



# Gluware® User Guide

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# About Gluware 5.2

Gluware automates network life cycle management on existing networks, allowing you to roll out a robust suite of advanced network and security features while reducing manual deployment and support costs. It simplifies network configuration and change management, enables compliance checking, and implements security policies.

Gluware provides powerful tools that allow you to monitor and update to your network devices.

- Create and maintain a hardware and software inventory of devices using **Device Manager**.
- Take configuration snapshots in **Config Drift** and monitor configuration changes over time.
- Create specific compliance rules in **Config Audit** to ensure policies are maintained on all devices.
- Monitor device data and activity in one place with **Dashboards**.
- Support process-oriented activities across devices with **Network RPA** workflows.
- Keep your network diagrams up-to-date and simplify troubleshooting with Gluware **Topology**.
- Model and manage configurations for devices with **Config Model Editor**.
- Install the latest OS on one or many devices using **File Server** and **OS Manager**.
- Create robust report templates and run reports on demand or on a schedule with **Data Explorer**.



Gluware is licensed per Solution:

- **Gluware** - Includes **Device Manager, Schedules, Data Explorer, Data Export, Dashboards,** and **Solutions Manager**
- **Config Drift and Audit**
- **OS Manager** - Includes **File Server**
- **Config Model Editor**
- **Workflows**
- **Network RPA**
- **Topology**

The **Gluware license** is for a specific device count for the organization it is installed in and any child organizations. Each license, including the Gluware license, has an activation and expiration date.

An unlicensed system can be installed, but only the system settings configuration functions are available until the Gluware license is installed.

Watch Gluware introductory videos at <https://gluware.com/videos/product-videos/>

## Contact us

Please contact Gluware, Inc. directly for further information or if you have any questions.

### Web

For help with Gluware, and to learn more about Gluware, Inc. products, visit <https://www.gluware.com>.

### Technical support

We're here to deliver the support and service you need to get the most from your investment in Gluware. If you need support for Gluware, contact the Gluware Support and Service team. Technical support requires a valid support and maintenance agreement with Gluware, Inc.

**Email:** [support@gluware.com](mailto:support@gluware.com)

**Web Support:** <https://support.gluware.com>

### Professional services

Gluware, Inc. has a staff of professionals who can help you with installation, provisioning, project management, custom designs, project design, and custom solutions. Contact your account manager or Gluware, Inc. Sales for a quote at [sales@gluware.com](mailto:sales@gluware.com).

### Training

If you're new to our software solution, or seek to advance your skills, we offer an extensive range of training to help you accomplish your goals and make the most of your Gluware, Inc. investment. Gluware, Inc.'s training courses are tailored to fit specific skill levels, from beginner through advanced, covering our core solutions. We can also create custom courses to meet your specific training needs. If you would like more information about training options, email [training@gluware.com](mailto:training@gluware.com) and we can discuss the most suitable option for your organization.

## Documentation

Gluware, Inc. strives for continual refinement and improvement in the quality and usability of Gluware documentation. We regularly update our documents and if you have any comments, suggestions, or information that you believe we should include, send documentation comments to [techpubs@gluware.com](mailto:techpubs@gluware.com). Reference version 5.2.4.

# Product dependencies and compatibility

## Host operating system

CentOS v7.6 is the base operating system for the virtual machine on which Gluware runs.

## Hypervisors

**Supported Hypervisors:** VMWare ESXi™ v6.0, or above; Microsoft® Hyper-V™ v2012 R2, or above

Other Hypervisors are not recommended for production installations and are not validated with this Gluware version. Installation results attempted on other platforms may vary significantly. Please contact Gluware, Inc. for more information regarding demonstration of other hypervisor proof-of-concepts and lab testing.

## Browser

**Supported Browser:** Google Chrome™ browser, desktop versions (not iOS)

Other browsers may work, but the user experience may vary.

## Display resolution

**Recommended:** 1920 x 1080 pixels

**Minimum:** 1280 x 1024 pixels

## Security and encryption

The Gluware SSH engine supports the following:

### Supported SSH ciphers

aes256-ctr	aes192-ctr
aes128-ctr	aes256-cbc
aes192-cbc	aes128-cbc
3des-ctr	Arcfour
arcfour128	arcfour256

### Supported key exchange mechanisms

diffie-hellman-group14-sha1  
diffie-hellman-group-exchange-sha1  
diffie-hellman-group1-sha1

### Supported signatures

ssh-rsa  
ssh-dss

### Supported encryption algorithms

aes128-ctr	aes128-cbc
3des-ctr	3des-cbc
blowfish-cbc	

### Supported integrity algorithms

hmac-sha2-256  
hmac-sha1  
hmac-sha1-96  
hmac-md5-96 (deprecating soon)  
hmac-md5 (deprecating soon)

### Supported authentication mechanisms

Password  
keyboard-interactive

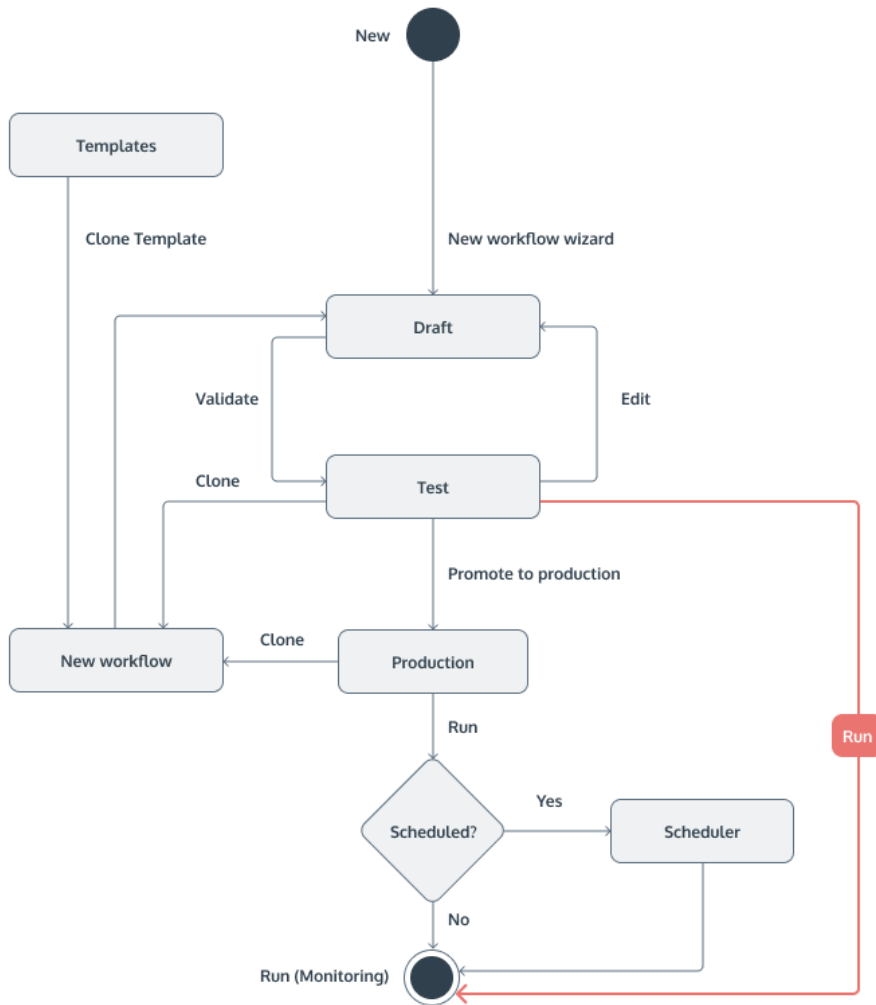
# Network RPA overview

Gluware **Network RPA** (robotic process automation) allows you to create workflows that automate simple and complex tasks. No coding is required—simply drag and drop tasks and conditional statements and establish notifications. Set up test devices to try out the process. And when you're ready to run the workflow in production, easy-to-find logs help you confirm the process was completed successfully or troubleshoot any problems.

With **Network RPA**, you can:

- Automate processes that involve more than one Gluware Solution (Device Manager, Config Audit, Config Model Editor)
- Automate processes triggered by a status change such as a syslog message
- Automate processes that include a change across different device types
- Include BPMN (Business Process Model Notation) and export the workflow diagram for standards-based documentation
- Send automated messages

# Network RPA development states



Every workflow has a start and at least one end. Workflows may include:

- A task to display a list of target devices from which you select when you run the workflow
- A device filter to restrict the list of target devices that will be displayed when you run the workflow
- One or more conditional statements
- More than one end
- Email notifications at any stage in the workflow

## **Network RPA views**

**Workflow Library** - Provides workflow management and general information with the ability to track development levels and execute workflows. Workflows can be executed on demand, scheduled, or triggered by events.



**Workflow editor** - An automation flow designer providing a drag-and-drop user interface. Build end-to-end processes composed of triggers, actions, and events using pre-built tasks along with multi-path decision logic. Add tasks, conditional statements, annotations, and comments. Zoom in or out and re-center as you work. Workflows can be printed and exported in a standard BPMN format.



**Workflow Activity** - Provides the ability to monitor the workflow execution. View detail and take action on task or device/endpoint. Manage workflow states (Pending, Running, Blocked) and view the history and logs.






# Create a workflow

## Create the workflow



1. Go to  **Network RPA > Workflow Library**.
2. Click  **Create new workflow**.
3. Name and describe the workflow.
4. Click **Next**.
5. Do one of the following:
  - Select **Private** if you want to prevent any other user from accessing the workflow.
  - Select **Public** to allow other users to access the workflow. Check the box to share the workflow with users in child organizations. Slide to select the permission level required for other users to run the workflow: **I** through **V**. See “Permission descriptions” and “Gluware roles and permissions” topics for details on permission levels.
6. Click **Next**.

**Note:** You can also create a workflow by cloning an existing workflow. Click  next to the workflow you want to clone and select  **Clone**.




## Add a task to the workflow

1. Click  to display the **Task Library** in the right panel.
2. Drag and drop tasks from the **Task Library** or from the **Used tasks** list to the  on the workflow.
3. Click the task in the workflow to configure it in the right panel.
4. Optional: Click  to change the task name to something more specific.
5. Configure the task. See the “Task Library” topic for configuration details.
6. Optional: Add annotations in the box provided.
7. Click **Apply**.

## Add a conditional statement

1. Click  and select **Set condition > If...Then...Else**.
2. Optional: Click **+ Add variable**.
  - a. Name the variable.
  - b. Select the type of variable from the drop-down list.
  - c. Enter the value you are testing against.
  - d. Optional: Enter a description of the variable.
  - e. Save.
3. Click **Add rule** and click **AND** or **OR** to add a logical operator.
4. Select a property from the first drop-down list.
5. Select a relational operator from the drop-down list.
6. Select a value from the third drop-down list or enter a value.
7. Optional: Click **Add group** to add nested rules.
8. Click  to change the name of each path in the conditional statement; for example, Then, Else.
9. Enter any annotations in the box provided.
10. Click **Apply**.

## Add a Try...catch block

1. Click  and select **Try...catch**.
2. Click on **Try** in the workflow to add a description and annotation.
3. Add the task that you want feedback on between the **Try** and **Catch**.
4. Add a **Send email** task at the **Task Error**  to get feedback on any task errors. You may want to rename the **Send email** task to describe the errors you want information on.
5. Add a **Send email** task at the **Target Error**  to get feedback on any target errors. You may want to rename the **Send email** task to describe the errors you want information on.
6. Add a **Send email** task after the **Try...catch** block to get feedback on the block.

## Add a Wait for operator

You won't be able to add a task that requires user interaction, such as **Change device details** or **Run audit policy**, to the repeat branch.

1. Click **+** and select **Wait for**.
2. Drag and drop a task onto the Repeat branch.
3. Add a variable for the Repeat branch task result. For example, you can use the ServiceNow connector Get Change Request task with the variable named `approval` with the value of `{{taskResponse.approval.value}}` to get the approval status for the change. Or you can wait for an operational state from an ad hoc query.
4. Click on the **WF** in the workflow.
5. Add a condition:
  - a. Click **Add rule** and click **AND** or **OR** to add a logical operator.
  - b. Select a property from the first drop-down list. Only variables or task responses are available for use in the Wait for operator. Device variables and target variables aren't supported.
  - c. Select a relational operator from the drop-down list.
  - d. Select a value from the third drop-down list or enter a value.
  - e. Optional: Click **Add group** to add nested rules.
6. Select the frequency to check the condition: the number of hours or minutes.
7. Select when to stop checking the condition: the number of minutes, hours, days, or weeks.
8. Save.

## Add a result type to a path

- Click **OK** and then select the result type: **Critical, Major, Minor, Info, OK**.

## Add an alternate end to the workflow

If you have conditional statements in your workflow, you can add alternate ends and record a separate result for each end.



- Click  on the branch and select **Add END workflow**.

## Add annotations to a task




Annotations allow you to document the workflow.

1. Click a task in your workflow and then add the annotation text in the box provided in the right panel.
2. Save.


Or

1. Click .
2. In the right panel, click  next to the annotation you want to add and enter the annotation.
3. Save.

## Navigate within a workflow

- Click  to center the workflow on the screen.
- Click  to zoom in and  to zoom out.
- Click any place in the workflow and drag to reposition it on the screen. The **Workflow navigator** shows you where you are relative to the complete workflow.

## Discard your changes


- Click  **Reset workflow** and then click **Reset** to discard the entire workflow and start over.

## Save the workflow



- From the **Actions** menu, select **Save** or **Save Copy As**.

## Validate the workflow

Run validation on your workflow to ensure that all tasks are configured, no user actions are included in a triggered workflow, etc. When the workflow is validated, the workflow status changes to **Test**.

1. From the **Actions** menu, select **Save**.
2. Click **Validate** or .
3. Optional: Add a target prefilter to improve performance when you run the workflow.
  - a. Check the **Prefilter targets** box.
  - b. Click **Configure prefilter**.
  - c. Click **Add rule** and click **And** or **Or** to add a logical operator.
  - d. Select a property from the first drop-down list.
  - e. Select a relational operator from the drop-down list.
  - f. Select a value from the third drop-down list or enter a value.
  - g. Optional: Add additional rules.
  - h. Optional: Click **Add group** to add nested rules.
  - i. Save.
4. Click **Execute**.





## Problems?

1. Tasks that are not configured appear in the right panel. Click  to inspect and correct a task.
2. Save your changes.
3. Click  to correct any additional issue.
4. When all issues are resolved, click **Validate** or **Validate again**.

## Test your workflow

When all your tasks are configured and validated, test your workflow. If your workflow includes targets, test the workflow on test devices.

1. Click **Run test**.
2. Click **Execute** to test the workflow now and click **Go to Activity** to see the results.
3. If the workflow includes an interactive task, the execution state will be **BLOCKED**.

- a. Click **Interact** in the notification in the right panel.
  - b. Click **Save**. The workflow continues to run and completed tasks appear in the right panel. When the workflow execution is complete, results are displayed in the right panel.
4. Do any of the following:
- Select **Targets** from the drop-down list in the right panel. Click  to view a target's log.
  - Select **Info** from the drop-down list in the right panel. Click on any **Results** category (Critical, Major, Minor, Info, OK, Failed) to filter the list.
5. Optional: Go to **Workflow Library**, click  or  and select **Edit** to make changes.
6. When the test is successful, go to **Workflow Library**, click  and select **Promote workflow** to move the workflow to production. Once a workflow is moved to production, you cannot edit it. If you need to make changes, clone the workflow.
7. Optional: Add a target prefilter to improve performance when you run the workflow.
- a. Check the **Prefilter targets** box.
  - b. Click **Configure prefilter**.
  - c. Click **Add rule** and click **And** or **Or** to add a logical operator.
  - d. Select a property from the first drop-down list.
  - e. Select a relational operator from the drop-down list.
  - f. Select a value from the third drop-down list or enter a value.
  - g. Optional: Add additional rules.
  - h. Optional: Click **Add group** to add nested rules.
  - i. Save.
  - j. Click **Move to Production**.

# Task Library

With Network RPA, you get a set of generic tasks. The generic tasks are detailed below.

If you have StackStorm integration enabled in **Settings**, you can load and use StackStorm packs in Gluware Network RPA.

**NOTE:** The **Environment** device field restricts the devices available to the workflow:

- **Test** - Only workflows in Test state can run on this device
- **Production** - Only workflows in Production state can run on this device (default)
- **Production/Test** - Workflows in Test or Production state can run on this device

Make sure devices have the **Environment** setting you need.

## Add device

Adds a device to inventory. Upload a CSV file of devices or add a single device at the time you run the workflow.

### To upload a CSV file of devices

1. In **Workflow Activity**, under **Notifications** in the right panel, click **Interact**.
2. Select **Upload device list CSV**.
3. Click **Select files** and drop the file in the space provided.
4. Check the boxes of the devices you want to add.
5. Click **Save and Exit**.

## To add a single device

1. In **Workflow Activity**, under **Notifications** in the right panel, click **Interact**.
2. Click **Add device manually**.
3. Enter a name and description for the device.
4. Select a **Managed State**:
  - **Managed** - The device can be managed in all Gluware solutions (default)
  - **Unmanaged** - The device can be managed only in Device Manager and in Config Drift and Audit
  - **Inventory Only** - The device can be managed only in Device Manager
5. Select an **Environment**:
  - **Test** - Only workflows in Test state can run on this device
  - **Production** - Only workflows in Production state can run on this device (default)
  - **Production/Test** - Workflows in Test or Production state can run on this device
6. Provide the configuration details for the device: **IP Address**, **Device API Key**, **Device Username Password**, **Enable Mode Password** key (if required), **Connection Type**, and **Port**.
7. If using Zone Engines, select the zone for the device. Check the **Lock Zone** box to restrict the device to the selected Zone Engine.
8. Click **+ Add Proxy** to add a proxy and its connection details if applicable.
9. Click **>**.
10. Check the box of the device you want to add.
11. Click **Save and Exit**.



## Assess state

Assesses the state of one or more devices by running the state assessment policy associated with the devices' assembly. A finish object is created for the task and the results can be used in the workflow.

**Note:** The **Assess state** task runs the assessment and filters the result based on target devices that pass the state assessment.

## Assess node state

Assesses the state by selecting one or more state assessment policies to run on the nodes you select in the workflow.

1. Select a state assessment policy from the list and click >.
2. Click **Apply**.



## Associate an assembly with a node


Associates the type of node with an assembly you created in **Config Model Editor**.

1. Click **+ Add assignment**.
2. Select the type of node from the drop-down list.
3. Select the assembly to associate with the node type from the drop-down list.
4. Click **Apply**.

## Assign variable

Assigns a variable you created in the workflow to a task. The **Assign variable** task must precede any task that consumes the variable in the workflow.

1. In the workflow editor, click  to display the **Task Library** in the right panel.
2. Drag and drop the **Assign variable** task from the **Task Library** to the  on the workflow.

3. Click the task in the workflow to configure it in the right panel.
4. Optional: Click  to change the task name to something more specific.
5. Select the variable from the drop-down list.
6. Check the **Variable reference** box if you want to reference another variable in the value.
7. Enter the value for the variable.
8. Optional: Add annotations in the box provided.
9. Click **Apply**.

## Capture configuration

Executes a `show run` command on the targets and saves the configuration snapshot.

## Change device details

1. Click the **Add properties** box and then select one or more device properties to change.
2. From each **Properties** drop-down list, select the value you want to change to.
3. Click **Apply**.

## Compare configuration snapshots

Compares the most recent configuration snapshot of the targets with the default snapshot.

## Config modeling filter

Retrieves the nodes associated with the selected instance.

1. Select the **Config Model Editor** construct: **Domain**, **Feature**, or **Global**.
2. Select the type of the construct.
3. Select the instance of the type.
4. Click **Apply**.

## Create OS plan

Creates an OS plan to upgrade or downgrade devices. Only devices that have a **Management State** of **Managed**, that have been [discovered in Device Manager](#), and are supported, appear in **OS Manager**. For API image compatibility checks, set up [API integration](#) and enable [vendor API image validation](#) in **Settings**.

**Note:** To create and run an OS plan in a Network RPA workflow, include a **Select targets** task, a **Create OS plan** task, a **Validate OS plan** task, and a **Run OS plan** task in the workflow.

1. Name and describe the plan.
2. Select the action you want to take from the **Plan action** drop-down list:
  - **Transfer Image Only**
  - **Deploy New Image**
3. Click **+ Add association**.
4. Do one of the following:
  - Click the **SKU** box and select the image or images to associate with the SKU.
  - Check the **Regex** box and enter regex to filter SKUs.
5. Select the image transfer protocol from the drop-down list. For Cisco IOS devices, select **SCP**.
6. Optional: Select an SSH window size between 8192 and 131072 with increments of 8.
7. Click the **Variables** tab.
8. Click **+ Add**.
9. Name the variable. For example, `planId`.
10. Specify the value. For example, `{{taskResponse.planId}}`.
11. Click **Save**.
12. Click **Apply** to save the **Create OS plan** task configuration.

## Example finish object

```
{  
  "ignoredDevices": [],  
  "failedDevices": [],  
  "planId": "3824f3d2-6fc9-434a-9e16-d683097f2c2c",  
  "planName": "OSPlanRPA 49c9ac"  
}
```

## Delete device

Deletes a device, its associated node, snapshots, logs, and OS plan results.

**Important** Include a filtering task in the workflow so that all devices in the organization are not deleted.

1. Run the workflow that includes a filtering task and the **Delete device** task.
2. Go to **Workflow Activity**, and under **Notifications** in the right panel, click **Interact**. You'll see the list of devices that will be deleted.
3. Click **Delete**.

## Email Data Explorer report

Runs a Data Explorer report on the target list and emails it after it is run. The following pre-defined variables may be used:

`{{generatedBy}}` - User running the Data Explorer report

`{{generatedOn}}` - Date the Data Explorer report was run

`{{orgName}}` - Name of the organization

`{{templateName}}` - Name of the Data Explorer template

1. Select the report template you want to run from the drop-down list.
2. Select the report format you want from the drop-down list: **CSV**, **PDF**, or **JSON**.

3. Check the appropriate recipient boxes. Add other email addresses to **Recipients**. Separate email addresses with a comma.
4. Optional: Replace the default subject with your own.
5. Optional: Replace the default message with your own or add additional text.
6. Click **Apply**.

## Filter targets

Allows you to filter your device list. When you run a workflow that includes a **Filter targets** task, the workflow will only run on the filtered list of devices. If you also include a **Select targets** task in the workflow, you can further refine the target list at the time you run the workflow.

Make sure the **Environment** device field is set to what you need (**Test**, **Production**, or **Production/Test**).

1. Click **Add rule** and click **AND** or **OR** to add a logical operator.
2. Select a property from the first drop-down list.
3. Select a relational operator: **equal**, **not equal**, **is empty**, **is not empty**.
4. Select a value from the third drop-down list or enter a value.
5. If there is an output variable in your workflow:
  - a. Select **Variables**.
  - b. Click **Map variables**.
  - c. Click **Add new**.
  - d. Select the **Response object name** and **Response object property** from the drop-down lists.
  - e. Click **Save**.
  - f. Click **Add rule** and click **AND** or **OR** then add the output variable to your workflow.
6. Click **Add group** to add nested rules.
7. Enter any annotations in the box provided.
8. Click **Apply**.

## Preview feature

Generates a configuration for review but don't write it. The configuration to be previewed must be modeled and assigned to an assembly for the target nodes in **Config Model Editor**. Make sure the **Environment** device field for the target node is set to what you need (**Test, Production, or Production/Test**). A finish object is created for the task and the results can be used in the workflow.

1. Select the preview type:
  - **Connected** - Validation occurs but, in this case, the existing device configuration is analyzed and the CLI model generated is the difference between the existing CLI and the proposed CLI model. This option requires a connection to the device. Check the box for output in processed format.
  - **Initial** - Validates the model and creates a list of the CLI commands that would be generated to support this model. No analysis of the existing configuration is performed; no connection to the node is required.
2. Enter any annotations in the box provided.
3. Click **Apply**.

## Provision device

Writes a configuration to a device. The configuration to be provisioned must be modeled and assigned to an assembly for the target nodes in **Config Model Editor**. Make sure the **Environment** device field for the target node is set to what you need (**Test, Production, or Production/Test**). A finish object is created for the task and the results can be used in the workflow.

## Reboot device

Restarts a device.

## Run ad hoc query

Finds a specific string in a configuration by running a saved ad hoc query that was defined in **Device Manager**, **Config Drift and Audit**, or **OS Manager**. A finish object is created for the task and the results can be used in the workflow.

1. Select a query from the drop-down list.
2. Optional: Add an annotation in the box provided.
3. Click **Apply**.

## Run audit policy

Runs a policy defined in **Config Audit** against a configuration snapshot. You can replace the drop-down list with a variable reference in the configuration.

1. Select the policy from the drop-down list.
2. Optional: Add an annotation in the box provided.
3. Click **Apply**.

## Run device discovery

Discovers the hardware and software on target devices.

## Run network discovery

Discovers networked devices by running a plan defined in **Device Manager**. Make sure the **Environment** device field for the target is set to what you need (**Test**, **Production**, or **Production/Test**). You can replace the drop-down list with a variable reference in the configuration.

1. Select the plan from the drop-down list.
2. Optional: Add an annotation in the box provided.
3. Click **Apply**.

## Run OS plan

Runs an OS plan on the devices that are common to the OS plan and the workflow's target list.

Running a workflow in Test state that includes this task, runs it against Test devices. Running a workflow in Production state that includes this task, runs it against Production devices. Once you run an OS plan and the status is COMPLETE, the plan becomes read-only and cannot be run again.

## Run an OS plan created in OS Manager

If no filtering task is included in the workflow, the OS plan will run on plan devices.

- Select the OS plan from the drop-down list and click **Apply**.

## Run an OS plan created in Network RPA

You can replace the drop-down list with a variable reference in the configuration.

1. Click the **Variables** tab.
2. Click **+ Reference**.
3. Click the **Configuration controls** box and select **OS plan**.
4. Select the name of the variable you created in the **Create OS plan** task.
5. Click **Apply** to save the reference.
6. Click **Apply** to save the **Run OS plan** task configuration.

## Run script on device

Runs a custom script on one or more devices. A finish object is created for the task and the results can be used in the workflow.

1. Select the script type from the drop-down list.
2. Select the instance of the script to run from the drop-down list.



3. Enter explanatory comments that you want to appear in the log.
4. Click **Apply**.

## Select targets

Allows you to select specific devices from your inventory at the time you run the workflow. Make sure the **Environment** device field is set to what you need (**Test**, **Production**, or **Production/Test**).

1. In **Workflow Activity**, under **Notifications** in the right panel, click **Interact**.
2. Optional: Search for targets. Or to filter the list of targets, click **■** to select the device properties to display. Click **▼** to filter the list of devices.
3. Check the boxes of the targets you want to run the workflow on.
4. Click **>**.
5. Click **Save and Exit**.

## Send email

Sends email to individuals or a group. The following pre-defined variables may be used:

`{{deviceName}}` - Name of the device

`{{lastActivityError}}` - Type of last error

You can also include the environment variables. For example, to include a link to the log in an email, add:

```
<a href="https://<<gluware url>>/frontend/rpa/activity?instanceID={{environment.execution.id}}"> Workflow Link</a>
```

1. Check the appropriate recipient boxes. Add other email addresses to **Recipients**. Separate email addresses with a comma.
2. Enter the **Subject**. The subject line is required.
3. Select **Single output** to the whole email body text once. With **Per target output**, you'll get the whole email body text for each target.
4. Enter the **Message**.
5. Click **Apply**.

## Set default snapshot

Setting a default (baseline) snapshot designates that snapshot as the approved configuration for the device. When you take subsequent snapshots of the configuration, Gluware detects any deviations from the default.

## Update a CLI Command List

Modifies the CLI commands in an existing CLI Command List. Any changes will impact any other assemblies that employ the same CLI Command List. Only the workflow's target nodes will be changed when this workflow is run. Any other nodes associated with the CLI Command List's assemblies will have this change pending. You can replace the drop-down list with a variable reference in the configuration.

- Select the CLI Command List from the drop-down list and save. You'll make your changes to the CLI commands in **Workflow Activity** when the workflow is blocked.

## Update support info

Retrieves the latest Cisco EoX bulletins, PSIRT Advisories, SmartNet details, and NIST NVD advisories (when enabled is **Settings**).

## Validate OS plan

Runs an OS plan validation (read-only) on the devices that are common to the OS plan and the workflow's target list.

### Validate an OS plan created in OS Manager

- Select the OS plan from the drop-down list and click **Apply**.

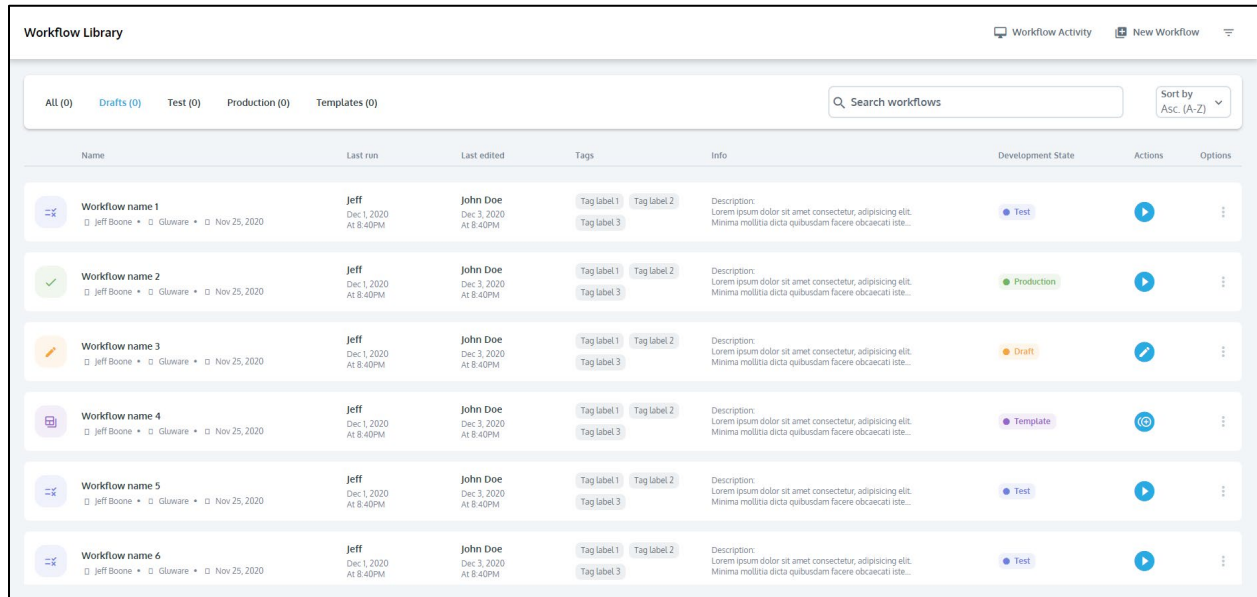
### Validate an OS plan created in Network RPA

You can replace the drop-down list with a variable reference in the configuration.

1. Click the **Variables** tab.
2. Click **+ Reference**.
3. Click the **Configuration controls** box and select **OS plan**.
4. Select the name of the variable you created in the **Create OS plan** task.
5. Click **Apply** to save the reference.
6. Click **Apply** to save the **Validate OS plan** task configuration.

# Manage workflows

The **Workflow Library** lists all the workflows you created and shared workflows you have access to. You manage workflows from the **Workflow Library**.



Name	Last run	Last edited	Tags	Info	Development State	Actions	Options
<b>Workflow name 1</b> Jeff Boone • Gluware • Nov 25, 2020	Jeff Dec 1, 2020 At 8:40PM	John Doe Dec 3, 2020 At 8:40PM	Tag label 1 Tag label 2 Tag label 3	Description: Lorem ipsum dolor sit amet consectetur, adipisicing elit. Minima mollitia dicta quibusdam facere obcaecati iste...	Test	▶	⋮
<b>Workflow name 2</b> Jeff Boone • Gluware • Nov 25, 2020	Jeff Dec 1, 2020 At 8:40PM	John Doe Dec 3, 2020 At 8:40PM	Tag label 1 Tag label 2 Tag label 3	Description: Lorem ipsum dolor sit amet consectetur, adipisicing elit. Minima mollitia dicta quibusdam facere obcaecati iste...	Production	▶	⋮
<b>Workflow name 3</b> Jeff Boone • Gluware • Nov 25, 2020	Jeff Dec 1, 2020 At 8:40PM	John Doe Dec 3, 2020 At 8:40PM	Tag label 1 Tag label 2 Tag label 3	Description: Lorem ipsum dolor sit amet consectetur, adipisicing elit. Minima mollitia dicta quibusdam facere obcaecati iste...	Draft	✎	⋮
<b>Workflow name 4</b> Jeff Boone • Gluware • Nov 25, 2020	Jeff Dec 1, 2020 At 8:40PM	John Doe Dec 3, 2020 At 8:40PM	Tag label 1 Tag label 2 Tag label 3	Description: Lorem ipsum dolor sit amet consectetur, adipisicing elit. Minima mollitia dicta quibusdam facere obcaecati iste...	Template	🔄	⋮
<b>Workflow name 5</b> Jeff Boone • Gluware • Nov 25, 2020	Jeff Dec 1, 2020 At 8:40PM	John Doe Dec 3, 2020 At 8:40PM	Tag label 1 Tag label 2 Tag label 3	Description: Lorem ipsum dolor sit amet consectetur, adipisicing elit. Minima mollitia dicta quibusdam facere obcaecati iste...	Test	▶	⋮
<b>Workflow name 6</b> Jeff Boone • Gluware • Nov 25, 2020	Jeff Dec 1, 2020 At 8:40PM	John Doe Dec 3, 2020 At 8:40PM	Tag label 1 Tag label 2 Tag label 3	Description: Lorem ipsum dolor sit amet consectetur, adipisicing elit. Minima mollitia dicta quibusdam facere obcaecati iste...	Test	▶	⋮

In the **Workflow Library**, you can:

- Filter the list of workflows by clicking **Drafts**, **Test**, or **Production**
- Search by workflow name
- Sort the list of workflows by name, A-Z or Z-A
- View who initiated the last run, who last edited the workflow, and other properties

## Workflow development states

- **Draft** - Workflows that are in progress but not validated. Construct the workflow with drag-and-drop tasks and conditional statements. Validate that everything is fully defined. You can view as read-only, edit, view info, clone, and delete draft workflows.
- **Test** - Test your validated workflow on test devices to ensure you get the results you expect. You can run test workflows, move them to production, view as read-only, clone, edit, and delete them.

- **Production** - When the workflow is fully tested, move the workflow to production to run it on production devices. You can view production workflows as read-only, view associated info, run, clone, and delete them.

See:

[Create a workflow](#)

[Clone a workflow](#)

[Use variables in RPA workflows and tasks](#)

[Edit a workflow](#)

[Test a workflow](#)

[Run a workflow](#)

[Troubleshoot a workflow](#)

[Share a private workflow or restrict access](#)

[View the workflow's properties, history, and other info](#)

[Cancel a workflow schedule](#)

# Use variables in RPA workflows and tasks

You can define variables for use in third-party tasks (e.g. StackStorm), Gluware Service Connector tasks, and Gluware Lab custom tasks. Variables can be defined for the workflow (a workflow variable), for a specific task (a task variable), or for a specific device (a target variable).

