoing mail server.
   - **Encryption** — Select the encryption to be used for the outgoing mail server (either **None** or **SSL/TLS)**.

- **Authenticate** — Select if the outgoing mail server requires authentication.
- **Username** — Displays if using authentication. Enter the username for the outgoing mail server.
- **Password** — Displays if using authentication. Enter the password for the outgoing mail server.

6. Under **Test Mail**, enter the following information to send a test e-mail to confirm that you have configured the mail server correctly**:**
   - **From E-Mail Address** — Enter the e-mail address that you want the test email to show as being sent from.
   - **Test E-Mail Address** — Enter the e-mail address that you want the test email to be sent to.
7. Click **Send Test Email** to send a test e-mail to and from the addresses entered in the previous step.

   A test e-mail is sent to the **Test E-Mail Address** entered. Receiving it confirms the mail server has been configured correctly.
8. Click **OK**.

   The configurations to the mail server have been saved and the **Configuration** window closes.

Managing Recipients

When the mail server has been configured, you are ready to begin managing the recipients intended to receive the license expiry notifications. It is outlined below how to both add new recipients to the recipients list, and how to edit existing ones.

To add new recipients

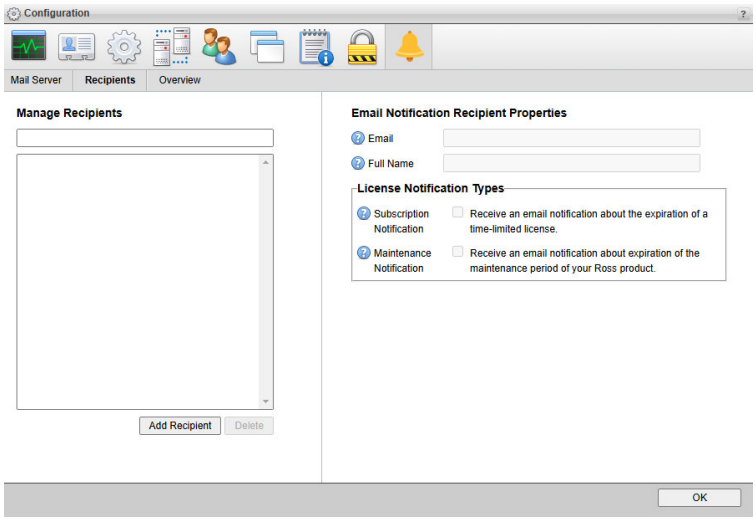
1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:
   - **Username** — `root`
   - **Password** — `password`
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Notifications** icon.

   The **Notifications** panel opens.
4. Click the **Recipients** tab.

   The **Recipients** tab opens.



5. Under the **Manage Recipients** list, click **Add Recipient.**

   A new recipient is added to the **Manage Recipients** list and opens under **Email Notification Recipient Properties**.

6. Under **Email Notification Recipient Properties**, enter the following information for the recipient:

   - **Email** — Enter the email address of the recipient.
   - **Full Name** — Enter the full name of the recipient.

7. Under **License Notification Types**, select the desired license notification types for the recipient:

   - **Subscription Notification** — Select if the recipient should receive notifications when a license is about to expire. A maximum of 30 recipients can be signed up to receive Subscription Notifications.
   - **Maintenance Notification** — Select if the recipient should receive notifications when a maintenance agreement is about to expire. A maximum of 30 recipients can be signed up to receive Maintenance Notifications.

   Note that a recipient must be signed up for at least one type of notification to be saved.

8. Repeat from step **5** of this procedure onwards for any additional recipients that must be added.

To edit existing recipients

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

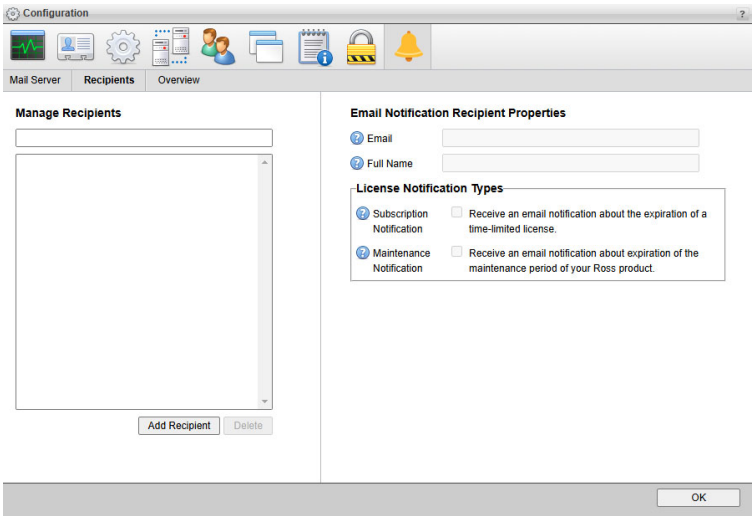
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Notifications** icon.

   The **Notifications** panel opens.

4. Click the **Recipients** tab.

   The **Recipients** tab opens.



5. Under the **Manage Recipients** list, select the recipient that you want to edit**.**

   The selected recipient loads under **Recipient Properties**.

6. Under **Email Notification Recipient Properties** and **License Notification Types,** edit the desired information.

   Note that a maximum of 30 recipients can be signed up to receive each type of notification, and that a recipient must be signed up for at least one type of notification to be saved.

Configuring the Schedule

The Overview tab in the Notifications panel (**Figure 6.1**) outlines the schedule settings for license expiry notifications. Most of the fields in this tab are read-only. Users can only interact with the **Notify Product Keys that are already expired** and **Notify Product Keys with already expired maintenance** check boxes. When selected, the license expiry notification email will include details about product keys that have already passed their expiration date for the product keys, and/or maintenance.

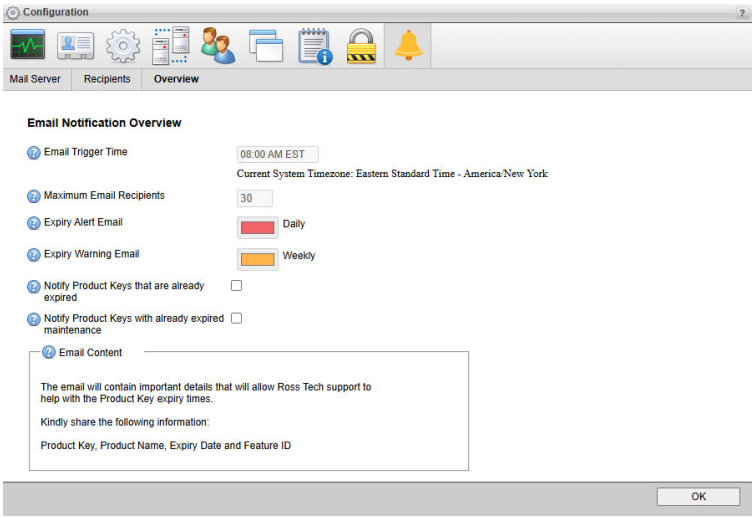


Figure 6.1 The Overview tab in the Notifications panel

Managing Product Keys

You can use the Product Key Summary panel to search for a product key or filter for a particular group of product keys that share the same properties, such as the same product type, feature, or licensed user.

To find a product key or group of similar product keys

1. To open the **Product Key Summary** panel, in the RPM top menu click **License Reporting > Product Key Summary**.

2. In the **Product Key Summary** panel, click  **Filter** and enter the product key, product name, feature, or the assigned user for the product key(s) that you wish to view.

✶ You cannot search by **Total Count**, **Used Count**, **Host Name**, or **IP Address**.

Generating a License Usage Report

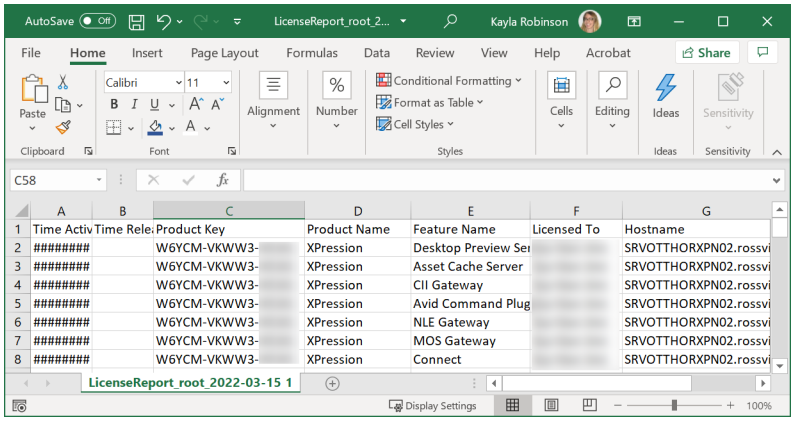
You can generate a license usage report for any product key in the Ross Platform Manager. The report includes a history of product key activation and release times, licensed users, and network details.

To generate a license usage report

1. To generate a license report, in the RPM top menu click **License Reporting > Product Key Summary**.

2. Select the product key that you wish to get a report for, and click  **Export**. The **.csv** file will appear in your **Downloads** folder.

3. Open the report using **Microsoft Excel** or a software that supports .csv files.



Understanding Dynamic and Static Licenses

Licensing modes in Ross Platform Manager fall under two categories: Static licenses and Dynamic licenses.

Static licenses are used by products that are connected to the same instance of RPM, such as OverDrive, Caprica, and RWP based products. When using a Static license, the user is required to manually activate the product key before the product can be granted a license.

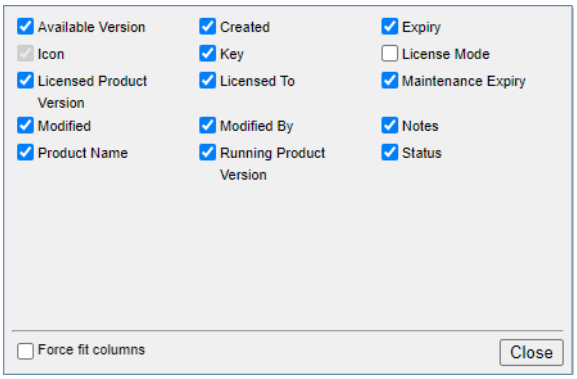
Dynamic licenses are managed by the Activation Server, and are granted either by being directly connected to the Internet, or by connecting through RPM. Some examples of products which use Dynamic licenses are XPression, DashBoard CustomPanels, and Carbonite switchers. For Dynamic licenses, RPM acts as a proxy between the Activation Server and the product, forwarding the request for the license from the product to the Activation server, and then forwarding the Activation Server's response to the product. Unlike Static licenses, the user is not required to manually activate the product key before being granted a license.

To view which licensing mode is being used for a product, follow the procedure below to display the **License Mode** column in the **Product Key Manager**. The **License Mode** column is hidden by default, but can easily be displayed.

To display License Mode in the Product Key Manager

1. Open the **Product Key Manager** by clicking **Licensing > Product Key Manager** in the RPM top menu.
2. Right click on the column headers of the **Product Key Manager**.

   The displayed columns menu opens.



3. Select **License Mode**.
4. Select **Close**.

   The **License Mode** column is now displayed at the far right of the **Product Key Manager,** and can be dragged to whichever position is desired.

Viewing License Analytics

You are able to view License Analytics either By Feature, or By Host. Although both options provide much of the same information, they each present it with a different focus.

When viewing License Analytics under the By Feature option (**Figure 6.2**), the interface displays the information in a way that gives a clear view of how licenses are being used. All features available in that RPM instance are listed, ordered by product name. Expanding a feature reveals the product keys and who they are licensed to, and expanding a product key reveals the hosts. The Total, Used, Available, and Checked Out columns all refer to license usage.

Figure 6.2 License Analytics - By Feature View

When viewing License Analytics under the By Host option, the information is presented with a focus on who is using the licenses and how. All hosts using a license in that RPM instance are listed, along with the product in use and who it is licensed to. Expanding a host reveals the product keys in use, and expanding a product key reveals the associated features, as well as the appropriate info in the Active Until column.

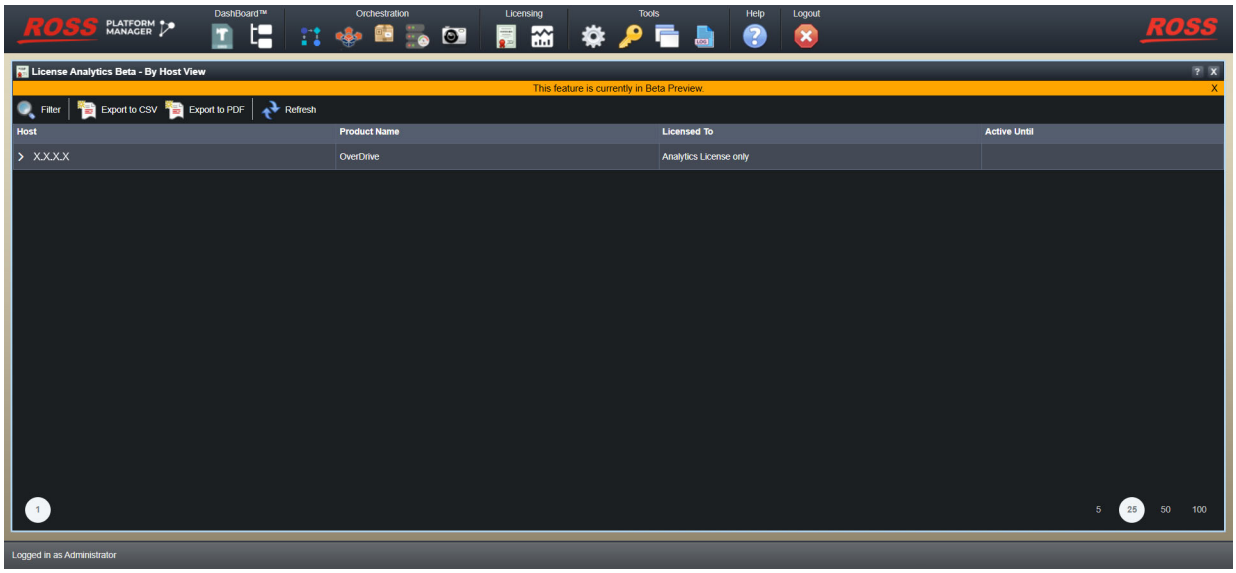


Figure 6.3 License Analytics - By Host View

To view License Analytics

- Open **License Analytics** by clicking either **License Reporting > By Feature** or **License Reporting > By Host** in the **Licensing** section of the RPM top menu, depending on which view you want.

  The **License Analytics** window opens in the selected view.

Managing a Target

The Ross Platform Manager allows you to instantiate multiple different connections to target devices in the Target Manager. Examples of targets include static Windows or Linux hosts (on bare metal machines, VMs, or Amazon EC2 instances), Cloud hosts, and Ross Platform switchers (Carbonite or Acuity). Once a connection to a target is instantiated, the target must be authorized using a method that is suitable for the type of target.

This chapter discusses the following topics:

- Adding a Target
- Authorizing a Target
- Transitioning an SDPE Blade Target
- Extending Carbonite as an OGP Device
- Copying Info from the Target Manager
- Force Stopping a Cloud Instance
- Taking a Snapshot of a Ross Platform Target
- Editing a Snapshot Description
- Using the Visual Workflow Manager

Adding a Target

To start off, you'll add your target to the target manager by providing Ross Platform Manager with information about the target. When a target is added (even by another user), it will display automatically in the list of targets in the sidebar of the Visual Workflow canvas.

✶ softGear deployments are supported by Linux targets, and XPression deployments are supported by Windows targets.

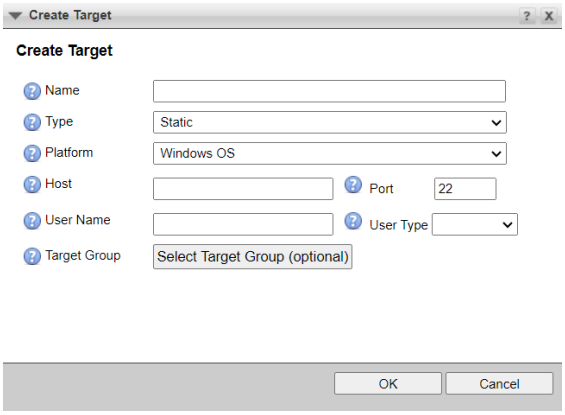
To add a Windows or Linux target

1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Browse Targets** icon.

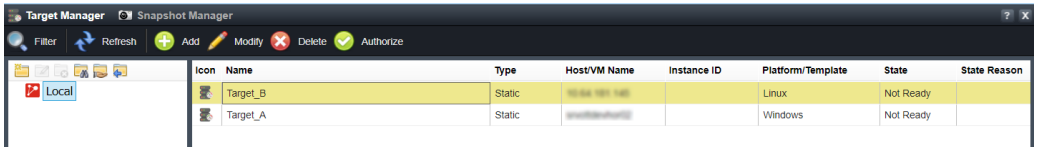
   The **Target Manager** opens.

2. To create a target, click  Add.

   The **Create Target** window opens.



3. In the **Create Target** window, enter the following information:
   - **Name** — Enter a meaningful name for the target.
   - **Type** — Select **Static**.
   - **Platform** — Select either Windows OS or Linux OS.
   - **Host** — Enter your host name or IP address.
   - **Port** — Enter the port number for the target.
   - **User Name** — Enter the user name for the target.
   - **User Type** — Select whether the user account type is AD/LDAP or Local (optional).
   - **Domain** — Available when User Type is set to AD/LDAP. Use this field to enter the domain name (optional).
   - **Target Group** — Select a group for the target (optional).
4. Click **OK** to add the target.
5. Verify that your new target appears in the **Target Manager.**



✶ If you have added a **Windows OS** target, the target will automatically be authorized and appear with **Ready State** if you have downloaded and executed the Open SSH script on the target device.

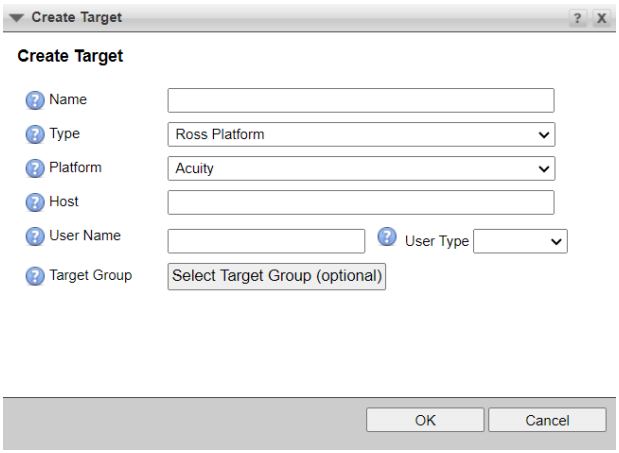
To add a Ross Platform target

1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Browse Targets** icon.

   The **Target Manager** opens.

2. To create a target, click  Add.

   The **Create Target** window opens.