Variable names:

- Can include letters, numbers, underscores, and dashes. Use periods for referencing properties in an object e.g. `device.name`
- Are 255 characters maximum
- Are not case-sensitive; however, variable paths **are** case-sensitive. For example, `{{var1.property1}}` is not the same as `{{var1.Property1}}`
- You can use dot notation or brackets with single or double quotation marks
- Use `{{startObj.<variableName>}}` for variable inputs when the workflow is run

## Notes:

- These variables are predefined in Gluware and may be used in the **Send Email** task:

`{{deviceName}}` - Name of the device

`{{lastActivityError}}` - Type of the last error

- These variables are predefined in Gluware and may be used in the **Email Data Explorer Report**:

`{{generatedBy}}` - User running the Data Explorer report

`{{generatedOn}}` - Date the Data Explorer report was run

`{{orgName}}` - Name of the organization the report was run in

`{{templateName}}` - Name of the Data Explorer template

## Notes continued:

- These environment variables are reserved and may be used in any configurable task (**Send Email, Email Data Explorer Report, custom tasks, etc.**):

`{{environment.user.email}}` – Email address of the user

`{{environment.user.username}}` – User's username

`{{environment.user.firstName}}` – User's first name

`{{environment.user.lastName}}` – User's last name

`{{environment.workflow.name}}` – Name of the workflow

`{{environment.workflow.devState}}` – Development state of the workflow

`{{environment.execution.id}}` – Unique key for the workflow execution

`{{environment.execution.started}}` – Date and time the workflow was run

`{{environment.execution.status}}` – Execution status of the workflow

`{{environment.execution.executedBy.id}}` – User ID of the user running the workflow

`{{environment.execution.executedBy.name}}` – Name of the user running the workflow

`{{environment.execution.error.task.message}}` – Latest task error. Useful when using a Try...catch block

`{{environment.organization.name}}` – Organization name

`{{environment.organization.id}}` – Organization ID

## Add a workflow variable

Finish objects are created for the following tasks and the results can be used in the workflow:

- Run ad hoc query
- Assess state
- Preview feature

- Provision device
- Run script on device

1. In the workflow editor, click {x}.
2. Click **+ Add variable**.
3. Enter a name for the variable. Variable names can include letters, numbers, underscores, and dashes. Use periods for referencing properties in an object e.g. `device.name`.
4. Select the variable type from the drop-down list: **String**, **Object**, **Number**, or **Boolean**
5. Enter the property in the response that will provide the value for the variable.
6. Optional: Add a description of the variable.
7. Click **Apply**.

**Add variable** ×

Create in task

Select task ▼

Name

Type  
String ▼

Value i




Description 0 / 250

Cancel Apply



## Assign a variable to a task

Create the variable and then add the **Assign variable** task in the workflow. The **Assign variable** task must precede any task that uses the variable.

1. In the workflow editor, click  to display the **Task Library** in the right panel.
2. Drag and drop the **Assign variable** task from the **Task Library** to the  on the workflow.
3. Click the task in the workflow to configure it in the right panel.
4. Optional: Click  to change the task name to something more specific.
5. Select the variable from the drop-down list.
6. Check the **Variable reference** box if you want to reference another variable in the value.
7. Enter the value for the variable.
8. Optional: Add annotations in the box provided.
9. Click **Apply**.

## Add a variable reference

You can replace any drop-down list with a variable reference in the configuration for the following tasks:

- Run audit policy
  - Update a CLI Command List
  - Run network discovery
  - Run OS plan
  - Validate OS plan
  - Custom JNIB tasks
  - Cisco Meraki tasks
1. Click the task in the workflow to open the configuration in the right panel.
  2. Click **Reference a variable**.
  3. Click **+ Add reference**.

4. Select a configuration control from the drop-down list. The configuration control will be replaced by a variable reference.
5. Select a value from the drop-down list.
6. Click **Apply**.

## Add a task variable

1. Click the task in the workflow to open its configuration in the right panel.
2. Click the **Variables** tab.
3. Click **+ Add variable**.
4. Check the **Create in task** box. Ensure the task is selected in the drop-down list.
5. Enter a name for the variable. Variable names can include letters, numbers, underscores, and dashes. Use periods for referencing properties in an object e.g. `device.name`.
6. Select the variable type from the drop-down list: **String**, **Object**, **Number**, or **Boolean**
7. Enter one of the following for the **Value**:
  - The property in the response that will provide the value for the variable.
  - Reference the whole response object using `{{taskResponse}}` and any of the properties using dot notation; `{{taskResponse.<property>}}`
  - Reference a specific property of an object using dot notation: `{{taskResponse.<value from Response Object>}}`.
8. Optional: Add a description of the variable.
9. Click **Apply**.

## Add a target variable

1. In the workflow editor, click {x}.
2. Click the **Variables** tab.
3. Click **+ Target**.
4. Enter a name for the variable. Variable names can include letters, numbers, underscores, dashes. Use periods for referencing properties in an object e.g. `device.name`.
5. Select the variable type from the drop-down list: **String**, **Object**, **Number**, or **Boolean**
6. Enter one of the following for the **Value**:
  - The property in the response that will provide the value for the variable.
  - Map the value of a property to each device: `{{targetResponse.<property>}}`.
7. Optional: Add a description of the variable.
8. Click **Apply**.

## Import a form for variable parameter input

You can create a JType file in **Gluware Lab** and import it to provide an input form for variable parameters when the workflow is run.

*Refer to the [Gluware Lab User Guide](#) for details on developing JType files.*

1. In the workflow editor, click **Start** in the workflow diagram.
2. Click **Import**, select the Gluware JType file, and click **Open**.
3. Click **Form** to see a preview.
4. Use the start object variable in task configurations or operators using the pattern, `{{startObj.<variableName>}}`

You can export the form, revise it, and import it again.

## Sync input variables for the start object

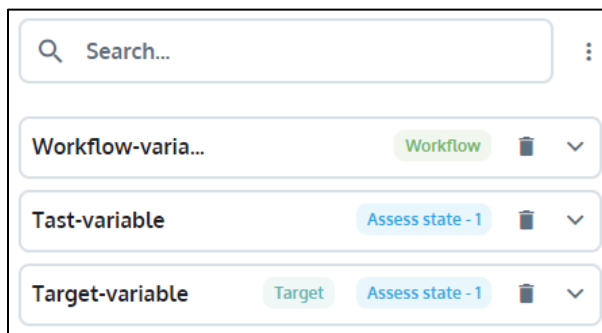
If you define a start object variable in a task configuration, you can navigate to the start object and sync it to create a variable definition.

**WARNING!** Syncing variables can overwrite any custom changes to the JType file.

1. In the workflow editor, click **Start** in the workflow diagram.
2. Click **Sync**.

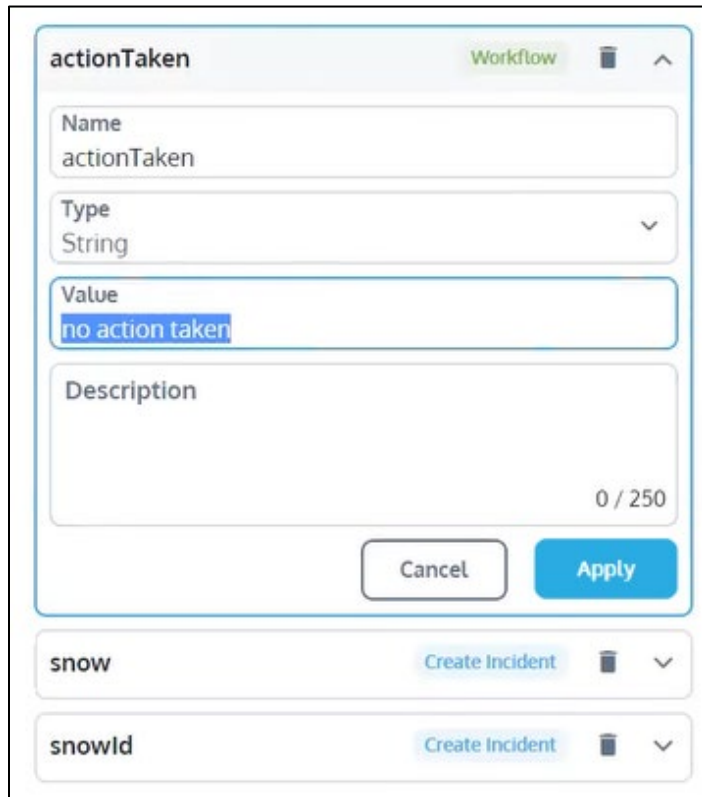
## See a list of the variables in the workflow

- In the workflow editor, click {x}. Task types are tagged.



## Examples

### Example workflow variable in a ServiceNow task



The image shows a configuration form for a workflow variable named 'actionTaken'. The form is titled 'actionTaken' and has a 'Workflow' tag. It contains the following fields:

- Name:** actionTaken
- Type:** String
- Value:** no action taken
- Description:** (empty text area, 0 / 250 characters)

At the bottom of the form are 'Cancel' and 'Apply' buttons. Below the main form are two additional rows, each with a variable name and a 'Create Incident' button:

- Variable: snow, Action: Create Incident
- Variable: snowld, Action: Create Incident

# Example of variable in a conditional statement

The screenshot shows a configuration window titled "IF condition-1" with a close button (X) in the top right corner. Below the title is a help box containing an information icon (i) and the text "Need help with variables?". To the right of this box is a blue button labeled "+ Add variable".

The main configuration area has two tabs: "And" (selected) and "Or". To the right of these tabs are the labels "Add rule" and "Add group", and another close button (X). A single rule is currently defined in a light grey box: "scriptStatus" followed by a dropdown menu showing "equal", and two radio buttons labeled "No" and "Yes". Each of these elements has a small "X" icon to its right for removal.

A search dropdown menu is open over the "scriptStatus" field. It contains a search icon and a vertical bar. Below the search bar are two expandable sections: "Device properties" (expanded) and "Variables" (collapsed). Under the "Variables" section, the variable "scriptStatus" is listed and highlighted with a blue selection bar.

Below the rule configuration are sections for "Then" and "Else" actions, and an "Annotation" field. The "Annotation" field is currently empty and has a character count "0 / 250" in the bottom right corner.

# Example of referencing a variable

### Create Incident ✎ ✕

...dent.rpaTask.jnib\_labServiceNow\_ServiceNow.CreateIncident-0

**Task configuration** **Variables**

**i** Create an Incident from ServiceNow

Caller \*

Short Description \*

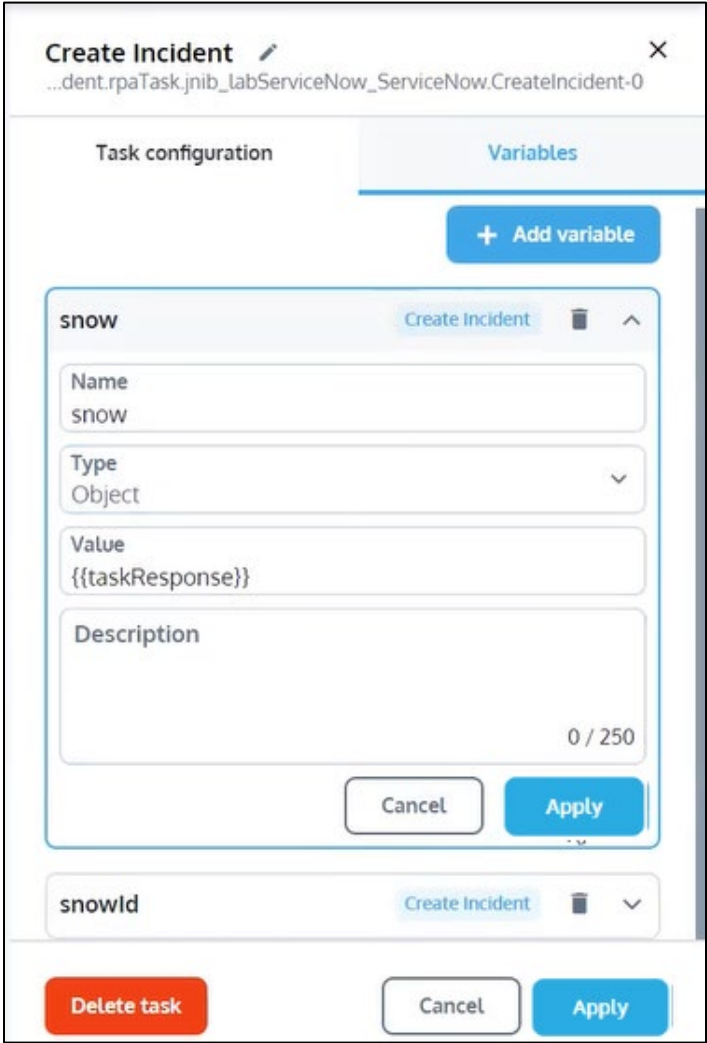
creds

**Annotation**

0 / 250

**Delete task** **Cancel** **Apply**

# Example of a variable created in a task





## Example of a target variable







Runs a script on a device task that has two target variables: one that has the whole object and one that references the status of the script execution.

The screenshot displays a workflow editor interface. The main workspace shows a vertical flowchart starting with a 'Start' node, followed by 'Select targets', 'Run script on device', an 'IF' decision diamond, two 'Send email' tasks (one for successful execution, one for failed execution), 'Send Email - Workflow Execution Complete', and finally an 'END' node. The 'Run script on device' task is highlighted, and its configuration panel is open on the right. The panel has two tabs: 'Task configuration' and 'Variables'. Under 'Variables', there are two target variables defined:

- customScriptRes**: Name 'customScriptRes', Type 'Object', Value '{{taskResponse}}', Description empty.
- scriptStatus**: Name 'scriptStatus', Type 'Boolean', Value '{{targetResponse.successful}}', Description empty.

At the bottom of the configuration panel, there are buttons for 'Delete task', 'Cancel', and 'Apply'. A 'Workflow navigator' window is also visible in the bottom right corner of the editor.

# Test a workflow



1. Go to  **Network RPA > Workflow Library**.
2. Click  next to a **Test** workflow.
3. Click **Execute**.
4. Click **Go to Activity** to see the results.
5. If the workflow includes an interactive task, the execution state will be **BLOCKED**.
  - c. Click **Interact** in the notification in the right panel.
  - d. Click **Save**. The workflow continues to run and completed tasks appear in the right panel. When the workflow execution is complete, results are displayed in the right panel.
6. Do any of the following:
  - Select **Targets** from the drop-down list in the right pane. Click  to view a target's log.
  - Select **Info** from the drop-down list in the right pane. Click on any **Results** category (Critical, Major, Minor, Info, OK, Failed).
7. Optional: Go to **Workflow Library**, click  or  and select **Edit** to make changes.
8. When the test is successful, click  and select **Move to production**. Once a workflow is moved to production, you cannot edit it. If you need to make changes, clone the workflow.

# Run a workflow



## Prefilter targets to improve performance

You can restrict the devices available to the workflow by configuring a prefilter. In addition, you can use **Select targets** and **Filter target** tasks in the workflow to further filter the targets.

Workflows with prefilters can be run on demand or scheduled.




1. Go to  **Network RPA > Workflow Library**.
2. Click  on a workflow.
3. Click **Add rule** and click **And** or **Or** to add a logical operator.
4. Select a property from the first drop-down list.
5. Select a relational operator from the drop-down list.
6. Select a value from the third drop-down list or enter a value.
7. Optional: Add additional rules.
8. Optional: Click **Add group** to add nested rules.
9. Save.

## Run the Workflow now

1. Go to  **Network RPA > Workflow Library**.
2. Click on a workflow that is in **Test** or **Production** and then click .
3. Optional: Add a target prefilter if you don't already have one to improve performance.
  - a. Check the **Prefilter targets** box.
  - b. Click **Configure prefilter**.
  - c. Click **Add rule** and click **And** or **Or** to add a logical operator.
  - d. Select a property from the first drop-down list.
  - e. Select a relational operator from the drop-down list.
  - f. Select a value from the third drop-down list or enter a value.
  - g. Optional: Add additional rules.
  - h. Optional: Click **Add group** to add nested rules.
  - i. Save.
4. Click **Execute**.
5. Click **Go to Activity**.

6. If the workflow includes a **Select targets** task, the execution state will be **BLOCKED**. Click **Interact** in the **Select Targets** notification in the right panel and take the appropriate action.



## Stop a running workflow

- Click  to pause a running workflow.
- Click  to stop a running workflow.
- Click  to resume running a paused workflow.

## Schedule the workflow to run


Only **Public** workflows in **Production** state can be scheduled.

**Note:** Only **Public** workflows in **Production** state can be scheduled.

1. Go to  **Network RPA > Workflow Library**.
2. Click on a **Production** workflow and then click .
3. Click **Schedule**.
4. Select **One time** or **Repeating**.
5. Select the day and time.
6. Click **Set**.

## Set up triggers to run a workflow

**Note:** You cannot trigger both a snapshot and a workflow for the same action.

1. Go to  **Settings > Events**.
2. Check the **Enable Event Triggers for this Organization** box.
3. For each action you want to trigger a workflow, double-click in the **Workflow** column and select a workflow.
4. If you want to trigger a workflow for **Syslog - Configuration Change**,
  - a. Ensure the **Activate Syslog for this organization** box is checked.





- b. In the **Ignore duplicate messages within (minutes)** field, enter the number of minutes to ignore syslog messages after the first message is received. The workflow is run after the wait time you enter. Entering 0 does not ignore duplicate messages and the workflow is run after each message.
5. Save.

## Run a workflow from GluAPI







GluAPI documentation can be found on your system at

<yourGluwareSystem>/api-docs/

or at <http://api-control.gluware.com/api-docs/>. Use your preferred authentication method and set your header key as `Content-Type` with the value pair `application/json`. Use the method `Post`.

1. Go to  **Network RPA > Workflow Library**.
2. Click  next to the workflow you want to see information about.
3. Select  **View info**.
4. In the **API reference** section, copy the URL, which contains the unique workflow ID.
5. Optional: Fill out the JSON form in the **API reference** section.
6. Optional: Click  to copy the payload to an API client and insert it in the request body.

# View a workflow log







1. Go to  **Network RPA > Workflow Activity**.
2. Search for your workflow.
3. Click  on the workflow.
  - **Search for a text string** - Enter the text string and click **Enter**. Check the **Case-Sensitive** box to make the search case-sensitive. Clear the box to ignore case. Click > and < to see the occurrences found.
  - **Filter the log** - Click . Check or clear the boxes to display just the levels you want. All levels are displayed by default.
  - **Change the line label** - Select a line label from the drop-down list. Select from: Log event #, Line number, Timestamp, Time passed, and Event duration.
4. Optional: If you are viewing the log while the workflow is running, click  to stop the log from scrolling. Click  again to restart scrolling.
5. Optional: Click  to download the log bundle.

Log Levels	Description
<b>Error</b>	<b>A problem that must be fixed</b>
<b>Warning</b>	<b>A problem that did not stop the process but should be fixed</b>
<b>Task</b>	<b>The beginning or the end of a step</b>
<b>Checkpoint</b>	<b>A significant point in the code</b>
<b>Info</b>	<b>General info about the process that does not fit in the other logging categories</b>
<b>Response</b>	<b>The raw interaction between the Gluware engine and the device</b>
<b>Debug</b>	<b>Low-level informational log messages usually related to the internal state of code variables. It's specific to how the code is working, as opposed to how the process is proceeding</b>

# View a target log

Tasks that produce logs include:

- Reboot device
- Run device discovery
- Capture configuration
- Compare configuration snapshots
- Set default snapshot
- Provision device
- Preview feature
- Run script on device
- Update support info
- Run audit policy

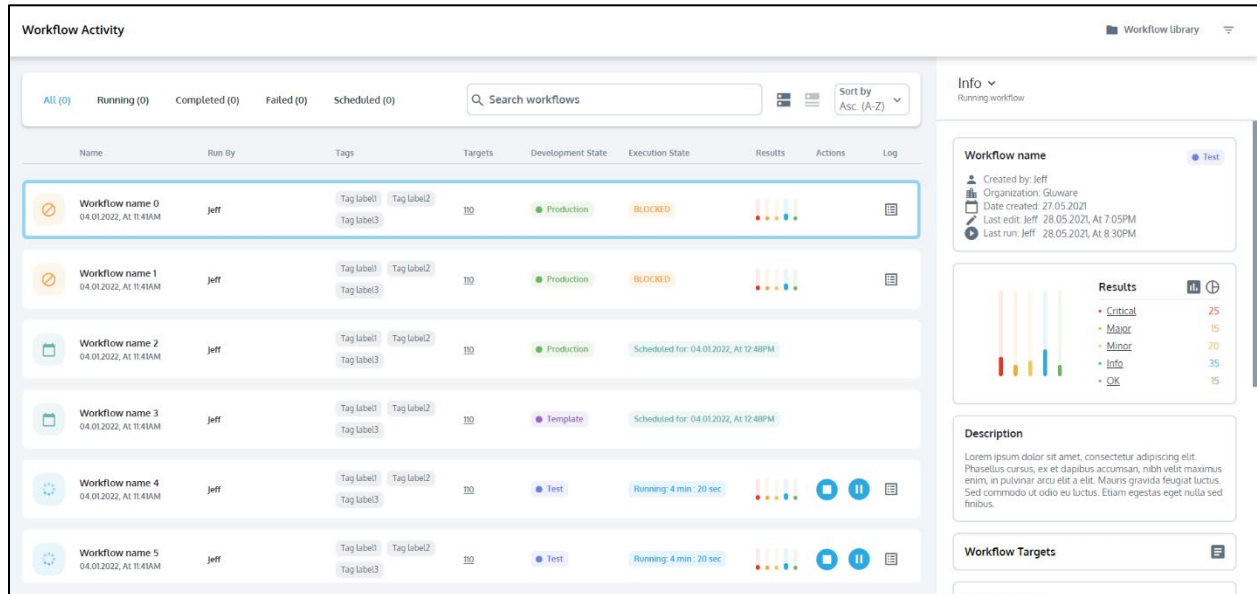
1. Go to  **Network RPA > Workflow Activity**.
2. Search for your workflow.
3. Click the workflow.
4. Select **Targets** from the right panel drop-down list.
5. Click  next to the target you want to view the log for.
6. Do any of the following:
  - **Search for a text string** - Enter the text string and click **Enter**. Check the **Case-Sensitive** box to make the search case-sensitive. Clear the box to ignore case. Click > and < to see the occurrences found.
  - **Filter the log** - Click . Check or clear the boxes to display just the levels you want. All levels are displayed by default.
  - Select a workflow task from the drop-down list. Only tasks that produce logs appear in the list.
  - **Change the line label** - Select a line label from the drop-down list. Select from: Log event #, Line number, Timestamp, Time passed, and Event duration.
7. Optional: If you are viewing the log while the workflow is running, click  to stop the log from scrolling. Click  again to restart scrolling.
8. Optional: Click  to download the log bundle.

Log Levels	Description
<b>Error</b>	<b>A problem that must be fixed</b>
<b>Warning</b>	<b>A problem that did not stop the process but should be fixed</b>
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<b>Debug</b>	<b>Low-level informational log messages usually related to the internal state of code variables. It's specific to how the code is working, as opposed to how the process is proceeding</b>



# Troubleshoot a workflow

You can troubleshoot a workflow from **Workflow Activity**.



## Blocked workflow


1. Go to **Network RPA > Workflow Activity**. Click on a **BLOCKED** workflow. The workflow tasks are displayed in the right panel.
2. Click on the **Interact** link in a **Notification** to address the block.

## View the workflow log

1. Go to **Network RPA > Workflow Activity**.
2. Click on the workflow.




## View targets

1. Go to **Network RPA > Workflow Activity**.
2. Search for your workflow.
3. Click the workflow.
4. Select **Targets** from the drop-down list in the right panel.


5. Optional: Click **Open Target List**. Click  to filter the target list by results (Critical, Major, Minor, Info, OK, Failed, Running, Ignored) and turn off the results categories you want to hide. All targets are displayed by default.

# Share a private workflow or restrict access

## From the Workflow Library



1. Go to  **Network RPA > Workflow Library**.
2. Click  next to the **Draft**, **Test**, or **Production** workflow.
3. Click  **Share workflow**.
4. Select a different setting.
5. Save.

## From a workflow


1. Click  **Share workflow**.
2. Select a different setting.
3. Save.


## From Workflow Activity


You can share the link to a workflow instance with another user. The user must be signed in to Gluware before pasting the link in a browser tab. You can also paste the link into another tab in your browser.


1. Go to  **Network RPA > Workflow Activity**.
2. Select **Info** from the right panel drop-down list.
3. Click  to copy the workflow instance link.
4. Share the link with another user or paste the link in a new tab.



**May snapshot** • Test

 Created by: [@mohit@myorg](#)

 Organization: MyOrganization

 Date created: 4/28/2022, At 3:37 PM





 Run by: [@mohit@myorg](#), 4/29/2022, At 8:52 AM

 Link: <https://10.100.106/frontend/rpa/activity?instanceID=41fa6ee4-29d9-40e1-8406-f12efd947077> 



## Edit a workflow



You can edit saved **Draft** or **Test** workflows. Once the workflow is moved to production, you can't make changes except to add comments. To make changes to a **Production** workflow, clone it and then edit the clone.

1. Go to  **Network RPA > Workflow Library**.
2. Do one of the following:
  - Click  next to the **Draft** workflow you want to edit.
  - Click  next to the **Test** workflow you want to edit and then click  **Edit**.

**Note:** You can edit a **Draft** or **Test** workflow that you opened as read-only. Click **Actions** and then click **Edit**.

## Add comments

With comments, you can raise possible issues or suggest improvements. You can even make comments on **Production** workflows that are read-only.

1. Click  and then click anywhere on your workflow.
2. Write your comment in the space provided in the right panel. To mention someone in the comment in a public workflow, use `@username` and the user will be notified in email. Comments will be numbered C1, C2, etc.
3. Optional: Click  to flag your comment as important.
4. Click **Post**.

## Delete a task

- Click on the task you want to delete and then click **Delete task** or 


## Delete a conditional statement

Deleting an If...Then...Else statement deletes the entire statement.



1. Select **IF** in the workflow and click **Delete condition**.
2. Click **Confirm**.

## Delete an alternate end




Each workflow must have one end, but you can delete an alternate end for a conditional statement.

1. Select the alternate end in the workflow.
2. Click .




## Delete a comment

1. Click  and then click on the comment you want to delete in the right panel.
2. Click .




## Find a comment

- Click  and search for the comment.
- Click  and click  to filter the list of comments in the right panel. You can restrict the results to comments that you added, those that mention you, resolved comments, and comments flagged as important.
- Click on the comment icon in the workflow to display the comment in the right panel.


## Reply to a comment

1. Do one of the following:
  - In your workflow, click on the comment you want to reply to.
  - Click  and search for the comment you want to reply to. Click to open the comment you want to reply to.
  - Click  and filter the list of comments in the right panel. Click to open the comment you want to reply to.
2. Write your reply in the space provided in the right panel.
3. Click .

## Resolve a comment

1. Do one of the following:
  - In your workflow, click on the comment you want to resolve.
  - Click  and search for the comment you want to resolve.
  - Click  and filter the list of comments in the right panel.
2. Click  on the comment to resolve it.

## Share a private workflow or restrict access




1. Click  **Share workflow**.
2. Select a different setting.
3. Save.

## Sync field values from tasks that have start objects


1. In the workflow editor, click **Start** in the workflow diagram.
2. Click **Sync**.

# Share a private workflow or restrict access

## From the Workflow Library


1. Go to  **Network RPA** > **Workflow Library**.
2. Click  next to the **Draft**, **Test**, or **Production** workflow.
3. Click  **Share workflow**.
4. Select a different setting.
5. Save.

## From a workflow





1. Click  **Share workflow**.
2. Select a different setting.
3. Save.



# Update StackStorm Packs




1. Go to  **Settings** > **Organization** > **Integrations**.
2. Click **Reload StackStorm Packs**. Reloading may take some time, depending on the number of packs. You'll see a confirmation when done.
3. Save.

# View past instances of a workflow



1. Go to  **Network RPA** > **Workflow Activity**.
2. Click .
3. Search for your workflow.
4. Click . The past few instances are displayed.
5. Optional: Click view all instances to see all past instances. Your data retention policy determines the number of past instances available.
6. Click any instance to view Info in the right panel.
7. Click  to return to the grouped instances view.

# Cancel a workflow schedule

## From the Workflow Library

1. Go to  **Network RPA** > **Workflow Library**.
2. Click  next to the scheduled workflow and click  **Cancel schedule**.
3. Click **OK**.




## From Schedules

1. Go to  **Schedules** and select a scheduled RPA workflow.
2. Click .
3. Click **Confirm**.

# View the workflow's properties, history, and other info




The **Info** panel displays the following information about a workflow:

- Name of the workflow
- Name of the user who created the workflow
- Organization the workflow was created in
- Date created
- Date last executed
- Development state: Draft, Test, Production, or Template
- Description of the workflow
- History of actions taken on the workflow
- Link to export the BPMN (Business Process Model Navigation) view of the workflow
- Tags assigned to the workflow



1. Go to  **Network RPA > Workflow Library**.
2. Click  next to the workflow you want to see information about.
3. Select  **View info**.

# Clone a workflow

Once a workflow is moved to production, you can no longer make changes to it. Instead, clone the existing workflow, rename it, and make your changes.

1. Go to  **Network RPA > Workflow Library**.
2. Click  next to the **Draft, Test, or Production** workflow you want to clone and select  **Clone**.
3. Name and describe the clone.
4. Click **Clone**.

Cloned workflows are always made **Private**. To change the workflow to **Public**:

1. Click  next to the **Draft** workflow.
2. Click  **Share workflow**.
3. Select **Public** and a permission level setting.
4. Save.

## Create a custom task for Network RPA

You can develop custom tasks using **Gluware Lab**, package the task, and install it in Gluware using **Solutions Manager**. Developing a task for Network RPA includes:




- Implementing a JNIB (JavaScript Object file) in **Gluware Lab** to perform the RPA task.
- Implementing a JType in **Gluware Lab** that describes the data used as input to the JNIB. A JType describes the structure of the JSON data—the field names, kind of data, and any restrictions—and is used to render a form to collect this input.
- Defining an entity used to store the JType and providing the name of the RPA task's JNIB.
- Launching the execution of the JNIB and process the output of the RPA task.

*Refer to the [Gluware Lab User Guide](#) for details on developing JNIB-based tasks for Network RPA.*

# Export or import a workflow

Workflows are exported as a JSON file with the name format, NRPA\_Export\_YYYYMMDD\_HHmm\_TimezoneCode.

## Export a workflow



1. Go to  **Network RPA > Workflow Library**.
2. Click  next to the workflow you want to export and select  **Export workflow**.

## Import a workflow

Information specific to an organization is not imported:



- Custom fields and references to them
- Network discovery plans
- Audit policies
- Script types and instances
- Config modeling constructs including filters, associations, constructs, etc.
- Role email recipient lists
- OS plans and OS image associations
- JNIB tasks' ref field types

Imported workflows will be in **Draft** state and will be **Private**.


1. Go to  **Network RPA > Workflow Library**.
2. Click  **Import workflow**.
3. Select the workflow JSON file to import and click **Open**. You'll see a message if any of the tasks in the workflow are not available in the imported workflow. This can happen if you don't have the necessary Gluware license or package installed or if you have not set up the necessary integration, such as with StackStorm.

# Export a BPMN flowchart

## From the Workflow Library

1. Click  next to the workflow you want to export the BPMN flowchart for and select  **View Info**.
2. In the **BPMN preview**, click **Export BPMN**.
3. Enter a title for the export file.
4. Select a format from the drop-down list: **PDF**, **PNG**, or **JPEG**.
5. Select a paper size from the drop-down list.
6. Optional for **PDFs**:
  - Check the **Workflow Details**, **Annotations**, and **Comments** boxes to include those in the file.
  - Select the orientation: **Landscape** or **Portrait**.
7. Click **Export**.

## From the workflow in the editor

1. Click .
2. Enter a title for the export file.
3. Select a format from the drop-down list: **PDF**, **PNG**, or **JPEG**.
4. Select a paper size from the drop-down list.
5. Optional for **PDFs**:
  - Check the **Workflow Details**, **Annotations**, and **Comments** boxes to include those in the file.
  - Select the orientation: **Landscape** or **Portrait**.
6. Click **Export**.

## From Workflow Activity

1. Select **Info** from the drop-down list in the right panel.
2. In the **BPMN preview**, click **Export BPMN**.
3. Enter a title for the export file.
4. Select a format from the drop-down list: **PDF**, **PNG**, or **JPEG**.
5. Select a paper size from the drop-down list.
6. Optional for **PDFs**:
  - Check the **Workflow Details**, **Annotations**, and **Comments** boxes to include those in the file.
  - Select the orientation: **Landscape** or **Portrait**.
7. Click **Export**.



# Add Cisco Meraki networks and devices using Network RPA

Using Network RPA, you can create a workflow to add Cisco Meraki networks and devices to your inventory at scale. Networks are added to your existing networks in the Meraki dashboard and in Gluware. Devices are added to the Meraki dashboard, to Gluware **Device Manager**, and as nodes in Gluware **Config Model Editor**.

You'll need:

- Licenses for **Config Model Editor** and **Network RPA**
- The latest **Gluware Core Solutions** package
- The latest **Config Modeling Kit for Cisco Meraki**
- A Meraki organization created in the Meraki dashboard
- A Meraki API key created in the Meraki dashboard
- Policies for Meraki networks created in **Config Model Editor**

## Step 1: Create the Meraki Cloud Service in Device Manager

1. Go to **Device Manager > Devices**.
2. Click 
3. Enter a name for the **Meraki Cloud Service** and click **Create**.
4. For the **Connection Method**, select **Meraki API connection**.
5. Enter your Meraki API key.
6. Click **Save**.
7. In the **Device Explorer** grid, select the Meraki Cloud Service you just created and click  to allow Gluware to discover the service. Verify discovery in the **Discovered Status** column.



## Step 2: Import existing Meraki organizations and networks



1. Go to **Config Model Editor > Nodes**.
2. Select a Cisco Meraki controller node from the drop-down list.
3. Right-click on the Meraki node in the grid and select **Import Organizations and Networks from Meraki**.

## Step 3: Create the Network RPA workflow

1. Go to **Network RPA > Workflow Library**.
2. Click **New Workflow**.
3. Name and describe the workflow.
4. Click **Next**.
5. Do one of the following:
  - Select **Private** if you want to prevent any other user from accessing the workflow.
  - Select **Public** to allow other users to access the workflow. Check the box to share the workflow with users in child organizations. Slide to select the permission level required for other users to run the workflow: **I** through **V**.
6. Click **Next**.

## Step 4: Set the context for the workflow

Setting a context allows you to share data across all the tasks in the workflow.

1. Click  to display the **Task Library** in the right panel.
2. Drag and drop the **Set workflow Context** task from the **Task Library** to the  on the workflow.
3. Click the task in the workflow to configure it in the right panel.
4. Click the **Variables** tab.
5. Click **+ Add variable**.
6. Name the variable. For example, `rpaContext`.
7. Click **Apply**.

## Step 5: Add a Cisco Meraki network

### Add the **Set Meraki connection defaults** task to the workflow

1. Drag and drop the **Set Meraki connection defaults** task from the **Task Library** to the ⊕ on the workflow.
2. Click the task in the workflow to configure it in the right panel.
3. Select the **Meraki Cloud Service** from the drop-down list.
4. Select the organization from the drop-down list.
5. Click **Apply**.

### Add the **Create and deploy Meraki network** task to the workflow

1. Drag and drop the **Create and deploy Meraki network** task from the **Task Library** to the ⊕ on the workflow.
2. Click the task in the workflow to configure it in the right panel.
3. Name the network.
4. Select the time zone.
5. Check the boxes of the product types you want to add to the network.
6. Click **Apply**.

### Add the **Assign policies to Meraki network task** to the workflow

1. Drag and drop the **Assign policies to Meraki network** task from the **Task Library** to the ⊕ on the workflow.
2. Click the task in the workflow to configure it in the right panel.
3. Click **+ Add settings**.
4. Select a setting from the drop-down list. These are the Meraki network policies you created in **Config Model Editor**.
5. Select the instance for the setting you selected.
6. Add additional network settings.
7. Click the **Wireless** tab.
8. Click **+ Add wireless** settings.
9. Select SSID from the drop-down list.
10. Select an SSID policy and click **>**.
11. Click **Apply**.

## Step 6: Add Meraki devices to the network

Add the **Add Meraki device task** to the workflow. This adds the device in Gluware

1. Drag and drop the **Add Meraki device** task from the **Task Library** to the **+** on the workflow.
2. Click the task in the workflow to configure it in the right panel.
3. Click **+ Add device**.
4. Name the node (device).
5. Select the device type from the drop-down list.
6. Enter the serial number.
7. Add additional devices.
8. Click **Apply**.

Add the **Add Meraki device to network** task to the workflow

- Drag and drop the **Add Meraki device to network** task from the **Task Library** to the **+** on the workflow. The devices above will be added to the network you create in this workflow.

Add the **Claim Meraki device** task to the workflow

1. Drag and drop the **Claim Meraki device** task from the **Task Library** to the **+** on the workflow.
2. Select a device and click **>**. Click **>>** to select all the devices.
3. Click **Apply**.

## Step 7: Remove the workflow context

- Drag and drop the **Remove workflow context data** task from the **Task Library** to the **+** on the workflow.

## Step 8: Save the workflow

- From the **Actions** menu, select **Save**.

## Troubleshooting

If you encounter the error, `TypeError: Cannot read property "uuid" from undefined`, this may indicate incomplete configuration or an unsaved workflow task. These steps should resolve this issue:

1. Ensure all necessary task configuration is complete, for example, device info has been specified in the **Add Meraki device** task.
2. Open and save all tasks in the workflow.
3. Save and validate the workflow.

# Topology overview




Keep your network diagrams up-to-date and simplify troubleshooting with Gluware **Topology**. It provides a snapshot using the most recent discovery of your network and allows you to drill down to each hierarchical layer of devices. Hover and click on devices and connections to see details. Add annotations for future reference. Export diagrams in PDF or Visio format.

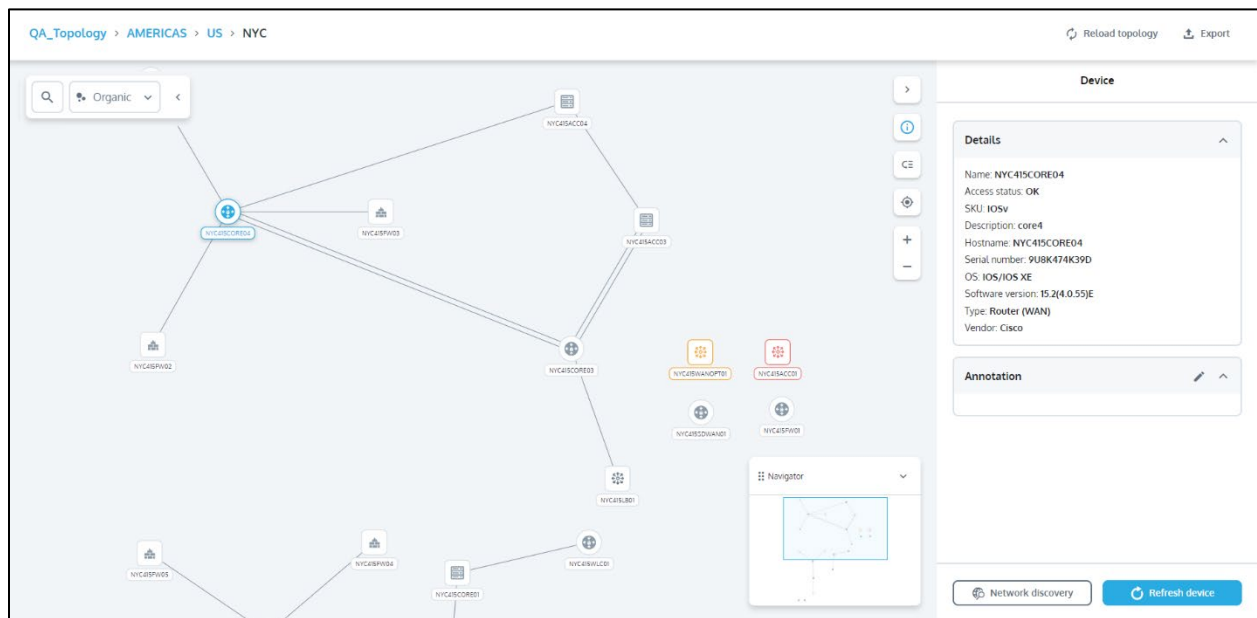
You'll need a Topology license to use the **Topology** Solution.

## Notes:




- Ensure the latest config modeling kits are installed for your devices.
- Devices in your inventory must be discovered in **Device Manager**. And the **Discovery Level** for the organization should be set to **3 - Neighbor**.
- To group devices, assign them to a site. By default, devices are assigned to the root site (the device's organization).
- Gluware relies on CDP, LLDP, and ARP protocols to render device connections.
- Gluware **Topology** shows only physical connections from device to device. Multiple connection lines indicate multiple physical connections.

## Display a site diagram





- Go to  **Topology** to display the organization's site. Or go to  **Device Manager** > **Devices** and click  next to a **Site Code Name** in the grid.
- Click and then click and drag a device to reposition it. (Refreshing or navigating away from **Topology** returns the default view.)
- Choose a layout from the drop-down list: **Organic** (the default), **Hierarchical**, or **Radial**. You can select a subset of devices and choose a different layout. (**Mixed** appears when there is a combination of the layouts.) Check the **Anchor** box in the right panel to arrange the layout around a specific device or site. Devices you don't have permissions to manage can't be an anchor.



## Display diagram details


- Hover over a device or connection to display summary info. Click  to change what info is displayed.
- Single-click a device or connection to display detailed info in the right panel. Click  if the right panel is closed. Click  if **Details** are not displayed.
- Double-click a site to go to it.

## Navigate a diagram

- Click  to center the diagram on the selected device or connection.
- Click  to zoom in and  to zoom out.
- Click any place in the diagram and drag to reposition it. The **Navigator** shows you where you are relative to the complete diagram.
- Search by any displayed label property (except VLAN trunk or port channel) to locate a specific device. For example, search for **Device name** or **Access status**. Click  if there is more than one result.
- Use the breadcrumbs at the top of the screen to go to any parent site.

**Note:** Scrolling with a mouse may not keep a selected device centered in the diagram.

## Select groups of devices or sites

- **Ctrl + A** or  + **A** selects all devices and sites displayed.
- Hold **Ctrl** + click to select specific devices and sites or to deselect them. Clearing a checkbox in the right panel also deselects.
- Click in the empty space to deselect all. Or clear the **Name** checkbox in right panel.
- Click and drag the cursor to select all the device and sites in the area you define or to deselect what's already selected.

# Get updates in Topology

## Update the diagram

Rediscover connections and device details. This may take some time, depending on the number of connections.



1. Go to  **Topology**.
2. Click **Refresh topology** > **Reload topology**.

Redraw the diagram and include any recent updates to connections and device details that may have occurred.

1. Go to  **Topology**.
2. Click **Refresh topology** > **Refresh page**.



## Rediscover the hardware and software details of a device

Connect to the selected device and capture the configuration.

1. Go to  **Topology**.
2. Select a device.
3. Click  **Refresh device**.
4. When completed, click **Reload topology** to update the device details.

## Rediscover the network using network discovery

**Note:** Rediscovering the network returns the default view and labels.



1. Go to  **Topology**.
2. Select a device. The starting device must have a CLI connection.
3. Click  **Network discovery**. Gluware displays **Device Manager** with your selected device as the device to start discovery from.
4. See the topic, "Add devices using network discovery" for how to discover devices using any combination of the CDP, LLDP, and ARP protocols.



# Customize Topology labels

You can add additional properties for display in **Topology** diagrams. The labels displayed will also be included in any exported diagram, so you may want to omit sensitive information for export.



Refreshing or navigating away from **Topology** returns the default view.

1. Go to  **Topology**.
2. Click .
3. Click a category (**Site**, **Device**, **Connection**).
4. Double-click a property to add it to the category's label. You can have up to five properties displayed for each category. Drag and drop to reorder properties. Click X to remove a property from the label.
5. Save.

**Note:** Refreshing or navigating away from **Topology** returns labels to the default.

## Export a topology diagram

Export diagrams in PDF or Visio format. Select the information to include in the exported diagram by customizing the diagram labels.

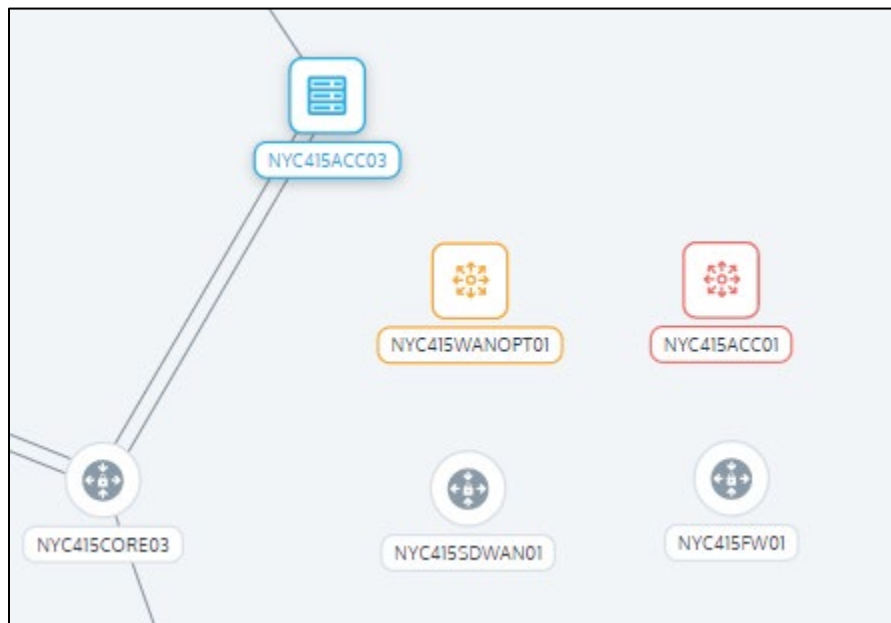
1. Go to  **Topology**.
2. Click  **Export**.
3. Enter a title for your exported file.
4. Select the format from the drop-down list: **PDF** or **VSDX**.
5. Select the paper size and page orientation.
6. Click **Export**.

# Troubleshoot your network using Topology

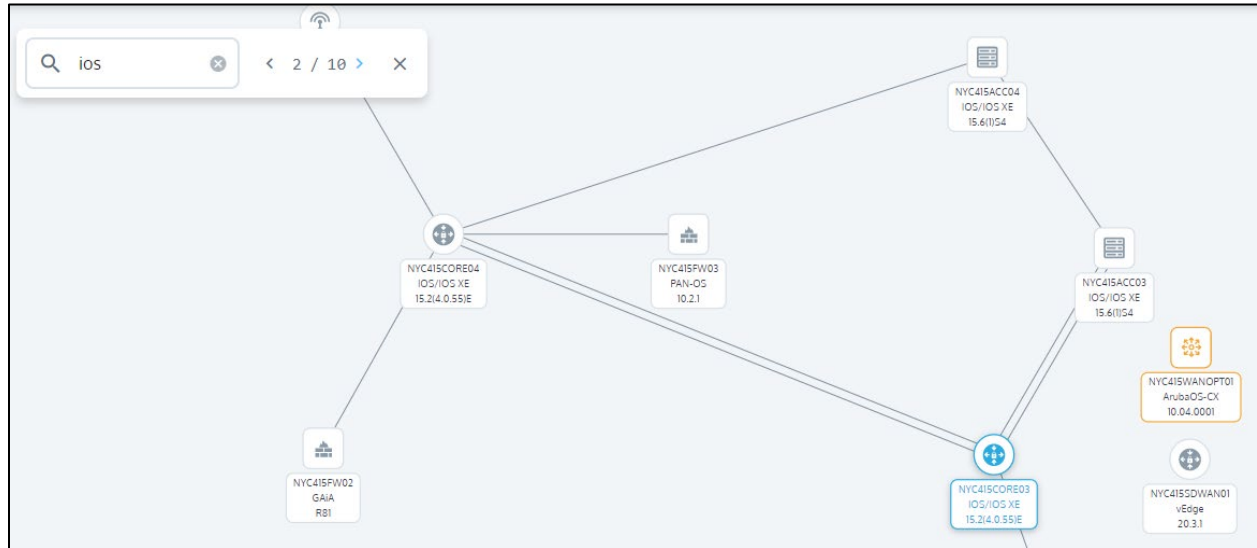
**Topology** diagrams can aid in troubleshooting your network.

Devices in **Topology** are color coded to indicate their access status from the most recent connection:

- Invalid Credentials - Device has a credential issue
- Undiscoverable - Device can't be identified
- Unknown - Connection not yet attempted
- Unreachable - Device is offline or unreachable

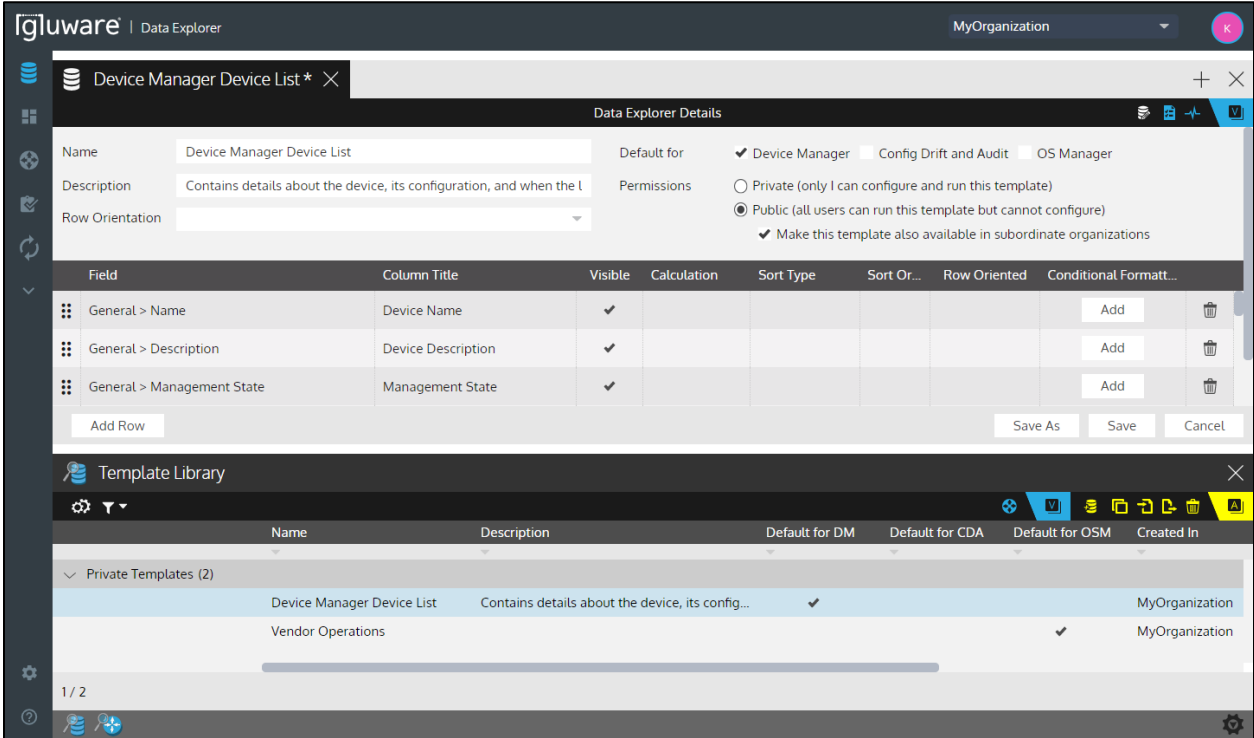


You can also search by any displayed label property to locate a specific device and check its status or connections. For example, search for **Device name** or **Access status**. Click > if there is more than one result.









For best results, ensure your devices have **Discovery Level** set to **3 - Neighbor**.

# Data Explorer quick reference



## Actions

-  Add Template - Create a new Data Explorer report template
-  Clone Template - Clone a Data Explorer report template
-  Import Template - Import a Data Explorer report template created in another organization
-  Export Template - Export a Data Explorer report template
-  Run Report - Run a Data Explorer report on demand or on a schedule
-  Ad Hoc Query - Search for a specific string in a device's configuration

## Views



Data Explorer Details - Display the template details



Data Explorer Results - Display the Data Explorer report results



Activities - View all previous actions related to the template

# Create a report template



Gluware **Data Explorer** allows you to create custom, reusable report templates, selecting from data stored by Gluware with flexible layouts. The report templates can be used within other Gluware solutions. Reports can be viewed, downloaded, emailed, and scheduled to run automatically.



With **Data Explorer**, you can:

- Select the fields you want
- Sort by one or more columns
- Group results within a column
- View sum and average values for numeric data
- Specify conditional highlighting of specified values in a column
- Create default reports for exporting from **Device Manager**, **Config Drift and Audit**, and **OS Manager**
- Run reports on demand or on a schedule

Gluware provides a variety of useful report templates in the Gluware Knowledge Base (<https://support.gluware.com/hc/start>) that you can import to **Data Explorer**.

To create a new report template:


1. Go to  **Data Explorer > Template Library**.
2. Click .
3. Name the template and click **Create**.
4. Describe the template.
5. Optional: Check one or more boxes to make the report template your default when you export in **Device Manager**, **Config Drift & Audit**, or **OS Manager**. Any default you set is a personal preference and does not impact other users.
6. Do one of the following:
  - Select **Private** if you want to prevent anyone else from using the template.

- Select **Public** to allow other users to use the template. Check the box to share the template with users in child organizations.
7. Click **Add Row**.
  8. Select a field from the drop-down list. You can search by field name by typing one or two characters.
  9. Do any of the following:
    - Double-click the **Column Title** to rename it.
    - Double-click **Visible** to hide or show the column in the report. You might want to hide the column if you are using it to influence sorting, for example.
    - Double-click **Calculation** to **average** or **sum** number values. An average calculation assumes 0 for null values. If you don't want null values included in the average calculation, you must filter out those devices from your data set.
    - Double-click **Sort Type** and select how to sort the column.
    - Double-click **Sort Order** to prioritize the sorting of columns.
    - Click **Conditional Formatting** to highlight in color specified values in the column.
      1. Click **+ Add rule**.
      2. Select the filter type from the dropdown list, enter a value, and select the highlight color.
      3. Optional: Check the **Stop if true** box if you want no further evaluation if it matches the rule.
      4. Click **OK** to add the conditional formatting to the column.
  10. Optional: Click  and drag a row to a new position to re-order columns.
  11. Optional: If more than one column is to be sorted, click **Sort Order** to prioritize the sorting of the columns. Click  and drag a column to the order you want. Then **OK**.
  12. Optional: To report on ports, chassis, components, licenses, and stacks, select the type from the **Row orientation** drop-down list. If you don't select **Row orientation** and there is more than one column with the same title, <key#> will be replaced with "1," "2," "3," etc., in the report. *See examples below.*

**Note:** Selecting **Row Orientation** drops the <key#> in default column titles. Customized column titles are unchanged.

13. Save the report template.

**Notes:** You can also create a report template by:

- Cloning an existing template. Simply select a template and click 
- Opening an existing template and clicking **Save As**.
- Importing a template that was created in a different organization.

## Example: Report with Row orientation

Name	Component	Component SKU	Component Serial Number
Juniper EX4300-24T PF3715490034	Gbics 0	NON-INPR	XCW1548508D7
Juniper EX4300-24T PF3715490034	Gbics 1	NON-INPR	XCW1547502D7
Juniper EX4300-24T PF3715490034	Gbics 2	NON-INPR	XCW154750529
Juniper EX4300-24T PF3715490034	Gbics 3	NON-INPR	XCW16065007D
Juniper EX4300-24T PF3715490034	Gbics 4	NON-INPR	XCW154850C51
Juniper EX4300-24T PF3715490034	Gbics 5	NON-INPR	XCW1605502BA

## Example: Report without Row orientation



Name	Component GBI Cs 0 SKU	Component GBI Cs 0 Serial Number	Component GBI Cs 1 SKU	Component GBI Cs 1 Serial Number	Component GBI Cs 2 SKU	Component GBI Cs 2 Serial Number
Juniper EX4300-24T PF3715490034	NON-INPR	XCW1548508D7	NON-INPR	XCW1547502D7	NON-INPR	XCW154750529



# Run a Data Explorer report

## From Data Explorer


When you run a report from **Data Explorer**, you can view the results, modify the report, and re-run it. You also see any column highlighting you specified and can group the results by any column.

1. Go to  **Data Explorer > Devices**.
2. Select the devices you want to report on and click .
3. Optional: Rename the file.
4. Optional: Click **Apply current filter** when scheduling a run so that changes in the filtered device list are represented.
5. Select the report template from the drop-down list.
6. Run or schedule the report:
  - Click **Run** to run the report immediately.
  - Click **Schedule** to define the schedule. Check a **Notify on Completion** box to send an email when the report is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma. Select a format for the report and click **Confirm**.
7. Do any of the following:
  - Click **Edit Data Selection** and then run the report again.
  - Click **Email** and enter email recipients separated by commas and then click **Send**.
  - Click **Download** to send the report to your Downloads folder.


**Note:** You can select CSV, PDF, or JSON format for your report. Rich PDF formatting is available when you run reports on demand from the Data Explorer viewer.

## From Device Manager, Config Drift and Audit, or OS Manager



If you have specified a Data Explorer report as the default for the solution:

- Click . The Data Explorer report is run and sent to your Downloads folder.



To run any Data Explorer report:

1. Optional: Select one or more devices in the Device Explorer.
2. Click .
3. Optional: Rename the output file.
4. Select the device to run the report on:
  - **Selected** - Run the report on the devices you selected in the Device Explorer.
  - **Apply current filter** - Run the report on the resulting devices of the filter currently in effect in the Device Explorer. This will include any new devices that satisfy the filter and is a good option when running a report on a schedule.
  - **All** - Run the report on all the devices.
5. Run or schedule the report:
  - Click **Run** to run the report immediately. The report is sent to your Downloads folder.
  - Click **Schedule** to define the schedule. Check a **Notify on Completion** box to send an email when the report is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma. Then click **Confirm**.

## View the Data Explorer report results

1. Go to  **Data Explorer > Template Library.**
2. Double-click a report template.
3. Click .



## View Data Explorer report history

1. Go to  **Data Explorer > Template Library.**
2. Double-click a report template.
3. Click .



# Export and import a report template

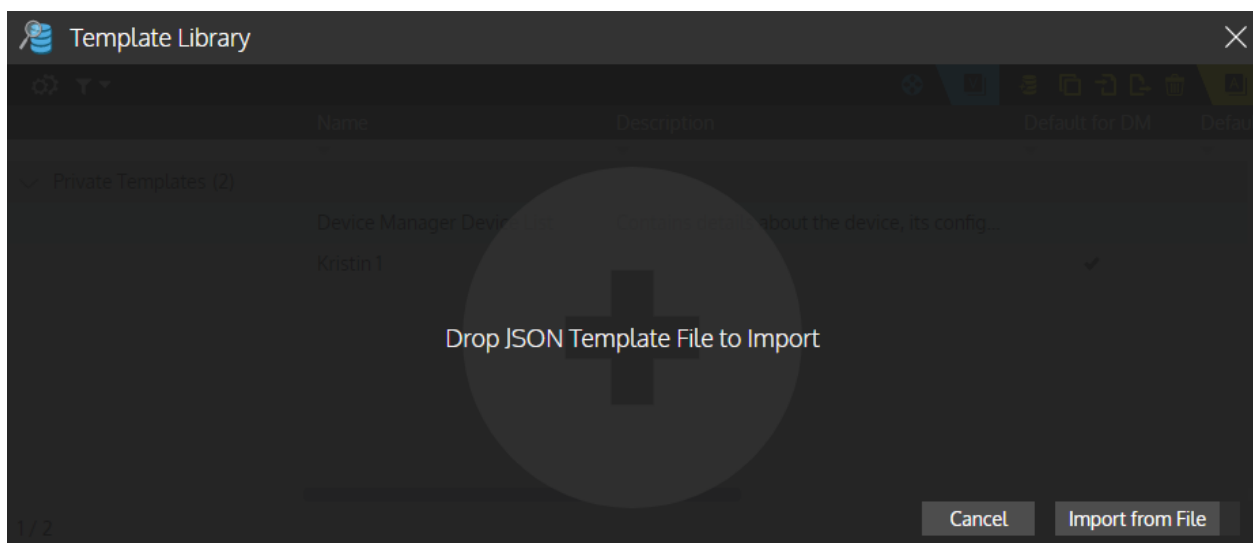
You can share a report template with other organizations, users, and Gluware systems by exporting the template and importing it in a new organization.

## Export a report template

1. Go to  **Data Explorer** > **Template Library**.
2. Select a report and click . This exports the report as a JSON file to your Downloads folder.

## Import a report template

1. Ensure you're in the organization you want to import the template to.
2. Go to  **Data Explorer** > **Template Library**.
3. Click .
4. Do one of the following:
  - Drag and drop the JSON template file into the **Template Library** and click **OK**.
  - Click **Import from File**, select the template file or the files you want to import, and then click **Open**.



# Dashboards overview

Gluware **dashboards** provide a central place to monitor device data and activity. Customize your dashboard widgets to stay on top of important changes like failed upgrades or configuration changes. Notice something you need to investigate? Just click in the widget to open the appropriate Gluware Solution in context.

You can also post bulletins, get RSS feeds, and see web pages. And the dashboard is responsive so you can check it on your phone or tablet, or on a communal display in the office.

You can see all your dashboards, plus any public dashboard shared with you, in the **Dashboard Library**. Private dashboards are indicated by a lock icon. You can import example dashboards from the Gluware Knowledge Base (<https://support.gluware.com/hc/start>).

[Manage dashboards](#)

[Widget gallery](#)

[Manage dashboard widgets](#)

[Customize dashboards](#)

**Dashboard Library** Go to running dashboard Create new dashboard

Favorite dashboards

**Eastern Operations**  
 Created by: me  
 Created in: MyOrganization  
 Critical info for Operations in the East region

**Tags:** Actions, Activity, Assets, Informational, Notifications, Status

**Widget list:** Gluware Tech Docs, Scheduled activities, Dataset chart, Cisco Device Count

**Western Operations**  
 Created by: me  
 Created in: MyOrganization  
 Critical info for Operations in the North region

**Tags:** Actions, Activity, Assets, Collaboration, Informational, Notifications, Productivity, Status

**Widget list:** Count, Bulletin, Dataset chart, User activity, Cisco news feed, Scheduled activities

Other dashboards

**OS Management**  
 Created by: admin  
 Created in: GluwareSystemOrganization  
 Understanding the state of device operating systems

**Tags:** Actions, Activity, Assets, Notifications, Status

**Widget list:** Top OS Versions, OS Plan Status, Plans with Failed Devices, Scheduled OS Plans, File Server Status, OS File Status, Incomplete Fi...

**My Inventory**  
 Created by: admin  
 Created in: GluwareSystemOrganization  
 Device Management and Inventory overview.

**Tags:** Actions, Activity, Assets, Notifications, Status

**Widget list:** Total Devices, Discovered Status, Device Types, OS Versions, Device Activity, Currently Scheduled Activities, Upcoming Activities

**Audit and Drift Alerts**  
 Created by: admin  
 Created in: GluwareSystemOrganization  
 Overview of audit violations and devices with configuration drift

**Tags:** Actions, Activity, Assets, Notifications, Status

**Widget list:** Audit Violations, Audit Policies with Violations, Audit Run Status, Drift Status, Scheduled Audits, Devices that have Drifted

**Welcome to Gluware**  
 Created by: admin  
 Created in: GluwareSystemOrganization  
 Introductory Dashboard for those new to Gluware.

**Tags:** Actions, Activity, Collaboration, Informational, Productivity

**Widget list:** Getting Started, The latest from Gluware, Security threats, Gluware Inc., User activity, Updates and Status

**Gluware System**  
 Created by: kseligson@gluware.com  
 Created in: GluwareSystemOrganization  
 System level details






**Tags:** Actions, Activity, Assets, Collaboration, Productivity, Status



**Widget list:** File Servers > Status, Files > File Type, Files > Image, Files > Status, Files > Vendor, User activity, Bulletin

Watch an overview of Gluware dashboards  
<https://youtu.be/9rDcBpvnDqo>

# Manage dashboards



## Create a new dashboard

1. Go to  **Dashboard** > **Dashboard Library**.
2. Click  **Create new dashboard**  
On a running dashboard, click , then click  **Create new dashboard**
3. Name and describe the dashboard and click **Next**.
4. Do one of the following:
  - Select **Custom Image** and then click  to add an image to brand your dashboard. Select a file and click **Open**.
  - Select **Default Image** if one is enabled in system settings.
  - Select **None**.
5. Click **Next**.
6. Do one of the following:
  - Select **Private** if you want to prevent any other users from viewing the dashboard.
  - Select **Public** to allow other users to view the dashboard. Check the box to share the dashboard with users in child organizations.
7. Click **Next**.
8. Add and configure widgets.
9. Click **Publish**.

**Note:** You can also clone an existing dashboard. From the **Dashboard Library**, click  on the dashboard you want to clone and then click 




## Open a dashboard

Keyboard shortcuts to display your favorite dashboards are enabled by default in your profile.

- Go to  **Dashboard** > **Running Dashboard**.
- On a running dashboard, click . Then click a dashboard name.
- On a running dashboard, click **Alt+→** or **Alt+←** to view your favorite dashboards in turn.
- On a running dashboard, click **Alt+1** through **Alt+9** to display a dashboard in your favorites list.

## Make a dashboard a favorite




If a dashboard is shared, it will be a favorite in all organizations it is shared with.

- Go to  **Dashboard** > **Dashboard Library**, click  and then click  **Add to favorites**.
- On a running dashboard, click  **Set as favorite** and then click **Publish**.

## Edit a dashboard



- Go to  **Dashboard** > **Running Dashboard** and click 

## Change dashboard permissions

1. Go to  **Dashboard** > **Running Dashboard**.
2. Click  and then click  **Permission settings**
3. Do one of the following:
  - Select **Private** if you want to prevent any other users from viewing the dashboard.
  - Select **Public** to allow other users to view the dashboard. Check the box to share the dashboard with child organizations.
4. Save.






## Search for or filter dashboards

1. Go to  **Dashboard** > **Dashboard Library** and click .
2. Do any of the following:
  - Enter a dashboard name.
  - From the drop-down lists, select a tag, permission level, or shared status.
3. Click **Apply Filters**.


## Copy a dashboard to another organization

You can export a dashboard to your Downloads folder and then import it to another organization.

1. Go to  **Dashboard** > **Dashboard Library** and click  **Export dashboards**.
2. Check the boxes of the dashboards you want to export.
3. Click **Export**. The dashboard files are sent to your Downloads folder.
4. Go to the organization you want to add the exported dashboard in.
5. Click  **Import dashboards**.
6. Drag and drop the dashboard files you want to import and click **Import**. The dashboards are added to your **Dashboard Library**, Other dashboards list.

**Note:** You can also import example dashboards from the Gluware Knowledge Base at <https://support.gluware.com/hc/start>.

## Pause dashboard rotation

- If you enabled a Dashboard carousel in system settings, you can pause and restart rotation by clicking  in the **Dashboard Library**.

## View the properties of a dashboard

- Go to  **Dashboard** > **Dashboard Library**, click  and then click 

## Delete a dashboard

You can delete a dashboard you created. If you have permissions to Moderate Public Dashboards, you can delete any public dashboard.

- Go to  **Dashboard** > **Dashboard Library**, click  and then click .

# Widget gallery

With Gluware, you get a set of generic widget types plus some preconfigured examples such as **The Latest from Gluware** and **Security threats**. The generic widgets are:

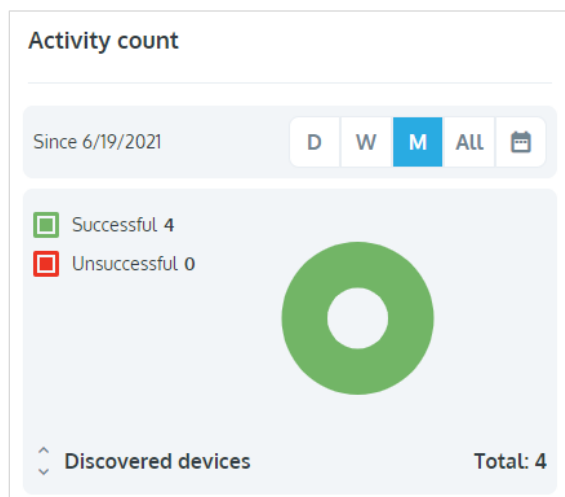
## Activity count widget

Display counts for activities performed on devices over the last day, week, month, or all available. You can also select a specific start date from the calendar.

Set the rate to rotate results when more than one activity selected. Select how often to refresh the results.

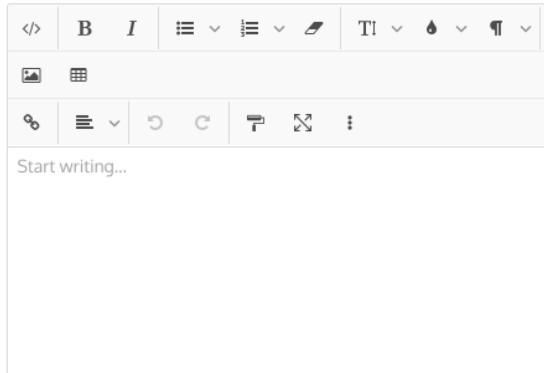
Activities available to display:

- Audited devices
- Captured devices
- Discovered devices
- Provisioned devices
- Upgraded devices



## Bulletin widget

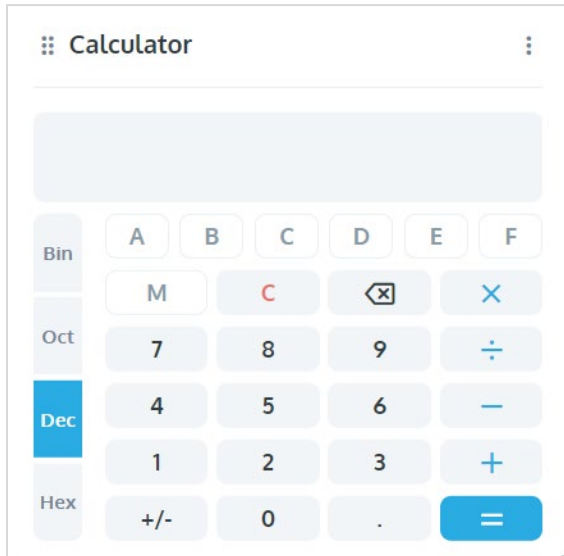
A presentation widget for HTML, rich text, images, and links.