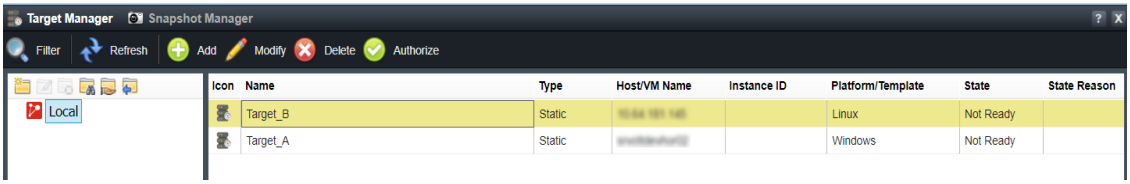


3. In the **Create Target** window, enter the following information:

   - **Name** — Enter a meaningful name for the target.
   - **Type** — Select **Ross Platform**.
   - **Platform** — Select **Acuity**, **Carbonite**, or **SDPE Blade**.
   - **Host/Instance Id** — Enter your host name or IP address.
   - **Port** — If the target is a **Carbonite**, enter the port number.
   - **Extend as OGP device** — Available when the target is a **Carbonite**. Select to extend the Carbonite as an OGP device (optional).
   - **Port** — Available when the target is a **Carbonite** and **Extend as OGP device** is selected. Autofills with the port number for the extension as an OGP device.
   - **User Name** — Enter the user name for your target.
   - **User Type** — Select whether the user account type is AD/LDAP or Local (optional).
   - **Domain** — Available when User Type is set to AD/LDAP. Use this field to enter the domain name (optional).
   - **Target Group** — Select a group for the target (optional).

4. Click **OK** to add the target.

5. Verify that your new target appears in the **Target Manager.**



✶ If a message indicates that the maximum number of OGP devices has been reached, it is because the allowance for your RPM subscription tier has been reached. Please contact your system administrator.

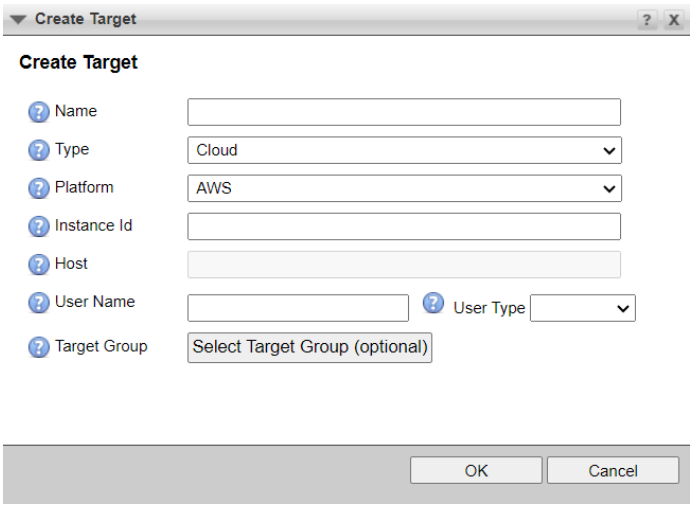
To add a Cloud target

1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Browse Targets** icon.

   The **Target Manager** opens.

2. To create a target, click  Add.

   The **Create Target** window opens.



3. In the **Create Target** window, enter the following information:

   - **Name** — Enter a meaningful name for the target.
   - **Type** — Select **Cloud.**
   - **Platform** — The Platform will automatically be set to AWS.
   - **Instance Id** — Enter your EC2 instance ID.
   - **Host** — This field will be automatically populated with the host server's private IP address.
   - **User Name** — Enter the user name for your target.
   - **User Type** — Select whether the user account type is AD/LDAP or Local (optional).
   - **Domain** — Available when User Type is set to AD/LDAP. Use this field to enter the domain name (optional).
   - **Target Group** — Select a group for the target (optional).

4. Click **OK** to add the target.

5. Verify that your new target appears in the **Target Manager.**

Authorizing a Target

Once a target has been added, it will need to be authorized in order to be eligible for use in a deployment. Targets with a Windows OS are automatically authorized if the Open SSH script is installed on the target device. Targets with a Linux OS will need to be authorized using a key-based or password-based method. Ross Platform targets need to be authorized using a password-based method.

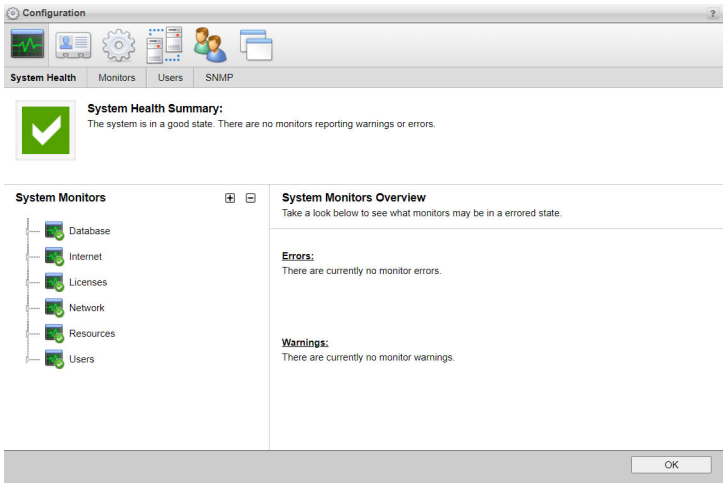
Once Ross Platform Manager verifies that a target's operating system is available and successfully connects to it, the target will automatically move into **Ready State** in the **Target Manager**, signaling that it is eligible for a deployment**.**

To authorize a Windows target

✶ This procedure can be completed before the target is added to the Target Manager. If you already have SSH installed on the machine, you are not required to follow this procedure.

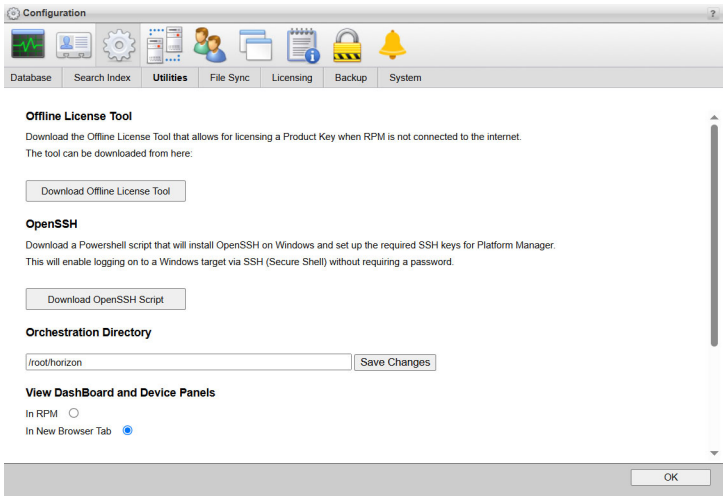
1. Open the **Ross Platform Manager**, and from the top menu under **Tools**, select the **Configuration** icon.

   The **Configuration** window opens.

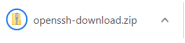


2. Select **System > Utilities** to open the Utilities tab.

   The **Utilities** tab opens.



3. Select **Download OpenSSH Script** to download the OpenSSH Script.



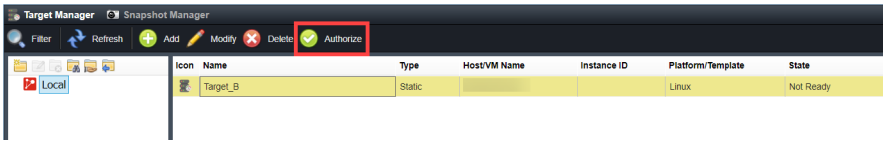
The **openssh-download.zip** file containing the OpenSSH Script downloads.

4. Open the **README.txt** file included in the **openssh-download.zip** file.
5. Follow the instructions in the **README.txt** file to install the OpenSSH Script on the Windows target device.
6. In the Target Manager, select the Windows target by clicking on it.
7. Click **Authorize**.
8. Verify that the Windows target is in **Ready State**.

To authorize a Linux or Cloud target (key-based)

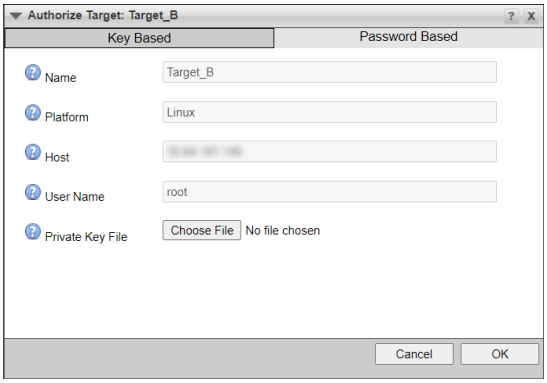
✶ You must generate a .pem key file for the target device before following this procedure.

1. Select the Linux or Cloud target in the **Target Manager**.
2. Click **Authorize.**



The **Authorize Target** window opens.

3. Ensure that the **Key Based** tab is selected, and select **Choose File** to upload the key file in .pem format.



4. Verify that the correct key file is uploaded and click **OK.**
5. Verify that the Linux or Cloud target is in **Ready State** in the Target Manager.

   If the **State** status shows **Not Ready** with the **Status Reason "**Failed to retrieve OS information: Auth fail", there is an error in the key file, or the incorrect user name was used.

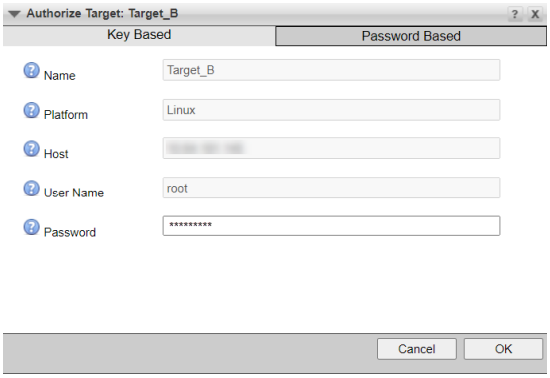
✶ If you authorize a target with the key-based method, you will automatically be prompted to use the key-based method for future authorizations. You will no longer have access to password-based authorization.

To authorize a Linux, Cloud, or Ross Platform target (password-based)

✶ Currently, you may only authorize a Ross Platform target using the password-based method.

1. Select the Linux, Cloud, or Ross Platform target in the **Target Manager**.
2. Click **Authorize.**

   The **Authorize Target** window opens.
3. Click the **Password Based** tab.



4. If you are authorizing anything OTHER than a Carbonite, SDPE, or Acuity target, carry on to the next step.
   If you are authorizing a Carbonite, SDPE, or Acuity target, ensure that the **User Name** field says `rpmuser`. If anything else is displayed in the field, modify the target details in the **Target Manager** so that the User Name is correct.
5. Enter the password that you configured for your device.
   If you are authorizing a Carbonite, SDPE, or Acuity target, enter the default password `rosswombats`.

✶ It is recommended that you change the default password for Carbonite, SDPE, and Acuity targets. How to change the password varies depending on your switcher. Refer to your switcher's documentation for more information.

6. Click **OK.**
7. Verify that the target is in **Ready State** in the Target Manager.

Transitioning an SDPE Blade Target

Once you have added an SDPE Blade target in the Target Manager, you can transition the SDPE Blade between Carbonite and Acuity from the Ross Platform Manager.

To transition an SDPE Blade target between Carbonite and Acuity

1. Select an SDPE Blade target in the **Target Manager** by clicking on it.
2. Click **Transition**.

   The SDPE Blade Target will take up to five minutes to transition.

   The state column will reflect whether the SDPE Blade is currently in Carbonite or Acuity state.

Extending Carbonite as an OGP Device

By extending a Carbonite switcher on RPM as an OGP device, you will not need to add the Carbonite target multiple times to make full use of it's functionality.

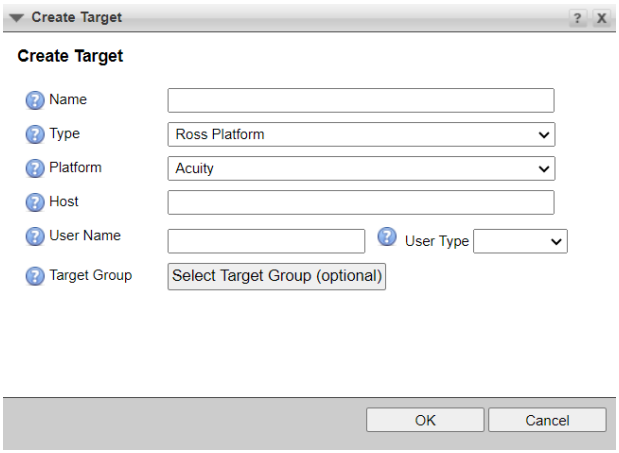
To extend a Carbonite as an OGP device

1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Browse Targets** icon.

   The **Target Manager** opens.

2. To create a target, click Add.

   The **Create Target** window opens.



3. In the **Create Target** window, enter the following information:

   - **Name** — Enter a meaningful name for the target.
   - **Type** — Select **Ross Platform**.
   - **Platform** — Select **Carbonite**.
   - **Host/Instance Id** — Enter your host name or IP address.
   - **Port** — Enter the port number.
   - **Extend as OGP device** — Select to extend the Carbonite as an OGP device.
   - **Port** — Autofills with the port number for the extension as an OGP device, but can be manually changed.
   - **User Name** — Enter the user name for your target.
   - **User Type** — Select whether the user account type is AD/LDAP or Local (optional).
   - **Domain** — Available when User Type is set to AD/LDAP. Use this field to enter the domain name (optional).
   - **Target Group** — Select a group for the target (optional).

4. Click **OK** to add the target.

   The **Create Target** window closes and the Carbonite target has been extended as an OGP device.

Copying Info from the Target Manager

You may find that you need information about a target (for troubleshooting, for example). Rather than need to type out the information that is displayed in the Target Manager, you can copy the information from any cell in the Target Manager and have its contents available to paste anywhere you need.

To copy information from the Target Manager

1. Select the cell with the desired information from the **Target Manager**.

   The selected cell is outlined in black and highlighted in yellow.

2. Press **Ctrl+C**.

   The information from the selected cell is copied and ready to be pasted wherever desired.

Force Stopping a Cloud Instance

In some cases, a cloud instance may get stuck in a stopping state. If this happens, force stopping the instance will fix this issue.

To force stop a cloud instance

1. Right click the target that is stuck in the **Stopping** state in the **Target Manager**.

   A context menu opens.

2. Click **Force Stop**.

   A confirmation message opens, asking if you want to force stop the instance.

3. Click **Yes**.

   The selected cloud instance is stopped.

Taking a Snapshot of a Ross Platform Target

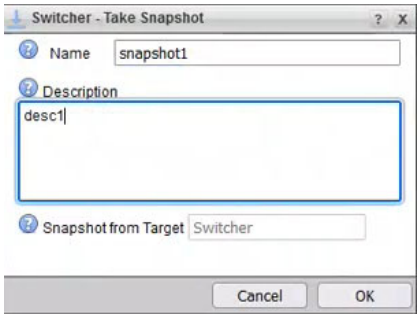
You can capture a snapshot of a Ross Platform type target (Carbonite, Acuity, or SDPE Blade in Carbonite state). The snapshot will contain a working set of files for the target. You can view the snapshot and its associated files in the **Snapshot Manager**. Once you've taken a snapshot of a Ross Platform target, you can apply the snapshot back to the target in the **Snapshot Manager**.

- RossTalk functionality must be enabled for Ross Platform Manager to save working set configuration files for switchers. RossTalk functionality will be automatically enabled for Carbonite and Ultrix Carbonite. For instructions on enabling RossTalk functionality for Acuity and Ultrix Acuity switchers, refer to the ***Enabling RossTalk on Switchers*** document.
- You can only take a snapshot of an SDPE Blade target when it is in Carbonite mode.

To save a snapshot of a Ross Platform target

1. From the top menu of **Ross Platform Manager**, select **Target Manager**.
2. Select the **Ross Platform** target and once it is highlighted in yellow, click **Get Working Set**.

   The **Switcher - Take Snapshot** dialog opens.



3. In the **Name** box, enter a name for the snapshot.
4. In the **Description** box, enter a description of the snapshot.

- Each working set snapshot is unique, and will not be overwritten if another snapshot is taken.

5. Click **OK**. Ross Platform Manager will then collect a configuration file from the target, which contains the current working set of files for the target.

Editing a Snapshot Description

After you have captured a snapshot of a Ross Platform type target, you can edit the snapshots description in the **Snapshot Manager**.

To edit a snapshot description

1. From the top menu of **Ross Platform Manager**, select **Snapshot Manager**.

   The **Snapshot Manager** opens.

2. Select the snapshot with the description that you want to edit.
3. Click **Edit Description.**

   The **Edit Description** dialog box opens.

4. Make the desired changes to the Description.
5. Click **Ok**.

   The changes to the description of the selected snapshot are saved.

Using the Visual Workflow Manager

The Visual Workflow Manager is a tool that allows Ross Platform Manager users to create, modify, and manage workflows in a visual interface. In the visual workflow canvas, you can visually map out flows that start and stop running Cloud targets, and take snapshots of Ross Platform targets. It can be used to:

- Start an EC2 instance.
- Make a sequential flow. For example: Start Cloud Target A, then Start Cloud Target B.
- Schedule flows. For example: Start Cloud Target A at 9am, then Stop Cloud Target A at 6pm.
- Schedule a workflow where a recurring snapshot is taken of a Ross Platform target and applied to multiple Ross Platform targets.

This section covers the following topics:

- Creating a Visual Workflow
- Viewing OGP Device Status

✶ The Visual Workflow Manager is a paid feature.

Creating a Visual Workflow

To create a visual worklow, follow the steps outlined in the procedure below.

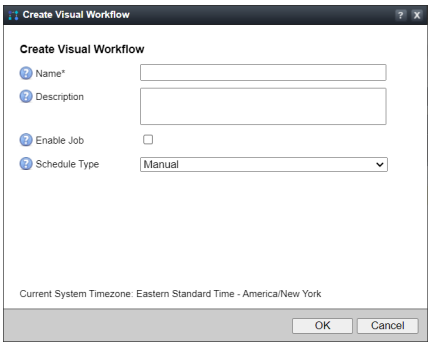
To create a visual workflow

1. Open the Ross Platform Manager, and from the top menu under **Orchestration**, select  **Visual Workflow Manager**.

   The **Visual Workflow Manager** opens.

2. From the toolbar, select  **Create.**

   The **Create Visual Workflow** window opens.



3. In the **Create Visual Workflow** window, enter the following information:

   - **Name** — Enter a meaningful name for the visual workflow.
   - **Description** — Enter a description for the visual workflow.
   - **Enable** — Check this box if you'd like to enable the visual workflow to run on a manual or recurring basis. If this box is unchecked, the visual workflow will remain disabled.
   - **Schedule Type** — Select either **Manual** or **Recurrence**.

     Visual workflows on a **Manual** schedule run whenever a user manually instructs them to run.

     Visual workflows on a **Recurring** schedule run according to a regular schedule, as it is set by a user.
   - **Recurrence Pattern** — Available when Schedule type is set to **Recurrence**. Select the interval at which to set a recurring time for the visual workflow to run.
   - **Timezone** — Available when Schedule type is set to **Recurrence**. Select the timezone for the recurrence.
   - **Recurs Every** — Available when Schedule type is set to **Recurrence**. Enter the specific amount of time to elapse between each recurrence of a run of the visual workflow.