## Calculator widget

Calculate binary, octal, decimal, and hexadecimal values. The keyboard is enabled for entries:

Keyboard entry	Result
Numeric key	Number
<b>Delete</b>	Clears entry
<b>+</b>	Addition operation
<b>-</b>	Subtraction operation
<b>*</b>	Multiplication operation
<b>/</b>	Division operation
<b>Ctrl + M</b> <b>Cmd + M</b>	Clears memory
<b>Ctrl + R</b> <b>Cmd + R</b>	Restores from memory
<b>Ctrl + C</b> <b>Cmd + C</b>	Copies
<b>Ctrl + V</b> <b>Cmd + V</b>	Pastes
<b>F9</b>	Changes sign of the value

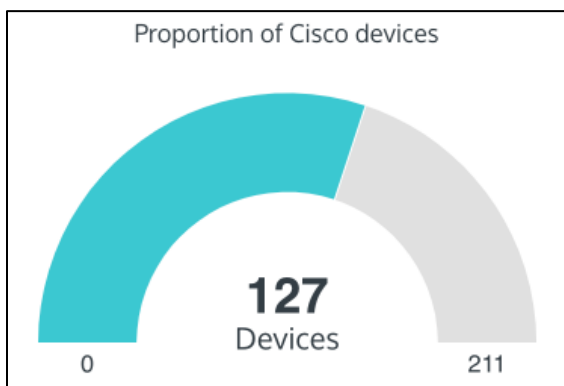


## Count widget

The number of the selected data in the current organization with optional filtering. The count or a gauge chart can be displayed.

Data available to display:

- Audit policies
- Devices
- Files
- OS plans
- Schedules

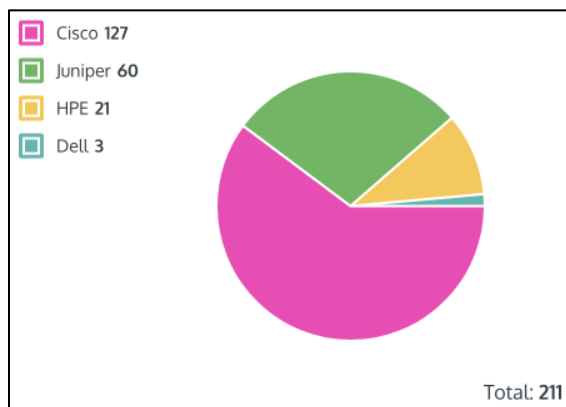


## Dataset chart widget

A doughnut or pie chart of the selected property with optional filtering. If the groups of properties exceed the **Number of items** you select, the remainder are represented in an "Other" category.

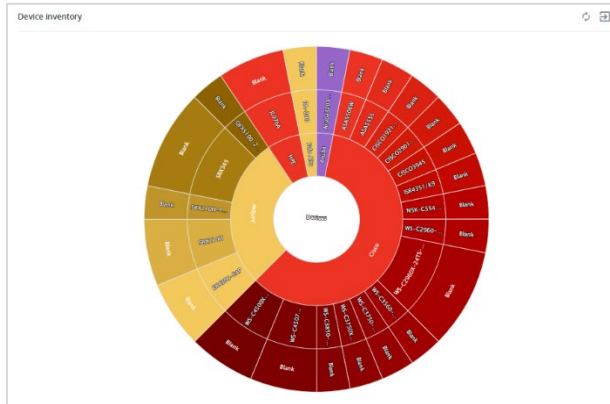
Data available to display:

- Audit policies
- Devices
- File servers
- Files
- OS plans
- Schedules



## Device inventory widget

A starburst chart of device inventory properties, such as OS and Access Status, with optional filtering. Select up to three properties to include and how often to refresh the chart. Click on a segment to zoom in on the detail. Click in the center of the starburst to go back.



## Grid widget

A simple data grid of the selected items with optional filtering.

You can double-click a row in the grid and go to that item in the Gluware Solution. For example, click on a device in the widget and go to that device in Device Manager. Any filtering applied in the widget is also applied in the Gluware Solution.

Data available to display:

- Audit policies
- Devices in Device Manager, Config Drift & Audit, or OS Manager
- File servers
- Files
- OS plans
- Schedules

Type	Name	IP Address	Vendor
	CSR	10.255.150.101	Cisco
	BIG-IP Virtual Edition	10.255.150.102	F5
	VM100	10.255.150.103	Palo Alto
	vEOS	10.255.150.105	Arista
	Gateway	10.255.150.106	Check Point
	Wireless Controller	10.255.150.107	Cisco
	vThunder	10.255.150.109	A10
	ASAv	10.255.150.112	Cisco

## IPv4 subnet calculator widget

Calculate the subnet network using IP address, subnet mask, subnet bits, mask bits, maximum required IP subnets, and maximum required hosts per subnet.

**IPv4 subnet calculator**

---

IP Address  
10.0.0.1

Subnet Mask  
255.0.0.0

Subnet Bits  
8

Mask Bits  
8

Maximum Subnets  
256

Hosts per Subnet  
16777214

Wildcard Mask  
0.255.255.255

Host Address Range  
10.0.0.1 - 10.255.255.254



## License summary widget

Total number of licenses, number of licenses currently in use, license expiration dates, and the Gluware Solutions that are licensed:

CDA - Config Drift and Audit

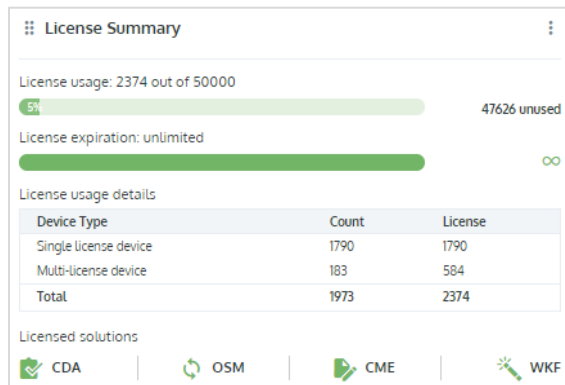
OSM - OS Manager

CME - Config Model Editor

RPA - Network RPA

TOP - Topology

WKF - Workflows



## RSS feed widget

One to five RSS URLs and links to open articles. Select how often to refresh the feeds and how many feeds you want per URL.

**Citrix: The Always-On Network – Simplifying for Success, Episode 2**  
Businesses are moving to the cloud for a myriad of reasons. From the ability to manage multiple  
Source: Gluware, Published: Nov 11, 2020

**Packet Pushers Tech Bytes: First Bank's Automation With Gluware. The Real Story.**  
with Greg Ferro, Co-founder, Packet Pushers Interactive In this Tech Byte, we talk with  
Source: Gluware, Published: Nov 3, 2020

**Creating Digital Transformation Through Network Automation**  
by Jeff Gray, Gluware CEO and Co-founder Enterprises are racing to adopt EVPN-VXLAN to  
Source: Gluware, Published: Oct 16, 2020

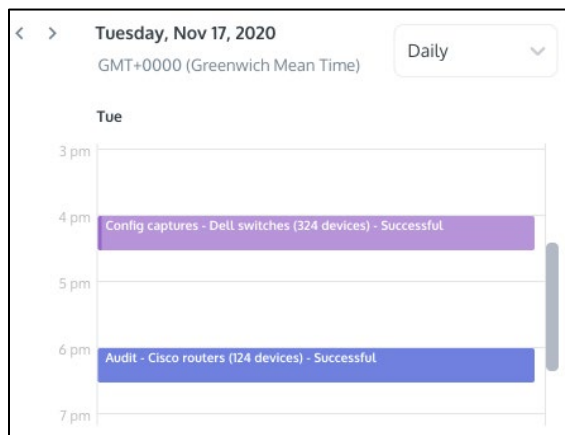
## Scheduled activities widget

Upcoming and running scheduled events in list or calendar view. Select a Daily, Weekly, or Monthly schedule.

Scheduled activities available to display:

- All
- Audit
- Capture
- Cisco API
- OS Plan Provisioning
- Reboot
- Data Retention

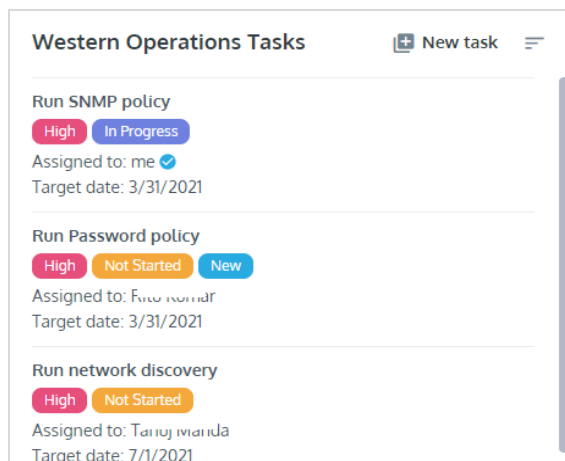
You can only have three scheduled activities widgets on a dashboard.



## Task list widget







Add tasks for team members, and assign task status, priority, and target completion date. Create a task list to display all tasks or only those assigned to a specific team member. Create a separate task list widget for each team member if you choose.

When the widget is published, you can sort the task list and click to update task status. You can only see tasks you created or are assigned to you.



## User activity widget

Up to 10 active Gluware users for the selected organization with optional filtering by role.

	<b>Sam Phillips</b> System Admin <small>Online</small> Solution used: Device Manager	
	<b>Nigel Davis</b> Operations Admin <small>Last connected: 30 minutes ago</small> Solution used: My Dashboards	
	<b>Monica Green</b> System Developer <small>Last connected: 35 minutes ago</small> Solution used: Data Export	

## Web page widget

The contents of an external web page. Select how often to refresh the page. The web page must support iFrames. You'll see "connection refused" if it does not.








The screenshot shows a Gluware web page with a search icon and a menu icon in the top right. The main content features a world map with network connections and the text: "Transforming Network Automation" in yellow, and "Make the shift to agility, security and business continuity" in white. The background shows a person looking at computer monitors.

# Manage dashboard widgets




Add a widget to a dashboard and configure it to show the data and activity you want to monitor. You can also add pre-configured widgets: Cisco RSS feeds, etc.

## Add a widget to a dashboard

1. On a running dashboard, click .
2. Click  **Add widget** if the side panel is not displayed.
3. Click  to drag and drop any widget from the side panel onto your dashboard. Or click on the widget's name and then click **Add Widget**.
4. Click **Configure**. Or click  and then click .
5. Select what you want the widget to display and then click **Save**.
6. Click **Publish** to save the changes to the running dashboard.

**Note:** You can also add a widget by cloning an existing one. Click  on the widget you want to clone and then click .

## Change the data displayed in a widget

1. On a running dashboard, click .
2. On the widget you want to change, click  and then click .
3. Make your changes and save.

## Go to a Gluware Solution from a widget


You can jump from a widget to the Gluware Solution from which the widget data is drawn. For example, if a widget displays the discovered status of devices in Device Manager, you can jump from the widget to Device Manager.

If the widget has a filter applied, that same filter is applied in the Gluware Solution.

You can also jump from a web page widget to that page if your Gluware system has external access.

- On the widget, click .

## Search for or filter widgets

- On the side panel, click . Enter a widget name or select a tag and click **Apply Filters**.

# Manage your device inventory

Gluware **Device Manager** makes it easy to import your inventory of devices, use network discovery, and add new devices ad hoc. Once your inventory is imported, Gluware can capture connection, hardware, and software details for the devices. You can also view Cisco EoX Bulletins, PSIRT Advisories, and SmartNet contract details in Device Manager.

[Device Manager quick reference](#)

[Import a list of devices](#)

[Add devices using network discovery](#)

[Add individual devices](#)

[Find and select specific devices](#)

[Run an ad hoc query](#)

[Discover the hardware and software details of a device](#)

[View the device log](#)

[View a device configuration](#)

[Change device details](#)

[Assign a device to a zone](#)

[View a device configuration](#)

[Run an ad hoc query](#)

[View the past activities performed on a device](#)

[Monitor configuration changes](#)

[View Cisco EoX Bulletins, PSIRT Advisories, and SmartNet contract details](#)

[View NIST NVD Advisories](#)

[Export a list of devices from Device Manager](#)

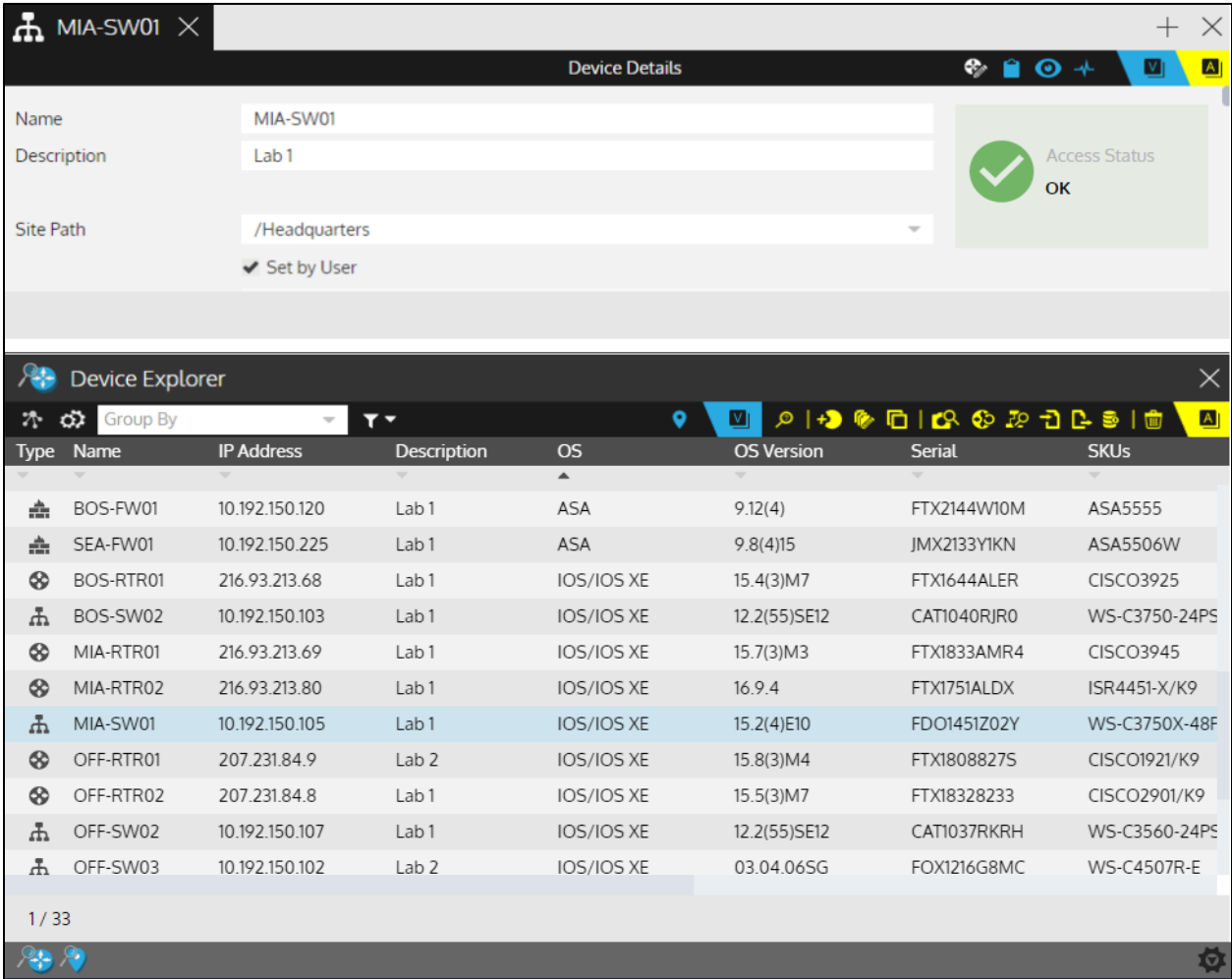
[Delete devices from Gluware](#)

[Reboot a device](#)





For an example of managing your device inventory, see [Example: Importing and managing your inventory](#).












# Device Manager quick reference











## Actions


-  Discover Devices - Discover the hardware and software details for the selected network devices
-  Reboot Devices - Reboot the selected devices
-  Update Support Data - Get Cisco EoX, PSIRT, SmartNet details, and NIST NVD advisories
-  Add Device - Add a new network device

-  Edit Devices - Edit the device information
-  Clone Device - Clone the device details of an existing device to a new device
-  Ad Hoc Query - Search for a specific string in a device's configuration
-  Import Devices or Sites - Import a list of network devices or sites
-  Network Discovery - Add devices using network discovery
-  Export Devices - Export inventory details for all devices in the Device Explorer
-  Run Report - Run a Data Explorer report on demand or on a schedule
-  Delete Devices - Delete selected devices and all associated configuration details
-  Go To Site - Open the Topology Solution and display the device and its network connections






## Views

-  Details - View device details
-  Audit Summary - View the Audit Summary
-  EoX Bulletin - View Cisco EoX Bulletin
-  Advisory Summary - View Advisory Summary
-  SmartNet Details - View Cisco SmartNet contract details
-  Configurations - View the most recent configuration captured for the device
-  Details - Display the network discovery plan details




 Results - Display the network discovery results

 Activities - View all previous device actions and associated logs. View all the network discovery plans run in the organization

## Access Status






-  OK - All is well
-  Invalid Credentials - Device has a credential issue
-  Undiscoverable - Device can't be identified
-  Unknown - Connection not yet attempted
-  Unreachable - Device is offline or unreachable

## Configurations

-  - Configuration from discovery
-  - Configuration from a Config Drift snapshot
-  - Configuration from a Config Drift snapshot and is the default configuration

# Example: Importing and managing your inventory

Importing your device inventory is easy using the template Gluware provides.

1. Ensure you're in the organization that you want to add devices to.
2. Go to Gluware  **Device Manager** and click .
3. Click **Download CSV Template** to get a template.
4. Add your device inventory to the template.
  - Column headings are required.
  - The **Name** column is required information.
  - Columns marked with \*\* are recommended information. **IP Address, Username, Password** are required if you want to discover the device configuration using Gluware.
  - In the **Manage** column, select **Managed** if you want to model the configuration or use Gluware to upgrade the OS.
5. Drag and drop the CSV file into **Device Manager** and click **OK**.
6. Use **Ctrl+A**/ **+A** to select all the devices.
7. Click . Gluware discovers the hardware and software details for the selected devices and the status will change in the **Discovered Status** column.
8. Double-click a device and then click  to view a log to aid in troubleshooting.

# Import a list of devices to Device Manager

Gluware provides a comma-separated values (CSV) template in **Device Manager** that contains the format for importing your list of devices. If any device already exists in Device Manager, the import will update the device details.

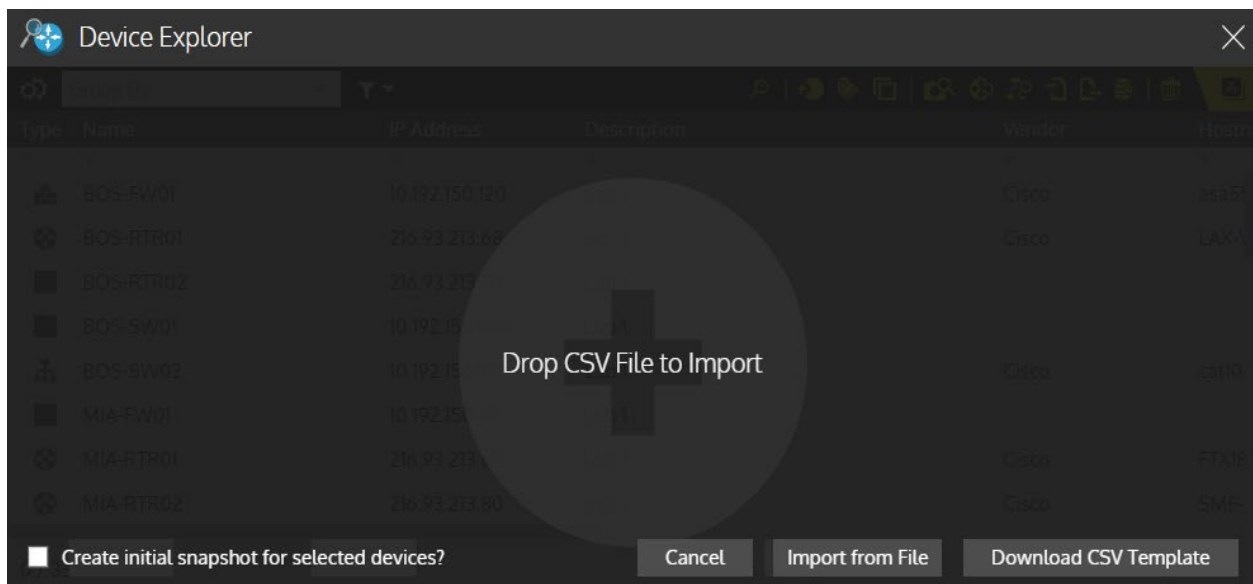
## Notes:

- You'll need to establish device credentials, including any enable mode password key and proxy credentials, in **Settings** before importing the device list.
- If you are updating devices and include a column in the CSV file that you leave empty, the field will be cleared.
- If your organization uses customized roles, it's possible to import devices that you will not later be able to manage. And if your organization uses customized roles with device filters, you may not be able to import some devices.
- Any custom fields defined for the organization will be included.
- Importing Cisco Meraki controller details is not supported.
- [GluAPI](#) supports all device management functions.

Column headings must match the column headings in the Device Manager grid. Only the device name is required for import, but connection details (Connection Method, IP address, and credential) are required if you want to discover the device configuration using Gluware.

1. Go to Gluware  **Device Manager** and click .
2. Click **Download CSV Template** to get a template.
3. Add your device inventory to the template.
  - Column headings are required.
  - The **Name** is required information.

- **Connection Method**, **IP Address**, and **Credential** are required if you want to discover the device configuration using Gluware.
  - In the **Manage** column, select **Managed** if you want to model the configuration or use Gluware to upgrade the OS.
4. Optional: Check the box if you want Gluware to take a configuration snapshot of each device after importing it.
  5. Do one of the following:
    - Drag and drop the CSV file into **Device Manager** and click **OK**.
    - Click **Import from File**, select the template file or the files you want to import, and then click **Open**.



# Add devices using network discovery

You can add devices to **Device Manager** by specifying a starting device and allowing Gluware to discover devices using any combination of the ARP, LLDP, and CDP protocols. A unique device is identified by its serial number and SKU.

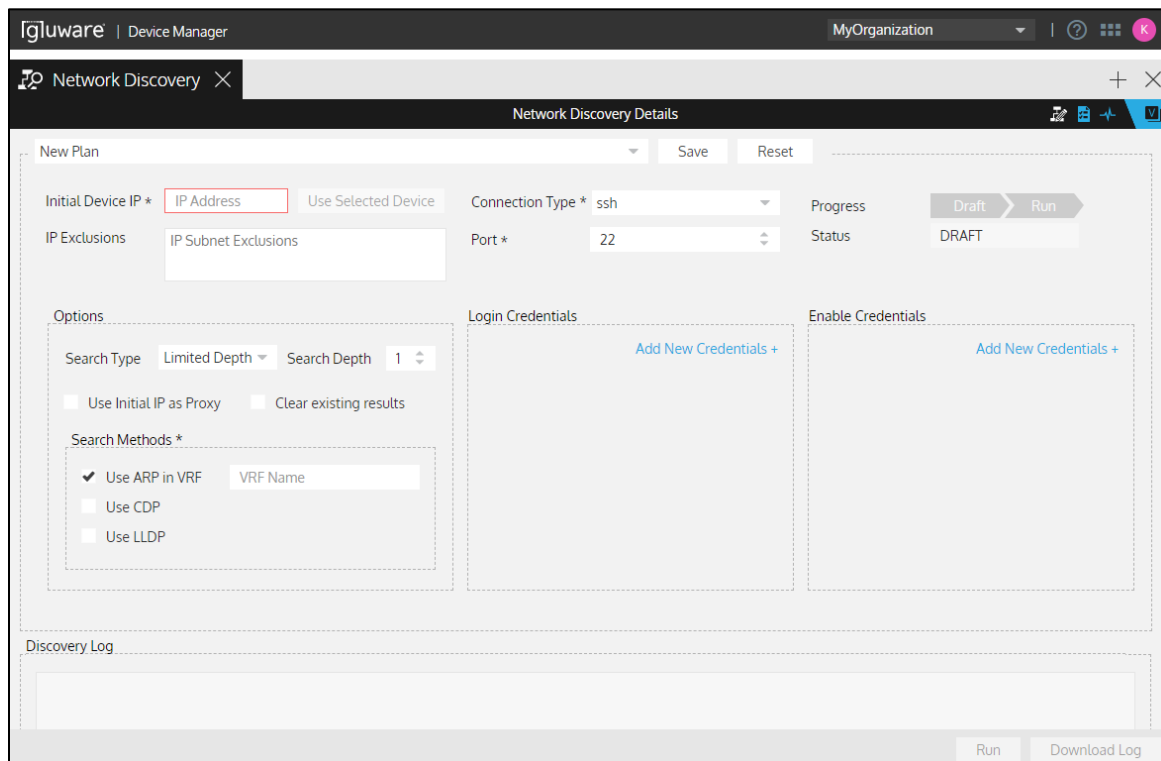
You can re-run network discovery periodically to discover new devices and import them to **Device Manager**.

Watch a video demonstration of network discovery at [https://www.youtube.com/watch?v=Dbaxmb\\_kSEg](https://www.youtube.com/watch?v=Dbaxmb_kSEg).


You can also start network discovery from the device selected in **Topology**.

**Note:** The starting device must have a CLI connection.

1. Go to  **Device Manager** > **Devices** and click .



The screenshot displays the 'Network Discovery Details' configuration page in the Gluware Device Manager. At the top, there are 'Save' and 'Reset' buttons. The 'New Plan' section includes an 'Initial Device IP \*' field with a dropdown menu set to 'IP Address' and a 'Use Selected Device' checkbox. The 'Connection Type \*' is set to 'ssh' and the 'Port \*' is set to '22'. A 'Progress' indicator shows 'Draft' and 'Run' buttons, and the 'Status' is 'DRAFT'. Below these are three main sections: 'Options' with 'Search Type' set to 'Limited Depth' and 'Search Depth' set to '1', and checkboxes for 'Use Initial IP as Proxy' and 'Clear existing results'; 'Login Credentials' with an 'Add New Credentials +' link; and 'Enable Credentials' with another 'Add New Credentials +' link. The 'Search Methods \*' section has a checked checkbox for 'Use ARP in VRF' with a 'VRF Name' input field, and unchecked checkboxes for 'Use CDP' and 'Use LLDP'. At the bottom, a 'Discovery Log' section contains a 'Run' button and a 'Download Log' button.


2. Optional: Select a previously saved plan from the drop-down list.
3. Enter the **IP address** of the device you want to start discovery from. Or select a device in the Device Explorer and click **Use Selected Device**.  indicates that the selected device uses one or more proxies.
4. Optional: To exclude a host or a subnet from discovery, enter an IP address in the **IP Exclusions** field. Example acceptable formats are 10.4.128.3 and 10.4.128.0/27. Enter one IP address per line in the field.
5. Select the **Connection Type** from the drop-down list.
6. Ensure the **Port** is correct for your connection.
7. Select the **Search Type** from the drop-down list:
  - **Limited Depth** - Discovery will be limited to the number of devices distant from the starting device that you specify as the **Search Depth**. This option can help limit the time it will take to search the network.
  - **Exhaustive** - Every device will be explored until no other unique device can be found.
8. Check the **Use Initial IP as Proxy** box if Gluware should proxy via this device during discovery. If this device was selected from your existing inventory and already uses a proxy, then this device will act as a double proxy connection during discovery.
9. Optional: Check the **Clear existing results** box to clear the results of the last network discovery.
10. Check the boxes of the Search Methods to employ. One method is required:
  - **Use ARP** - Collect data from the devices' ARP table. Enter a **VRF name** if Gluware should collect data from the VRF only. If you don't enter a VRF name, Gluware will collect data from the default ARP table only.
  - **Use CDP** - Collect data from the devices' CDP table.
  - **Use LLDP** - Collect data from the devices' LLDP table.
11. Select at least one **Credential** to access the devices. Click **Add Credential+** to add additional credentials.
12. Click **Add Credential+** to add additional **Enable Mode Credential**, if applicable.

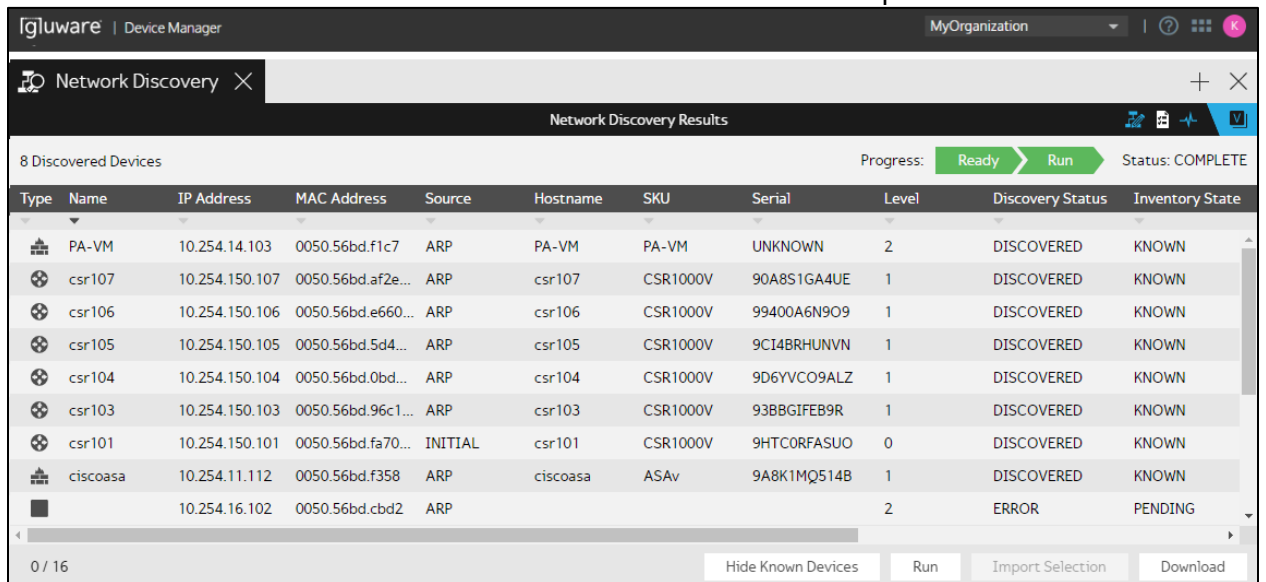


13. Do any of the following:

- Click **Save**, enter the name for the plan, and click **Save**.
- Click **Run**. Progress is displayed in the log and the status is displayed at the top of the tab.

## After running a plan:

1. Optional: Click **Download Log** to send the discovery log to your Downloads folder.
2. Click . The devices discovered and the status is reported.



Type	Name	IP Address	MAC Address	Source	Hostname	SKU	Serial	Level	Discovery Status	Inventory State
PA-VM	PA-VM	10.254.14.103	0050.56bd.f1c7	ARP	PA-VM	PA-VM	UNKNOWN	2	DISCOVERED	KNOWN
csr107	csr107	10.254.150.107	0050.56bd.af2e...	ARP	csr107	CSR1000V	90A8S1GA4UE	1	DISCOVERED	KNOWN
csr106	csr106	10.254.150.106	0050.56bd.e660...	ARP	csr106	CSR1000V	99400A6N9O9	1	DISCOVERED	KNOWN
csr105	csr105	10.254.150.105	0050.56bd.5d4...	ARP	csr105	CSR1000V	9CI4BRHUNVN	1	DISCOVERED	KNOWN
csr104	csr104	10.254.150.104	0050.56bd.0bd...	ARP	csr104	CSR1000V	9D6YVCO9ALZ	1	DISCOVERED	KNOWN
csr103	csr103	10.254.150.103	0050.56bd.96c1...	ARP	csr103	CSR1000V	93BBGIFEB9R	1	DISCOVERED	KNOWN
csr101	csr101	10.254.150.101	0050.56bd.fa70...	INITIAL	csr101	CSR1000V	9HTCORFASUO	0	DISCOVERED	KNOWN
ciscoasa	ciscoasa	10.254.11.112	0050.56bd.f358	ARP	ciscoasa	ASAv	9A8K1MQ514B	1	DISCOVERED	KNOWN
		10.254.16.102	0050.56bd.cbd2	ARP				2	ERROR	PENDING

**Discovery Status:** The status of the network discovery process.

- **DISCOVERING** - Network discovery is in process.
- **DISCOVERED** - Network discovery has found complete details about the device.
- **UNREACHABLE** - The device is listed in the MAC table, but Gluware was not able to connect to the device.
- **AUTH FAILURE** - Invalid credentials prevent Gluware from connecting to the device.
- **ERROR** - There was a problem with the network discovery process. Double-click to check the device log for details.



**Inventory State:** The status of the device in your existing inventory.


- **PENDING** - The device was found in the ARP table but discovery is not yet completed. Or there was a problem during network discovery.
  - **NEW** - The device is not in your existing inventory.
  - **IMPORTING** - The device is being imported to your inventory.
  - **ERROR** - There was a problem importing the device to your inventory.
  - **KNOWN** - The device is already in your inventory. If the device details found don't match your existing inventory, for example the OS version is different, your device inventory will be updated.
3. Optional: Click **Hide Known Devices** to display only devices that are new to your **Device Manager** inventory. **Show Known Devices** displays all devices discovered, including those already in your inventory.
  4. Optional: Click **Download** to send the list of devices to your Downloads folder. If you have hidden known devices, they are not included in the download.
  5. Select the devices you want to import.
  6. Optional: Check the box if you want Gluware to take a snapshot of each device after importing it.
  7. Click **Import Selection**.
  8. Click **Confirm**. The selected devices are imported to **Device Manager** and the discovered hardware and software details are included.

**Note:** If your organization uses customized roles with device filters, you may not be able to import some devices.

## Add individual devices

You can add new devices to your inventory, one at a time. Only the device name is required, but connection details (IP Address, Credential, and Connection Method) are required if you want to discover the device configuration using Gluware.

1. Go to Gluware  **Device Manager** > **Devices** and click .
2. Enter a name for the device and click **Create**.
3. Add a description.
4. Provide the configuration details for the device: **IP Address**, **Credential**, **Enable Mode Credential** (if required), **Connection Type**, and **Port**. Click **Add Proxy+** to add a proxy and its connection details if applicable. For Cisco Meraki devices, provide the **API version** and **X-Cisco-Meraki-API-Key** credential.
5. Enter additional properties for the device. *Refer to the "Device fields" topic on online Help for information about each field.*
6. Enter any custom field information. Custom fields are set up in **Settings** and are unique to an organization. Region, Department, and Restricted are examples of custom fields.
7. Save.



**Notes:** You can also add a device by cloning an existing device. Simply select a device and click .

If your organization restricts the devices users can manage, it's possible to add devices that you will not later be able to manage. Once devices are discovered, devices may appear or disappear from your device list.

## Assign a device to a zone




Each device can be assigned to a zone that has a dedicated **Gluware Zone Engine** to make processing times faster. All jobs on the device will be run on the Zone Engine in that zone when that engine status is **ACTIVE**. If the Zone Engine is **OFFLINE** or **DISABLED**, the device's jobs will run on any other **ACTIVE** Zone Engine.