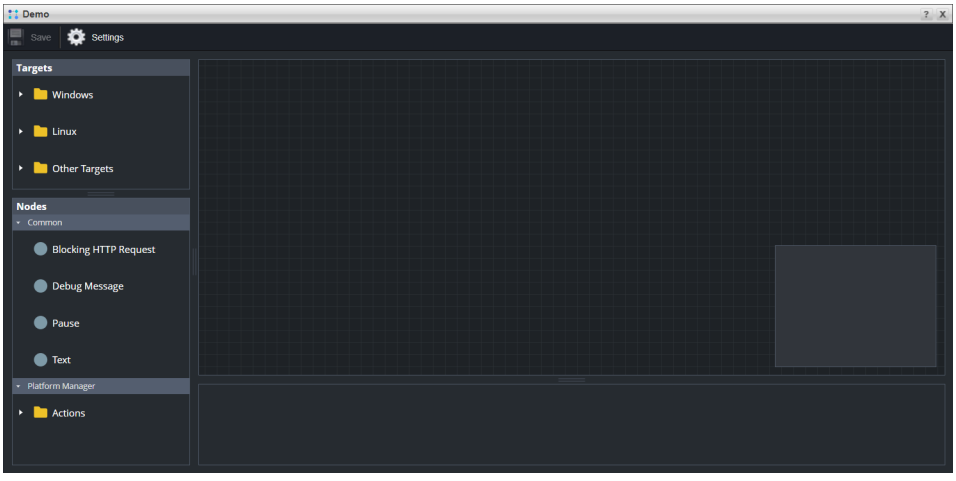
   Note: You can edit these settings at any point by selecting **Settings** within the **Visual Workflow Tool**.

4. Select **OK**.

   The new Visual Workflow is added to the **Visual Workflow Manager**.

5. Double click on the newly added Visual Workflow in the **Visual Workflow Manager**.

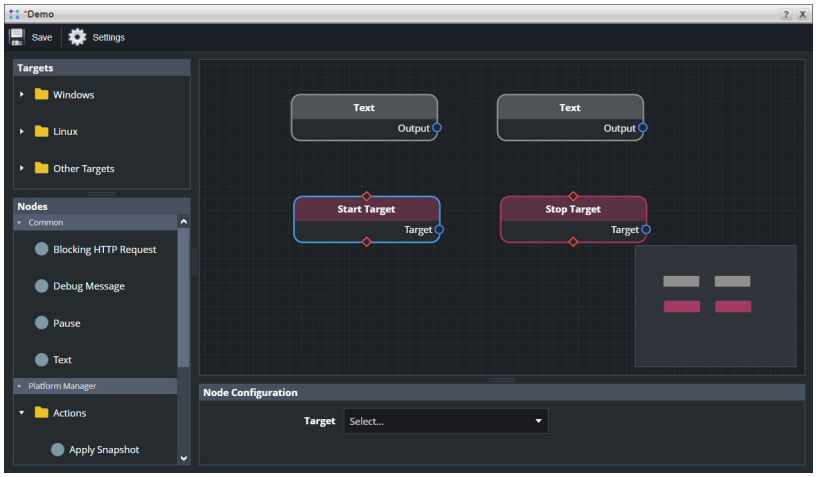
   The **Visual Workflow Tool** opens.



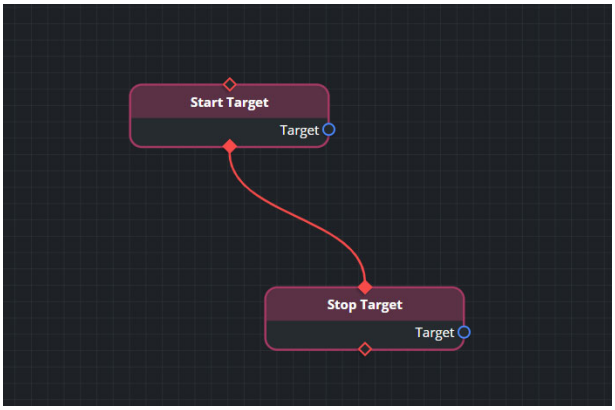
6. Drag and drop **nodes** from the sidebar on the left into the visual workflow canvas. You can add as many nodes as you'd like to create a custom workflow.

   Note: Alternatively, you can select a Target from the **Targets** section of the sidebar on the left and the Nodes will be filtered to display only the options supported by the selected Target. Adding Nodes this way also automatically sets the Target for the Node.

7. When you add an **Action** node, select the name of the target that you'd like to start, stop, take or apply a snapshot of from the **Targets** section of the sidebar on the left. Note that a green icon beside a Target indicates that it is in a **Ready State**.

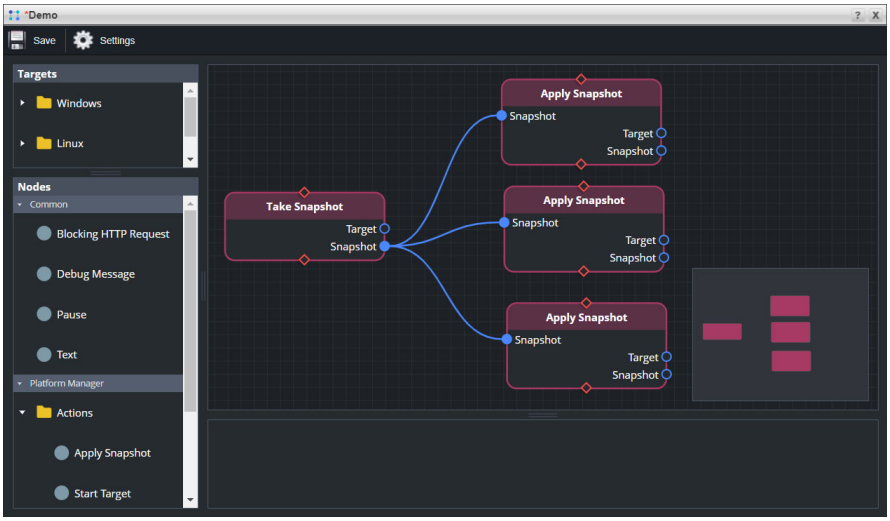


8. To connect two nodes together to make a sequential workflow, click and drag the red circle on the bottom of the first node to connect it to the red circle on the top of the second node.

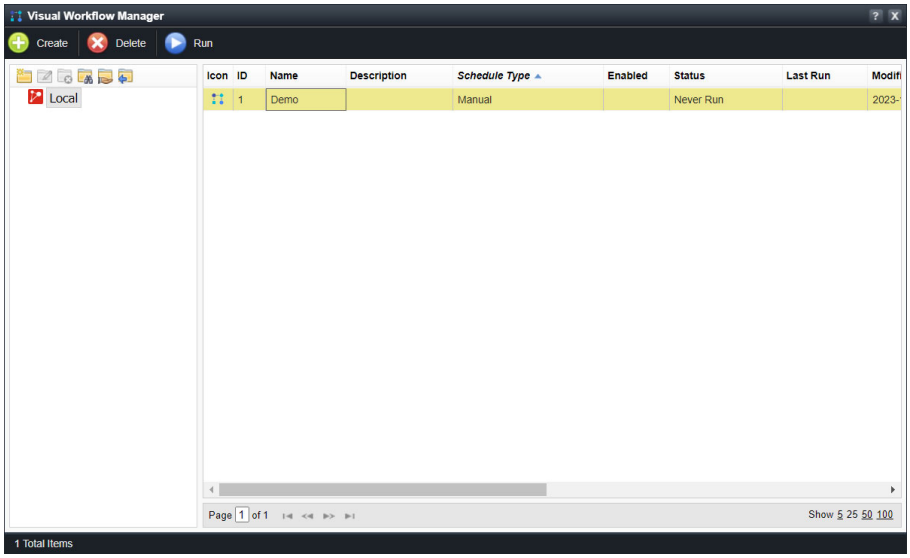


9. To connect one node's output to another node's input, drag the blue circle from the right side of the first node to the blue circle on the left side of the second node.

   In the below example, a snapshot taken by the Take Snapshot node is sent to three Apply Snapshot nodes.



10. To delete a node, select it and press the Backspace key.
11. When you've completed your visual workflow, click **Save.**
12. Your visual workflows will be saved in the **Visual Workflow Manager**. If you opted for a manual workflow, you can run the workflow at any point by selecting a saved workflow from the list so that it is highlighted in yellow, and clicking  **Run**.



Viewing OGP Device Status

When connected to an OGP device, users can view a list of devices connected to RPM and their status.

To view OGP device status

1. Ensure the OGP device has been added to the **Target Manager** following the steps outlined in the procedure "**To add a Ross Platform target**" on page 7–3.
2. Open the V**isual Workflow Manager**.
3. Expand the **Targets** section of the sidebar on the left.

   The status of all connected devices are displayed with a green indicator (meaning connected) or a red indicator (meaning disconnected).

Using the Device Tree

The Ross Platform Manager allows you to manage Catena devices, OGP JSON devices, OGP Binary devices from within the Device Tree, separate from other targets within the Target Manager. Users can add, view, and access device UIs from the Device Tree.

This chapter discusses the following topics:

- Adding Devices
- Reconnecting Devices
- Removing Devices
- Accessing Device UIs

Adding Devices

To add a device to the Device Tree, you'll need to provide Ross Platform Manager with information about the device. When a device is added, it will display automatically in the list of targets in the sidebar of the Visual Workflow canvas.

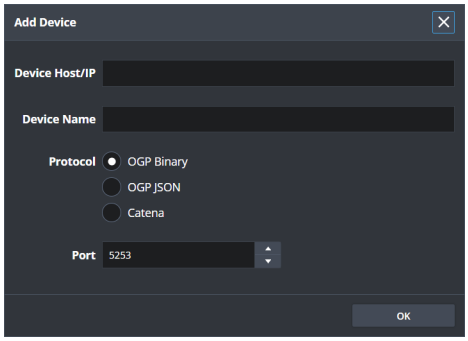
To add a device

1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Device Tree** icon.

   The **Device Tree** opens.

2. To add a device, click **+ Add Device**.

   The **Add Device** window opens.

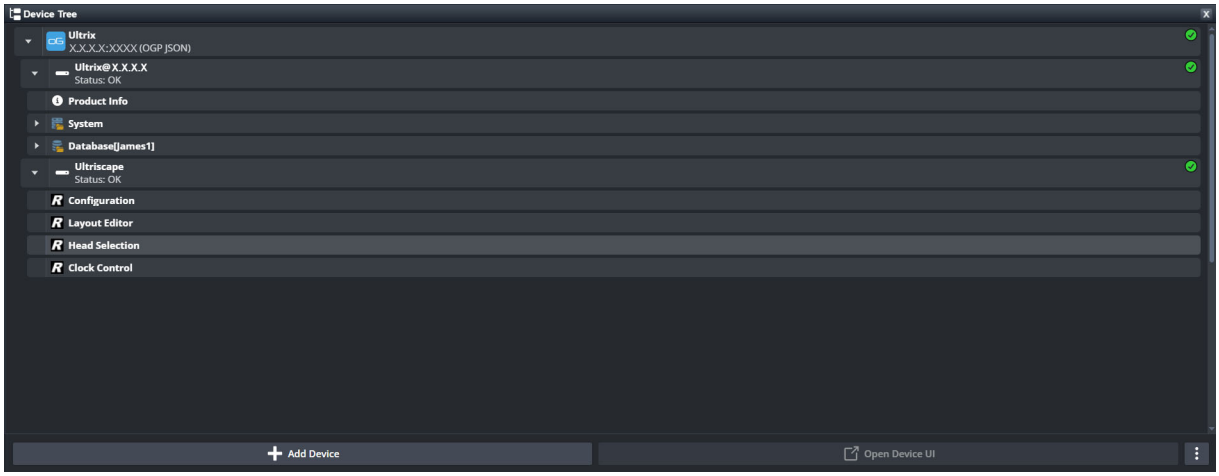


3. In the **Add Device** window, enter the following information:

   - **Device Host/IP** — Enter your host name or IP address.
   - **Device Name** — Enter a meaningful name for the device.
   - **Protocol** — Select **OGP Binary**, **OGP JSON,** or **Catena.**
   - **Port** — Enter the port number for the device.
   - **Use SSL** — Available when the device protocol is **Catena**. Select to use SSL (optional).

4. Click **OK** to add the device.

5. Verify that your new device appears in the **Device Tree.**



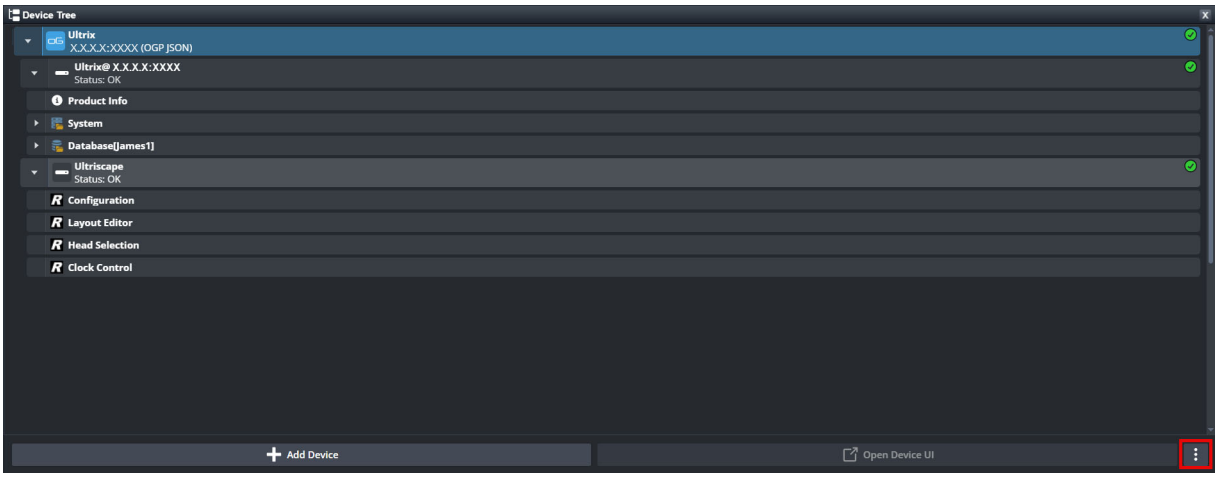
✶ If a message indicates that the maximum number of OGP devices has been reached, it is because the allowance for your RPM subscription tier has been reached. Please contact your system administrator.

Reconnecting Devices

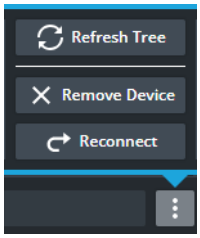
If the connection to a device is interrupted, users can reconnect to the device to regain access to the device.

To reconnect to a device

1. Select the frame (i.e. top-level node) you want to reconnect in the **Device Tree**.
2. Click the **three dots** button in the bottom right of the **Device Tree** window.



The **three dots** button expands.



3. Select **Reconnect.**

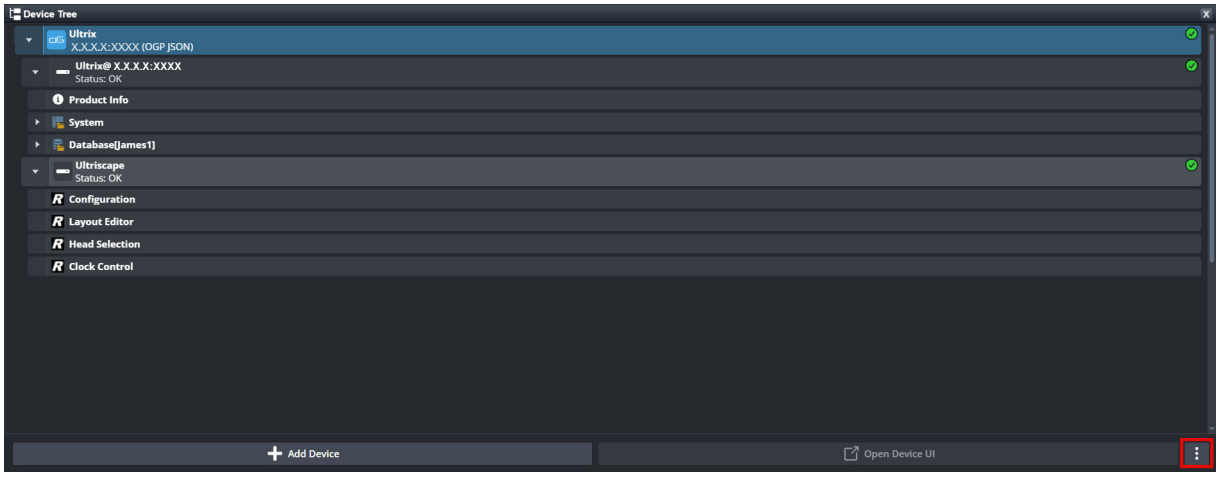
The selected device reconnects.

Removing Devices

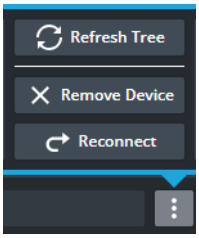
Users are able to remove any devices from the Device Tree that they no longer need to be displayed. Users may find that removing unneeded devices helps to remove visual clutter, making it easier to access devices that are actually used.

To remove a device

1. Select the frame (i.e. top-level node) you want to remove in the **Device Tree**.
2. Click the **three dots** button in the bottom right of the **Device Tree** window.



The **three dots** button expands.



3. Select **Remove Device.**

   The selected device is removed from the **Device Tree**.

Accessing Device UIs

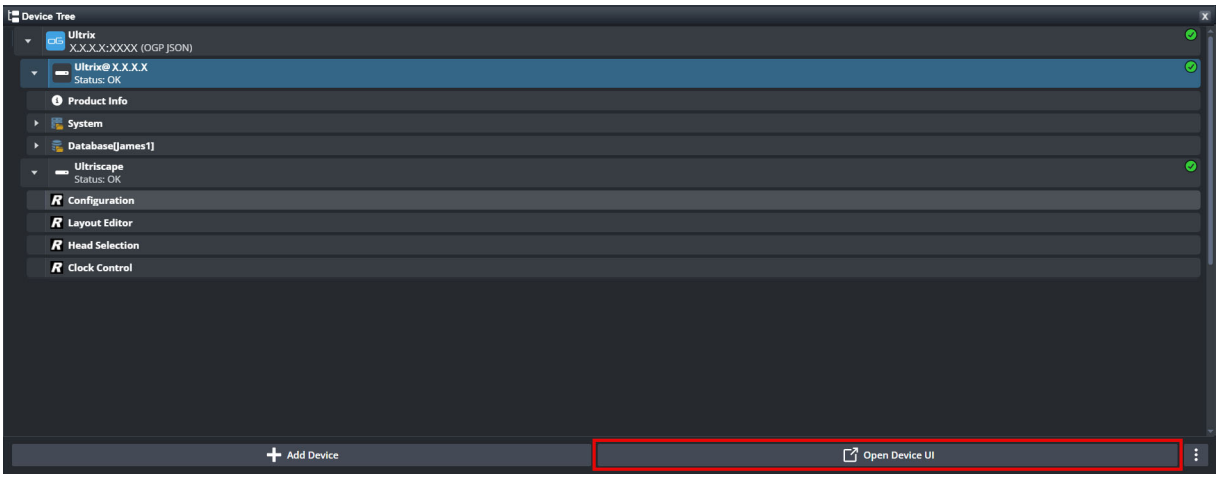
Users are able to access device UIs from within the **Device Tree.** This allows you to view device details and make any needed changes while staying in Ross Platform Manager.