You can lock the device to only run on the engines in a zone. If locked, the device's jobs will not run if the zone's engines are **OFFLINE** or **DISABLED**.

1. Go to  **Device Manager** > **Devices**.
2. In the **Device Explorer**, select the device or devices and click .
3. Select a **Zone** from the drop-down list.
4. Optional: Check the **Lock** box if you want to restrict the device's jobs only to the Gluware Zone Engine in the assigned zone.
5. Save.

## Associate a device with a File Server

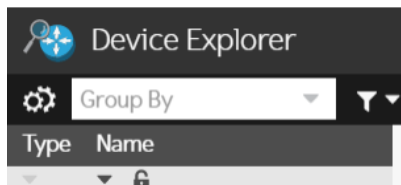
If you use **OS Manager** to upgrade your devices, the **File Server** that stores the device's upgrade files must be specified.




1. Go to  **OS Manager** > **Devices** or  **Device Manager** > **Devices**.
2. In the **Device Explorer**, select the device or devices and click .
3. Select a **File Server** from the drop-down list.
4. Save.

# Find and select specific devices


Watch a demo of using the **Device Explorer** at <https://youtu.be/3SKREKWxLX4>.

## Rearrange the display of devices



- Click  and select the columns you want to see in the **Device Explorer** list.
- Drag and drop a column to re-order it.
- Reverse the sort order of the column by clicking  under the column title.
- Click  to lock the column at the beginning of the row.
- Select an attribute from the **Group By** drop-down list to group like devices. Expand and collapse the groups to show or hide devices.

## Find specific devices

- Click  and type your search term. Check the **RegEx** box if you want to use a regular expression. Need help with regex? Go to <http://regex101.com/>



- Click the ▼ next to ▼ for advanced search capabilities.
  - Select a column or snapshot type from the drop-down list, select a condition from the drop-down list, and then enter a search term or string. The search term or string can contain spaces.

**Notes:** You'll need to run discovery on each device before using this advanced filter for the first time. And if you select **Latest Snapshot**, you'll need to have taken a snapshot of each device.

- Click **Add rule** and click **AND** or **OR** to add a logical operator.
- Click **Add group** to add nested rules.
- Click **Apply** to implement the search.







- To clear an advanced filter, click **Reset** and then click **Apply**.
- See also "Run an ad hoc query."

## Select devices

Click, **Shift+click**, **Ctrl+click**/**⌘+click**, or **Ctrl+A**/**⌘+A** to select rows.

# Run an ad hoc query

To find devices that contain a specific search string and then inspect the devices' configurations that contain that string, run an ad hoc query.

1. Go to  **Device Manager** > **Devices**,  **Config Drift and Audit** > **Devices**, or  **OS Manager** > **Devices**.
2. Select one or more devices in the **Device Explorer**.
3. Click .
4. Optional: Select a previously saved query from the drop-down list or the results from the last run query. The devices that were used in that query are listed.
5. Select the source of the query from the drop-down list:
  - **Default Config Snapshot** - Searches within the default snapshot's configuration.
  - **Device** - Connects to the device.
  - **Latest Config Snapshot** - Searches within the most recent config snapshot's configuration.
  - **Latest Operational Snapshot** - Searches within the most recent operational snapshot's configuration.
6. Select a filter:
  - **All (Full Snapshot)** - Searches the entire configuration.
  - **By Command Set** - Searches using a command set. Select the **Command Set** to use from the drop-down list and then select a **Command Result**.
  - **By Section** - Searches results of the **Concept Item** or **RSI** (REST Sync Item).
  - **By Show Command** - Enter a list of show commands to be executed on the device.



7. Select a **Command Result**:

- If you selected **By Command Set** as the filter, select the command set.
- If you selected **By Section** as the filter, select a **Concept Item** or **RSI** (REST Sync Item).

**NOTE:** If your source is a snapshot and you select a **Concept Item**, a command, for example, a `show` command, is displayed. The command cannot be run on a snapshot; however, the **Concept Item** will extract the same configuration lines that the command would produce.


If the devices to be queried have several operating systems, create a rule for each OS and select the appropriate **Concept Item**.

8. Enter the regex search string for the **Query**.

Need help with regex? Go to <http://regex101.com/>

9. Click **Run Query**. The **Match Count** shows the number of devices that matched the query.

10. Optional: Do any of the following:

- Click **Hide Unmatched** to hide devices in the returned list that do not match the query. Click **Show Unmatched** to return the hidden devices to the returned list.
- Click **Remove Unmatched** to delete devices from the returned list that do not match the query.
- Click **Select Matched** to select the devices that conform to the query.
- Double-click  to view the device configuration with the search string highlighted.
- Click **Download** to send a ZIP folder to your Downloads folder that includes the results of the query for the devices selected. If no devices are selected, includes results for all devices queried.
- Click **Edit Targets** to modify the device list searched. Click **Add**, **Remove**, or **Remove All** to refine the list of devices to search. Then click **Save** and **Back**.

- Click **Save**, enter the name for the query, and click **Save**.

The screenshot shows the 'Ad Hoc Query' window. At the top, there is a 'New Query' dropdown menu, a 'Save' button, and a 'Reset' button. Below this, there are three dropdown menus: 'Source' set to 'Latest Config Snapshot', 'Filter' set to 'All', and 'Section' set to 'Any'. A 'Query' input field contains 'Regular Expression'. Below the form is a table with the following data:

Type	Name	Description	IP Address	Vendor	Serial	Match Count	Query Status
🔗	Cisco_C8300-1N1S-6T_FLM2633...		10.150.1.2	Cisco	FLM2633116G	N/A	?
👤	Cisco_C9200L-24P-4G-E_JAE22...		10.150.1.41	Cisco	JAE2250061X	N/A	?
👤	Cisco_C9300-24T-E_FJC2311E037		10.150.1.42	Cisco	FJC2311E037	N/A	?

At the bottom of the table, there is a status bar showing '0 / 104' and several action buttons: 'Hide Unmatched', 'Remove Unmatched', 'Select Matched', 'Edit Targets', 'Download', and 'Run Query'.

# Discover the hardware and software details of a device

Gluware **Device Manager** uses the connection details for a device to interrogate that device and discover the hardware and software details.

There are three discovery levels. The higher the number, the more device details are collected.



- 1 - Basic: Basic device details
- 2 - Port: Basic device details plus port details
- 3 - Neighbor: Basic device details plus port and the neighbor details required for Topology.

If you have a Topology license, set the **Discovery Level** to 3. Levels 1 and 2 don't provide sufficient information for Topology.


## Set the discovery level

You can set the discovery level at the root site and it will be inherited by all child site's devices. You can also set the discovery level on each device.

### Set the discovery level for all the devices in a site


1. Go to  **Device Manager** > **Sites**.
2. If **Discovery Level** is set to inherit from the parent site's settings, click .
3. Select the discovery level from the drop-down list.
4. Click **Save**.
5. Click **OK**.

### Set the discovery level for a device

1. Go to  **Device Manager** > **Devices** and select one or more devices.
2. If **Discovery Level** is set to inherit from the site's settings, click .


3. Select the discovery level from the drop-down list.
4. Click **Save**.
5. Click **OK**.

## Run discovery



1. Go to  **Device Manager** > **Devices** and select one or more devices.

### Notes:

- External access to <https://api.meraki.com> is required to discover Cisco Meraki controllers and devices.
- The system IP addresses of vManage controlled devices must be accessible directly or via proxy.
- Downloading the discovery log for Cisco Meraki and ACI devices may take several minutes.
- Selecting a controlled device discovers all the controlled devices in the same organization and network.
- After initial discovery, for controllers and controlled devices in hybrid mode:
  - When only the controller is selected, discovery will identify any new hybrid controlled devices.
  - When only hybrid controlled devices are selected, discovery is run only on the selected devices.
  - When the controller and hybrid controlled devices are selected, discovery is run on the controller and the selected devices.
  - When the controller no longer includes the hybrid controlled device in its list of controlled devices, the device is disassociated from the controller. The device remains in inventory.

2. Click . Gluware discovers the hardware and software details for the selected devices and the status will change in the **Discovered**




**Status** column. A snapshot of the configuration is saved and can be used to detect drift. You can view the snapshot in **Config Drift**.

3. Double-click a device and then click  to view a log to aid in troubleshooting.
4. If discovery failed, click  to see the error messages.

# View the device log

When you discover a device's hardware and software details, a log is created.



**Note:** Logs for controlled devices are found in the controller's logs.

1. Go to  **Device Manager** > **Devices** and double-click a device.
2. Click .
3. View the log:
  - Point to  to quickly skim the log.
  - Double-click on the row to see the log in detail.


**Note:** Any errors appear in red. Common errors include incorrect or missing device credentials (e.g. password, serial number) indicating you're not connected to the device.

4. Optional: Click **Download** to send the log to your Downloads folder.
5. Click **Back** to return to the activity summary.

## Tips for reviewing the log

- When you see an error or warning, you may need to inspect the lines above it to determine the cause.
- Click  to pause scrolling.
- Click **Show Settings** to:
  - **Search for a text string** - Enter the text string and click **Enter**. Check the **Case-Sensitive** box to make the search case-sensitive. Clear the box to ignore case. Click > and < to see the occurrences found.
  - **Change the line label** - Select a line label from the  drop-down list. Select from:
    - Log Event #
    - Line Number
    - Timestamp

Time Passed  
Event Duration

- **Filter the log** - Click . Check or clear the boxes to display just the levels you want. All levels are displayed by default.
- **See the source code file and line number that produced the log line** - Point to a line.



Log Levels	Description
<b>Error</b>	<b>A problem that must be fixed</b>
<b>Warning</b>	<b>A problem that did not stop the process but should be fixed</b>
<b>Task</b>	<b>The beginning or the end of a step</b>
<b>Checkpoint</b>	<b>A significant point in the code</b>
<b>Info</b>	General info about the process that does not fit in the other logging categories
<b>Response</b>	<b>The raw interaction between the Gluware engine and the device</b>
<b>Debug</b>	Low-level informational log messages usually related to the internal state of code variables. It's specific to how the code is working, as opposed to how the process is proceeding

# Change device details

You can make changes to a single device or make the same change to multiple devices.



**Note:** Not all properties of controlled devices can be changed; for example, Name changes for Cisco Meraki controlled devices must be made in the Meraki dashboard.

## Change one device

1. Go to Gluware  **Device Manager** > **Devices** and select a device.
2. Click .
3. Make changes to the device info in the top of the screen. Some fields are read-only.
4. Save.

## Make the same change to more than one device

**Note:** When using Multi-Edit, be sure to select the connection type if it's not already selected.

1. Go to Gluware  **Device Manager** > **Devices** and select the devices you want to change.
2. Click . A Device Multi-Edit tab opens in the top panel. Click **View All** to see the list of devices you are editing.
3. Click a radio button next to the field and make changes. Some changes are restricted since they would apply to multiple devices.
4. Save.



Multi-Edit (8) ×

Device Multi-Edit

Description  ≠ Description View All

Site Path  /

Allow Site Auto Assignment

Management State  Managed

Environment  Production/Test

Connection Method

CLI connection

Credential  This is a required field.

Enable Mode Credential






Connection Type

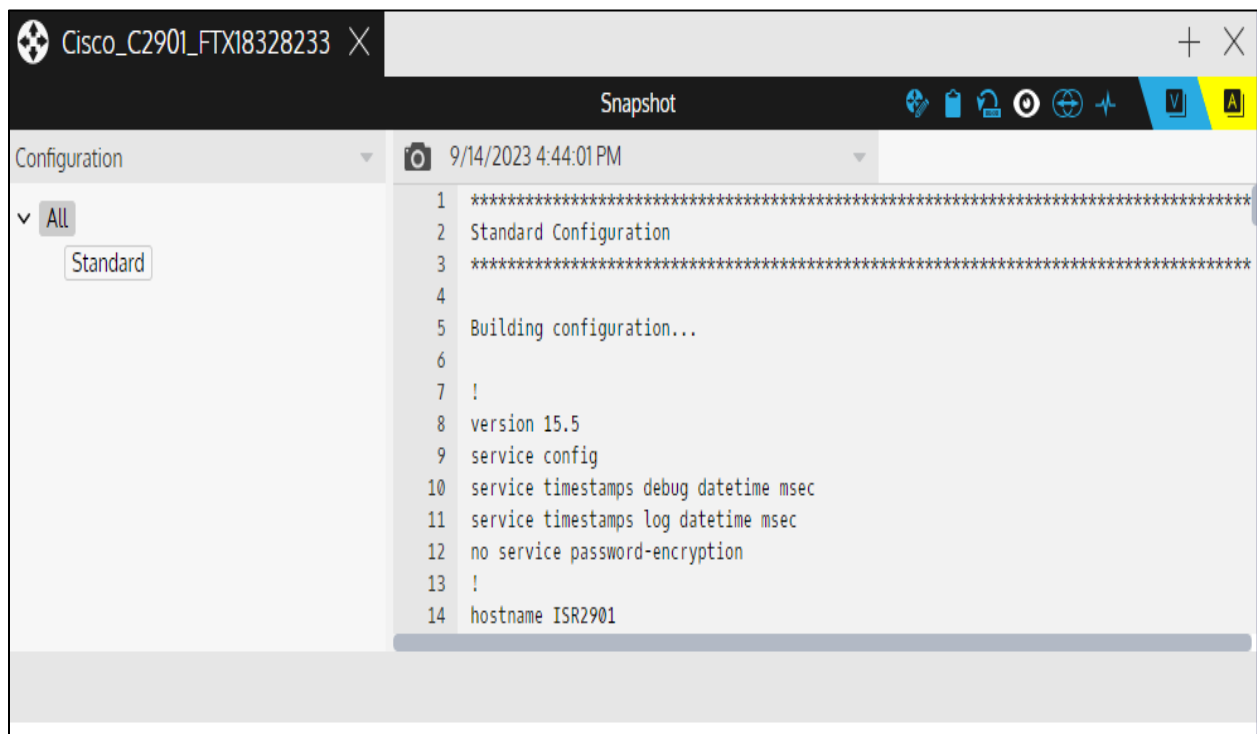
ssh

Port 22

# View a device configuration



Once you have discovered the hardware and software details using **Device Manager**, you can view the last captured configuration of a device.

1. Go to Gluware  **Device Manager** > **Devices** and double-click a device to display the device details in the upper panel.
2. Click . In the upper left,
  -  means the configuration is from discovery
  -  means the configuration is from a Config Drift snapshot
  -  means the configuration is from a Config Drift snapshot and is the default configuration
3. For Cisco Meraki devices, click **Text** to display the configuration in dot notation. Click **JSON** to display the configuration in JSON.
4. Optional: Click **Download** to save the configuration to a file.



# View the past activities performed on a device

You can view a list of the actions taken in Gluware for any device.




1. Go to  **Device Manager** > **Devices**.
2. Select a device in the **Device Explorer**.
3. Click  to view **Activities** related to the device.
4. If there are errors, view the log.

# View Cisco EoX Bulletins, PSIRT Advisories, and SmartNet contract details






When enabled in system settings, **Device Manager** can display Cisco Bulletins, Security Advisory counts, and SmartNet contract details. Updates can be retrieved manually or can be scheduled.

**Note:** You must have discovered the hardware and software details on your Cisco devices to view the latest Cisco support info. Limited information is available for Cisco Meraki devices.

## Retrieve the latest Cisco support info

1. Go to Gluware  **Device Manager** > **Devices**.
2. If not already displayed, click  to add the following columns to the **Device Explorer**:
  - Critical Advisories**
  - High Advisories**
  - Medium Advisories**
  - EOX Bulletin**
  - Contract**
  - Contract End**
  - End of Sale**
  - End of Maintenance**
  - End of Support**
  - Product ID**
3. Select one or more Cisco devices.
4. Click  and **Confirm**.




## View the latest Cisco support info for a device

1. Go to Gluware  **Device Manager** > **Devices**.
2. Double-click a Cisco device.
3. Click  to view an EoX Bulletin.  
Click  and then click  to view an Advisory Summary.  
Click  to view SmartNet Details.
4. Click **Download** to save the information to a CSV file.




# View NIST NVD Advisories

When enabled in Settings, **Device Manager** can display NIST NVD Advisories. Updates can be retrieved as needed or can be scheduled.

## Retrieve the latest NIST NVD Advisories



1. Go to  **Device Manager** > **Devices**.
2. If not already displayed, click  and select the following columns to add them to the **Device Explorer**:
  - Critical Advisories**
  - High Advisories**
  - Medium Advisories**
3. Select one or more devices.
4. Click  and **Confirm**.

## View the latest NIST NVD Advisories for a device

1. Go to  **Device Manager** > **Devices**.
2. Double-click a device.
3. Click  and then click  to view an Advisory Summary.
4. Click **Download** to save the information.

## Export a list of devices

**Device Manager** allows you to export your device inventory to a CSV file. Any custom fields defined for the organization will be included in the export.

- If you have filtered your device list, only the devices displayed will be exported.
  - If you have created a default report for **Device Manager** in **Data Explorer**, that report will be run and exported.
1. Go to Gluware  **Device Manager** > **Devices** and select one or more devices.
  2. Click . This exports the list as a CSV file to your Downloads folder.

**Note:** You can also export the list of devices using **Data Export**.



## Delete devices from Gluware

When you delete a device, all the related information about the device also gets deleted, including:

- Configuration snapshots
- Device logs
- OS plan results




The device is also removed from any scheduled activities and from any OS plan. And if the device was associated with a **Config Model Editor** node, that node is also deleted.

**Note:** You can delete a controlled device that isn't associated with a controller.

1. Go to Gluware  **Device Manager** > **Devices** and select one or more devices.
2. Click  and click **Confirm**.



## Reboot a device

1. Go to  **Device Manager** > **Devices** or  **OS Manager** > **Devices**.
2. In the **Device Explorer**, select one or more devices.
3. Click .
4. Click **Confirm**.



# Add sites

You can add sites to **Device Manager** and then assign devices to those sites. This allows you to filter devices by site. You can also create custom roles to manage only the devices assigned to a site.

And with a Gluware **Topology** license you can view a map of your sites and see the status of all devices assigned to each site and the connections between sites. In the Device Explorer (in Device Manager, Config Drift and Audit, OS Manager, and Data Explorer), you can go directly to the site in Topology from any assigned device.

If you have a **Config Model Editor** license and have defined locations in **Config Model Editor**, those locations will be listed as sites at the root level in **Device Manager**. Any sites defined in **Device Manager** will also become **Config Model Editor** Site Locations.



## Add a site

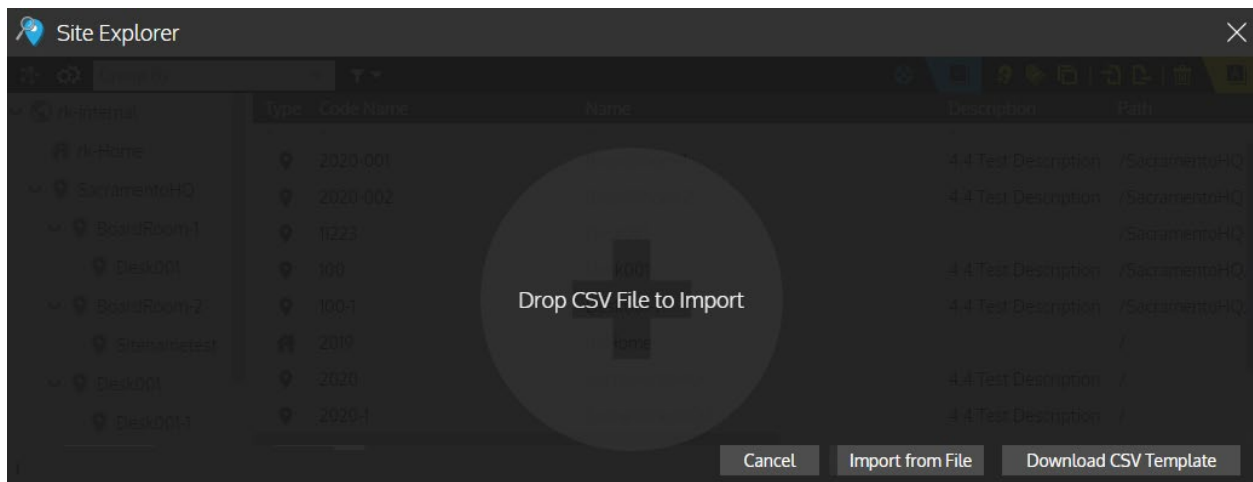
1. Ensure you're in the organization you want to add the site in.
2. Go to  **Device Manager** > **Sites** and click .
3. Select the path for the site. The root, /, is your current organization. Define child sites by selecting the parent site from the **Path** drop-down list.
4. Enter a unique name for the site. For example, `Headquarters` or `Bldg A`. Site names can include uppercase and lowercase letters, numbers, spaces, periods, commas, underscores, dashes, ampersands, at signs, parenthesis, and square brackets. Site names must be unique.
5. Enter a unique code for the site. For example, `HQ01` or `BLDGA`. Site codes can include uppercase letters, 0-9, underscores, dashes, and dots. Site codes must be unique within the organization.
6. Click **Create**.
7. Add additional descriptive site info. See the topic, "Sites fields," in online Help for information on each field.
8. Save.

## Import a list of sites

You can import a list of sites instead of adding them one by one.

If more than one site has the same site name or code, the last site processed updates the earlier entry.

1. Go to  **Device Manager** > **Sites** and click .
2. Click **Download CSV Template** to get a template to add your sites to. The site code for the parent site, site name, and site code are required. Site names and site codes must be unique within the organization.
3. Add your site inventory to the template. The **Administrative Contact** and **Technical Contact** are multi-line fields. Separate lines for these fields in the CSV file using `\n`. For example, "Jane Reddy\n555.123.1234"
4. Do one of the following:
  - Drag and drop the CSV file into **Site Explorer** and click **OK**.
  - Click **Import from File**, select the template file or the files you want to import, and then click **Open**.





When the import is complete, you'll see the number of sites successfully imported and the number of errors. If you import the same sites again, those sites will be represented in the number unchanged.

5. Click **OK**.


# Manage sites

## Assign devices to a site




1. Go to  **Device Manager** > **Devices**.
2. Select one or more devices.
3. Click .
4. For more than one device, click the radio button next to **Site Path**.
5. Select the site you want to assign the device to from the **Site Path** drop-down list.
6. Save.

## Automatically assign devices to a site

You can have devices automatically assigned to a site the next time discovery is run or if its hostname or device name changes.



1. Go to  **Device Manager** > **Sites** and double-click a site.
2. Check the **Enabled** box for **Auto-assign Devices**.
3. Select the property from the drop-down list that you want to base auto-assignment on: **Device name** or **Hostname**.
4. Enter the regex string that modifies the property.
5. Save.
6. Choose whether to make updates now or later, when devices are rediscovered.

## Display devices by sites



1. Go to  **Device Manager** > **Devices**.
2. Click . Only the device assigned to the site and any child sites are displayed.
3. Click on a site name.
4. Click  again to see the complete list of devices in the organization.

## Update a site's properties

### Change one site

1. Go to  **Device Manager** > **Sites** and double-click a site.
2. Click .
3. Make changes to the site info in the **Site Details**. Some fields are read-only. See the topic, "Sites fields," in online Help for information on each field.
4. Save.

### Make the same change to more than one site

1. Go to  **Device Manager** > **Sites** and select the sites you want to update.
2. Click . A Device Multi-Edit view opens. Click **View All** to see the list of sites you are editing.
3. Click a radio button next to a site property and make changes. Some changes are restricted since they would apply to multiple sites. See the topic, "Sites fields," in online Help for information on each field.
4. Save.

## Remove sites

When a site is deleted, it's child sites are deleted, too.

**Note:** You can't delete a site that has devices assigned to it or any child site. Remove the devices from the site and any child site.

1. Go to  **Device Manager** > **Sites** and select one or more sites.
2. Click  and click **Confirm**.

### See also:

Restrict by site the devices a user can manage

# Track device configurations

**Config Drift and Audit** allows you to take snapshots of device configurations and compare subsequent snapshots to a baseline. Config Drift and Audit also allows you to define what CLI are required and forbidden in the device configuration and audit those policies on specific devices.

To use Config Drift and Audit, you'll need a **Config Drift and Audit license** and the **Config Drift package** installed. Only devices that have a **Management State** of **Managed** or **Unmanaged** appear in **Config Drift and Audit**.

[Config Drift and Audit quick reference](#)

[Customize command sets](#)

[Take a snapshot](#)

[Set a default snapshot](#)

[View configuration snapshots](#)

[View the snapshot log](#)

[Compare configuration snapshots](#)

[Set up automatic snapshots](#)

[View the snapshot log](#)

[Create a policy using Config Drift and Audit](#)

[Audit your configuration](#)

[View audit results](#)

[View and edit policy details](#)

[View policy history](#)

[Export a policy](#)

[Import a policy](#)

[Delete a policy](#)

**For examples, see:**

[Example: Checking for configuration changes](#)

[Example: Auditing an SNMP policy](#)

# Config Drift and Audit quick reference

The screenshot displays a configuration comparison window for an Arista DCS-7050SX2-128 switch. It compares two snapshots: one from 4/4/2023 9:08:16 AM and another from 8/22/2023 4:44:05 PM. The configuration is shown in a diff format, with lines 1-14. Key differences include the boot system flash command, which changed from 'EOS-4.21.5F' to 'EOS-4.20.7M'. The 'Device Explorer' table below lists various network devices with columns for Type, Name, Description, Environment, Site Code Name, IP Address, Vendor, Hostname, and OS.

Type	Name	Description	Environment	Site Code Name	IP Address	Vendor	Hostname	OS
	Arista_DCS...		Production/Test	ROOT	10.150.17.4			
	Arista_DCS...		Production/Test	ROOT	10.150.17.8	Arista	GNSW-US-QTS-04	EOS
	Arista_DCS...		Production/Test	ROOT	10.150.17.2	Arista	7050sx2	EOS
	Arista_DCS...		Production/Test	ROOT	10.150.17.9	Arista	jsh09100522	EOS
	Arista_DCS...		Production/Test	ROOT	10.150.17.3	Arista	arista7340	EOS
	Aruba_3810...		Production/Test	ROOT	10.150.17.5	HPE	Aruba-Stack-3810M	ArubaOS
	Aruba_5406...		Production/Test	ROOT	10.150.3.2	HPE	HP-Switch-5406Rzl2	ArubaOS
	Aruba_Arub		Production/Test	ROOT	10.150.3.5	HPF	6300m-rx1	ArubaOS-


## Device actions


Capture Snapshot - Capture a current configuration snapshot from the selected devices, compare it to the baseline configuration for each device, and reflect the status of the comparison in the Captured Status field

Set Default Configuration - Make the most recent snapshot for the selected device the baseline configuration snapshot

Ad Hoc Query - Search for a specific string in a device's configuration




 Audit Configuration - Run or schedule an audit for the selected devices

 Export Devices - Export the most recent snapshot details for all devices in the Explorer to a CSV file in your Download folder


 Run Report - Run a Data Explorer report on demand or on a schedule


## Device views


 Details - View or modify device details

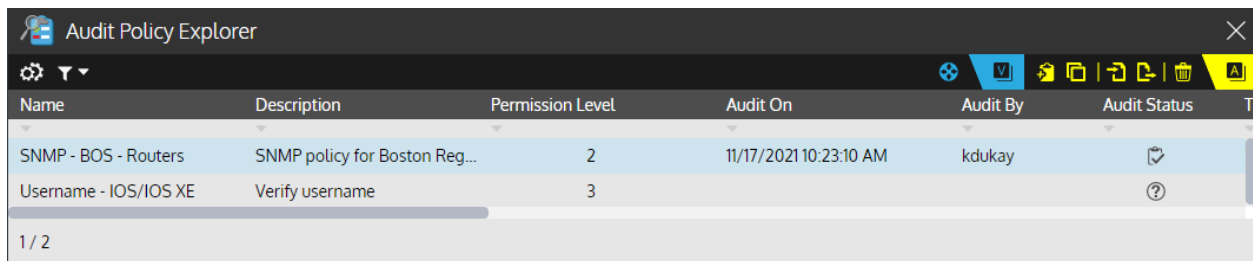
 Snapshots - View all available configuration snapshots for a device



 Configurations - View a single device configuration snapshot

 Comparisons - Compare two configuration snapshots

 Activities - View all previous device actions

 Audit Summary - Display results of the last time each policy was run on the device




Name	Description	Permission Level	Audit On	Audit By	Audit Status
SNMP - BOS - Routers	SNMP policy for Boston Reg...	2	11/17/2021 10:23:10 AM	kdukay	
Username - IOS/IOS XE	Verify username	3			

1 / 2


## Audit Policy actions

 Add Policy - Create a new policy

 Clone Policy - Duplicate a selected policy

 Import Policy - Import a policy or policies exported from another organization


 Export Policy - Export the selected policy or policies for backup or to import to another organization

 Delete Policy - Delete the selected policy or policies

## **Audit Policy views**

 Details - View or edit policy description and rules

 Audit Execution Summary - View when a policy was executed





 Audit Policy Results - Display the success or failure of the policy execution for the target devices

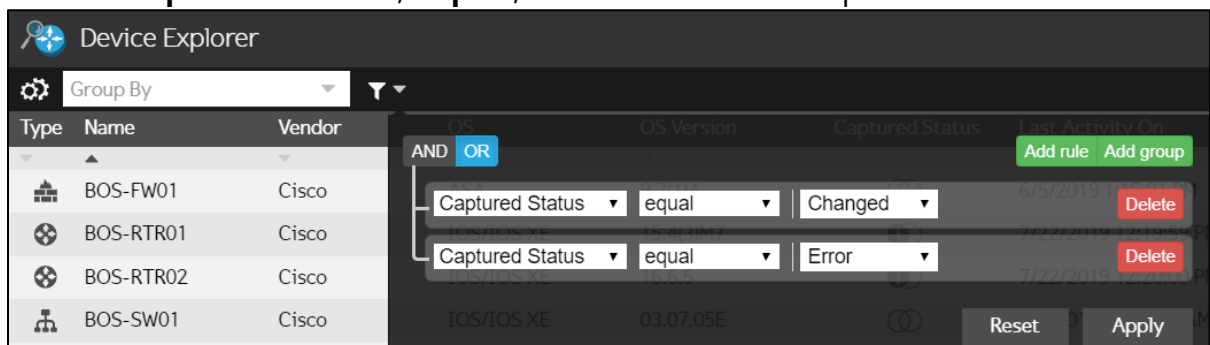
 Activities - View all previous policy actions

 Device Explorer - Switch to Device Explorer

# Example: Checking for configuration changes

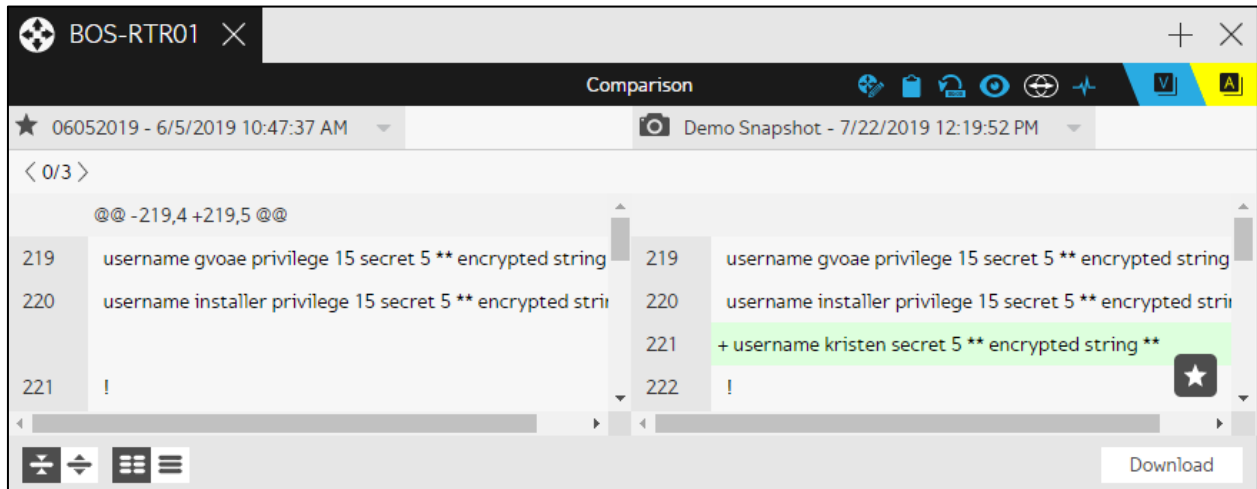
With Gluware, you can check for unauthorized configuration changes. You must have taken an initial snapshot and set a snapshot as the default (baseline) configuration.






1. Go to  **Config Drift and Audit > Devices**.
2. Use **Ctrl+A/Command+A** to select all the devices and then click  to take a new snapshot of the devices' configurations.
3. Name the snapshot.
4. Click **Start Capture**.
5. When the snapshot is complete, click the  next to .
6. Select **Captured Status, equal, Changed** from the drop-down lists.
7. Click **Add rule**.
8. Click **OR**.
9. Select **Captured Status, equal, Error** from the drop-down lists.



10. Click **Apply**.

11. Double-click a device in the returned list. The comparison between the default and the new snapshot appears in the top pane. Changes are highlighted. **<0/x>** is the number of configuration changes from the baseline snapshot. Click the **>** to see the next change.





12. Use   to switch between Expanded and Compact views. Use   to switch between Side-by-Side and Line-by-Line views.
13. Click  to save the changed configuration as the new default for the device.

## Example: Auditing an SNMP policy

This example policy helps ensure that the SNMP Feature is implemented correctly on all IOS routers.