To access a device's UI

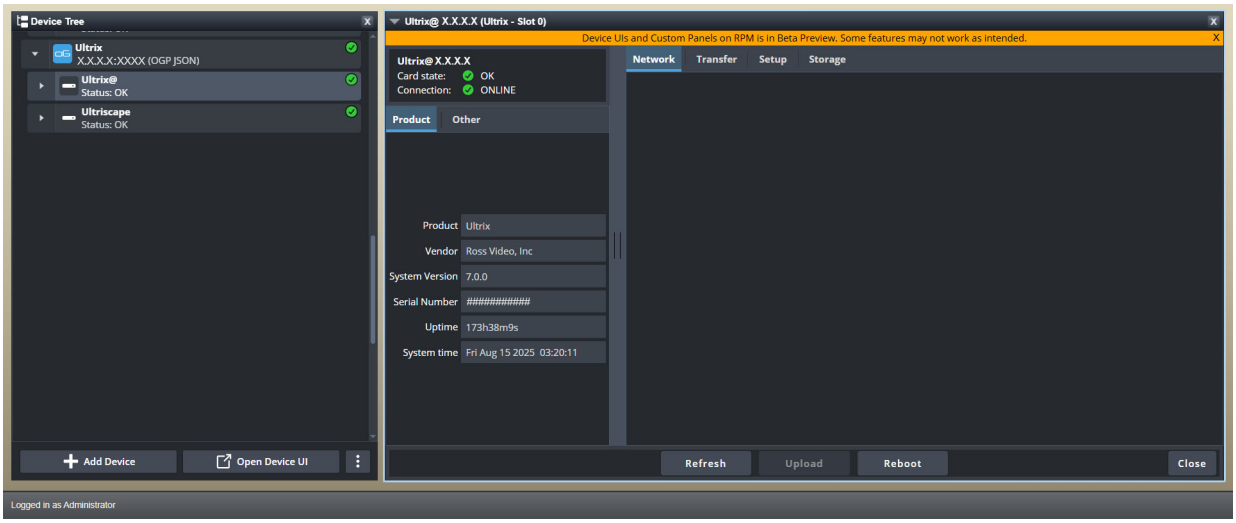
1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Device Tree** icon.

   The **Device Tree** opens.

2. Either double click the device which you would like to access the UI of, **or** select it and click **Open Device UI**.



The selected device UI opens and can be interacted with.



✶ By default, the device UI will open within RPM. If you would like to open the device UI in another browser tab instead, follow the procedure "**To configure how DashBoard and device panels open**" on page 5–9 to change the setting for how DashBoard and Device Panels open.

Managing a Deployment

The Ross Platform Manager allows you to manage multiple deployments and orchestrate a workflow for the Ross products XPression and softGear. This workflow allows you to upload the product into the release manager. Once that product is selected in the deployment manager, the release versions available for it are automatically populated. After a release is chosen, you can choose which targets, or target destinations, you want to deploy all the components of the product to. Once a target destination is chosen, you can add additional components to include in the deployment. Components are individual applications for a product that are often specific to a release.

This chapter discusses the following topics:

- Adding a Product to the Release Manager
- Creating or Modifying a Deployment
- Executing a Deployment
- Saving and Restoring a Deployment Snapshot

Adding a Product to the Release Manager

Ross products XPression and softGear can be uploaded to Ross Platform Manager in the Release Manager. This will provide Ross Platform Manager with definitions about the product and information about how to install the product. This will enable you to orchestrate these products through the Ross Platform Manager (**Figure 9.1**).

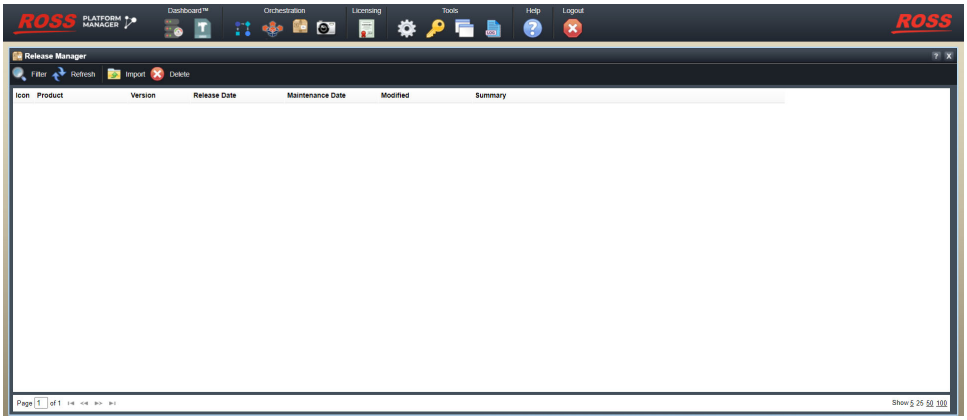


Figure 9.1 Ross Platform Manager

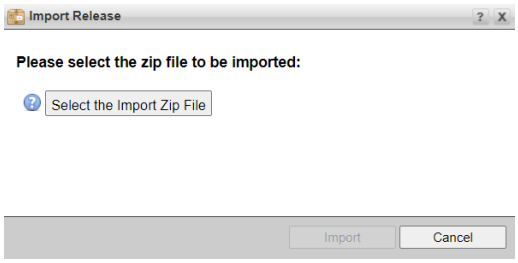
To upload a product to the release manager

1. Open the **Ross Platform Manager**, and from the top menu under **Orchestration**, select the **Releases** icon.

   The **Release Manager** opens.

2. To add a product, click  **Import**.

   The **Import Release** window opens.



3. Click **Select the Import Zip File** to upload the zip file that corresponds to the product you are uploading.
4. Select **Import**.

   The product will populate in the release manager.

Creating or Modifying a Deployment

You can create or modify a deployment to deploy products and product components. Targets and components can be selected and added in sequential order by dragging and dropping components to the appropriate area in the Deployment dialog (**Figure 9.2**).

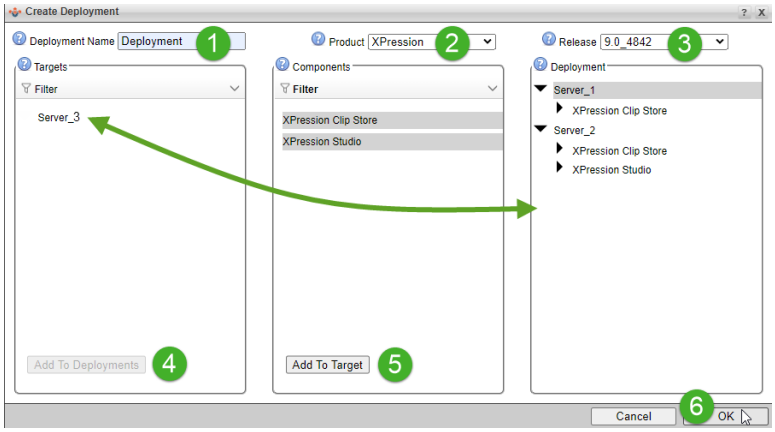


Figure 9.2 Deployment Dialog Box

To create a deployment

1. Open the Ross Platform Manager, and from the top menu under **Orchestration**, select the **Browse Deployments** icon.

   The **Deployment Manager** opens.

2. To create a deployment, select Create.

   The **Create Deployment** window opens.

3. In the **Create Deployment** window, enter the following:

   - **Deployment Name** — Enter a meaningful name for the deployment. E.g. Branch1_deployment
   - **Product** — Select the product you wish to use for this deployment. E.g. XPression
   - **Release** — Select from the list of available releases for this product. E.g. 10.0

✶ softGear deployments must be deployed to Linux targets, and XPression deployments must be deployed to Windows targets.

4. Targets and components can be selected and added to a deployment in sequential order.

   a. To add a component to the target, select the component, and click the **Add to Target** button or drag it into the Targets Column. For example, you could add an **XPression Clip Store** component to a target called **Server_1**.

   b. Next, select a target and click the **Add to Deployment button** or drag it to the Deployment column. In this example, the **Server_1** target and associated components would be added to the deployment column.

5. Click **OK** to deploy the product and components to the configured target machine or VM.

To modify a deployment

1. Open the Ross Platform Manager, and from the top menu under **Orchestration**, select the **Browse Deployments** icon.

   The **Deployment Manager** opens.

2. Select an existing deployment from the list.

3. From the Deployment Manager top menu select **Modify**.

The **Modify Deployment** dialog box opens.

4. Modify the deployment as desired. Modifications include:
   - Adding or removing targets in sequential order
   - Adding or removing components in sequential order
   - Changing the release version.
5. Click **OK** to apply your changes.

Executing a Deployment

Once a deployment has been created, you can deploy the products and components to the target end point (a machine or VM).

The example (**Figure 9.3**) shows a single deployment highlighted in yellow being deployed across multiple servers when an operator clicks Deploy. The log dialogs show the targets being deployed for Server 1 and Server 2.

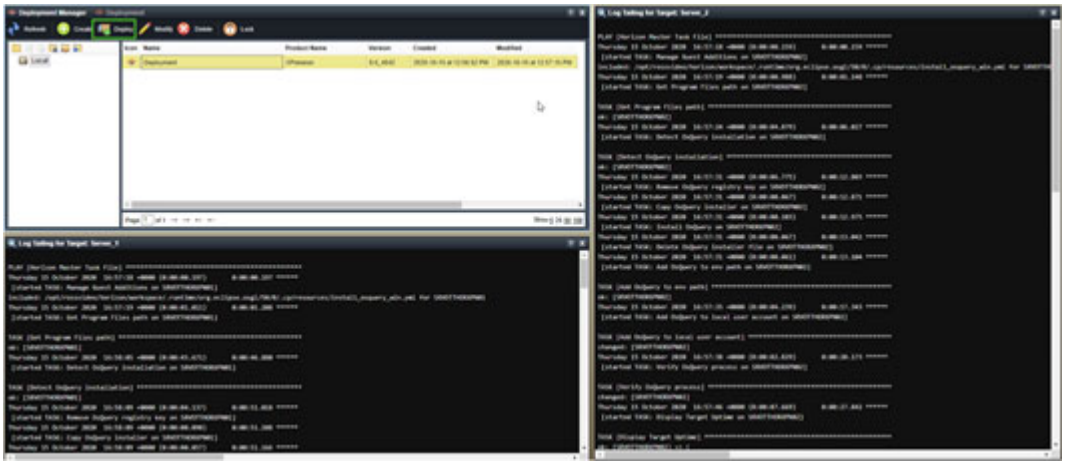


Figure 9.3 Deploying XPression on Multiple Servers

To execute a deployment

1. Open the Ross Platform Manager, and from the top menu under **Orchestration**, select the **Browse Deployments** icon.

   The **Deployment Manager** opens.
2. Select the desired deployment(s) from the list.

✶ If you have not yet configured a deployment, go back and first complete the procedure: "**To create a deployment**" on page 9–3.

3. Select  **Deploy**, and proceed to deploy to one or multiple deployments.

Note: To view your deployment, double click on it in the Deployment Manager.

Saving and Restoring a Deployment Snapshot

You can save a snapshot of a deployment as a backup or to reuse the saved configuration later (**Figure 9.4**).

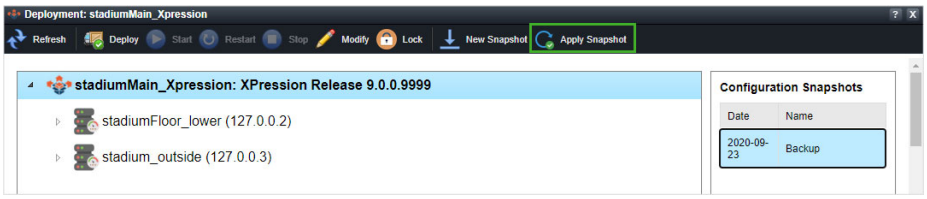
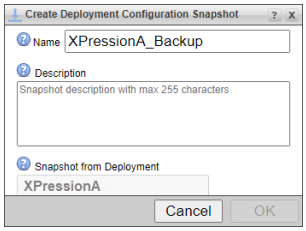


Figure 9.4 Saved Configuration

To save a snapshot of a deployment

1. Open the **Ross Platform Manager**, and from the top menu select **Deployment Manager**. Snapshots allow you to create backups of your deployment.
2. Double click the deployment that you wish to create a snapshot for.
3. In the **Deployment** window, click **New Snapshot** to save a snapshot of the deployment in its current state.

The **Create Deployment Configuration Snapshot** dialog opens.



4. In the **Name** box, enter a name for the snapshot.
5. In the Description box, enter a description of the snapshot.
6. Click **OK**.
7. Confirm that the **Snapshot Manager** contains your new snapshot.

   You can apply this snapshot to restore the deployment to the saved snapshot.

To restore a snapshot of a deployment

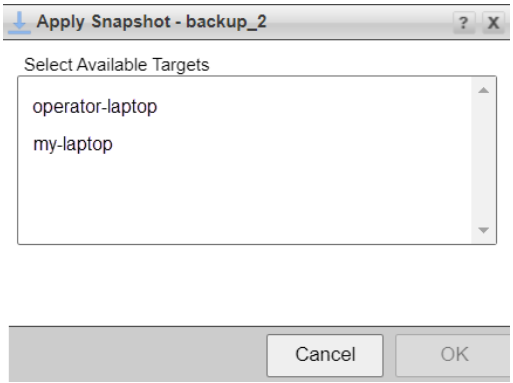
Once you have saved a snapshot of a deployment, you can restore that saved snapshot to a target.

1. From the top menu of **Ross Platform Manager**, select **Browse Configuration Snapshots**.

✶ It is recommended that you backup your current deployment by saving a snapshot as a precaution, before over-writing it by restoring a snapshot.

2. Select a snapshot from the list by clicking on it so that it is highlighted in yellow.
3. Click  **Apply**.

   The **Apply Snapshot** dialog opens.



4. Select a target that you'd like to apply the snapshot to from the list of available targets. The target must be in **Ready** status in the **Target Manager** to appear on the list of available targets.

Note: The list of targets that appears will not include targets that are not compatible with your selected snapshot. For example, XPression snapshots cannot be applied to Linux targets, so Linux targets will not appear in the list of available targets.

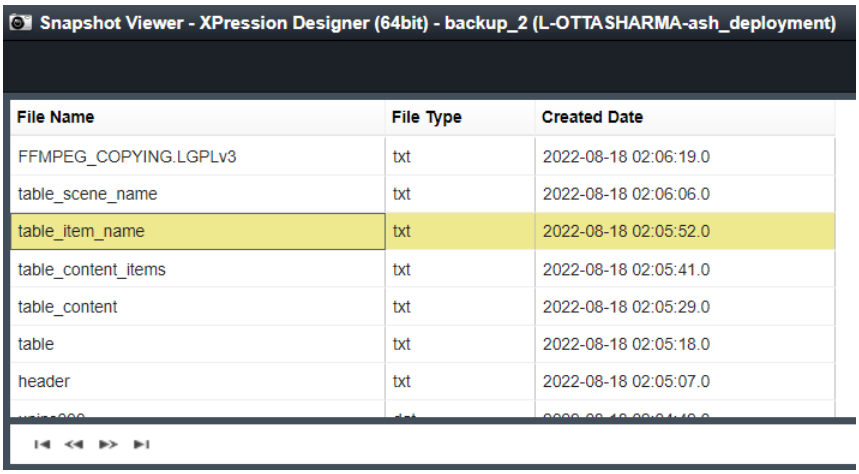
5. Click **OK**.

To view snapshot files

You can view the list of files associated with a snapshot in the **Snapshot Viewer**.

1. From the top menu of **Ross Platform Manager**, select **Browse Configuration Snapshots**.
2. Right click on a selected snapshot, and click **View Snapshot Files**.

   The **Snapshot Viewer** window appears for the selected snapshot.

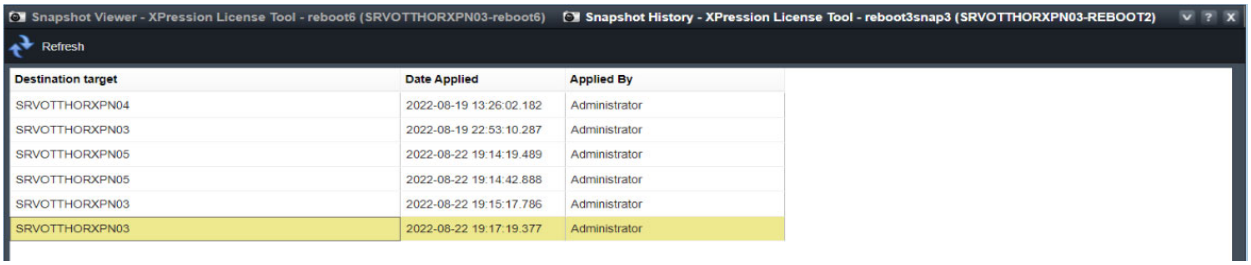


To view snapshot history

The **Snapshot History** window will display a log of previous snapshot applications, including which snapshots were applied at which times by which users.

1. From the top menu of **Ross Platform Manager**, select **Browse Configuration Snapshots**.
2. Right click on a selected snapshot, and click **View Snapshot History**.

   The **Snapshot History** window appears for the selected snapshot.



Managing DashBoard CustomPanels

The Ross Platform Manager allows you to upload DashBoard CustomPanel files to the CustomPanel Manager. CustomPanel files can be stored in the CustomPanel Manager. From the CustomPanel Manager, you can open and operate CustomPanel files in a browser.

Ross Platform Manager does not currently support the following CustomPanel tags:

- `img`
- `ndi`
- xml string

✶ The CustomPanel Manager is a paid feature.

This chapter discusses the following topics:

- CustomPanel Features Overview
- Using the CustomPanel Manager
- CustomPanel File Versioning
- Setting CustomPanel Privacy Levels

CustomPanel Features Overview

This section provides an outline of the CustomPanel customization features that are currently supported in Ross Platform Manager.

Tags

- Meta
- lookup
- API
- style
- color
- ogscript (onload and onchange)
- include

Styling Elements

- Foreground color
- Background color
- Font
- Font size
- State-specific styling for toggle buttons and radio buttons
- text alignment
- border

UI Components

- Push button
- Label
- Check box
- Radio button
- Toggle button
- browser
- image
- buttonbar
- summary
- menu
- menugroup

ogScript Functions

- Rename
- Set style
- Hide
- Reveal
- Conditional

Parameters

- Editable text box
- Read-only text box
- Label
- Drop down menu
- Parameter scripting
- Sliders
- Alarm parameters
- Color pickers
- Color dot
- Joysticks
- Button support (checkboxes, toggle buttons, radio buttons, prompt buttons)
- Header
- Multi-line text
- HTML content
- List selector
- Tree
- Progress bar

CustomPanel Layouts

- abs
- tabs
- simplegrid containers
- Blank
- split

Tasks

- TCP
- HTTP
- UDP
- RossTalk commands
- Debug messages
- Setting the access property of a parameter (`params.setAccess()`)

Using the CustomPanel Manager

In the CustomPanel Manager, you can upload, store, download, and operate CustomPanel files in Ross Platform Manager. The following sections cover the specifics of these actions:

- "**Uploading a CustomPanel File**" on page 10–3
- "**Downloading a CustomPanel File**" on page 10–4
- "**Opening a CustomPanel**" on page 10–5

Uploading a CustomPanel File

To use a CustomPanel in Ross Platform Manager, you must first upload the file to be used.

To upload a CustomPanel file

1. In DashBoard, save your custom panel as a .grid file. Note that this .grid file can be saved on its own, or located within a .zip file along with any assets for the CustomPanel.

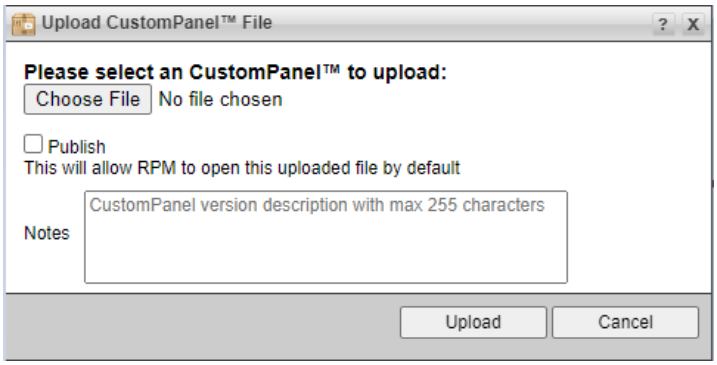
✶ If you choose to use a .zip file, the .grid file and any assets can be placed either at the root level or within a single folder at the root level. Note that multiple folders at the root level, or multiple copies of the .grid file anywhere within the folder will prevent the CustomPanel from uploading correctly.

2. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, click the **CustomPanel Manager** icon.

   The **CustomPanel Manager** opens.

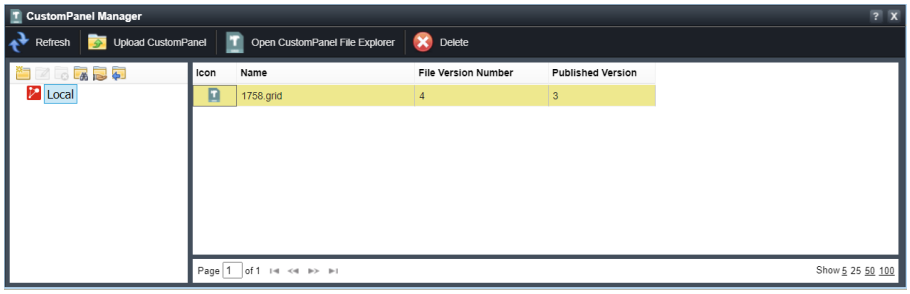
3. From the toolbar, click **Upload CustomPanel**.

   The **Upload CustomPanel™ File** window opens.



4. Click **Choose File** and select the .grid or .zip file for the CustomPanel.
5. Click **Upload**.

   Your **CustomPanel** file will appear in the **CustomPanel Manager**.



✶ If a message indicates that the maximum number of CustomPanels has been reached, it is because the allowance for your RPM subscription tier has been reached. Please contact your system administrator.

Downloading a CustomPanel File

CustomPanel files that are stored in Ross Platform Manager can be downloaded and used outside of Ross Platform Manager. CustomPanel files can be downloaded from both the CustomPanel Manager and the CustomPanel File Explorer. Both methods are outlined below.

To download a CustomPanel file (CustomPanel Manager method)

1. In the **CustomPanel Manager**, select the CustomPanel file you want to download.
2. Click **Download**.

The published version of the selected CustomPanel file downloads and saves to your Downloads folder.

To download a CustomPanel file (CustomPanel File Explorer method)

1. In the **CustomPanel Manager**, select the CustomPanel file you want to download.
2. Click **Open CustomPanel File Explorer**.

   The **CustomPanel File Explorer** opens.
3. Select the version of the CustomPanel file that you want to download.
4. Click **Download**.

   The selected version of the CustomPanel file downloads and saves to your Downloads folder.

Opening a CustomPanel

CustomPanel files that are stored in Ross Platform Manager are able to be launched and used in a new browser window or within RPM. Follow the procedure for the method that best suits your workflow.

✶ Note that the steps in the following procedures are based on default settings for RPM, and assume that they have not been changed by an administrator.
If you are an administrator and would like to change the default settings, follow the procedure "**To configure how DashBoard and device panels open**" on page 5–9.

To use a CustomPanel in a new browser window

1. In the **CustomPanel Manager**, double click on a CustomPanel file.

   The CustomPanel will open in a new browser window.
2. Operate your CustomPanel in the browser window.

✶ Note that any changes made to values or parameters in the CustomPanel will be saved. When the CustomPanel is refreshed/reopened, it will retain these changes. Changes are saved in the same CustomPanel file version that was opened. It will not create new file versions.

To use a CustomPanel within RPM

1. In either the **CustomPanel Manager** or the **CustomPanel File Explorer**, right click on a CustomPanel file, and select **Open in RPM**.

   The CustomPanel will open in a new tab within RPM.
2. Operate your CustomPanel within RPM.

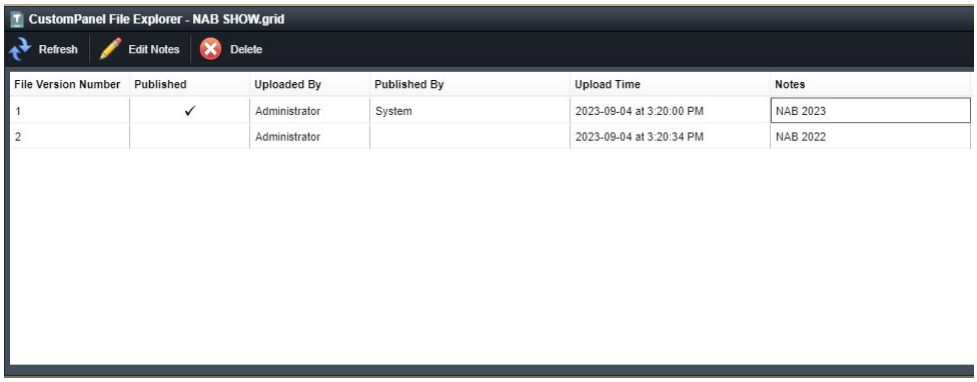
✶ Note that any changes made to values or parameters in the CustomPanel will be saved. When the CustomPanel is refreshed/reopened, it will retain these changes. Changes are saved in the same CustomPanel file version that was opened. It will not create new file versions.

CustomPanel File Versioning

You can upload and manage different versions of the same CustomPanel file in RPM. This feature enables you to maintain multiple versions of a CustomPanel file and navigate between them as required.

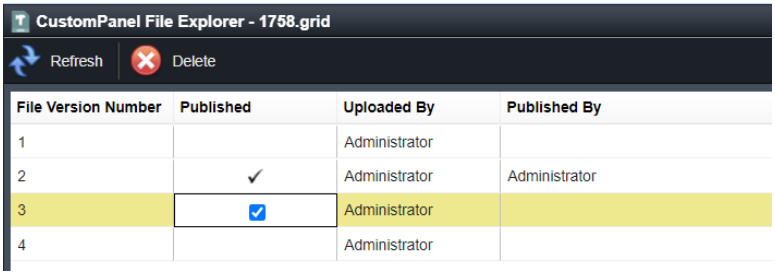
Publishing a CustomPanel File version signifies that it is the primary version displayed in the CustomPanel Manager. When you open the CustomPanel file from the CustomPanel Manager, the published version will open by default, as opposed to any of the other versions.

When you upload a CustomPanel file for the first time in the CustomPanel Manager, it will be automatically published. A subsequent upload of a CustomPanel file with the same name will automatically be designated as version number two.



To update the published version

1. Select a CustomPanel in the CustomPanel Manager by clicking on it so that it is highlighted in yellow.
2. Click on **Open CustomPanel File Explorer** from the CustomPanel Manager toolbar.
3. In the CustomPanel File Explorer, click on the **Published** column associated with the version that you would like to publish.
4. In the **Published** column, click on the check box so that it is selected.



5. Refresh the CustomPanel Manager to update it with the new published version.

Deleting a version

1. Select a CustomPanel in the **CustomPanel Manager** by clicking on it so that it is highlighted in yellow.
2. Click **Open CustomPanel File Explorer** from the **CustomPanel Manager** toolbar.
3. In the **CustomPanel File Explorer**, select the version you want to delete by clicking on it so that it is highlighted in yellow.

✶ You cannot delete a published version or a version that is currently in use (i.e., the session is active in a browser window).

4. Click **Delete** from the **CustomPanel File Explorer** toolbar.

Deleting an entire CustomPanel and all associated versions

1. Select the CustomPanel file you wish to delete in the **CustomPanel Manager** by clicking on it so that it is highlighted in yellow.

✶ You cannot delete a version that is currently in use (i.e., the session is active in a browser window).

2. Click **Delete** in the CustomPanel Manager toolbar.

File Version Number Display

The File Version Number column displayed in the CustomPanel Manager will always show the latest file version number.

- For example, if you have four version of a CustomPanel file and delete the second version, the CustomPanel Manager will still show four versions in the File Version Number column upon a refresh.

- However, if you delete the fourth version of the CustomPanel file, the CustomPanel Manager will show three versions in the File Version Number column upon a refresh.
- Deleting all file versions except for the last one (e.g., deleting the first three versions of the CustomPanel file and leaving the fourth one) will still result in the File Version Number column being displayed as four.
- If you delete all file versions except for the last one, the next uploaded version will automatically be assigned the number after the last one. For example, if you delete versions one, two, three, and four, but leave version five, the next uploaded version will be assigned the number six.

Setting CustomPanel Privacy Levels

In broadcast environments, it's common for CustomPanels to remain open and accessible at all times to ensure quick and seamless operator access. However, not all panels are suited for unrestricted availability. Some may provide access to sensitive systems or infrastructure that should be restricted.

By default, CustomPanels are set to private and require users to log in to access them. This can be done either through RPM or by logging in using a direct link to the CustomPanel. Administrators can define privacy levels for individual CustomPanels, allowing control over which panels can remain publicly accessible. By setting appropriate privacy levels, you can balance the need for fast access with the need to protect critical resources.

To set a CustomPanel as public

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

2. In the **CustomPanel Manager**, select the CustomPanel that you want to make public by clicking on it so that it is highlighted in yellow.
3. In the **Public** column of the **CustomPanel Manager,** select the check box for the CustomPanel.

   A confirmation message opens, asking if you want to make the CustomPanel public.

4. Click **Yes**.

   The CustomPanel is now publicly available.

Configuring User Permissions

User permissions define the actions users have permission to perform and determine which buttons, messages, and controls they see in the Ross Platform Manager user interface. In most Ross Platform Manager systems, the Ross Platform Manager administrator assigns users with the user permissions that are appropriate for their role in using Ross Platform Manager.

User permissions are role-based. Each user account has one or more user roles, such as journalist or producer. Each user role has a set of permissions. The role-based permissions model enables administrators to precisely define user permissions for each user, to ensure conformance to your organization's business processes.

A Ross Platform Manager administrator can create user accounts and roles within Ross Platform Manager, or imported them from a Lightweight Directory Access Protocol (LDAP) server. Ross Platform Manager can use a combination of created and imported user accounts and roles.

To configure user permissions, you create user roles and assign permissions to them, and then create user accounts and assign user roles to them.

User permission settings belong to the following categories, represented by tabs on the Users configuration panel:

- **Manage Users** — properties related to individual users, including role assignments.
- **Manage Roles** — properties related to user roles, including permissions associated with user roles.

This chapter discusses the following topics:

- Create a User Role
- Modify a User Role
- Delete a User Role
- Create a User Account
- Modify a User Account
- Delete a User Account
- Configure Target Permissions

Create a User Role

To create a user role

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

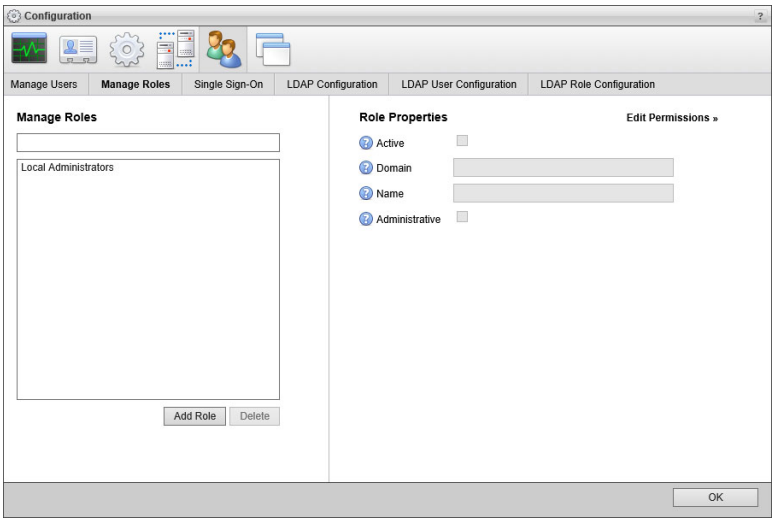
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

4. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.



5. In the **Manage Roles** section, click **Add Role**.

   Ross Platform Manager automatically saves property values set for a new user role.

6. In the **Role Properties** section, select the **Active** check box to make the role operational.

   Clear this check box to deactivate a user role. Inactive roles cannot convey permissions to user accounts.

7. In the **Name** box, enter a name for the user role.

8. Select the **Administrative** check box to grant the user role all user permissions and enable the user role to configure all administrative settings.

   Clear this check box to only include selected permissions with the user role.

9. Click **Edit Permissions**.

   The **Role Permissions** list opens.

10. In the **Role Permissions** list, select the permissions to assign to the user role.

    Keep in mind the following points as you assign permission to a user role:

    - Permission assignment changes save automatically.
    - Background shading delineates category headings from role permissions. To select or deselect all permissions in a category, select or clear the check box in the category heading.
    - Permissions displayed in **Bold Text** are assignable to all accounts or to selected accounts:
      - › If you want to assign the permission for all accounts, select the bolded permission. This setting also applies to any accounts created in the future.
      - › If you want to assign the permission for selected accounts, clear the bolded permission and then select individual accounts from the list below the bolded permission name.
      - › If you do not want to assign the permission for any accounts, clear all accounts in the list.
    - To select all permissions in the entire list, click **Select All**.

      Use this option to assign all permissions to the role, or to assign most of the permissions by selecting all of them and then clearing the ones you do not want to assign.
    - To clear all permissions, click **Deselect All**.

      Use this option to assign only a few permissions to the role, by clearing all of them and then selecting only the ones you want to assign.

    After finishing the configuration of a user role, you can assign it to a user.

For More Information on...

- user roles, refer to the sections "**Modify a User Role**" on page 11–3, and "**Delete a User Role**" on page 11–4.
- user accounts, refer to the sections "**Create a User Account**" on page 11–5, "**Modify a User Account**" on page 11–6, and "**Delete a User Account**" on page 11–7.

Modify a User Role

Within Ross Platform Manager you are only able to modify the properties of user roles created in Ross Platform Manager. To modify roles (groups) imported from an LDAP directory server, you must modify them on the LDAP directory server.

To modify a user role

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users panel** opens.

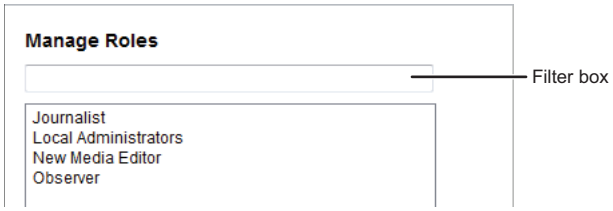
2. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.

3. In the **User Role** list, select the name of the user role to modify.

   You can filter the **User Role** list by typing any of the following information in the **Filter** box above the list:

   - Any part of a user role name. As you enter a user role name, the list automatically updates to only show user roles that match what you have entered.
   - Enter `local` to list only the user roles created in Ross Platform Manager.
   - Enter `LDAP` to list only the user roles imported from an LDAP directory.



4. In the **Role Properties** section, edit the user role properties as required.

   Ross Platform Manager automatically saves property value changes made to a user role.

5. Click **Edit Permissions**.

   The **Role Permissions** list opens.

6. In the **Role Permissions** list, edit the user role permission assignments as required.

   Ross Platform Manager automatically saves permission assignment changes made to a user role and applies the changes to all of the users assigned to the user role.

For More Information on...

- user roles, refer to the sections "**Create a User Role**" on page 11–2, and "**Delete a User Role**" on page 11–4.
- user accounts, refer to the sections "**Create a User Account**" on page 11–5, "**Modify a User Account**" on page 11–6, and "**Delete a User Account**" on page 11–7.

Delete a User Role

You can delete user roles created in Ross Platform Manager.

✶ You cannot delete user roles (groups) imported from an LDAP directory server.

To delete a user role

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.

3. In the **User Role** list, select the name of the user role to delete.

4. Click **Delete**.

   A confirmation message opens, asking you if you want to delete the selected user role.

5. Click **OK**.

   Ross Platform Manager deletes the selected user role from the system and from assigned users. Deleting a user role from a user removes the permissions contained in the user role from the user.

For More Information on...

- user roles, refer to the sections "**Create a User Role**" on page 11–2, and "**Modify a User Role**" on page 11–3.
- user accounts, refer to the sections "**Create a User Account**" on page 11–5, "**Modify a User Account**" on page 11–6, and "**Delete a User Account**" on page 11–7.

Create a User Account

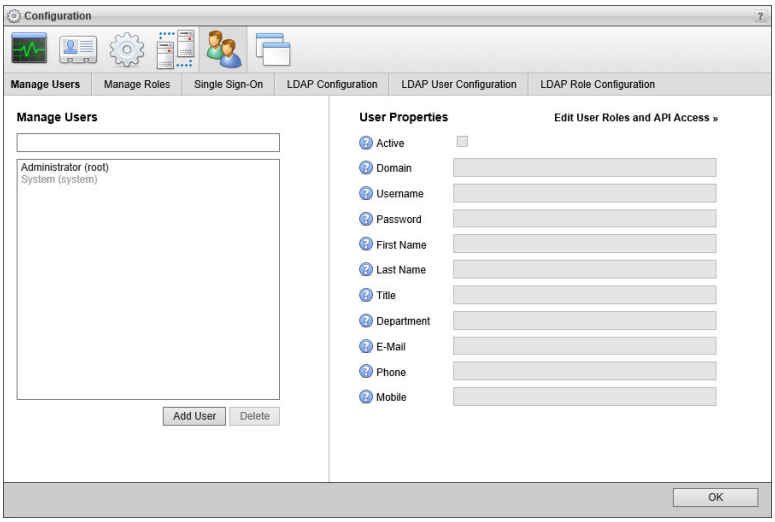
To create a user account

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **Manage Users** tab.

   The **Manage Users** tab opens.



3. In the **Manage Users** section, click **Add User**.

   Ross Platform Manager automatically saves property values set for a new user.

4. In the **User Properties** section, select the **Active** check box to make the user operational.

   Clear this check box to deactivate a user. Ross Platform Manager retains information associated with an inactive user account, but does not allow you to use the account to log in to your Ross Platform Manager system.

5. In the **Username** box, enter a name for the user.

   Use this username to log in to your Ross Platform Manager system. Usernames are case sensitive.

6. In the **Password** box, enter a password of at least five characters for the user. All user accounts must have a password.

   Use this password is along with the set username to log in to your Ross Platform Manager system. Passwords are case sensitive.

7. In the **First Name** box, enter the first or proper name of the user.

8. In the **Last Name** box, enter the last or family name of the user.

   After logging in to Ross Platform Manager with a username and password, the status bar displays the first and last name associated with the username.

9. In the **Title** box, enter the job title of the user within the organization.

10. In the **Department** box, enter the department to which the user belongs within the organization.

11. In the **E-Mail** box, enter the corporate e-mail address of the user.

12. In the **Phone** box, enter the corporate telephone number of the user.

13. In the **Mobile** box, enter the mobile telephone number of the user.

14. Click **Edit User Roles**.

    The **User Roles** list opens.

15. In the **User Roles** list, select the check boxes associated with the user roles to assign to the user. Clear the check box associated with a user role to unassign it from the user.

For More Information on...

- user accounts, refer to the sections "**Modify a User Account**" on page 11–6, and "**Delete a User Account**" on page 11–7.
- user roles, refer to the sections "**Create a User Role**" on page 11–2, "**Modify a User Role**" on page 11–3, and "**Delete a User Role**" on page 11–4.

Modify a User Account

You can modify the properties of user accounts created in Ross Platform Manager. If you want to modify users imported from an LDAP directory server, you must change them on the LDAP directory server.

To modify a user account

1. On the **Configuration** window toolbar, click the **Users** icon.

    The **Users** panel opens.