### Create an SNMP policy for IOS routers

1. Go to  **Config Drift and Audit > Audit Policies**.
2. Click  to create the **SNMP Policy** for Boston region routers.
3. Name the policy and click **Create**.
4. Describe the policy.
5. Select permission level 1.
6. Click **Add Rule**.
7. Name the rule and describe the rule as **Required updates for Boston Region IOS/IOS XE routers**.
8. Set the **Severity** of the rule to **Informational** from the drop-down list.
9. Select the **IOS/IOS XE** operating system as a constraint for the policy.
10. Select **IOS Router** for the **Command Set**.
11. Select **IOS Router** for the **Command Result**.
12. Select **Latest** for the **Source**. This will run the policy against the latest snapshot.
13. Select the **IF...Then** rule type.
14. For the **IF** statement, select **Region, equal, BOS** from the drop-down lists and then click **Add rule**.
15. Select **Type, equal, Router (WAN)** from the drop-down lists.
16. For the **THEN** statement, select **must contain (regex)** from the drop-down list.
17. Paste what the policy requires in the box. In our example, we want all Boston-located routers to have:

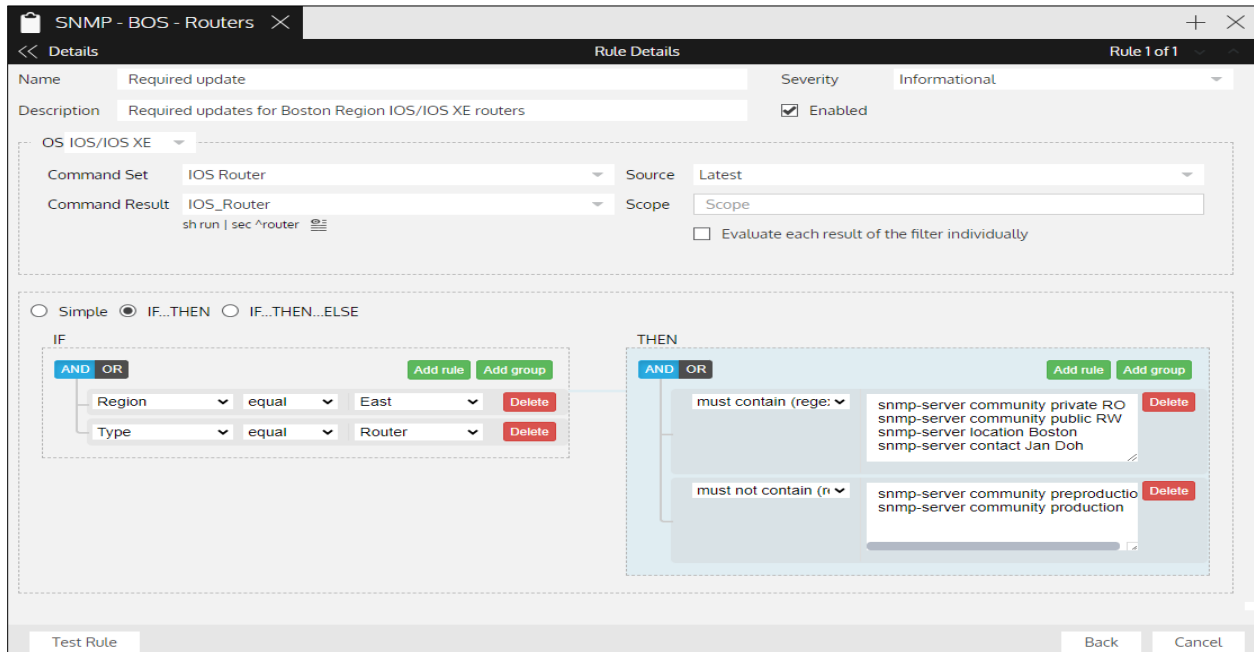
```
snmp-server community private RO
snmp-server community public RW
snmp-server location Boston
snmp-server contact Jan Doh
```
18. Click **Add rule**.
19. Select **must not contain (regex)** from the drop-down list.

20. Define what the policy forbids in the box. In our example, we want to ensure all our old standards have been updated:




```
snmp-server community preproduction
snmp-server community production
```

21. Click **Back**.

22. Save.



## Audit the SNMP policy




1. Go to  **Config Drift and Audit > Devices**.
2. To select the devices you want to audit:
  - a. Click  and ensure that the **Type** and **Vendor** columns are checked.
  - b. Click the **Type** column heading and then select all the Cisco routers you want to audit.
3. Select .
4. Click **Selection**.
5. Select the **SNMP Policy** from the drop-down list.
6. Click **Start Audit**.
7. Click **View Results**.

## Take a snapshot

You can capture a snapshot of the current configuration for the selected devices. **Config Drift** compares it to the default snapshot for each device and the result of the comparison is displayed in the **Captured Status** column.

Every capture action executes all Configuration and Operational command sets that match the device's vendor and OS. If no command sets are defined for vendor/OS, the Gluware Standard commands are used.



**Note:** Cisco Meraki controllers have no configuration to capture. The configuration is on the controlled devices. Cisco ACI controlled devices have no configuration.

1. Go to  **Config Drift and Audit > Devices**.
2. Select one or more devices and click .
3. Optional: Name the snapshot.
4. Run or schedule the snapshot:
  - Click **Start Capture** to run the snapshot immediately.
  - Click **Schedule Capture** to define the schedule. Check a **Notification** box to send an email when the snapshot is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma. Then click **Confirm**.
5. When the snapshot is complete, look for changes in the **Captured Status** column.
6. Double-click a device to open the **Device Editor** and click  to view details of the snapshot.

You can also set up Gluware to take snapshots automatically in system settings.

## Set a default snapshot



Setting a default (baseline) snapshot designates that snapshot as the approved configuration for the device. When you take subsequent snapshots of the configuration, Gluware detects any deviations from the default. If the changes are the result of purposeful action, you can set the new snapshot as the default. If you were unaware of the changes made, you can take corrective action on the device using **Config Model Editor**.

1. Go to  **Config Drift and Audit > Devices**.
2. Select one or more devices.
3. Click  and click **Confirm**. This sets the most recent snapshot as the default (baseline).




**Note:** You can also set a new default snapshot when comparing snapshots.

## View snapshots

### View a device snapshot

1. Go to  **Config Drift and Audit > Devices**.
2. Double-click a device to open the **Device Editor** and click .
3. For Cisco Meraki devices, click **Text** to display the configuration in dot notation. Click **JSON** to display the configuration in JSON.
4. Click **Download** to save the information to a file.




### View all available snapshots for a device

1. Go to  **Config Drift and Audit > Devices**.
2. Double-click a device and click .
3. Select a snapshot and click  to see the configuration.



# View the snapshot log



When you take a snapshot of a device, a log is created.


1. Go to  **Config Drift and Audit > Devices**.
2. Double-click a device and click  to view **Activities** related to the device.
3. View the log:
  - Point to  to quickly skim the log.
  - Double-click on the row to see the log in detail.

**Note:** Any errors appear in red. Common errors include incorrect or missing device credentials (e.g. password, serial number) indicating you're not connected to the device.

4. Optional: Click **Download** to send the log to your Downloads folder.
5. Click **Back** to return to the activity summary.

## Tips for reviewing the log

- When you see an error or warning, you may need to inspect the lines above it to determine the cause.
- Click  to pause scrolling.
- Click **Show Settings** to:
  - **Search for a text string** - Enter the text string and click **Enter**. Check the **Case-Sensitive** box to make the search case-sensitive. Clear the box to ignore case. Click > and < to see the occurrences found.
  - **Change the line label** - Select a line label from the  Log Event #
    - Log Event #
    - Line Number
    - Timestamp
    - Time Passed
    - Event Duration

- **Filter the log** - Click . Check or clear the boxes to display just the levels you want. All levels are displayed by default.
- **See the source code file and line number that produced the log line** - Point to a line.

Log Levels	Description
<b>Error</b>	<b>A problem that must be fixed</b>
<b>Warning</b>	<b>A problem that did not stop the process but should be fixed</b>
<b>Task</b>	<b>The beginning or the end of a step</b>
<b>Checkpoint</b>	<b>A significant point in the code</b>
<b>Info</b>	<b>General info about the process that does not fit in the other logging categories</b>
<b>Response</b>	<b>The raw interaction between the Gluware engine and the device</b>
<b>Debug</b>	<b>Low-level informational log messages usually related to the internal state of code variables. It's specific to how the code is working, as opposed to how the process is proceeding</b>

# Compare snapshots

You can inspect two snapshots for a device so comparison is easier. Differences are highlighted and four different views are available. The results are color-coded:

**Blue** - Changed




**Green** - Added

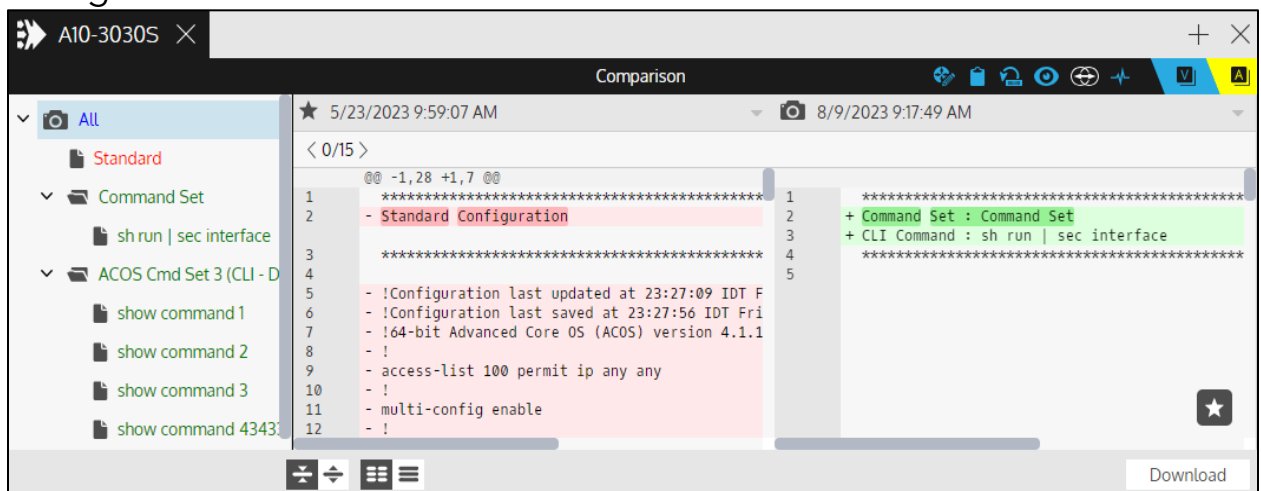
**Red** - Deleted






**Black** - Unchanged

**Note:** You can compare any two snapshots. Select a different snapshot from the drop-down list at the top of a column.

## Compare text versions




1. Go to  **Config Drift and Audit > Devices**.
2. Double-click a device that has , a **Changed** status.
3. Click . The comparison between the default and the newest snapshot appears in the top pane. Changes are highlighted. The number of changes appears in angle brackets, e.g., <0/3>. If there is more than one change, click the > to see the next change. The line number for the beginning of the change in each version is shown (@@-219, 4 +219, 5@@ in the example below). The numbers after the commas indicate the number of lines involved in the change. + and - indicate lines added and deleted.

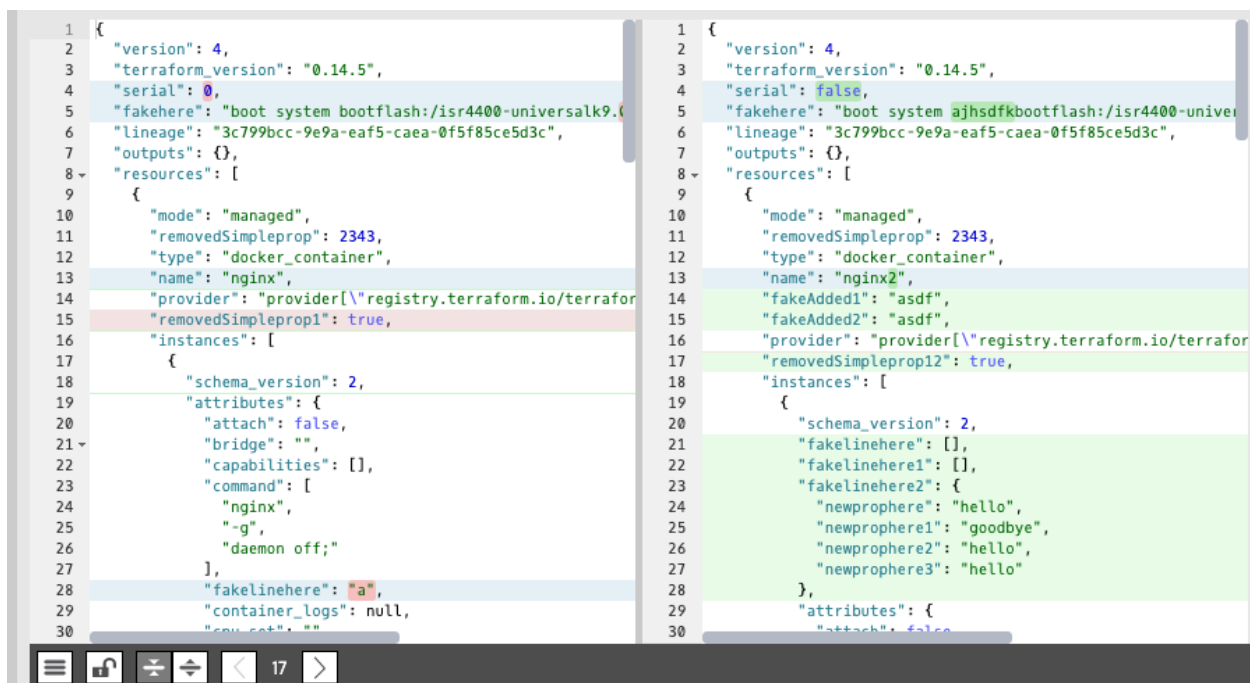


4. Use   to switch between expanded and compact views,   to switch between side-by-side and line-by-line views.
5. Download the comparison to review and share.
6. To save the changed configuration as the new default for the device, click .

## Compare JSON versions

JSON is available for devices with a **Connection Method** of **Meraki API connection**, **Cisco ACI API connection** (controllers only), or a **CLI connection with REST API**.

1. Go to  **Config Drift and Audit > Devices**.
2. Double-click a device that has , a **Changed** status.
3. Click . The comparison between the default JSON and the newest JSON version appears in the top pane.
  - Updated properties are shaded blue.
  - New properties are shaded green. Solid green lines show where new properties were added.
  - Deleted properties are shaded red. Solid red lines show where properties were deleted.









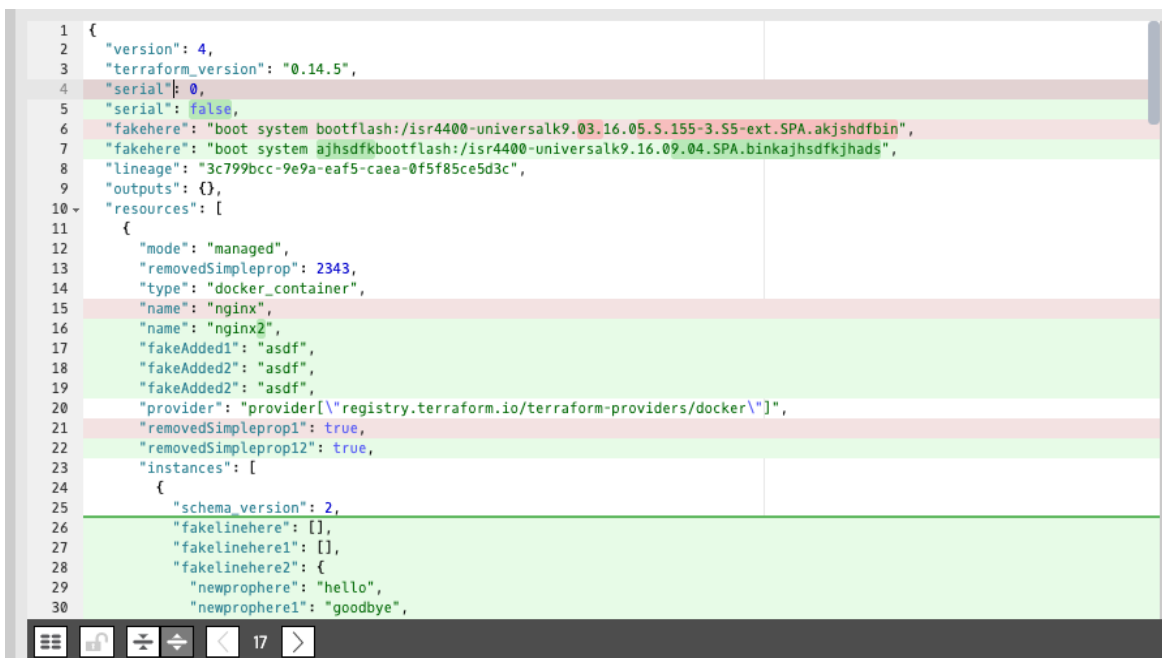
```

1 {
2   "version": 4,
3   "terraform_version": "0.14.5",
4   "serial": 0,
5   "fakehere": "boot system bootflash:/isr4400-universalk9.0",
6   "lineage": "3c799bcc-9e9a-eaf5-caea-0f5f85ce5d3c",
7   "outputs": {},
8   "resources": [
9     {
10      "mode": "managed",
11      "removedSimpleprop": 2343,
12      "type": "docker_container",
13      "name": "nginx",
14      "provider": "provider[\\registry.terraform.io/terraformio-modules\\docker-container]",
15      "removedSimpleprop1": true,
16      "instances": [
17        {
18          "schema_version": 2,
19          "attributes": {
20            "attach": false,
21            "bridge": "",
22            "capabilities": [],
23            "command": [
24              "nginx",
25              "-g",
26              "daemon off;"
27            ],
28            "fakehere": "a",
29            "container_logs": null,
30            "cpu_arch": "x86_64"
          }
        }
      ]
    }
  ]
}

```


4. Do any of the following:

- The number of changes is shown below the JSON. If there is more than one change, click the  to jump to the next change.
- Hover over a property to display the solid boundary lines and highlight the changes.
- Use  to switch between Expanded and Compact views. Compact view hides unchanged properties.
- Click  to hide a specific property in either JSON version.
- Click  to sync the two versions when scrolling.
- Click  to scroll each version independently.
- Use  to switch between side-by-side and updated-version-only views.



```
1 {
2   "version": 4,
3   "terraform_version": "0.14.5",
4   "serial": 0,
5   "serial": false,
6   "fakehere": "boot system bootflash:/isr4400-universalk9.03.16.05.S.155-3.S5-ext.SPA.akjshdfbin",
7   "fakehere": "boot system ajhsdfkbootflash:/isr4400-universalk9.16.09.04.SPA.binkajhsdfkjhads",
8   "lineage": "3c799bcc-9e9a-eaf5-caea-0f5f85ce5d3c",
9   "outputs": {},
10  "resources": [
11    {
12      "mode": "managed",
13      "removedSimpleprop": 2343,
14      "type": "docker_container",
15      "name": "nginx",
16      "name": "nginx2",
17      "fakeAdded1": "asdf",
18      "fakeAdded2": "asdf",
19      "fakeAdded2": "asdf",
20      "provider": "provider[\\registry.terraform.io/terraform-providers/docker\\"]",
21      "removedSimpleprop1": true,
22      "removedSimpleprop12": true,
23      "instances": [
24        {
25          "schema_version": 2,
26          "fakelinehere": [],
27          "fakelinehere1": [],
28          "fakelinehere2": {
29            "newprophere1": "hello",
30            "newprophere1": "goodbye",
```




5. Download the comparison to review and share.

6. To save the changed configuration as the new default for the device, click .

# Create a policy using Config Audit

You can create company-specific policies for your devices and then run audits against your device snapshots to identify policy violations.

You can audit the results of the Gluware Standard commands or a customized command set. And you can define simple or conditional rules with logical operators. These rules support native vendor command lines, and filtering by OS, **Concept Item** show commands, and regular expressions (regex).


1. Go to  **Config Drift and Audit > Audit Policies**.
2. Click .
3. Name the policy and click **Create**.
4. Add a description of the policy.
5. Select the **Permission level**, 1, 2 or 3, for the policy from the drop-down list. See "Permission descriptions" and "Gluware roles and permissions" for details on how permission level impacts the ability to manage and run the audit policy.
6. Click **Add Rule**. You can also clone an existing rule by clicking .
7. Name and describe the rule.
8. Select the **Severity** of the rule (Informational, Minor, Major, or Critical) from the drop-down list. You establish the meaning of each severity level.
9. Select an **OS** from the drop-down list.
10. Select the **Command Set** you want to run for the OS. If you select ALL for **OS**, then the **Command Set** is also ALL. The **Command Result** is Standard.
11. Select the name of the **Command Result**:
  - **All** - All the command sets for the selected vendor/OS
  - **Command** - The result of the CLI command
  - **Concept items** - The **Concept Item** filters the snapshot, returning a set of lines, and the audit policy is run against the returned lines. The **Concept item** must already be installed in **Config Model Editor** with a **Config Modeling Kit**
  - **REST sync items** - The REST sync item results

- **GET command** - The result of the GET command
  - **Standard** - The result of the Gluware Standard commands
12. Select the **Source** configuration to run the rule against.
- **Latest** - The most recent snapshot
  - **Default** - The default snapshot. Not available for **Config Audit**-only command sets
13. If you are running the Standard commands, select a **Section**:
- **All (Full Snapshot)** - The audit policy will examine the whole configuration
  - **Concept item** - The audit policy will examine the sections of the configuration identified by the **Concept Item**

**Note:** When you select a **Concept Item**, a command, for example, a `show` command is displayed. The command cannot be run on a snapshot; however, the **Concept Item** will extract the same configuration lines that the command would produce. To see what gets returned using a **Concept Item**, audit a single device. The log for the audit will show what is extracted from the configuration snapshot.

If the devices to be audited have several operating systems, create a rule for each OS and select the appropriate **Concept Item**.

14. Optional: For **Scope**, enter regex to further filter the lines in the configuration returned.
15. **Evaluate filtered results independently** - If filtering by **Concept Item** or **REST sync item**, check the box to evaluate each element in the **Item** results independently. If unchecked, the lines returned by the **Item** are treated as one block. (The Block Name will be ALL in the audit execution summary). Whether you evaluate each result independently or not impacts the number of violations reported. See the example below.
16. Define what the policy requires or forbids.
- Use dot notation to specify rules for a JSON configuration.
  - Select **Simple** if there are no conditions. Or create conditional statements by selecting **If...Then** or **If...Then...Else**.


- For **Simple** rules, select a rule type, plain text or regex version:
  - **must contain** - All lines in the rule must occur in the filter results
  - **must not contain** - The lines in the rule **cannot** occur in the filter results
  - **must contain, ordered** - All lines in the rule must occur in the filter results. And the lines in the filter results must appear in the same order as in the rule
  - **must only contain, ordered** - The filter results can **only** contain the lines in the rule. And the lines in the filter results must appear in the same order as in the rule
  - **must be empty** - The filter results must be empty
- For conditional rules, you can define rules specific to certain devices; for example, SKU, OS version, etc. Select from the list of device fields.
- For simple or conditional rules:
  - Click **AND** or **OR** to add a logical operator.
  - Click **Add group** to add nested rules.
- In regex, you can include custom fields. The syntax for including a custom field is `{{device.<customfieldname>}}`  
**Example:** For the custom field Bandwidth, `{{device.Bandwidth}}`  
 Make sure you use the correct capitalization of the custom field name. Go to  **Settings > Custom Fields** to verify names.
- You can include variables that reference the discoverable properties on a device. The syntax for including a discoverable property is `{{device.<discoverableproperty>}}`  
**Example:** `{{device.detectedHostName}}`


The discoverable properties on a device are:


```
detectedRawTypeBase
detectedTypeBase
detectedComponents
detectedHostName
detectedOs
detectedRawOs
```



```
detectedRawVendor  
detectedSerialNumber  
detectedSku  
detectedSoftwareVersion  
detectedStack  
detectedTypeName  
detectedUptime  
detectedVendor  
name
```

17. Optional: Click **Test Rule** to test the rule offline.
  - Paste the configuration you want to test in the **Test Data** box.
  - In the **Device Properties**, supply the value to test if your rule references a device property variable.
  - Click **Test**.
  - Select from the **Results** drop-down list if your filter returns more than one CLI group.
  - The passed/failed results are displayed in the **Rule** box.
  - Click **Cancel** to go back.
18. Click **Back**.
19. Optional: Click **Add Rule** to add additional rules.
20. Optional: Click  to drag and re-order any rule.
21. Save.

**Note:** You can also create a policy by cloning an existing policy. Select a policy and click .

Import example policies from the Gluware Knowledge Base at <https://support.gluware.com/hc/start>. Click  to import.

## Example: Evaluate filtered results independently

The Concept Item IOS\_User extracts the lines from the configuration snapshot regarding the local users configured on the device. For example, from a device that has two users defined:

```
{
  "Username": {
    "pod6user": ["username pod6user privilege 15 secret 5
$1$diD6$JEfT7oB3eyvl7jUylbcuz0"],
    "new_sqa": ["username new_sqa privilege 15 secret 5
$1$nUme$z3x7v5Ewp/EBr4.zobhzo0"]
  }
}
```

There is one block per user in this example, where one block is named pod6user and the other new\_sqa. The data that is audited are the lines associated with each block. In this case, each block only has a single line.

If **Evaluate each result of the filter individually** is **not** checked, then the lines of each block are combined and audited as a single unit:

```
"username pod6user privilege 15 secret 5
$1$diD6$JEfT7oB3eyvl7jUylbcuz0"
"username new_sqa privilege 15 secret 5
$1$nUme$z3x7v5Ewp/EBr4.zobhzo0"
```



If a violation is found, it is reported using a Block Name of ALL.

If **Evaluate each result of the filter individually** is checked, then each block is audited separately and a violation may occur for each block. The Block Name in the results will indicate each block that has a violation.

# Audit your configuration


Run a policy audit to ensure that no changes have been made to devices that make them out of compliance.

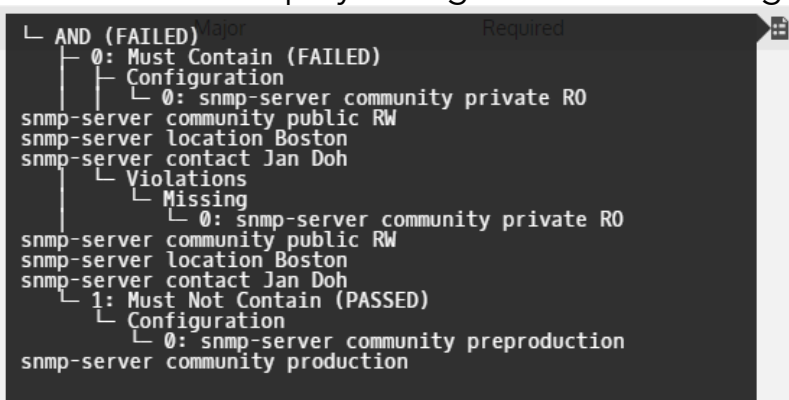
**Notes:** Cisco Meraki controllers do not have a configuration and are ignored during auditing. Cisco ACI controlled devices have no configuration. The configuration is on the controller.

1. Go to  **Config Drift and Audit > Devices**.
2. Select the devices you want to audit.
3. Click .
4. Apply the audit to the current selection of devices, the current filter, or all devices. If using a filter and additional devices are added later, those devices will be included the next time the audit is run.
5. Select **Capture new snapshot** to capture a new snapshot for any rule using **Latest** as the source. If the **Source** you selected for a rule is **Default**, the default configuration will be used as the source.
6. Select the audit policy to run from the drop-down list.
7. Run or schedule the audit:
  - Click **Start Audit** to run the audit immediately.
  - Click **Schedule Audit** to define the schedule. Check a **Notification** box to send an email when the audit is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma. Then click **Confirm**.
8. Click **View Results**.

**Note:** It may take some time for the audit to run, so **View Results** may not be immediately available. You can continue to work in Gluware while the audit is run.

9. Click  to expand the list of violations on a device.





10. Point to  to display a diagram of the rule logic.




11. Optional: Click **Download Results** for the pass/fail status of each rule in CSV format.




12. Optional: Click **Download Details** to see the results of each rule in JSON format.

13. Click  to see the **Audit Execution Summary**.







- Click  to review the audit policy at the time of execution.
- Click  to review the logs of the audit.
- Click  to view the devices that were audited.
- Click  to view the audit results.

14. Optional: Click  to run the audit policy against the same set of devices and then click **View Results**.





# View audit results

1. Go to  **Config Drift and Audit > Audit Policies**.
2. Double-click a policy.
3. Click  to expand the list of violations on a device.
4. Point to  display a diagram of the rule logic.

```
└─ AND (FAILED) Required
  └─ 0: Must Contain (FAILED)
    └─ Configuration
      └─ 0: snmp-server community private R0
        snmp-server community public RW
        snmp-server location Boston
        snmp-server contact Jan Doh
      └─ Violations
        └─ Missing
          └─ 0: snmp-server community private R0
            snmp-server community public RW
            snmp-server location Boston
            snmp-server contact Jan Doh
          └─ 1: Must Not Contain (PASSED)
            └─ Configuration
              └─ 0: snmp-server community preproduction
                snmp-server community production
```



5. Optional: Click **Download Results** for a status summary of each rule in CSV format.
6. Optional: Click **Download Details** to see the results of each rule in JSON format.
7. Click  to see the **Audit Execution Summary**.
  - Click  to review the audit policy at the time of execution.
  - Click  to review the logs of the audit.
  - Click  to view the devices that were audited.
  - Click  to view the audit results.
8. Optional: Click  to run the audit policy against the same set of devices and then click **View Results**.

## View and edit policy details



1. Go to  **Config Drift and Audit > Audit Policies**.
2. Double-click a policy and click .
3. Update the name, permission level, or description.
4. Select a rule you want to update and click .
5. Make any changes. To skip the rule when the plan is run, clear the **Enabled** checkbox.
6. Click **Back**.
7. Click  to drag and re-order any rule.
8. Click **Save**.
9. Click **Download** to export the policy and rules to a JSON file.

## View policy history

### View when a policy was executed






1. Go to  **Config Drift and Audit > Audit Policies**.
2. Double-click a policy and click .



### View all previous policy activity

1. Go to  **Config Drift and Audit > Audit Policies**.
2. Double-click a policy and click .

### View all the audit policies run on a device

The **Audit Summary** displays results of the last time each audit policy was run on a device.

1. Go to  **Config Drift and Audit > Devices** or  **Device Manager > Devices**.
2. Double-click a device and click .
3. Do any of the following:
  - Click  to display the audit policy at the time of execution.
  - Click  to view the audit results.

- Click  to run the current audit policy against the same set of devices.
- Click  to remove the audit policy from the list.
- Click **Download** for the summary of each policy in CSV format.
- Click **Run All** to run all the current audit policies listed in the Audit Summary on the selected device.

## Export a policy

You can export one or more policies from Gluware to a JSON file and then import those policies in another organization or Gluware system.



1. Go to  **Config Drift and Audit > Audit Policies**.
2. Select one or more policies and click .

## Import a policy

You can export a policy to a JSON file, modify it, and import the policy.

**Notes:** The import file must have a unique name and any referenced Concept Items must already exist in the organization.

You can import example policies from the Gluware Knowledge Base (<https://support.gluware.com/hc/start>).

1. Go to  **Config Drift and Audit > Audit Policies**.
2. Click .
3. Drag and drop the JSON file in to the **Audit Policy Explorer** or click **Import from File**.

## Delete a policy

1. Go to  **Config Drift and Audit > Audit Policies**.
2. Select the policy and click .
3. Click **Confirm**.

# OS management overview

The Gluware **File Server** provides a VM server to store and manage OS image, ROMMON, Cisco NX-OS Kickstart, and ASDM files. Gluware **OS Manager** allows you to create and manage OS plans and an optional Catalog of images. These features allow you to perform safe, controlled upgrades or downgrades.

To use File Server and OS Manager, you'll need an **OS Manager** license and the latest **Gluware Core Solutions** package installed. In addition, the Cisco Automated Software Distribution API is used in **OS Manager** validation of Cisco devices. See [Set up Cisco API Console integration](#) to request access.

The devices currently supported are listed at <https://gluware.com/supported-platforms/> 

Watch a video on OS Manager at <https://youtu.be/WAWfhO79rRE>

## In File Server

[File Server quick reference](#)

[Add a folder to File Server](#)

[Rename, move, or delete a folder on File Server](#)

[Add an OS image or other file to File Server](#)

[Move, rename, or delete a file on File Server](#)

[Change the properties of a file](#)

[View the past actions performed on a file](#)

## In OS Manager

[OS Manager quick reference](#)

[Prepare devices for OS management](#)



[Add an entry in the OS Catalog](#)

[Edit an OS Catalog entry](#)

[Delete an OS Catalog entry](#)

[Create an OS plan](#)

[Edit an OS plan](#)

[Delete an OS plan](#)

[Move devices from one OS plan to another](#)

[Run an OS plan](#)

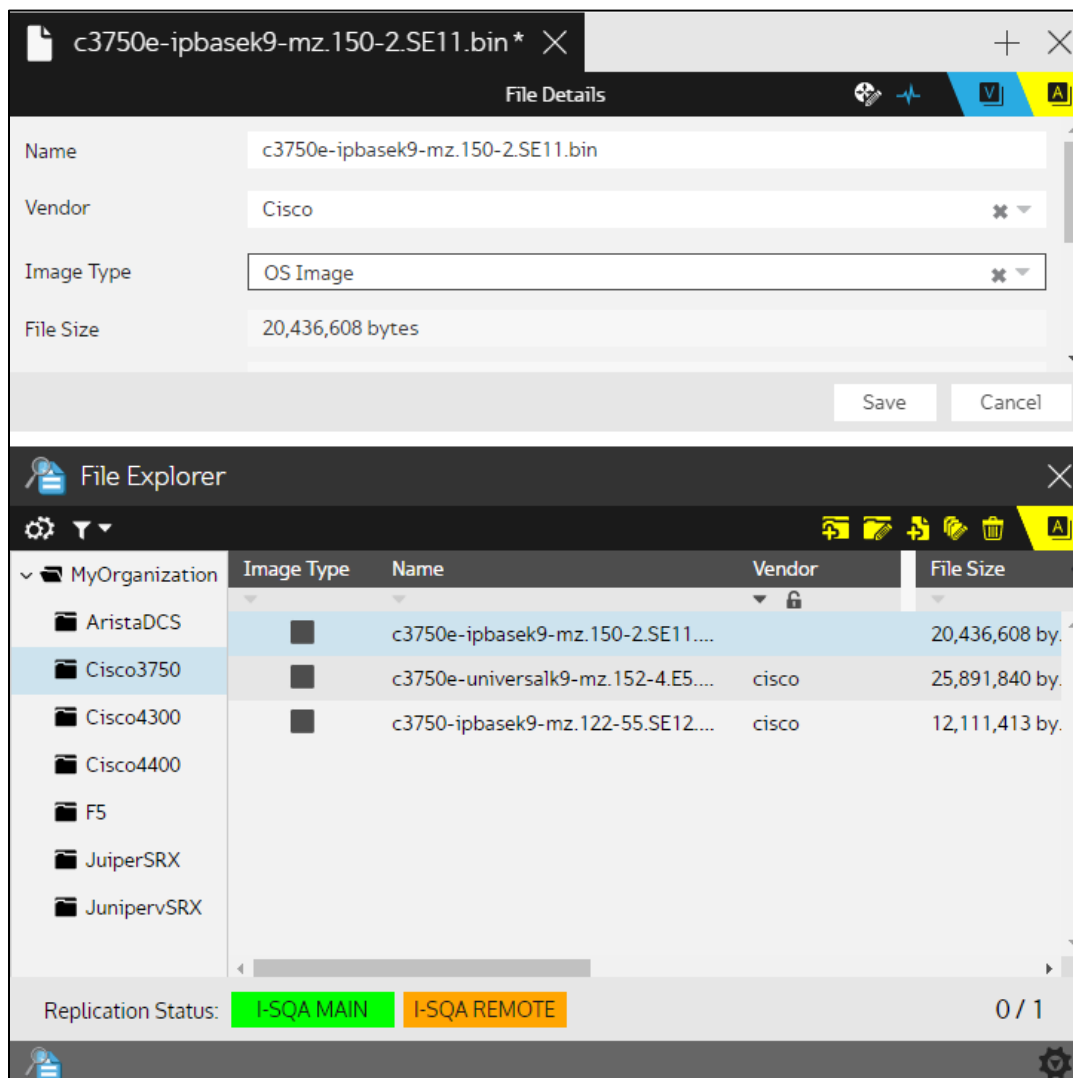
[View the device log](#)

[Reboot a device](#)






# File Server quick reference

The Gluware **File Server** allows you to store and manage OS image, ROMMON, Cisco NX-OS Kickstart, and ASDM files. All standard folder and file operations are available: add, move, rename, delete, and edit properties.