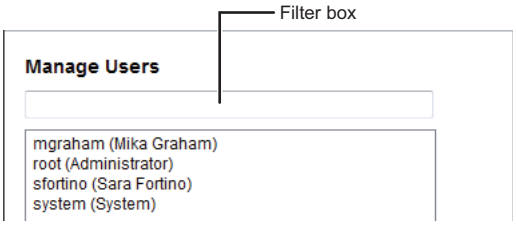
2. Click the **Manage Users** tab.

    The **Manage Users** tab opens.

3. In the **User s** list, select the name of the user to modify.

    You can filter the **Users** list by typing any of the following information in the **Filter** box above the list:

    - Any part of a user name. As you enter a user name, the list automatically updates to only show user names that match what you have entered.
    - Enter **`local`** to list only the users created in Ross Platform Manager.
    - Enter **`LDAP`** to list only the users imported from an LDAP directory.



4. In the **User Properties** section, edit the user properties as required.

    Ross Platform Manager automatically saves property value changes made to a user.

5. Click **Edit User Roles**.

    The **User Roles** list opens.

6. In the **User Roles** list, edit the user roles assignments as required.

    Ross Platform Manager automatically saves user role assignment changes made to a user.

For More Information on...

- user accounts, refer to the sections "**Create a User Account**" on page 11–5, and "**Delete a User Account**" on page 11–7.
- user roles, refer to the sections "**Create a User Role**" on page 11–2, "**Modify a User Role**" on page 11–3, and "**Delete a User Role**" on page 11–4.

Delete a User Account

You can delete user accounts created in Ross Platform Manager.

✶ You cannot delete user accounts imported from an LDAP directory server.

To delete a user account

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **Manage Users** tab.

   The **Manage Users** tab opens.

3. In the **Users** list, select the name of the user to delete.

4. Click **Delete**.

   A confirmation message opens, asking you if you want to delete the selected user.

5. Click **OK**.

   Ross Platform Manager deletes the selected user.

6. After completing your configuration tasks, click **OK** in the lower toolbar to close the **Configuration** panel.

For More Information on...

- user accounts, refer to the sections "**Create a User Account**" on page 11–5, and "**Modify a User Account**" on page 11–6.
- user roles, refer to the sections "**Create a User Role**" on page 11–2, "**Modify a User Role**" on page 11–3, and "**Delete a User Role**" on page 11–4.

Configure Target Permissions

Target permissions enable Ross Platform Manager users to configure specific target permissions for different user roles. These permissions can be configured from within the **Target Manager**. The three permission categories are **View, Execute,** and **Manage**. See below for a table that displays the capabilities of each category.

Permission Name	View Target	Update State (Cloud Target)	Add/Delete/ Modify (Cloud and Static Targets)	Execute (Start and Stop Cloud Targets)	Authorize (Static Targets)
View	Yes	Yes	No	No	No
Manage	No	No	Yes	No	Yes
Execute	No	No	No	Yes	No

✶ The permission framework works on the principle of Least-Privilege, meaning that the lowest level of permission will win.

Example: The Parent Folder restricts "Viewing the Target", but the child-folder enables the user to "View" the target. In this case, by following the least privilege principle, the user will not be able to "View" the target in the child-folder.

To update target permissions

1. Open the Ross Platform Manager, and from the top menu under **DashBoard™**, select the **Browse Targets** icon.

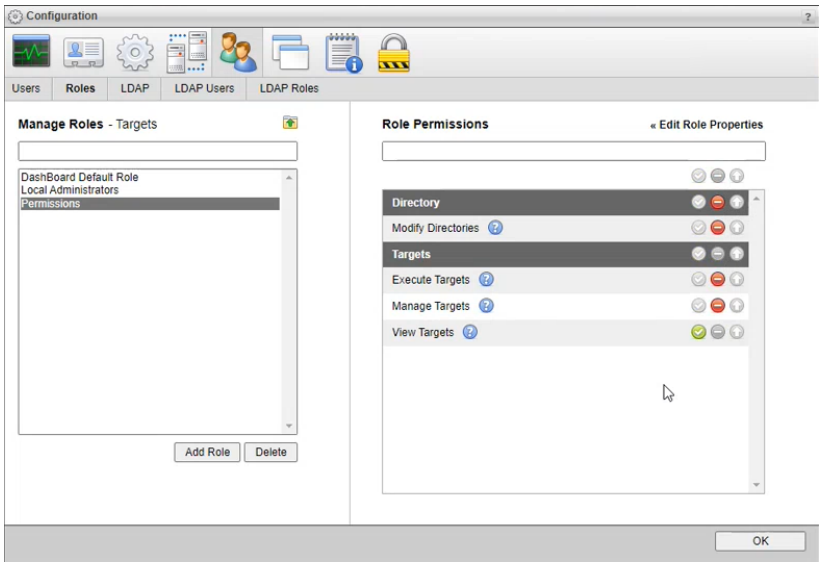
   The **Target Manager** opens.

2. From the folders tree view, select **Modify Permissions**.

   The **Configuration** window opens.

3. Under **Manage Roles**, select a role to configure the permissions for.

4. Under **Role Permissions,** modify the permissions by selecting the green check mark for each permission you'd like to grant for the user.



5. When the role permission selections are complete, select **OK**.

Configuring LDAP Authentication

Lightweight Directory Access Protocol (LDAP) is a protocol for accessing and maintaining distributed directory information services over a network. Ross Platform Manager can import data related to user accounts and user roles (groups) from an LDAP directory server. The **Manage Users** and **Manager Roles** tabs lists users and user roles imported from LDAP directory servers alongside user accounts and user roles created in Ross Platform Manager. You cannot alter the properties of imported user accounts and user roles.

Ross Platform Manager configuration settings related to LDAP belong to the following categories, represented by tabs on the Users configuration panel:

- **LDAP Configuration** — properties related to establishing connectivity with an LDAP directory server.
- **LDAP User Configuration** — mappings to enable Ross Platform Manager to import user accounts from the LDAP directory server.
- **LDAP Role Configuration** — mappings to enable Ross Platform Manager to import user roles (groups) from the LDAP directory server.

This chapter discusses the following topics:

- Connect to an LDAP Directory Server
- Map to LDAP User Data
- Map to LDAP Group (Role) Data

Connect to an LDAP Directory Server

Your network administrator can provide you with the settings required to connect to the LDAP directory server in your organization.

To connect to an LDAP directory server

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

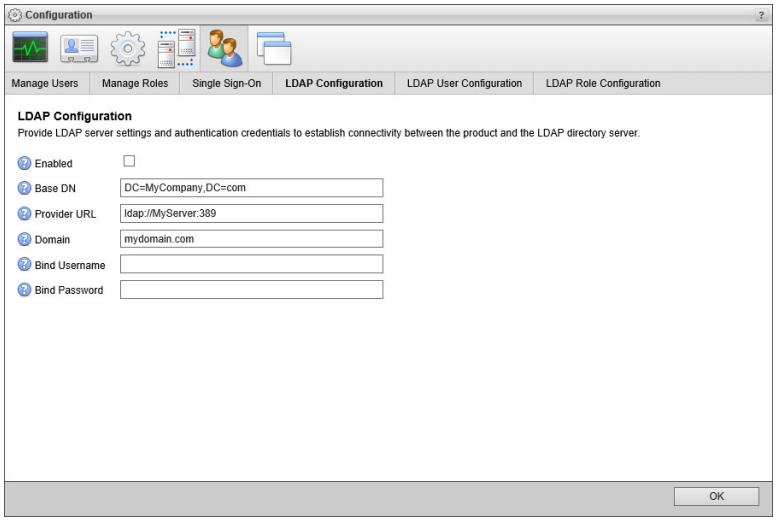
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

4. Click the **LDAP Configuration** tab.

   The **LDAP Configuration** tab opens.



5. Select the **Enabled** box to enable LDAP user authentication.

   If you clear this box, users are only able to log in to your Ross Platform Manager system with user accounts created by Ross Platform Manager.

6. In the **Base DN** box, enter the name of the root LDAP node for user data.

   Example: `DC=MyCompany,DC=com`

7. In the **Provider URL** box, enter the URL of the LDAP provider, with optional port.

   Example: `ldap://MyServer:389`

8. In the **Domain** box, enter the domain name to append to users upon login.

   Example: `rossvideo.com`

9. In the **Bind Username** box, enter the distinguished name (DN) used to log in to the directory server.

10. In the **Bind Password** box, enter the password used to log in to the directory server.

For More Information on...

- how to import LDAP user account data, refer to the section "**Map to LDAP User Data**" on page 12–3
- how to Import LDAP user role data, refer to the section "**Map to LDAP Group (Role) Data**" on page 12–4

Map to LDAP User Data

You can synchronize users between an LDAP directory server and the Users table of the Ross Platform Manager Database.

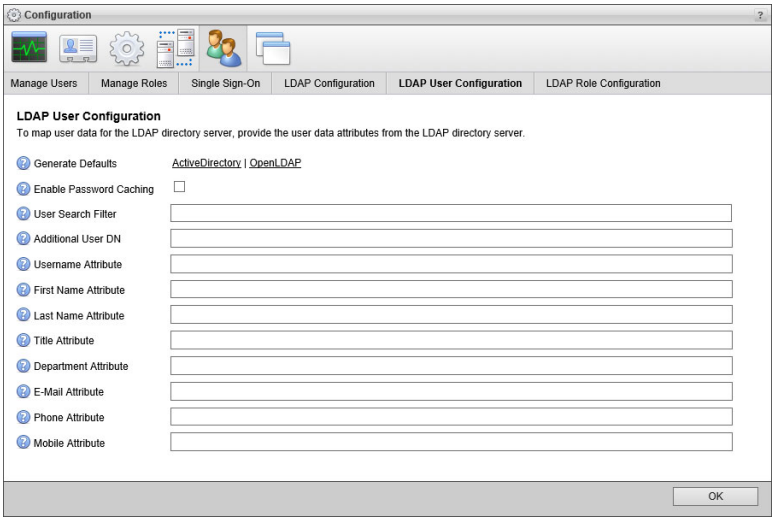
To map to LDAP user data

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **LDAP User Configuration** tab.

   The **LDAP User Configuration** tab opens.



3. To populate the **LDAP User Configuration** tab with editable default values, click one of the following **Generate Defaults** links:

   - **Active Directory** — your organization uses Active Directory.
   - **OpenLDAP** — your organization uses an OpenLDAP directory server.

4. Select the **Enable Password Caching** check box to cache encrypted user password data on the Ross Platform Manager system and use this data for user authentication when Ross Platform Manager is unable to contact the directory server.

5. In the **User Search Filter** box, enter a valid LDAP query to define the filter that returns a list of potential Ross Platform Manager users.

   During LDAP user synchronization, Ross Platform Manager only imports LDAP users who meet the criteria of the LDAP User Search filter into the Ross Platform Manager Database. During LDAP user synchronization, Ross Platform Manager deletes LDAP users imported by previous User Search filter queries from the Ross Platform Manager Database.

6. In the **Additional Group DN** box, enter the distinguished name (DN) of the user to optimize efficiency of the search defined in the **User Search Filter** box.

7. In the **Username Attribute** box, enter the attribute for the user account login on the LDAP directory server.

   Example: `uid` or `sAMAccountName`

8. In the **First Name Attribute** box, enter the attribute for the user first name on the LDAP directory server.

   Example: `givenName`

9. In the **Last Name Attribute** box, enter the attribute for the user surname on the LDAP directory server.

   Example: `sn`

10. In the **Title Attribute** box, enter the attribute for the user organizational title on the LDAP directory server.

    Example: `title`

11. In the **Department Attribute** box, enter the attribute for the user department on the LDAP directory server.

    Example: `department`

12. In the **E-Mail Attribute** box, enter the attribute for the user e-mail on the LDAP directory server.

    Example: `mail`

13. In the **Phone Attribute** box, enter the attribute for the user telephone number on the LDAP directory server.

    Example: `telephoneNumber`

14. In the **Mobile Attribute** box, enter the attribute for the user mobile phone number on the LDAP directory server.

    Example: `mobile`

For More Information on...

- how to connect to an LDAP directory server, refer to the section "**Connect to an LDAP Directory Server**" on page 12–2
- how to import LDAP user role data, refer to the section "**Map to LDAP Group (Role) Data**" on page 12–4

Map to LDAP Group (Role) Data

You can synchronize roles between an LDAP directory server and the Roles table of the Ross Platform Manager Database.

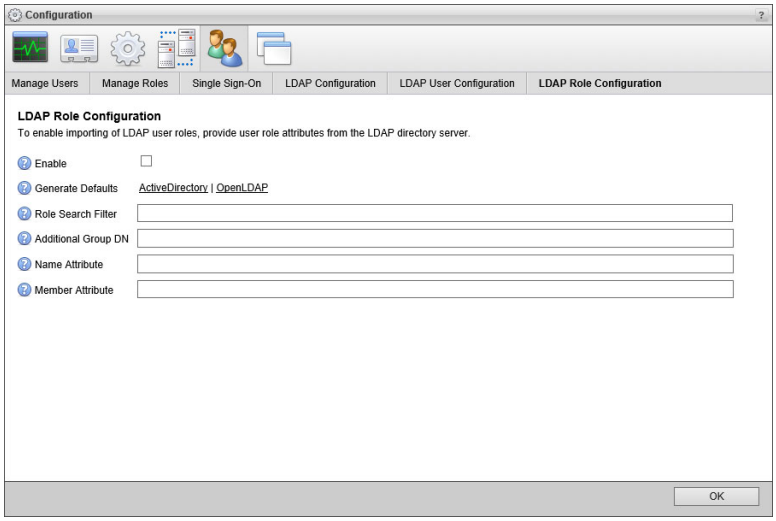
To map to LDAP group (role) data

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **LDAP Role Configuration** tab.

   The **LDAP Role Configuration** tab opens.



3. To populate the **LDAP Roles Configuration** tab with editable default values, click one of the following **Generate Defaults** links:
   - **Active Directory** — your organization uses Active Directory.
   - **OpenLDAP** — your organization uses an OpenLDAP directory server.
4. In the **Role Search Filter** box, enter a valid LDAP query to filter group (role) data to limit the list of roles available in Ross Platform Manager.

   During LDAP role synchronization, Ross Platform Manager only imports LDAP roles that meet the criteria of the LDAP Role Search filter into the Ross Platform Manager Database. During LDAP role synchronization, Ross Platform Manager deactivates LDAP roles imported by previous Role Search filter queries.
5. In the **Additional Group DN** box, enter the distinguished name (DN) of the group (role) to optimize efficiency of the search defined in the **Role Search Filter** box.
6. In the **Name Attribute** box, enter the attribute for the role name on the LDAP directory server.

   Example: `cn`
7. In the **Member Attribute** box, enter the user attribute that indicates group (role) membership on the LDAP directory server.

   Example: `memberOf`
8. After completing your configuration tasks, click **OK** in the lower toolbar to close the **Configuration** panel.

For More Information on...

- how to connect to an LDAP directory server, refer to the section "**Connect to an LDAP Directory Server**" on page 12–2
- how to import LDAP user account data, refer to the section "**Map to LDAP User Data**" on page 12–3

Changing Your Password

Regularly changing your Ross Platform Manager account password helps ensure that someone cannot acquire your password use it to gain access to your Ross Platform Manager account and content.

✶ You can only change the password for local Ross Platform Manager user accounts. If you use an LDAP user account to log into Ross Platform Manager, you cannot use the Change Password dialog box to change the password for your LDAP user account.

This chapter discusses the following topic:

- Change Your Ross Platform Manager Password

Change Your Ross Platform Manager Password

Your new password should be difficult to guess or crack. A good password is:

- At least eight characters long.
- Does not contain your username, real name, or company name.
- Does not contain a complete word.
- Significantly different from previous passwords.
- Contains uppercase letters, lowercase letters, numbers, and symbols.

To change your Ross Platform Manager password

1. While working in Ross Platform Manager, click or tap the  **Change Password** icon on the main toolbar.

   If the **Change Password** icon is not visible, you do not have permission to change your password within Ross Platform Manager. If you need to change your password, contact your administrator.

   The **Change Password** dialog box opens.
2. In the **Old Password** box, enter your current password.
3. In the **New Password** box, enter a new password.
4. In the **Verify Password** box, re-enter the new password.
5. Click or tap **Change Password**.

   A message informs you of the successful change of your password.
6. Click or tap **OK**.

   The next time you log in to Ross Platform Manager, use your new password.

Managing Perspectives

A user perspective is a customized view of the Ross Platform Manager user interface. It is a mapping of Ross Platform Manager panel types to positions in the user interface layout.

Perspectives are especially useful for people who perform many different tasks in Ross Platform Manager. For example, an administrator may use one perspective for configuring Ross Platform Manager, and another perspective for monitoring Ross Platform Manager. All Ross Platform Manager users can create perspectives for their own use. Ross Platform Manager administrators can also create global perspectives available to all users.

✶ Panels may not always appear exactly where you expect. As you open and close panels, Ross Platform Manager adjusts the layout to optimize use of the available space.

This chapter discusses the following topics:

- Create a New Perspective
- Open a Saved Perspective
- Rename a Perspective
- Change the Layout of a Perspective
- Revert a Perspective to the Default Layout
- Make a User Perspective Global
- Delete a Perspective

Create a New Perspective

As a Ross Platform Manager user you can create a perspective for the current positions of Ross Platform Manager panels. The perspectives you create are only available to you. Ross Platform Manager administrators can make perspectives for all Ross Platform Manager system users.

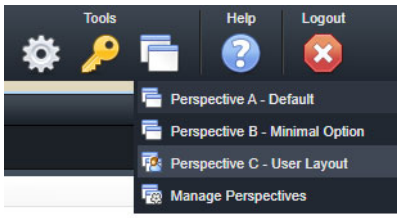
To create a new perspective for your own use

1. Use your Ross Platform Manager credentials to log in to the Ross Platform Manager web page.
2. Open one of each type of panel you want to include in the new perspective.
3. Rearrange the panels to the positions you want them to occupy in the perspective.

   For more information about repositioning panels, refer to section "**Using a Desktop Computer with Ross Platform Manager**" on page 2–3.

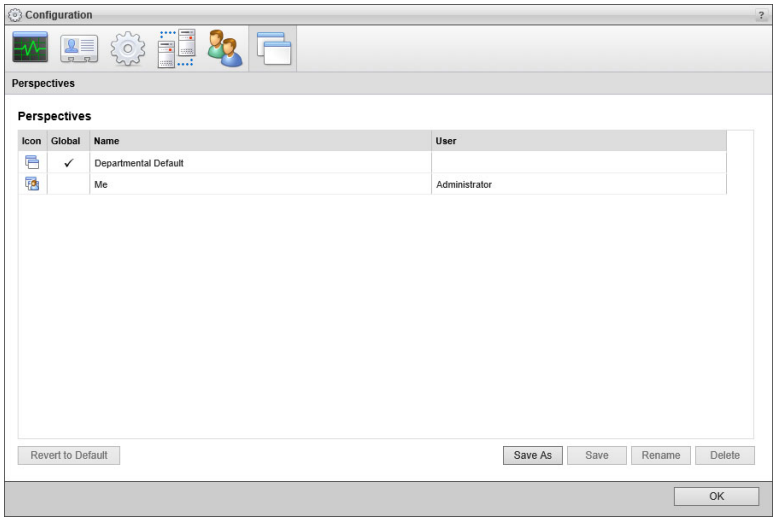
4. On the main toolbar, point to or tap the **Perspectives** icon.

   A list of saved perspectives opens.



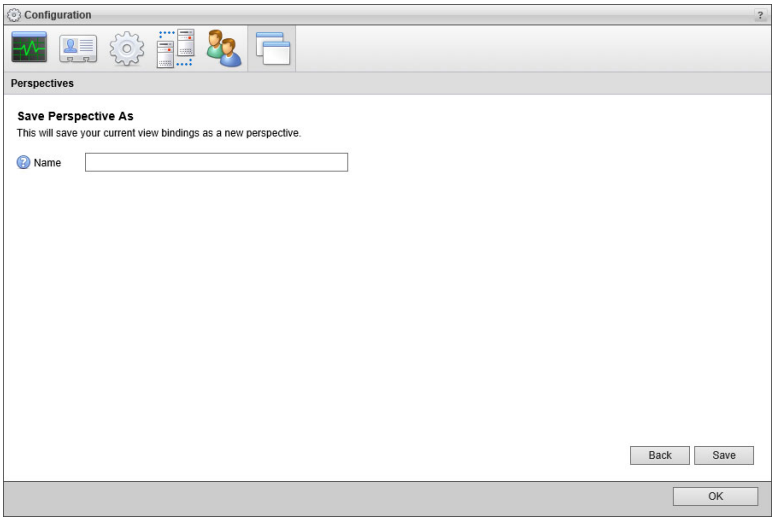
5. In the list, click or tap **Manage Perspectives**.

   The **Configuration** window opens, showing the **Perspectives** tab.



6. Click **Save As**.

   The **Save Perspective As** page opens.



7. In the **Name** box, enter a name for the new perspective.
8. Click **Save**.

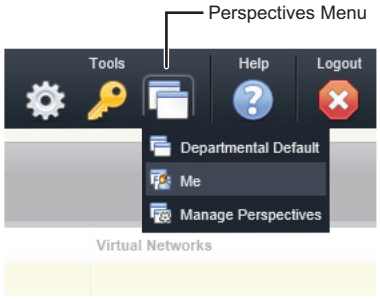
   The **Save Perspective As** page closes and Ross Platform Manager adds the new perspective to the **Perspectives** list.
9. Click **OK** to close the **Configuration** window.

Open a Saved Perspective

To open a saved perspective

1. On the main toolbar, point to or tap the **Perspectives** icon.

   A list of saved perspectives opens. The last item on the list, **Manage Perspectives**, is not a perspective.



2. In the list, click or tap the perspective to open.

   Ross Platform Manager repositions the open panels to conform to the layout in the selected perspective.

Rename a Perspective

To rename a perspective

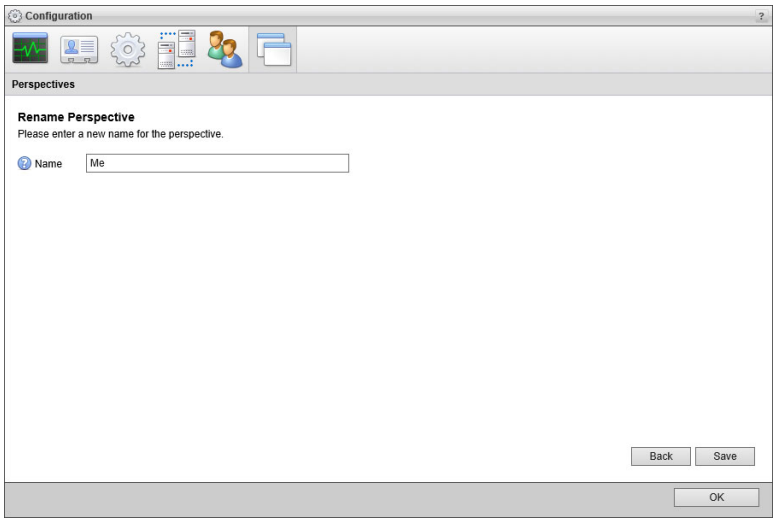
1. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspectives** list, select the perspective to rename.

3. Click or tap **Rename**.

   The **Rename Perspective** page opens.



4. In the **Name** box, enter a new name for the selected perspective.

5. Click or tap **Save**.

   The name of the perspective updates in the **Perspectives** list.

6. Click or tap **OK** to close the **Configuration** window.

Change the Layout of a Perspective

When the layout of a perspective no longer works for your workflow, you can change the perspective layout.

To change the layout of a perspective

1. Rearrange the panels in a perspective to form the new layout for the perspective.

2. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

3. In the **Perspective** list, select the perspective to update with the new panel layout.

4. Click or tap **Save**.

   A confirmation message opens, asking whether you want to overwrite the perspective.

5. In the confirmation message, click or tap **OK**.

   The confirmation message closes and Ross Platform Manager saves the set panel layout is with the selected perspective.

6. Click or tap **OK** to close the **Configuration** window.

Revert a Perspective to the Default Layout

When you first use Ross Platform Manager, it opens certain types of panels in certain panel positions by default. Ross Platform Manager continues to use the default layout until you move a panel or open a saved perspective.

By default, Ross Platform Manager does not occupy all eight panel positions. Ross Platform Manager optimizes the layout by expanding open panels to fill all available space.

To revert a perspective to the default layout

1. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspective** list, select the perspective to apply the default layout.

3. Click or tap **Revert to Default**.

   A confirmation message opens, asking whether you want to revert the perspective to the default layout.

✶ There is no undo for this change. When you revert to the default layout Ross Platform Manager also reverts the panels to their default columns. Click or tap **Cancel** to keep the current perspective layout.

4. In the confirmation message, click or tap **OK**.

   The confirmation message closes and Ross Platform Manager saves the default panel layout with the selected perspective.

5. Click **OK** to close the **Configuration** window.

Make a User Perspective Global

A user-specific perspective is only available to the Ross Platform Manager user who created it. Global perspectives are available to all Ross Platform Manager system users. If you are a Ross Platform Manager administrator, you can make a user-specific perspective global.

To make a user-specific perspective global

1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page. The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

   Only administrators can make a perspective available to all users.

2. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

3. In the **Perspectives** list, select the user-specific perspective to make available to all users.

   Perspectives that do not have a check mark in the **Global** column of the **Perspectives** list are user-specific and only available to the users that created them. A check mark in the **Global** column of the **Perspectives** list indicates that a perspective is global and available to all users.

4. Click **Set as Global**. This option is only available to Ross Platform Manager administrators.

   A check mark displays in the **Global** column of the selected perspective, which indicates that all users now have access the perspective from the **Perspectives** icon.

5. Click **OK** to close the **Configuration** window.

To make a global perspective user-specific

1. As an administrator, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspectives** list, select the global perspective to make user-specific.

   A check mark in the **Global** column of the **Perspectives** list indicates that a perspective is global and available to all users. Perspectives that do not have a check mark are user-specific.

3. Click **Set as User**. This option is only available to Ross Platform Manager administrators.

   Ross Platform Manager removes the check mark from the **Global** column of the selected perspective, which indicates that only the user who created the perspective can use it.

4. Click **OK** to close the **Configuration** window.

Delete a Perspective

Ross Platform Manager users can only delete perspectives that they created. You must log in to Ross Platform Manager as an administrator to delete global perspectives.

To delete a perspective

1. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspectives** list, select the perspective to delete.

3. Click or tap **Delete**.

   A confirmation message opens, asking whether you want to delete the perspective. Click or tap **Cancel** to keep the perspective.

4. In the confirmation message, click **OK**.

   Ross Platform Manager deletes the selected perspective from the **Perspectives** list.

5. Click **OK** to close the **Configuration** window.

Using the Log Explorer

The Log Explorer allows users to access and extract application log data from right within the Ross Platform Manager user interface. This prevents users from needing to login to the Ross Platform Manager server (and/or other Ross products) to access this data, making it quicker and easier to access.

This chapter discusses the following topics:

- Viewing Log Files
- Downloading Log Files
- Deleting Log Files
- Managing the Log Explorer Settings

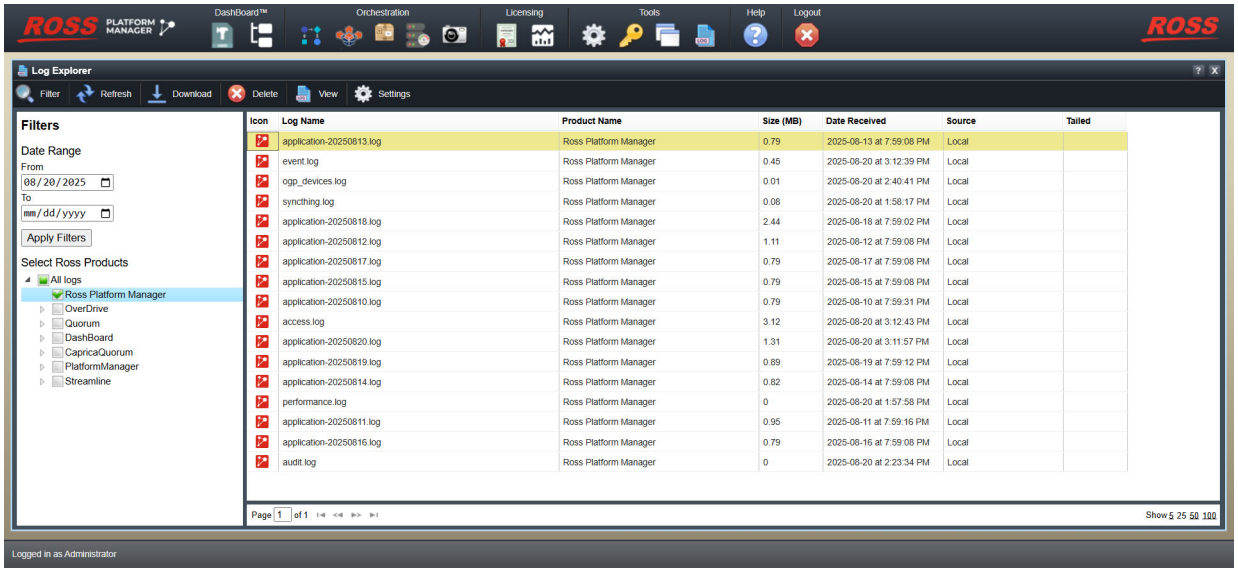
Viewing Log Files

It is possible to view log files from within the RPM Log Explorer, which can be useful when looking for information about how your system is running, or on any errors that may be occurring.

To view log files

1. On the main toolbar, select the **Log Explorer** icon.

   The **Log Explorer** opens.



2. Double-click the desired log.

   The selected log file opens and displays within the RPM Log Viewer.

✶ To filter the logs displayed in the Log Explorer, use the fields in the Filters pane on the left. You can filter by selecting specific products, and/or by entering a date range for the log files.

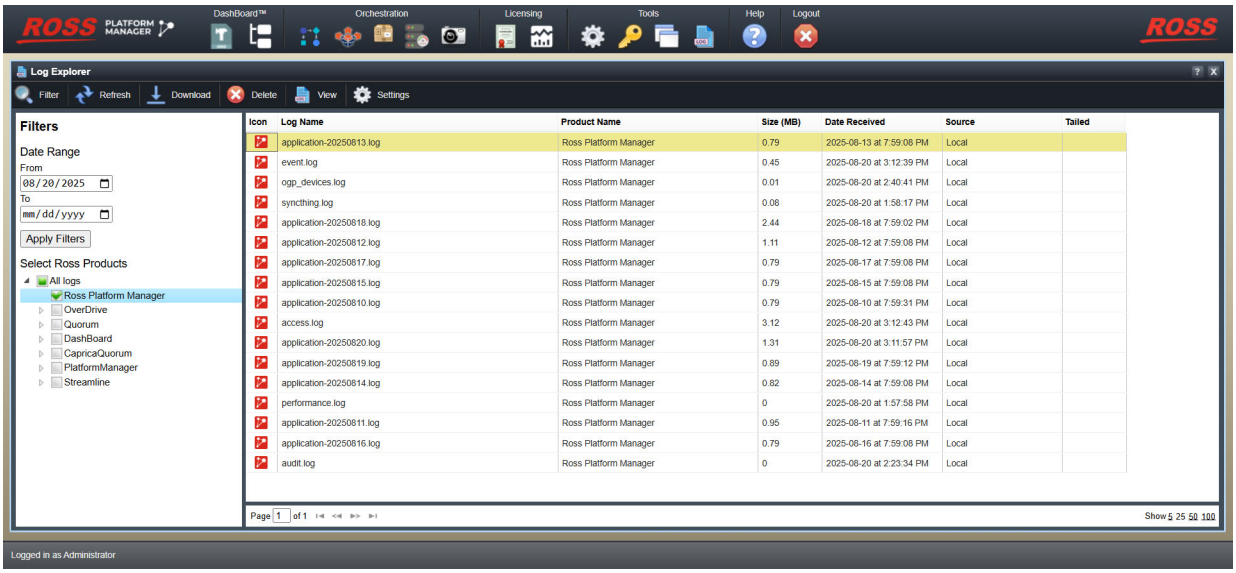
Downloading Log Files

Downloading the application log data from the RPM Log Explorer can be useful when troubleshooting your system. The application log data contains information about how your system is running, as well as any errors that may be occurring.

To download log files

1. On the main toolbar, select the **Log Explorer** icon.

   The **Log Explorer** opens.



2. Select the desired log(s).

✶ To filter the logs displayed in the Log Explorer, use the fields in the Filters pane on the left. You can filter by selecting specific products, and/or by entering a date range for the log files.

3. Click the **Download** button.

   Depending on your browser settings, the log files either save to a preset location on your computer, or a browser download dialog opens.

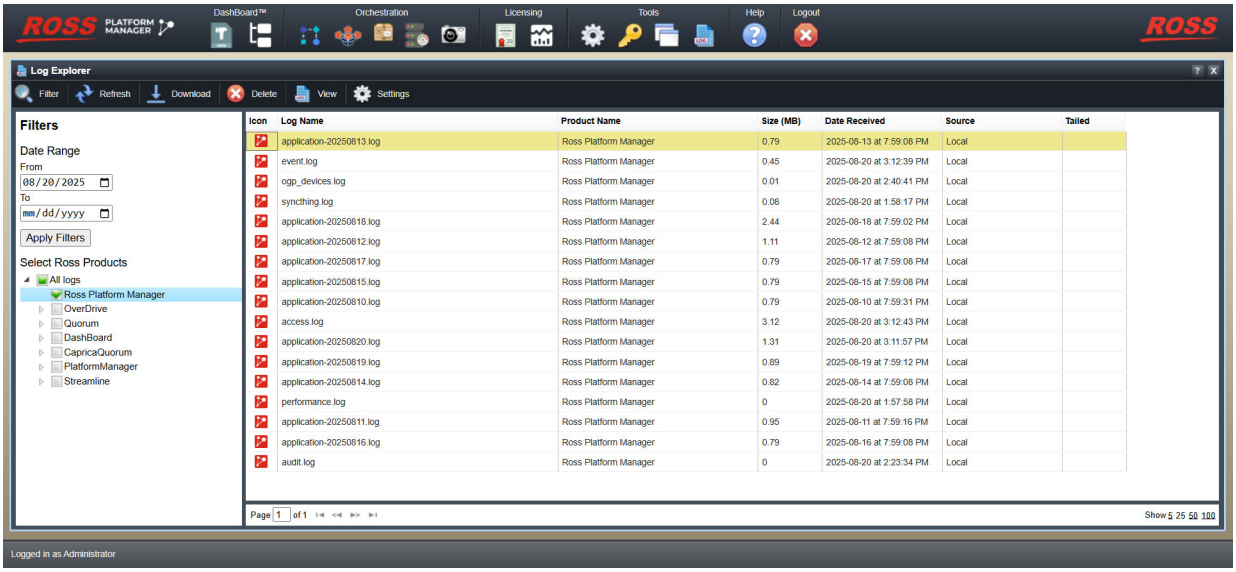
Deleting Log Files

Unlike clearing log files in the Log Viewer (which only temporarily clears the data from the viewer), deleting log files deletes the data entirely from your computer.

To delete the log data

1. On the main toolbar, select the  **Log Explorer** icon.

   The **Log Explorer** opens.



2. Select the desired log(s).
3. Click the **Delete** button.

   A confirmation message opens, asking if you want to delete the log file(s).
4. Click **Yes**.

   The selected log file(s) is deleted.

Managing the Log Explorer Settings

As a Ross Platform Manager administrator, you can access the Log Explorer settings window, allowing you to define the log retention period and set up log forwarding.

Setting the Log Retention Period

To prevent production logs from taking up valuable system space, they are automatically deleted based on the log retention period setting. Ross Platform Manager administrators are able to change the log retention period from the default setting of 10 days, to 20 days in the settings window.

To set the log retention period

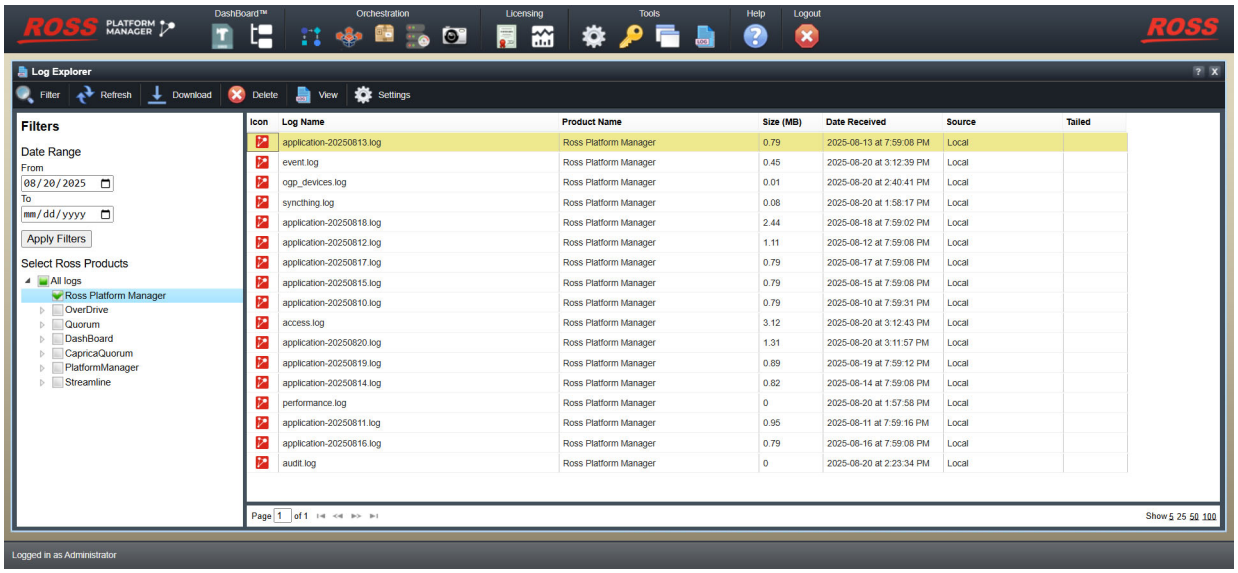
1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

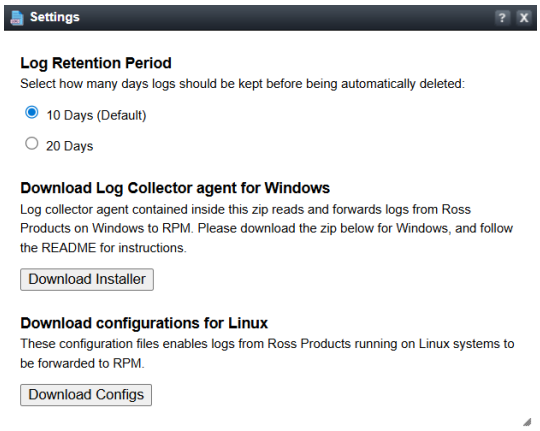
2. On the main toolbar, select the  **Log Explorer** icon.