Gluware **File Server** is required to use **OS Manager** and an **OS Manager license** is required.



## Actions

-  Add Folder - Add a folder or subfolder
-  Rename Folder - Rename the selected folder
-  Add File - Upload one or more files
-  Edit Files - Change the properties of a file or files: the file name, vendor, or image type
-  Delete Files - Delete the selected files

## Views

-  Details - View the file properties
-  Activities - View the past activities performed on a file

## File Status

UPLOADING - File is being transferred to Gluware



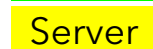


UPLOADED - File has been transferred to Gluware, but not yet to the File Server. If the file stays in this status, delete the file and add it again

SYNCING - File is being transferred from Gluware to the master File Server and remote File Servers

SYNCED - File has been transferred from Gluware to the master File Server and remote File Servers



ERROR - File cannot be transferred. Delete the file and add it again

## Replication Status



-  Server - UNKNOWN, NOT INSTALLED, DISABLED, or CONFIGURING
-  Server - IN SYNC
-  Server - SYNCING
-  Server - OFFLINE
-  Server - ERROR

## Add a folder to File Server

The first folder you add will be the parent folder. You can only have one top-level folder, but you can have as many subfolders as you want.

1. Go to  **File Server**.
2. If you are adding a subfolder, select the folder you want to add it to.
3. Click .
4. Name the folder.
5. Save.



## Rename a folder

1. Go to  **File Server** and select the folder you want to rename.
2. Click .
3. Rename the folder.
4. Save.



## Move a folder

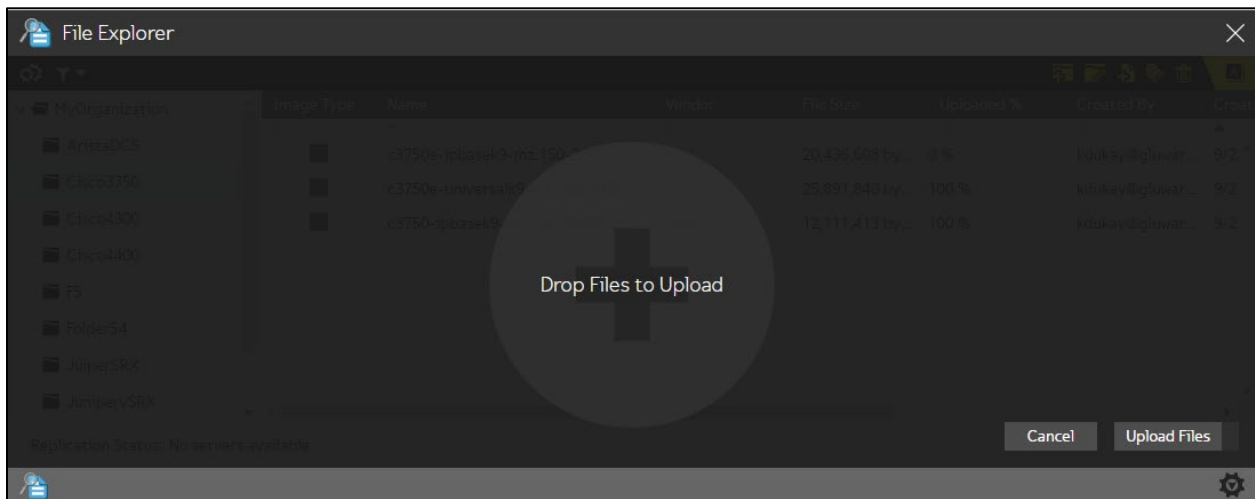
Drag and drop the folder to the new parent folder.

## Delete a folder

1. Go to  **File Server** and select the folder you want to delete.
2. Click  beside the folder name.
3. Click **Confirm**. The folder as well as all the files and subfolders are deleted.

# Add an OS image or other file to File Server

1. Go to  **File Server** and select the folder you want to add the file or files to.
2. Click .
3. Do one of the following:
  - Drag and drop the file or files into **File Server** and click **Save**.
  - Select **Upload Files**, select the file or files you want to upload, and click **Open**.





4. Optional: Select a vendor from the drop-down list.
5. Optional: Select an image type from the drop-down list.
6. Optional: Select a Catalog Entry from the **Catalog Entry** drop-down list if the Catalog is enabled.
7. Save.

**NOTE:** If you want to add many files at one time, you can assign vendor, image type, or OS plans to each file later by changing the properties of the file.

# Move, rename, or delete a file on File Server



## Rename a file

1. Go to  **File Server** and select the file you want to rename.
2. Click .
3. Rename the file.
4. Save.

## Move a file

Drag and drop the file to the new folder.

## Delete a file


1. Go to  **File Server** and select the file you want to delete.
2. Click .
3. Click **Confirm**.

# Change the properties of a file



In **File Server**, you can change the name, vendor, and image type of a file or make the same change to multiple files.

**Note:** The internal file ID is included in the file details to help you troubleshoot.



## Change one file

1. Go to  **File Server** and double-click the file in the File Explorer.
2. Make changes to the file info in the top of the screen. Some fields are read-only.
3. Save.

## Make the same change to more than one file

1. Go to  **File Server** and select the files in the File Explorer.
2. Click . A Multi-Edit tab opens in the top panel. Click **View All** to see the list of files you are editing.
3. Click a radio button next to the field and make changes. Some changes are restricted since they would apply to multiple files.
4. Save.

## View the past actions performed on a file

1. Go to  **File Server** and double-click the file in the **File Explorer**.
2. Click .

# OS Manager quick reference

The screenshot displays two windows from the OS Manager application. The top window, titled "November update \*", shows the "OS Plan Details" for a plan named "November update". The plan is in a "DRAFT" status. The description is "Cisco 44xx updates", and the plan action is "Transfer Image Only". The group is set to "SKU". The progress bar shows "Draft" as the current step, followed by "Validate" and "Run". There are checkboxes for "Skip API image compatibility check", "Capture before", "Capture after", and "Set as default". Below the form is a table with columns: Vendor, SKU, Device, Current OS, Current OS Version, Target Files, Protocol, and Action. Two rows are visible, both for Cisco devices (BOS-RTR02 and MIA-RTR02) with target files to be selected. At the bottom of this window are buttons for "Save", "Cancel", "Manage Devices", "Validate Plan", "Schedule", and "Run Now".

The bottom window, titled "OS Plan Explorer", shows a table of OS plans. The columns are Action, Name, Description, Total Devices, Plan Status, Created On, and Updated On. Three plans are listed:

Action	Name	Description	Total Devices	Plan Status	Created On	Updated On
DEPLOY	Third Quarter Update		1	DRAFT	10/1/2019 3:15:51 PM	10/9/2019 3:26:54 PM
TRANSFER	November updates	Cisco 44xx updates	2	DRAFT	10/2/2019 10:18:29 ...	10/2/2019 11:46:07 ...
DEPLOY	Lab 2 Updates		2	DRAFT	10/4/2019 4:16:17 PM	10/9/2019 3:10:41 PM

## Views

 OS Catalog Explorer - Switch to the OS Catalog Explorer













 OS Plan Explorer - Switch to the OS Plan Explorer

 Device Explorer - Switch to the Device Explorer

 OS Plan Execution



## Actions

-  Add Catalog Entry - Create a new Catalog Entry
-  Edit Catalog Entry - Change the name, SKUs, or images associated with the selected Catalog Entry
-  Clone Entry or Plan - Makes a copy of the selected Catalog Entry or OS plan
-  Run Report - Run a Data Explorer report on demand or on a schedule
-  Delete Entry or Plan - Delete the selected Catalog Entry or OS plan
-  Run OS Plan - Run the Plan Action associated with the selected plan
-  Add OS Plan - Create a new OS plan
-  Edit OS Plan - Change the name, plan action, devices, or images associated with the associated selected plan
-  Reboot Devices - Reboot the selected devices
-  Edit in OS Plan - Change the image associated with the device
-  Move to Another OS Plan - Move a device from one OS plan to another
-  Delete From OS Plan - Remove the device from the OS plan

## Plan Status

DRAFT - Plan was created and saved but not yet validated

VALIDATING - Validation is running

VALIDATED - Validation was successful. The plan can now be run

INVALID - Validation failed. The plan must be edited and fixed, which will return the plan status to DRAFT

SCHEDULED - Plan now scheduled and will run at the scheduled time

RUNNING - Plan is running

COMPLETE - Plan has successfully run; however, some devices may have failed to be updated

CANCEL PENDING - Processing Cancel request by user

CANCELED - Plan was running and was canceled before the execution was completed



ERROR - Plan execution failed

# Prepare devices for OS management

You'll want to verify that the following fields are defined, when appropriate, for the devices you want to manage in OS Manager.



## Management State

Only devices that have a **Management State** of **Managed** will appear in **OS Manager**. If a device you want to update does not appear in OS Manager, you'll need to change the Management State in **Device Manager**.

1. Go to  **Device Manager** > **Devices**.
2. In the **Device Explorer**, select the device or devices and click .
3. Select **Managed** from the **Management State** drop-down list.
4. Save.

## File Server

Ensure that the **File Server** for the device is specified.


1. Go to  **Device Manager** > **Devices**.
2. In the **Device Explorer**, select the device or devices and click .
3. Select a **File Server** from the drop-down list.
4. Save.

## SSH

If using SCP for file transfers, devices need to be configured for SSH v2.


## VRF

If access to File Server will use an interface in a VRF, provide the VRF name.

1. Go to  **Device Manager** > **Devices**.
2. In the **Device Explorer**, double-click the device.
3. Enter the **VRF** name in the **VRF** field.
4. Save.



## HA Group

Identify an HA pair when applicable. All the devices in the HA Group must be in the same OS plan and they will all be upgraded.

1. Go to  **Device Manager** > **Devices**.
2. In the **Device Explorer**, double-click one of the devices in the HA pair.
3. Click **Add** next to **HA Group**.
4. Select the device to be paired from the list.
5. Do one of the following:
  - In **Device Manager**, click **Back**.
  - In **OS Manager**, click **Save** and then click **Back**.

## Non-disruptive upgrades



Enable non-disruptive upgrade support for devices that support it.

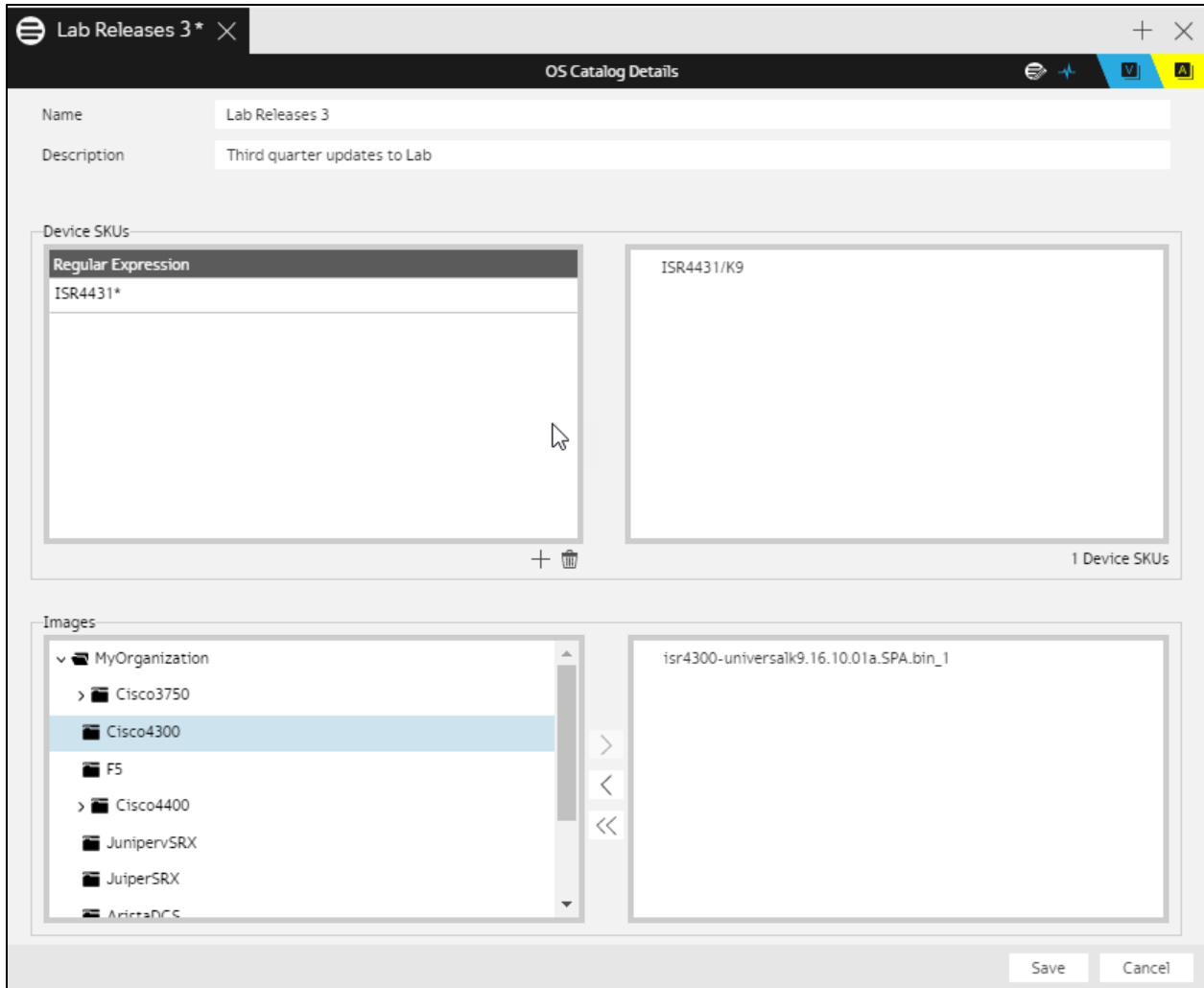
1. Go to  **Device Manager** > **Devices**.
2. In the **Device Explorer**, select the device or devices and click .
3. Check the **In-Service Software Upgrade** box.
4. Save.

# Add an entry in the OS Catalog




The **OS Catalog** allows you to associate specific OS images with one or more SKUs. Use of the OS Catalog is optional, but its use can help ensure operators only apply approved OS images to devices.

**NOTE:** The Catalog must first be enabled in system settings and each organization must enable its own Catalog.



1. Go to  **OS Manager > Catalogs**.
2. Click  to add an entry to the OS Catalog.
3. Name the entry and click **Create**.
4. Add a description of the Catalog entry.
5. Click **+** and enter a regular expression to add a specific SKU or SKUs to the Catalog entry.
6. Click **+** again to add another regular expression.
7. In the **Images** box, select an image that you want to associate with the SKUs and click **>**.
8. Select any additional images that you want to associate with the SKUs.
9. Save.



## Edit an OS Catalog entry

1. Go to  **OS Manager** > **Catalogs**.
2. Select the OS Catalog entry you want to edit and click .
3. Do any of the following:
  - Change the name or description.
  - Click **+** and enter a regular expression to add a specific SKU or SKUs to the Catalog entry.
  - Select an existing regular expression and click  to delete it.
  - In the **Images** box, select an image that you want to associate with the SKUs and click **>**.
  - Select any images you want to remove and click **<**.
4. Save.

## Delete an OS Catalog entry



1. Go to  **OS Manager** > **Catalogs**.
2. Select the OS Catalog entry you want to delete and click .
3. Click **Confirm**.

# Create an OS plan

You'll need to create an OS plan to upgrade or downgrade a device or devices. Only devices that have a **Management State** of **Managed**, that have been discovered in Device Manager, and are supported, appear in **OS Manager**. You can find the devices currently supported at <https://gluware.com/supported-platforms/>.

For API image compatibility checks, set up API integration and enable vendor API image validation in **Settings**.

## Create the plan



1. Go to  **OS Manager > Devices**.
2. Select the devices that you want to add to the plan. Only devices that have been discovered and are supported in OS Manager are listed in the OS Device Explorer.
3. Optional: For Cisco IOS devices, select SCP and an SSH window size between 8192 and 131072 with increments of 8. The window size returns to the default size after the OS plan is run.
4. Click .
5. Name the plan and click **Create**. The **OS Plan Explorer** is displayed.
6. Add a description of the plan in the upper pane.
7. Select the action you want to take from the **Plan Action** drop-down list:
  - **Transfer Image Only**
  - **Deploy New Image**
8. In the **Group By** drop-down list, select **None** if you want to see a list of all the devices instead of a list grouped by SKU.
9. Optional: Check the **Skip API image compatibility check** box if you have API integration set up and vendor API image validation enabled in **Settings**.
10. Check a **Config Snapshot** box to take a configuration snapshot:
  - **Capture before** - Takes a configuration snapshot before implementing the plan action




- **Capture after** - Takes a configuration snapshot before implementing the plan action. If automatic configuration snapshots are set up for OS updates in **Settings**, this option is selected and cannot be changed
  - **Set as default** - Designates the after snapshot as the default
11. Save.

**Note:** You can also create an OS plan by cloning an existing plan. Simply select a plan and click 


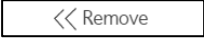

## Associate an image with a SKU or device

1. Click  next to the SKU or device in the OS plan.
2. Select the **Image Source**.
3. Select the image or images to associate with the SKU or device. Images will be processed in the order you select them. If you include a ROMMON image, select it first.
4. Click .
5. Save.
6. Click **Back** to return to the OS plan.

## Add or remove target devices


1. Click  next to the SKU or device you want to delete.
2. Click **Confirm**.

## OR



1. Click **Manage Devices**.
2. Do any of the following:
  - Select an Available Device and click .
  - Select a Selected Device and click .
  - Click .
3. Save.
4. Click **Back** to return to the OS plan.

# Edit an OS plan


**Note:** You can't edit a plan that has a status of COMPLETE.

1. Go to  **OS Manager > OS Plans.**
2. Double-click the **OS Plan** you want to modify.
3. Do any of the following:
  - Change the plan name or description.
  - Change the **Plan Action.**
  - Change the **Group By** setting.
  - Change the **Config Snapshot** setting.
4. Save.




## Associate a new image with a SKU or device

1. Click  next to the SKU or device in the OS plan.
2. Select the **Image Source.**
3. Select the image to associate with the SKU or device.
4. Click .
5. Save.
6. Click **Back** to return to the OS plan.


## Add or remove target devices

1. Click  next to the SKU or device you want to delete.
2. Click **Confirm.**

OR



1. Click **Manage Devices.**
2. Do any of the following:
  - Select an Available Device and click  Add >>
  - Select a Selected Device and click  << Remove
  - Click  << Remove All
3. Save.
4. Click **Back** to return to the OS plan.

## Move a SKU or device to another OS plan

1. Click  next to the SKU or device in the OS plan.
2. Enter a name for a new plan or select an existing plan from the drop-down list.
3. Click **Move**.
4. Save.

## Move devices from one OS plan to another

If you have problems when validating a plan, you may want to move the device or devices that are problematic to another plan.

1. Go to  **OS Manager > OS Plans**.
2. Double-click the OS plan you want to remove the devices from.
3. Click  next to the SKU or device in the OS plan.
4. Enter a name for a new plan or select an existing plan from the drop-down list.
5. Click **Move**.
6. Save.

# Run an OS plan


Before you run an OS plan,

- Check that the Plan Execution guidelines defined in **Settings** for your organization are appropriate for the plan.
- Validate the plan before you run it.

You can also create and run an **OS Management Policy** using **Config Model Editor** before you run an OS plan to assess the state of the devices before you upgrade.

Once you run an OS Plan and the status is COMPLETE, the plan becomes read-only and cannot be run again.


## Best practices

- Locating your **File Server** close to your devices can reduce transfer time.
- Use of TFTP is recommended. You can enable TFTP in  **Settings** > **Organization** > **OS Manager**.
- Download and review the log file for any device that fails.

## Validate and run the OS plan

Depending on the plan, validation checks may include:

- Should changes pending in the running configuration be saved before the upgrade?
- Is there an existing bootloader statement pointing to the currently running image version?
- For Cisco devices, is the image name a valid known image name, for the right platform, etc?
- Is there room on the disk?


1. Go to  **OS Manager** > **OS Plans**.
2. Select the OS plan you want to validate and run and click .

## Validate the plan

1. Click **Validate Plan**.
2. Optional: Click **Stop Validation** if you see errors. Click **Validate Plan** to restart validation. Click **Download** to send the log to your Downloads folder.
3. Click **Back** to return to the OS Plan.

## Move a SKU or device to another OS plan

If you have problems when validating the plan, you may want to move the device or devices that failed to another plan.


1. Click  next to the SKU or device in the plan that you want to move.
2. Enter a name for a new plan or select an existing plan from the drop-down list.
3. Click **Move**.
4. Save.

## Run the OS plan now

1. Click **Run Now**.
2. Click **Run**. During OS plan execution, there are six possible phases:  
INIT  
TRANSFER  
UPGRADE  
REBOOT  
VERIFICATION  
FINAL

Not every device goes through all phases. In the INIT phase, Gluware checks the health of the device and will abort the run if the device is in an unhealthy state. Click **Hide** if you don't want to watch the progress.

When the plan has run, the execution status is displayed. The total number of devices impacted by the plan is shown, as well as the number of devices successfully updated and the number of failures.



3. Click  or double-click the device to view the execution log for the device.
4. If any devices failed, click **Create New Plan From Failures**, name the new plan, and click **Create**.
5. Optional: Click **Download** to send the device log to your Downloads folder.

## Schedule the OS plan

1. Click **Schedule OS Plan**.
2. Set the schedule date and time.
3. Optional: Check the **Notify me when work completes** checkbox.
4. Click **Confirm**.

# View the device logs



Once an OS plan has run and its status is COMPLETE, you view the log for each device impacted by the plan.

1. Go to  **OS Manager > OS Plans**.
2. Double-click the COMPLETE **OS Plan** you want to view the logs for. The total number of devices impacted by the plan is displayed, as well as the number of devices successfully updated and the number of failures.
3. View the log:
  - Click  to view the log for a device.
  - Double-click on the row to see the log in detail.


**Note:** Any errors appear in red. Common errors include incorrect or missing device credentials (e.g. password, serial number) indicating you're not connected to the device.

4. Optional: Click **Download** to send the log to your Downloads folder.

## Tips for reviewing the log

- When you see an error or warning, you may need to inspect the lines above it to determine the cause.
- Click  to pause scrolling.
- Click **Show Settings** to:
  - **Search for a text string** - Enter the text string and click **Enter**. Check the **Case-Sensitive** box to make the search case-sensitive. Clear the box to ignore case. Click > and < to see the occurrences found.
  - **Change the line label** - Select a line label from the  Log Event #  
Log Event #  
Line Number  
Timestamp



Time Passed  
Event Duration

- **Filter the log** - Click . Check or clear the boxes to display just the levels you want. All levels are displayed by default.
- **See the source code file and line number that produced the log line** - Point to a line.




Log Levels	Description
<b>Error</b>	<b>A problem that must be fixed</b>
<b>Warning</b>	<b>A problem that did not stop the process but should be fixed</b>
<b>Task</b>	<b>The beginning or the end of a step</b>
<b>Checkpoint</b>	<b>A significant point in the code</b>
<b>Info</b>	General info about the process that does not fit in the other logging categories
<b>Response</b>	<b>The raw interaction between the Gluware engine and the device</b>
<b>Debug</b>	Low-level informational log messages usually related to the internal state of code variables. It's specific to how the code is working, as opposed to how the process is proceeding



## Delete an OS plan

1. Go to  **OS Manager > OS Plans**.
2. Select the OS plan you want to delete and click .
3. Click **Confirm**.

## Reboot a device

1. Go to  **Device Manager > Devices** or  **OS Manager > Devices**.
2. In the **Device Explorer**, select one or more devices.
3. Click .
4. Click **Confirm**.

# Model a configuration

The Gluware **Config Model Editor** allows you to standardize network features by leveraging your existing, validated CLI. Once onboarded to the **Config Model Editor**, the CLI becomes a feature that can be deployed to network devices and enforced at scale. You can model as many or as few features as you want. You can standardize AAA, NTP, SYSLOG, and other network-wide functions. And you can address pain points such as QoS management.

To use **Config Model Editor**, you'll need:

- A license for **Config Model Editor**
- The **Gluware Core Solutions** package installed
- The **Config Modeling Kit** packages for your device types installed

If you want to create a custom feature template, you'll also need a license for **Workflows**.

## [Install packages](#)

Here are the typical steps you take to model and deploy a network feature:

1. In **Workflows**, create a feature template and install it.  
[Design a new network Feature type](#)
2. In **Config Model Editor**, select existing **Concept Items** or create a new one. Then create **CLI Command Lists**, **CLI Command Groups**, **Features**, and **Assemblies** to fully define the feature. **Config Model Editor** also allows you to preview the feature to ensure it works as intended.

[Create a Concept Item](#)

[Create a CLI Command List](#)

[Create a CLI Command Group](#)

[Create a Feature](#)

[Create an Assembly](#)

[Associate an Assembly with a node](#)

[View the relationships in your model](#)

[Preview the modeled Feature](#)

[Review the logs](#)

[Provision nodes](#)

To quickly create model instances, use [Intelligent Model Discovery](#).

3. Create a distribution package containing Feature definitions and instances to be installed on your production environment.

[Package a Feature for distribution](#)

For an example, see: [Example: Model an SNMP feature](#)

Watch a video about config modeling at

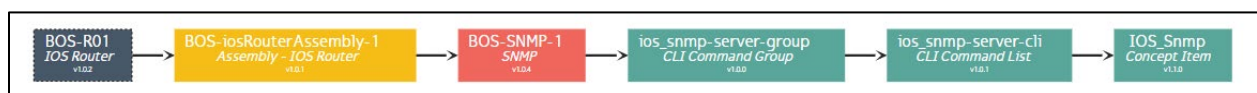
<https://youtu.be/pANntfCKTFw>

# Example: Model an SNMP feature

Modeling a configuration feature involves several steps. We'll take you through an example of modeling an SNMP feature for an IOS Router so you can see how it all fits together.

First, you'll ensure you have the proper packages installed in your organization. Then you create a Feature Set for your organization that will seed required components in **Config Model Editor**.

Each model requires, from right to left: a **Concept Item**, a **CLI Command List**, a **CLI Command Group**, a **Feature**, an **Assembly**, and **Nodes** representing devices.



Here's how you create and associate these components into a model:

[Step 1. Install packages](#)

[Step 2. Design an SNMP Feature type](#)

[Step 3. Select a Concept Item](#)

[Step 4. Create a CLI Command List for SNMP](#)

[Step 5. Create a CLI Command Group for SNMP](#)

[Step 6. Create a Feature for SNMP](#)

[Step 7. Create an Assembly for your IOS routers](#)

[Step 8. Associate the Assembly with nodes](#)


[Step 9. View the relationships in your SNMP model](#)

[Step 10. Preview the SNMP Feature](#)

# Config modeling via API

A new workflow, **Import Organizations and Networks from Meraki**, in **Config Model Editor** enables the automation of changes across Meraki orgs and networks. The workflow enables Gluware to read the current org and network configuration before implementing changes to the configuration policy. Gluware uses a declarative operation to implement changes via API calls.

You'll need the **Config Modeling Kit for Cisco Meraki** installed.

1. Go to  **Config Model Editor > Nodes**.
2. Select a Cisco Meraki node from the drop-down list.
3. Right-click on the Meraki node in the grid and select **Import Organizations and Networks from Meraki**.

# Node state assessment

**Config Model Editor** allows you to issue show commands to determine if a device is performing as expected. You can assess the state before and after provisioning or an OS upgrade. You can also assess the state on demand.

To use state assessment, you'll need:

- A license for **Config Model Editor**
- The **Gluware Core Solutions** package installed
- The **Config Modeling Kit** packages for your device types installed

Step 1: [Create a CLI State Item](#)

Step 2: [Create a CLI State Assessment Policy](#)

Optional Step 3: [Create a CLI State Assessment Query](#)

Step 4: [Associate a CLI State Assessment Policy with an Assembly](#)

Step 5: [Assess the state of a node](#)

# Solutions Manager quick reference

**Solutions Manager** is where you find and install packages from Gluware that provide the basic functionality for **Device Manager**, **Config Drift and Audit**, **OS Manager**, and **Config Model Editor**.

Make sure you install packages in the appropriate organization.

The screenshot displays the 'Config Modeling Kit for Cisco IOS Router' package details in the Solutions Manager. The top section, 'Installed Package Details', indicates the package is not currently installed. The 'Available Package Details' section provides the following information:

- Name:** Config Modeling Kit for Cisco IOS Router
- Version:** 1.0.23.201909041348
- Description:** Gluware Config Modeling Kit for Cisco IOS Router devices (ios/ios xe)
- Release Notes:**
  - Maintenance Release
  - minor bug fixes and enhancements
- Release Notes:**
  - Release Notes
  - <https://support.gluware.com>

Navigation tabs for 'General', 'Preview', and 'Install' are visible at the bottom of the details panel.

The 'Package Explorer' section below features a search bar and tabs for 'Installed', 'Available', and 'Import Package'. The 'Latest Releases' list includes the following packages:

Package Name	Status	Available Version
Config Drift (Solutions)	(up to date)	
Config Modeling Kit for Cisco ASA Firewall (MyOrganization Shared)	(not installed)	1.0.24.201911141104 is available
Config Modeling Kit for Cisco IOS Router (MyOrganization Shared)	(not installed)	1.0.23.201909041348 is available
Config Modeling Kit for Cisco IOS Switch (MyOrganization Shared)	(not installed)	1.0.22.201909041352 is available
Config Modeling Kit for Cisco NX-OS Switch (MyOrganization Shared)	(not installed)	1.0.11.201909041356 is available
Config Modeling Kit for Juniper Networks EX Switch (MyOrganization Shared)	(not installed)	1.0.19.201909041359 is available
Config Modeling Kit for Juniper Networks SRX Router (MyOrganization Shared)	(not installed)	1.0.19.201909041402 is available
Device Discovery (Solutions)	(up to date)	
OS Management (Solutions)	(up to date)	
OS Upgrade (MyOrganization Shared)	(not installed)	1.2.10.201909181643 is available
Workflows for Config Modeling (MyOrganization Shared)	(not installed)	1.0.51.201905101819 is available
X.509 Certificate Management for Cisco IOS CA (MyOrganization Shared)	(not installed)	1.0.73.201904171904 is available


# Install packages

Gluware Solutions, **Config Modeling Kits** (CMKs), and **Workflows** come as packages that you must install. Before installing these packages, make sure your organizations are set up in Gluware. Each relevant package must be installed in the appropriate organization.

When creating a new organization, the **Gluware Core Solutions** package is installed. And the **Gluware Core Solutions** package must be installed before any device **Config Modeling Kit** is installed. Packages must be installed one at a time. Updates to packages are also available.

Gluware uses this URL to access the Gluware Distribution Center:

<https://glulab.gluware.com/>  External access is required.

1. Ensure you're in the organization you want to install the package in.
2. Go to  **Solutions Manager** > **Available Packages**.
3. Search for the package you want to install in the **Package Explorer**.
4. Double-click on the name of the package to display the package details. You'll see "Package is Currently Not Installed" in the top pane if the package is not yet installed.
5. Select **Preview** and then click **Preview Package Installation**. This doesn't install the package but can alert you to any potential problems. Look for "Preview Completed!" when the preview script runs successfully. A list of any existing files and/or instances that will be updated are also displayed. Any potential problems with the installation will appear as red error messages. Contact Gluware Support ([support@gluware.com](mailto:support@gluware.com)) if you can't interpret or resolve errors.
6. Select **Install** and then click **Install Package**. You'll see "Installation Completed!" when the installation is successful. Any problems with the installation will appear as red error messages.

**NOTE:** Packages must be installed one at a time. The organization will be locked until the installation is complete.



Config Modeling Kit for Cisco IOS Router
+
✕

### Installed Package Details

Package is Currently Not Installed

### Available Package Details

**Name:** Config Modeling Kit for Cisco IOS Router  
**Version:** 1.0.23.201909041348  
**Description:**  
 Gluware Config Modeling Kit for Cisco IOS Router devices (ios/ios xe)  
**Release Notes:**  
 Maintenance Release  
 - minor bug fixes and enhancements  
 Release Notes  
 - <https://support.gluware.com>

General   Preview   Install

Package Explorer
✕


Installed   Available   Import Package
Search Packages

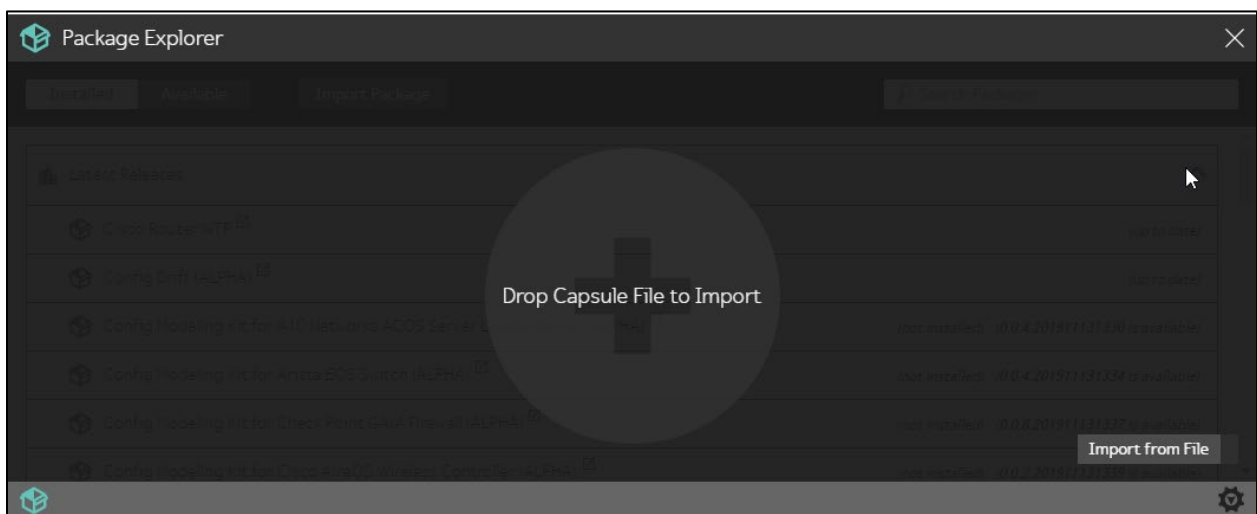
Latest Releases
^

Config Drift (Solutions) <span style="float: right;">(up to date)</span>
Config Modeling Kit for Cisco ASA Firewall (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.24.201911141104 is available)</span>
Config Modeling Kit for Cisco IOS Router (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.23.201909041348 is available)</span>
Config Modeling Kit for Cisco IOS Switch (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.22.201909041352 is available)</span>
Config Modeling Kit for Cisco NX-OS Switch (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.11.201909041356 is available)</span>
Config Modeling Kit for Juniper Networks EX Switch (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.19.201909041359 is available)</span>
Config Modeling Kit for Juniper Networks SRX Router (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.19.201909041402 is available)</span>
Device Discovery (Solutions) <span style="float: right;">(up to date)</span>
OS Management (Solutions) <span style="float: right;">(up to date)</span>
OS Upgrade (MyOrganization Shared) <span style="float: right;">(not installed) (1.2.10.201909181643 is available)</span>
Workflows for Config Modeling (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.51.201905101819 is available)</span>
X.509 Certificate Management for Cisco IOS CA (MyOrganization Shared) <span style="float: right;">(not installed) (1.0.73.201904171904 is available)</span>

## Import a capsule

Updates to Gluware On Prem systems are delivered via capsules to be imported in **Solutions Manager**.