   The **Log Explorer** opens.



3. Click the **Settings** button.

   The **Settings** window opens.



4. Under **Log Retention Period**, select the desired amount of time that logs should be stored.
5. Close the **Settings** window by clicking **X** in the top right corner.

   The Log Retention Period has been changed.

Setting Up Log Forwarding

If you need to collect system logs for monitoring, security purposes, or any other reason, you can automate this using either the NXLog log collector agent on Windows, or the rsyslog configurations on Linux. Follow the appropriate procedure for your system below.

To set up log forwarding (Windows)

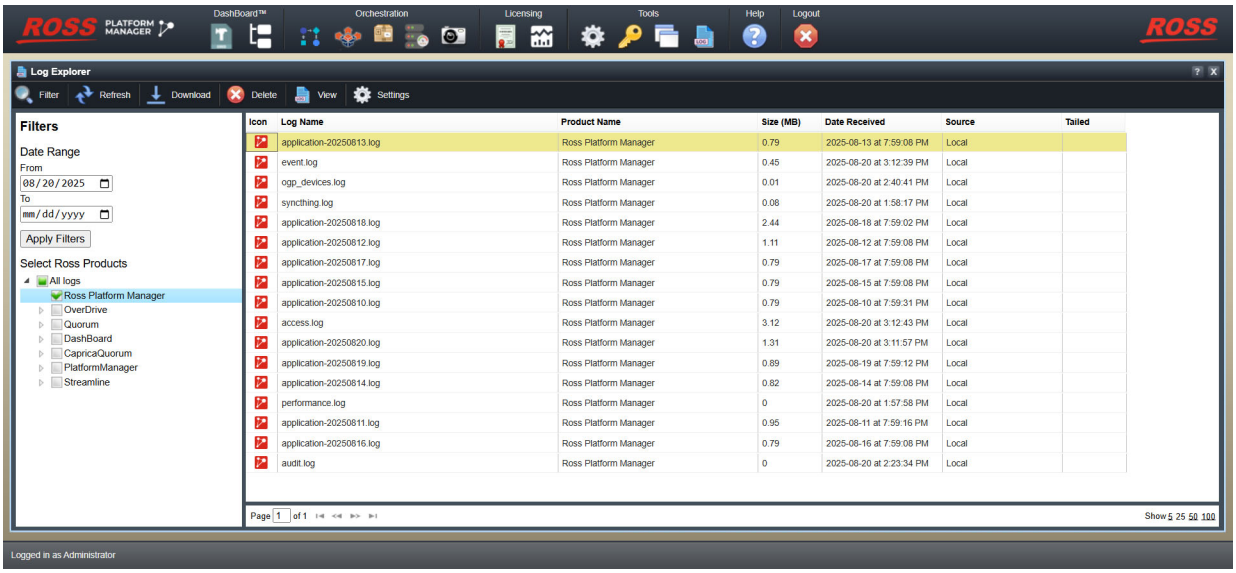
1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

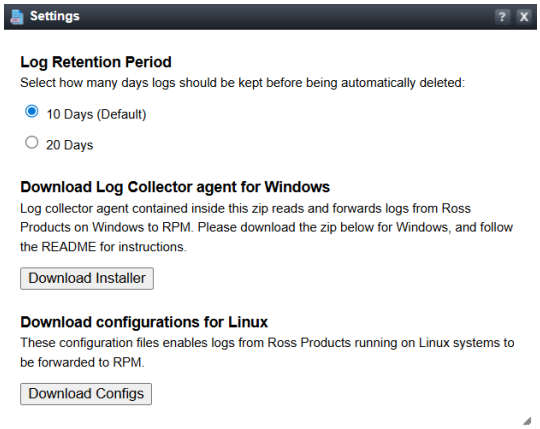
2. On the main toolbar, select the  **Log Explorer** icon.

   The **Log Explorer** opens.



3. Click the **Settings** button.

The **Settings** window opens.



4. Under **Download Log Collector agent for Windows**, click **Download Installer**.

   A zipped folder containing the **NXLog log collector agent installer** downloads.

5. Open the downloaded zipped folder.
6. Double click the **NXLog .msi** file in the downloaded zipped folder to run the installer

   The **NXLog installer** opens.

7. Follow the prompts to complete the installation of the NXLog log collector agent.
8. Open the NXLog configuration directory by going to **`C:\Program Files\nxlog\conf\nxlog.d`** in the File Explorer.

   The NXLog configuration directory opens.

9. Copy the following configuration files from the downloaded zipped folder:
   - The required input file(s) for the Ross product(s) you want to enable.

     Example: inputs_ovd.conf for OverDrive
   - extensions.conf
   - outputs.conf
   - routes.conf
10. Paste the configuration files copied in step **9** into the NXLog configuration directory opened in step **8**.
11. Update **`nxlog.conf`** by performing the following steps:
    a. Open **`C:\Program Files\nxlog\conf\nxlog.conf`** in a text editor.
    b. Add the following lines at the end:

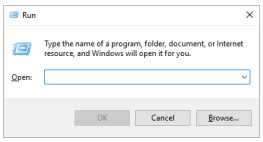
       ```
       include %CONFDIR%\extensions.conf
       include %CONFDIR%\outputs.conf
       include %CONFDIR%\routes.conf
       ```

    c. Add a line at the end for each necessary input file (one for each Ross product you are enabling). For example, if enabling OverDrive, the line added would be:

       ```
       include %CONFDIR%\inputs_ovd.conf.
       ```

12. Restart **nxlog** service by performing the following steps
    a. From the Windows Desktop, press **Windows Key+R**.

       The **Run** dialog box opens.

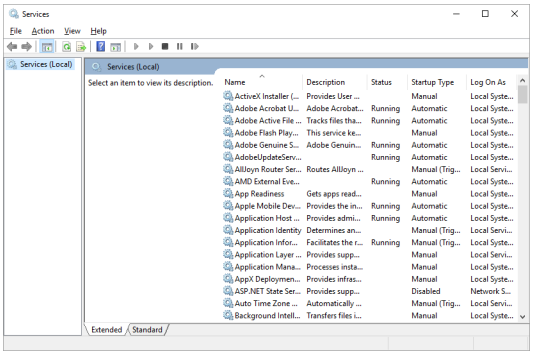


b. In the **Open** box, type the following application name:

`services.msc`

c. Click **OK**.

The **Services** window opens.



d. In the **Services** list, locate and select the **nxlog** service.

e. Click **Restart** for the **nxlog** service.

The **nxlog** service restarts. The NXLog log collector agent has been installed and configured. Logs will now be stored at **`C:\Program Files\nxlog\data\nxlog.log`**.

✶ For NXLog log collector agent troubleshooting, see the README file included in the zipped folder downloaded in step **4**.

To set up log forwarding (Linux)

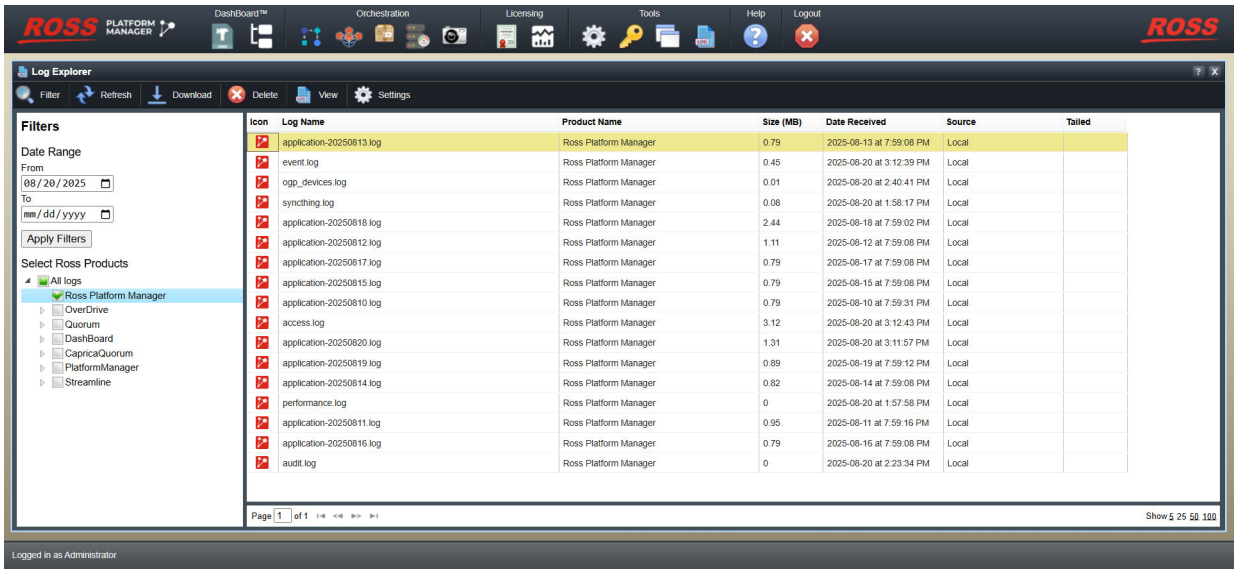
1. Use your Ross Platform Manager administrator credentials to log in to the Ross Platform Manager web page.

   The default administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

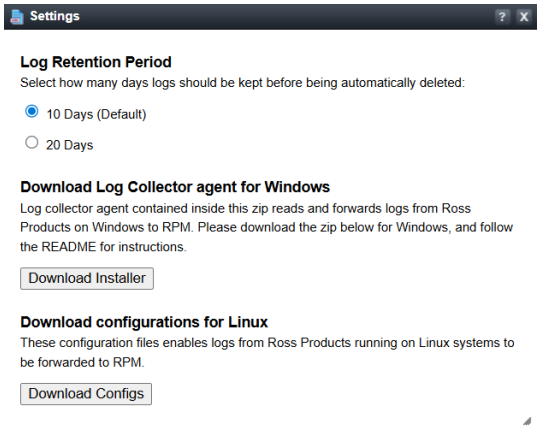
2. On the main toolbar, select the  **Log Explorer** icon.

   The **Log Explorer** opens.



3. Click the **Settings** button.

   The **Settings** window opens.



4. Under **Download configurations for Linux**, click **Download Configs**.

   A zipped folder containing the rsyslog forwarding configuration downloads.

5. Open the downloaded zipped folder and identify the appropriate **`.conf`** file(s) that correspond to your software or product. Note that you can use multiple input files if your system runs multiple software components.

   Example: **`10-input-caprica.conf`** for Caprica.

6. Access the Target Linux System by using SSH or direct console access to log in to the Linux system where your product is installed.

7. Navigate to the rsyslog Configuration Directory by running the following command:

   `cd /etc/rsyslog.d/`

8. Deploy the configuration files by performing the following steps:

   a. Copy the required product input **`.conf`** file(s) identified in step **5** into **`/etc/rsyslog.d/`**.

   b. Copy the **`50-output.conf`** file from the **`rsyslog_forwarder`** folder in the zipped folder downloaded in step **4** into **`/etc/rsyslog.d/`**.

9. Restart the rsyslog Service by running the following command:

   `sudo systemctl restart rsyslog`

10. Enable rsyslog to automatically run on system reboot by running the following command:

    ```
    sudo systemctl enable rsyslog
    ```

11. Verify that rsyslog is active and running by running the following command:

    ```
    sudo systemctl status rsyslog
    ```

    A green **active (running)** status should appear. Rsyslog has been configured and RPM should now receive logs.

- For rsyslog forwarding troubleshooting, see the README file included in the zipped folder downloaded in step **4**.
- If you need to forward logs from an Ultrix Door, run the following command on the Ultrix Door:

  ```
  syslogd -R RPM-IP:514
  ```

Setting Up Log Forwarding Using TLS/SSL

Using either NXLog log collector or rsyslog forwarding on their own will allow you to forward system logs, but the data will be unencrypted. If you require the system logs to be forwarded securely, complete the procedures below to set up log forwarding using TLS/SSL.

There are four steps that must be followed to set up log forwarding using TLS/SSL:

1. "**Creating Self-Signed Certificates**" on page 15–9
2. "**Configuring the Rsyslog Server**" on page 15–10
3. "**Configuring the NXLog Client**" on page 15–11
4. "**Finishing Set Up of Log Forwarding Using TLS/SSL**" on page 15–12

- Note that before completing the procedures below, you will need to have a Windows system with NXLog log collector installed and configured, and a Linux system with rsyslog forwarding configured. Follow the procedures "**To set up log forwarding (Windows)**" on page 15–5 and "**To set up log forwarding (Linux)**" on page 15–7 on their respective system before proceeding.

Creating Self-Signed Certificates

In this procedure, you will create the self-signed certificates needed for setting up log forwarding using TLS/SSL (a Certificate Authority, a server certificate, and a client certificate).

- If you already have a certificate for your client or server, you do not need to create another one.

To create self-signed certificates

1. On your Linux system, create the CA private key by running the following command::

   ```
   openssl genpkey -algorithm RSA -out ca-key.pem -aes256
   ```

2. Set a password for the CA private key when prompted.
3. Create the CA's self-signed certificate by running the following command:

   ```
   openssl req -x509 -new -key ca-key.pem -sha256 -days 1095 -out ca.pem
   ```

4. Provide the requested information to finish creating the CA's self-signed certificate. Note that the Common Name should be something descriptive, such as "My Log CA."
5. Create the rsyslog server's private key by running the following command:

   ```
   openssl genpkey -algorithm RSA -out server-key.pem
   ```

6. Create a Certificate Signing Request (CSR) for the server by running the following command:

   ```
   openssl req -new -key server-key.pem -out server-csr.pem
   ```

7. Set the Common Name for the CSR as the server's host or IP.
8. Sign the server CSR with your CA by running the following command:

   ```
   openssl x509 -req -in server-csr.pem -CA ca.pem -CAkey ca-key.pem -CAcreateserial
   -out server-cert.pem -days 365
   ```

9. Create NXLog client's private key by running the following command:

   ```
   openssl genpkey -algorithm RSA -out client-key.pem
   ```

10. Create a CSR for the client by running the following command:

    ```
    openssl req -new -key client-key.pem -out client-csr.pem
    ```

11. Sign the client CSR with your CA by running the following command:

    ```
    openssl x509 -req -in client-csr.pem -CA ca.pem -CAkey ca-key.pem -CAcreateserial
    -out client-cert.pem -days 365
    ```

12. Copy the following files to the appropriate server:
    a. To the rsyslog server, copy:
       - ca.pem
       - server-cert.pem
       - server-key.pem

    b. To the NXLog client, copy:
       - ca.pem
       - client-cert.pem
       - client-key.pem

    The required self-signed certificates have been created, and you are ready to continue on to "**Configuring the Rsyslog Server**" on page 15–10.

Configuring the Rsyslog Server

Using the files from the procedure "**To create self-signed certificates**" on page 15–9, you are now ready to configure the rsyslog server.

To configure the rsyslog server

1. On your Linux system, place the three files (ca.pem, server-cert.pem, and server-key.pem) copied in step 12a of "**To create self-signed certificates**" on page 15–9 into the directory **/etc/rsyslog.d/certs/**.
2. Change the permissions of the directory so that rsyslog service can read the files by running the following commands:

   ```
   sudo mkdir -p /etc/rsyslog.d/certs/
   sudo cp ca.pem server-cert.pem server-key.pem /etc/rsyslog.d/certs/
   sudo chmod -R 755 /etc/rsyslog.d/certs/
   ```

3. Update the rsyslog config file (e.g. 60-rpm-ross-logs.conf) by adding in these sections:

   ```
   input(type="imtcp"
         port="514"
         StreamDriver.Name="gtls"
         StreamDriver.Mode="1"
         StreamDriver.AuthMode="x509/certvalid")

   global(
       DefaultNetstreamDriver="gtls"
   ```

```
DefaultNetstreamDriverCAFile="/etc/rsyslog.d/certs/ca.pem"
DefaultNetstreamDriverCertFile="/etc/rsyslog.d/certs/server-cert.pem"
DefaultNetstreamDriverKeyFile="/etc/rsyslog.d/certs/server-key.pem")
```

Note that if you would like rsyslog to receive both TLS and non-TLS connections, you can use a different port than 514.

4. Install rsyslog-gnutls package by running the following command:

```
sudo apt-get install rsyslog-gnutls
```

The rsyslog server has been configured, and you are ready to continue on to "**Configuring the NXLog Client" on page 15–11**.

Configuring the NXLog Client

Using the files from the procedure "**To create self-signed certificates**" on page 15–9, you are now ready to configure the NXLog client.

To configure the NXLog client

1. On your Windows system, place the three files (ca.pem, client-cert.pem, and client-key.pem) copied in step 12a of "**To create self-signed certificates**" on page 15–9 into a desired location.
2. Modify the Output information in the nxlog.conf file. You will need to change the Host, Port, and file paths to your own information. The file paths will be to the location you saved the three files in step **1**.

   In the following example, the Host is hostserver, the port is 514, and the file paths are to the Downloads folder.

```
<Output out_syslog_ssl>
    Module      om_ssl
    Host        hostserver
    Port        514

    CAFile      C:/Users/User/Downloads/ca.pem
    CertFile    C:/Users/User/Downloads/client-cert.pem
    CertKeyFile    C:/Users/User/Downloads/client-key.pem

    AllowUntrusted  TRUE
    OutputType  Syslog_TLS
Exec        to_syslog_bsd();
</Output>
```

3. Modify the Route information in the nxlog.conf file. You will need to change the route name, and path values to your own information.

   In the following example, the route name is set to xpression_route, the In path is xpression_logs, and the Out path is out_syslog_ssl (set in step **2**).

```
<Route xpression_route>
    Path        xpression_logs => out_syslog_ssl
</Route>
```

4. Save the changes to the nxlog.conf file.

   The NXLog client has been configured, and you are ready to continue on to "**Finishing Set Up of Log Forwarding Using TLS/SSL**" on page 15–12.

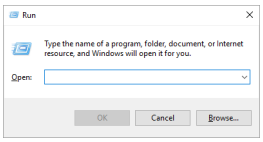
Finishing Set Up of Log Forwarding Using TLS/SSL

With the rsyslog server and the NXLog client both configured, you are now ready to finish the set up of log forwarding using TLS/SSL by restarting them both.

1. On your windows system, restart the **nxlog** service by performing the following steps:

   a. From the Windows Desktop, press **Windows Key+R**.

      The **Run** dialog box opens.

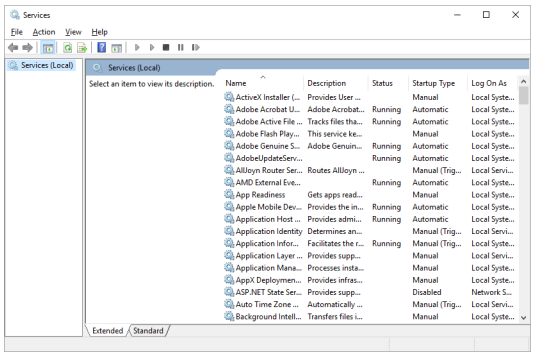


   b. In the **Open** box, type the following application name:

      `services.msc`

   c. Click **OK**.

      The **Services** window opens.



   d. In the **Services** list, locate and select the **nxlog** service.

   e. Click **Restart** for the **nxlog** service.

   The **nxlog** service restarts.

2. On your Linux system, restart rsyslog by running the following command:

   `sudo systemctl restart rsyslog`

   Rsyslog restarts and the set up of log forwarding using TLS/SSL is complete.