1. Ensure you're in the organization you want to install the updates in.
2. Go to  **Solutions Manager** and click **Import Package**.
3. Drag and drop the capsule file into the **Package Explorer**. The updated packages will be listed under **Latest Releases** in the **Package Explorer**.




# Import your own package

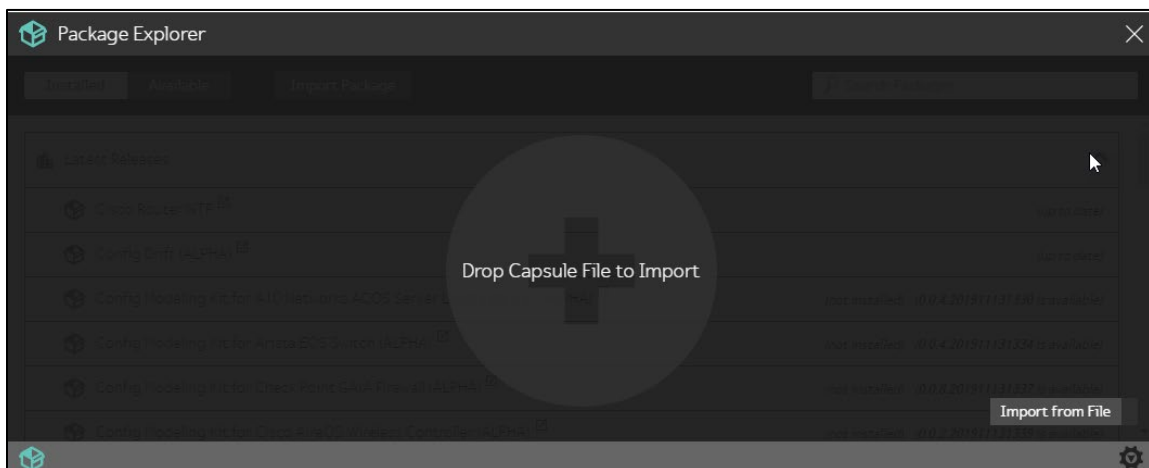
You can copy a network feature created in one organization to a different organization.

## Create a Feature capsule

1. Go to  **Solutions Manager** > **Installed Packages**.
2. Expand the **Design** folder and double-click the **Network Feature Distribution** workflow.
3. Click **Next**.
4. Select the **Feature Set** you want to copy to another organization from the drop-down list and click **Next**.
5. In the **Options** list, select the **Feature Policies** you want to include and click **→**. The **⇒** selects all the available Feature Policies.
6. Click **Next**.
7. Provide a name, description, and version description, and click **Finish**. The Feature capsule will be added to your Downloads folder.

## Import the Feature

1. Ensure you're in the organization in which you want to install the package.
2. Go to  **Solutions Manager** and select **Import Package**.
3. Drag and drop the Feature capsule into the **Package Explorer** or click **Import from File**.



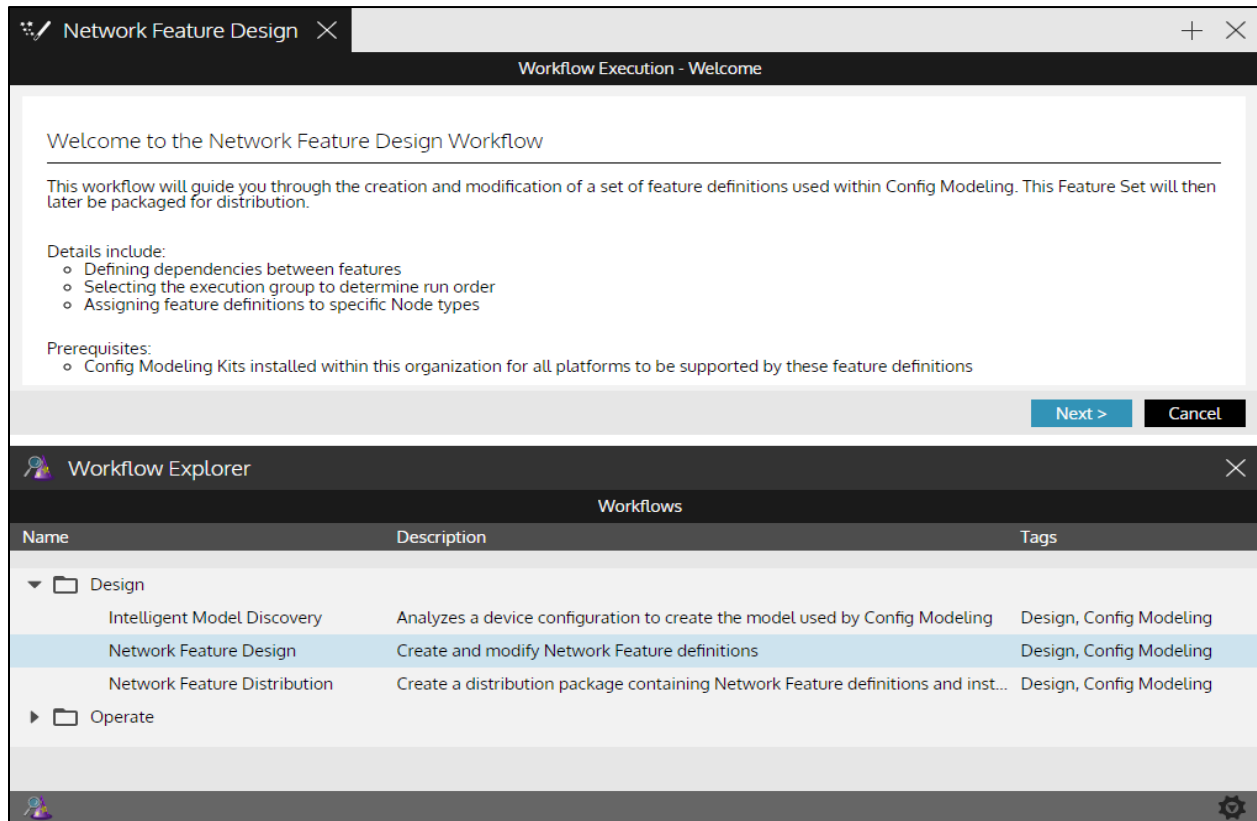
## Workflows quick reference

Workflows provide guided execution for a range of different activities applicable to Gluware-based capabilities. Workflows are tied to specific Gluware capabilities. The **Workflow Explorer** provides a list of available workflows for the current organization.

Workflows are only available to Gluware users assigned to a specific standard Gluware role or to a customized role with Workflows permissions.


Category	Workflow Name	Role Assignment
Design	Network Feature Design	System Admin; Level 4
Design	Network Feature Deployment	System Admin; Level 4
Design	Intelligent Model Discovery	System Admin; Level 4
Operate	CA Manager for Cisco IOS	System Admin; Level 4

The first page of each workflow describes any prerequisites.




# Design a new network Feature type

The **Workflows for Config Modeling** wizard guides you through the creation of a set of feature types; for example, NTP, SMTP, QoS. These will be used in **Config Model Editor** to create specific feature policies; for example, an SNMP policy for a specific region.

1. Install the **Gluware Core Solutions** package from **Solutions Manager**.
2. Go to  **Workflows**,
3. Expand the **Design** folder and double-click **Network Feature Design**. You'll see a description of the workflow in the top pane.
4. Click **Next**.
5. Select **Create New Feature Set** and click **Next**.
6. Name and describe the new feature set and click **Next**.
7. Name and describe the feature within the feature set and select a level of execution. **Initial** executes the feature in the first execution group, **Final** executes the feature in the last execution group, **Custom** allows you to assign a numerical order for execution between Initial and Final execution groups.
8. In the **Available** list of node types, select the device types you want the feature to run against and click → . The → selects all the available device types.
9. If the new feature is dependent on another feature, select **Feature Dependencies** and then select from the features in the same execution group.
10. Click **Next**.
11. Optional: To create a form to collect data to be used in the feature rendering, click **Add Section +** and then click **+** to add a row to the form. This is where you can define variables to be used in Command Lists. The variable format in the command line will be `<sectionname>.<fieldname>`, or if an array, `<sectionname>.<fieldname>[entry].<fieldname>`  
For **Field Type**, select:  
**String** - Alphanumeric value  
**Number** - Integer or floating point number  
**Boolean** - True or False

**Enum** - Enumerated list; a pick list

**Array** - You'll have more than one value for the variable

- Optional: Select the row and click  to further define the field in the optional form.

For **Field Type**:

**String** - You can define a default value for the field, specify a validation type, and make the field required.

**Number** - You can define a default value for the field, specify a validation type, and make the field required.

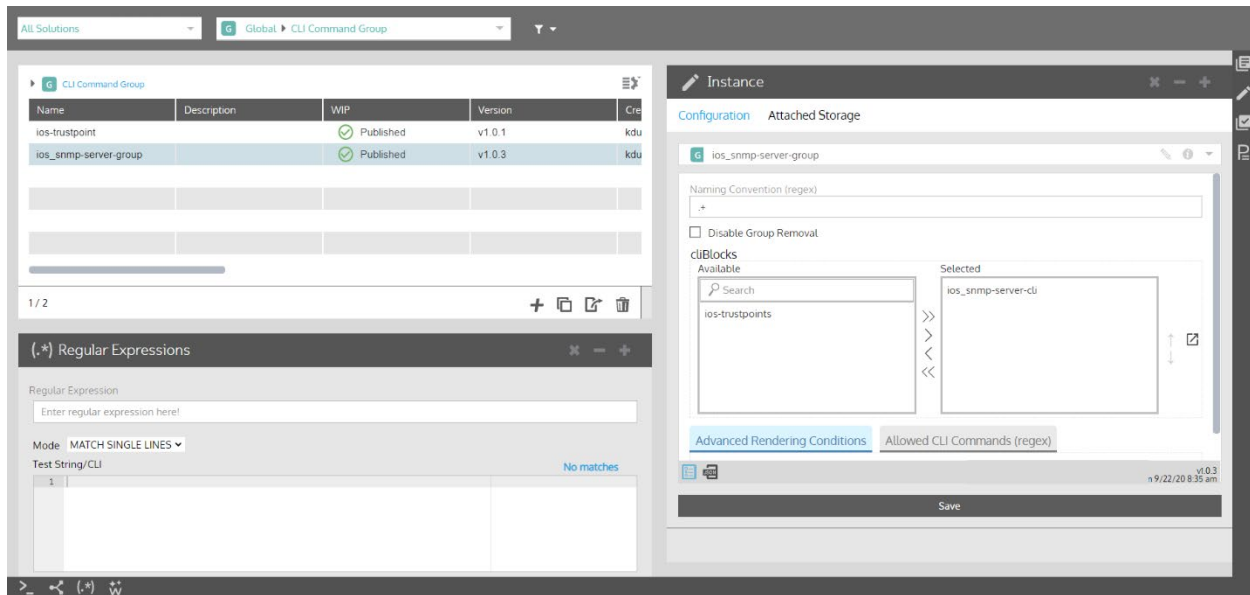
**Boolean** - You can define a default value for the field and make the field required.









**Enum** - You can define a default value for the field, valid available values and labels, and make the field required.

**Array** - You can define a default values for the field and make the field required.


- Click **+** to add a row as needed.
- Click **Add Section +** to the form as needed.
- Click the **X** in the **Allow Multiple** drop-down list if you want only one group of properties. If you want multiple groups of properties, select a format for the form from the drop-down list.
- Click **Next** and review the form.
- Click **Back** to make changes to the form. Click **OK** when you are satisfied with the form.
- Review the feature set you created and then select **Save** or **Publish**.
- Provide a package name and description.
- Optional: To change the version numbering schema, select a schema from the **New Version** drop-down list and provide a version description.
- Clear the **Install package into current organization** box if you don't want to install the package. Otherwise, the package is published to your organization's local distribution area and can be installed through **Solutions Manager**.
- Click **Finish**.

# Config Model Editor quick reference





-  Select the columns to be displayed in the grid
-  Create New - Add an instance
-  Clone Instance - Clone the selected instances
-  Manifest - Download a CSV file that lists all the references and version numbers for the selected instance
-  Export - Export a CSV file of devices
-  Delete Instance - Delete the selected instances
-  Terminal - Open the Terminal panel that allows you connect to a node via a secured terminal session to execute native commands
-  Node Instance Map - View the selected node and related global instances, features, and domains




 Regular Expressions - Opens the Regular Expressions panel that allows you to test a regex statement

 Workflow - Opens the Regular Expressions panel that allows you to run a custom workflow


 Detail - View status and property information about the selected instance, including the other instances that it references


 Instance - Open the Instance panel that allows you to edit the properties of an instance

 Action - Open the Actions panel that allows you to preview the model and provision the selected node

 Provisioning - View a list of the provisioning logs associated with the selected node

 Multi-Edit - Make the same updates to all the selected instances

 Form View - Display the Instance panel in form view. Available only to those in the System Developer role



 JSON View - Display the Instance panel in JSON view. Available only to those in the System Developer role

# Export or import a device list in Config Model Editor



All devices that have been added in Gluware **Device Manager**, that have been discovered in Device Manager, and that are categorized as **Managed**, will also appear in **Config Model Editor**. However, **Config Model Editor** maintains additional data elements for each node that will not appear in **Device Manager**. To add the additional data for your devices:

1. Export your device list from **Config Model Editor**
2. Add the additional information to the CSV file
3. Then import the device list in **Config Model Editor**

## Export a device list

1. Ensure you're in the organization you want to export devices from.
2. Go to  **Config Model Editor > Nodes**.
3. Select the type of devices you want to export from the drop-down list. For example, select **IOS Router**.
4. Click . A CSV file is added to your Downloads folder.



## Import a device list

1. Ensure you're in the organization you want to import devices into.
2. Go to  **Config Model Editor > Nodes**.
3. Select the type of devices you want to import from the drop-down list. For example, select **IOS Router**.
4. Click .
5. Do one of the following:
  - Select **Download CSV Template** to get a template formatted for **Config Model Editor**. The template in **Config Model Editor** differs from the template in **Device Manager** and is different for each type of node.
  - Select **Import from File** and click **Open** to import a CSV file.


# Add an individual device to Config Model Editor

All devices that have been added in Gluware **Device Manager**, that have been discovered in Device Manager, and that are marked **Managed**, will also appear in **Config Model Editor**. The **Config Modeling Kit** for the device type must also be installed.

Any nodes added in **Config Model Editor**, will also be listed in **Device Manger**. However, **Config Model Editor** maintains additional data elements for each node that will not appear in **Device Manager**.

1. Ensure you're in the organization you want to add devices to.
2. Go to  **Config Model Editor > Nodes**.
3. Select the type of node from the drop-down list.
4. Click **+**.
5. In the Instance panel, click  and name and describe the device.
6. Provide the connection information required for the device.
7. The **Assembly**, on the Associations tab, is required to model the configuration but you can add that later.
8. Save.

**NOTES:** You can also add a device by cloning an existing device.

Simply select a device in the grid list and click 

If your organization uses customized roles, it's possible to add devices that you will not later be able to manage.

Instance ✕ - +

Configuration Attached Storage

**N** Unnamed-iosRouter-1 ✎ ⓘ ▾

Site Location (optional)  
No Instances Available ▾ ↗

Control Management Type  
managed ✕ ▾

**Connection** Associations Persona Hardware Specs Provisioning ☰

IP Address \*  
  
**This is a required field**

Username \*  
  
**This is a required field**

Password \*  
  
**Please enter password**

Enable Mode Password

JSON v1.0.0 9/02/20 8:00 am

**Save**


# Create model instances using Intelligent Model Discovery


You can create all the instances required for config modeling from a device with a known configuration. The **Intelligent Model Discovery** (IMD) workflow will create CLI Command Lists, CLI Command Groups, Features, and Assemblies from the device's existing configuration if they don't already exist. You can then use these instances to model other devices in your network.

The required Feature Binder must exist in **Config Model Editor** and the Config Modeling Kit for the appropriate vendor device package needs to be installed to use **Intelligent Model Discovery**.


You can run the Intelligent Model Discovery workflow from **Config Model Editor** and from **Workflows**.

## Run from Config Model Editor

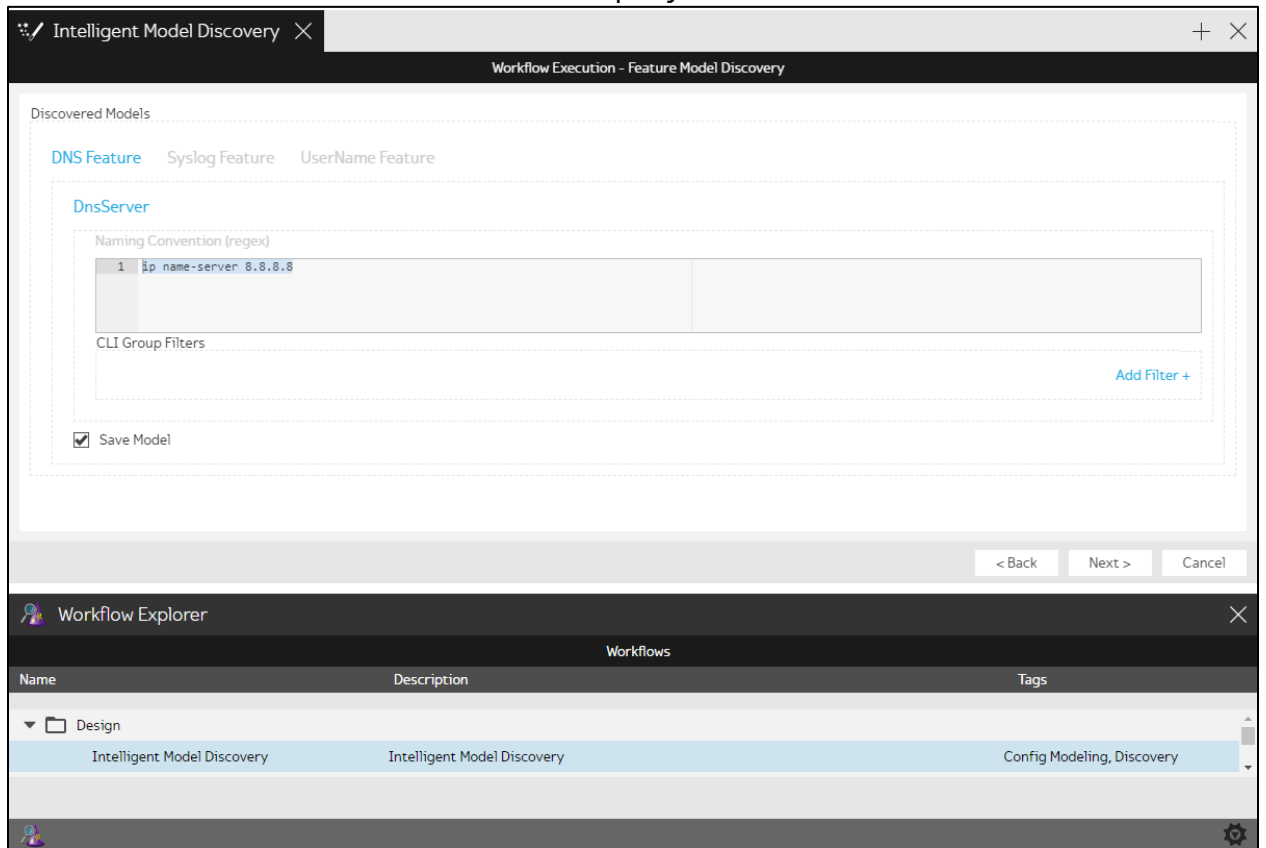
1. Go to  **Config Model Editor > Nodes**.
2. Select the type of node from the drop-down list.
3. Right-click the node in the grid that you want to model and click **Intelligent Model Discovery**. Gluware will connect to the device and parse the configuration into the instances required for modeling. The discovered models are then displayed.
4. For each model discovered:
  - If you want to restrict the CLI commands allowed, click **Add filter +**, select **Allowed CLI Commands (regex)**, and enter the CLI commands. If no commands are entered, Gluware will allow any command to be issued.
  - If you want to render the commands only if the listed elements are found during discovery, click **Add filter +**, select **Discovery Elements**, and list them.
  - Clear the **Save Model** box if you don't want to model the feature.

5. Click **Next**.
6. Confirm the features you want to build by checking the box next to the feature name and click **OK**.
7. Click **Finish**.
8. Click **Cancel**.
9. Click  to see the instances that were created or updated by the **Intelligent Model Discovery** workflow.
  - Click and scroll down to reduce the size of the map.
  - Click-and-drag to re-position the map.
  - Double-click on any item in the map to open and inspect the instance details.
10. To download the execution logs, go to **Data Export**, select **Most Recent IMD Workflow Logs** from the drop-down list, and click **Run and Download Export**.

## Run from Workflows

1. Go to  **Workflows**.
2. Expand the **Design** folder, and double-click **Intelligent Model Discovery**.
3. Click **Next**.
4. Select the **Access Method**:
  - Select **Existing Nodes**. Then select the **vendor**, **node type**, and the **node**.
  - Select **IP & Credentials** if you are running the workflow from **Workflows** and the node you want to model has not already been added to Gluware. Enter the **IP Address**, **username** and **password**, **connection information**, and **proxies** if applicable.
5. Click **Next**. Gluware will connect to the device and parse the configuration into the instances required for modeling.

6. The discovered models are then displayed.



7. For each model discovered:

- If you want to restrict the CLI commands allowed, click **Add filter +**, select **Allowed CLI Commands (regex)**, and enter the CLI commands. If no commands are entered, Gluware will allow any command to be issued.
- If you want to render the commands only if the listed elements are found during discovery, click **Add filter +**, select **Discovery Elements**, and list them.
- Clear the **Save Model** box if you don't want to model the feature.

8. Click **Next**.

9. Confirm the features you want to build by checking the box next to the feature name and click **OK**.

10. Click **Finish**.

11. Click **Cancel**.

12. To download the execution logs, go to **Data Export**, select **Most Recent IMD Workflow Logs** from the drop-down list, and click **Run and Download Export**.








## Create a Concept Item

**Concept Items** are used to discover information from a device before provisioning it. The Concept Item contains the show commands that help define the part of the configuration that will be impacted by a feature in **Config Model Editor**. Concept Items also discover information from devices to place into variables used in CLI Command Lists.

Gluware delivers many of the Concept Items that you will need. You may want to create new Concept Item instance if you want to add your own variables to the show commands or use discovery.

**NOTE:** You can create a **Concept Item** by cloning an existing one. Simply select a **Concept Item** in the grid and click 

1. Ensure you're in the organization you want to create a Concept Item for.
2. Go to  **Config Model Editor > Globals**.
3. Select **Concept Item** from the drop-down list.
4. Click **+**.
5. In the Instance panel, click  and name and describe the **Concept Item** instance.
6. Enter the name for the section of the configuration you want to model for the **Concept Item Name**. For example, ACL List.
7. Click **Add Vendor +** and select the **Operating System** (optional). This will allow you to filter the list of Concept Items.
8. Click **Add Command +** and type the list of show commands that will capture the section of the configuration you want to model. Use    to re-order or delete lines.
9. Select **Advanced** for the **Operating Mode** when the key line isn't found as the first line in the configuration section or when CLI metadata needs to be added to provide more instruction on how to remove commands, respond to confirmation prompts, etc.
10. Enter the unique identifier of the object you are modeling as the **Key CLI Line**.

11. Select the **Flat Structure CLI** box if the section of the configuration you want to model is at the root level.
12. Optional: If you selected **Advanced** for the **Operating Mode**, provide the **Key Line Depth** (usually 1), **Key Regex Group ID** (usually 1), and select a **CLI Metadata** instance.
13. Optional: Enter the **Start Line (regex)** for the section of the CLI returned that you want to include in the comparison. For example, when a device does not support a "section" command, the entire CLI configuration may come back in the show command. The Start Line tells Gluware where in the CLI that's returned to start to include in the comparison.
14. Optional: Click **Add Element +** and enter a **Field Name** (variable name) if you want to discover it in the configuration. Click **Add Expression +** to define the regex that gets the value for the variable.
15. Optional: To remove objects in the configuration without using the standard "no <statement>", click **Add Item +**, enter the regex for the object you want to find as the **Match Expression (regex)**, and then enter what you want to replace it with as the **Remove Expression (regex)**.

Instance ✕ - +

Configuration Attached Storage

**G** IOS\_Snmp i ▾

Concept Item Name \*

Snmp

Operating Systems

Cisco Systems

Operating System

IOS/IOS XE ✕

Add Vendor +

Show Commands

sh run | inc ^snmp|^no snmp

Operating Mode

Advanced ✕ ▾

Key CLI Line

{snmp|s|snmp-server|s}(\S+)

Flat Structure CLI ?

Key Line Depth

1


Key Regex Group ID

2

Naming Convention (regex)




Naming Convention (regex)


CLI Metadata (optional)

No Instances Selected ▾ 

# Create a CLI Command List

A **CLI Command List** includes the specific CLI commands to run on the device. The list can contain commands, variables, and information learned from the device during discovery.

1. Ensure you're in the organization you want to create a CLI Command List for.
2. Go to  **Config Model Editor > Globals**.
3. Select **CLI Command List** from the drop-down list.
4. Click .
5. In the Instance panel, click  and name and describe the **CLI Command List** instance.
6. Select a **Concept Item** from the drop-down list.
7. Type the list of command lines for the configuration you want. A reference to both the form and discovered variables can be used and values will be substituted at runtime.
8. Select a **Filter Option** if appropriate: **Compatible OS**, **Compatible OS And Platform SKU**, or **Compatible Platform SKU**. This gives you the option to apply this list only if the specified condition exists. For example, the command lines only apply if the discovered OS version is 15.5 or greater.
9. Save.

**NOTE:** You can also create a **CLI Command List** by cloning an existing list. Simply select a **CLI Command List** in the grid and click 

## Example 1: CLI Command List for SNMP

```
snmp-server community public RO
snmp-server community private RW
snmp-server location America
snmp-server contact Jan Doh
```

## Example 2: CLI Command List for SNMP with form-based variables

**NOTE:** The variable format in the command line will be `<sectionname>.<fieldname>`, or if an array, `<sectionname>.<fieldname>[entry].<fieldname>`

Use `$context` if the command is required. If the line doesn't exist in the configuration it will be added.

Use `#context` if the command is optional. If the line doesn't exist in the configuration it doesn't render at all.

```
snmp-server community
$context.snmp.readonlycommunity[*] RO
snmp-server community $context.snmp.writecommunity[*]
RW
snmp-server location $context.snmp.location
snmp-server contact $context.snmp.contact
```

Instance ✕ - +

Configuration Attached Storage

G ios\_snmp-server-cli ✎ ⓘ ▾

Associated Concept Item \*

IOS\_Snmp ✕ ▾ ↗

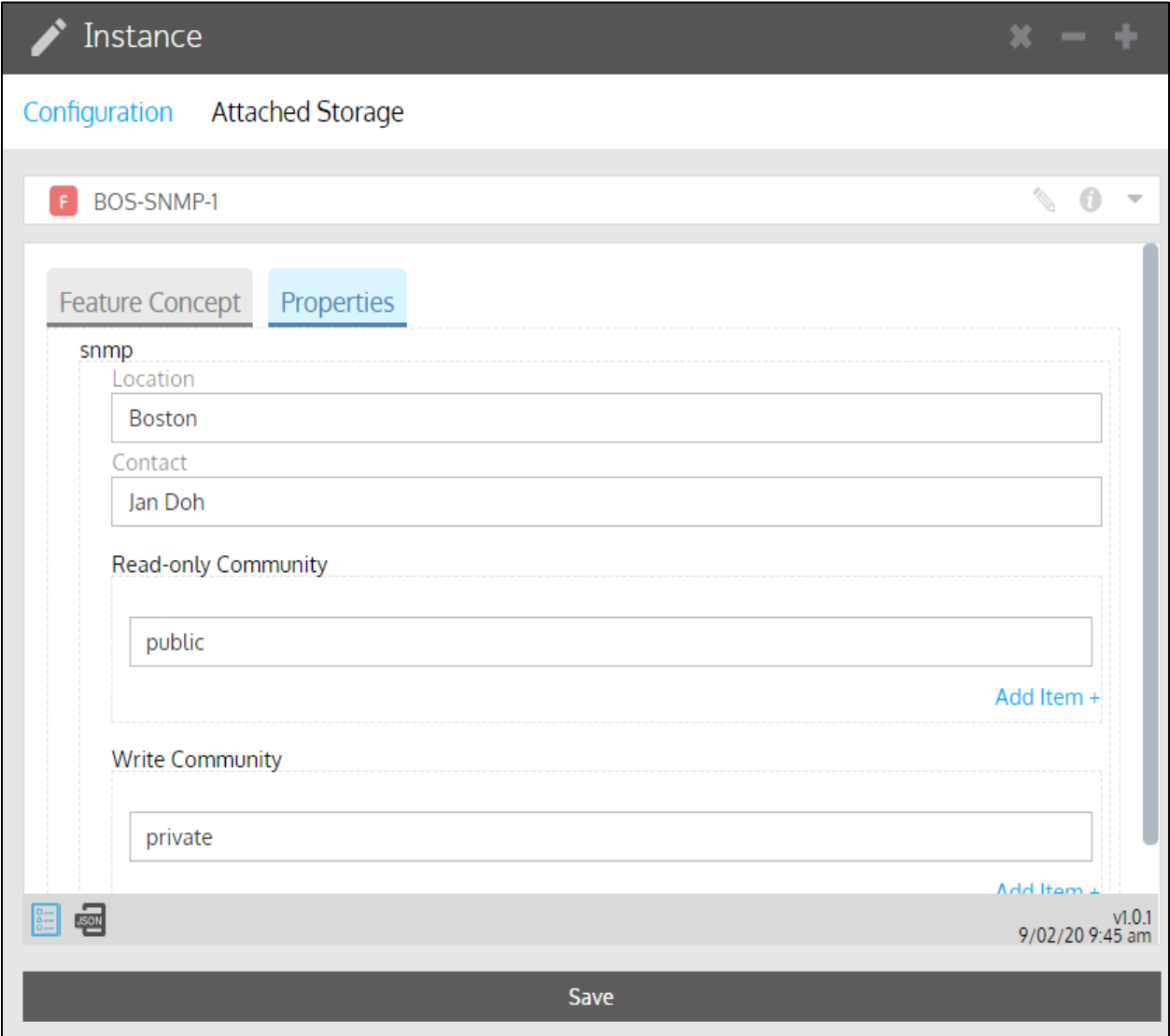
CLI Commands

```
1 snmp-server community $context.snmp.readonlycommunity[*] RO
2 snmp-server community $context.snmp.writecommunity[*] RW
3 snmp-server location $context.snmp.location
4 snmp-server contact $context.snmp.contact
```

📄 📄 v1.0.1  
8/11/20 12:51 pm



Save

# Feature Properties form for capturing the variables



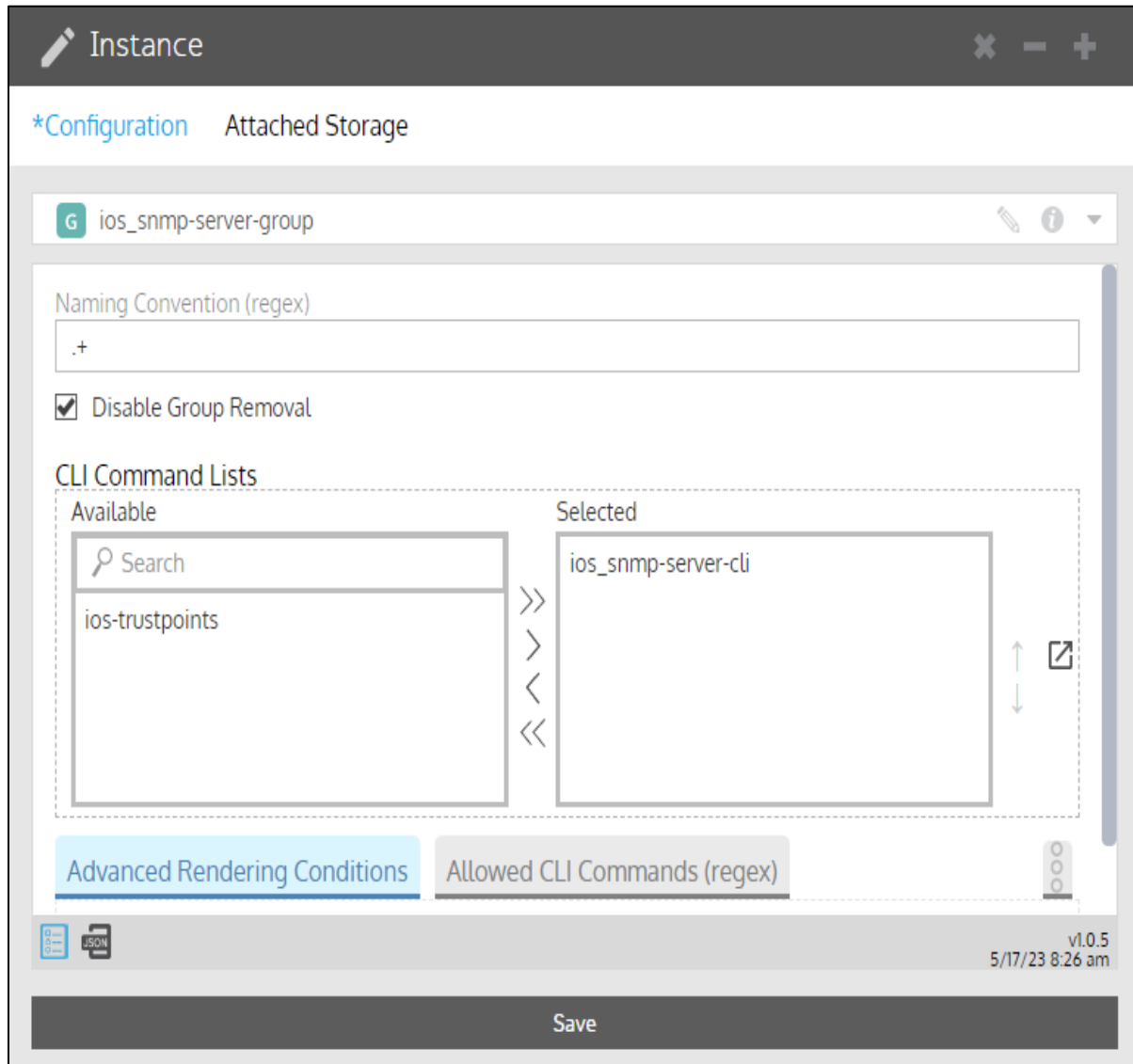
# Create a CLI Command Group

A **CLI Command Group** allows you to combine multiple **CLI Command Lists** to achieve a specific configuration. Every **CLI Command List** must be associated with a **CLI Command Group**, so you may have a one-to-one relationship.

1. Ensure you're in the organization you want to create a CLI Command Group for.
2. Go to  **Config Model Editor > Globals**.
3. Select **CLI Command Group** from the drop-down list.
4. Click **+**.
5. In the Instance panel, click  and name and describe the **CLI Command Group** instance.
6. To limit changes to only configuration items with a specific name, enter the regex in **Naming Convention (regex)**. For example, `acl-qos+` limits changes to ACLs that start with `acl-qos`.  
Need help with regex? Go to <http://regex101.com/>
7. If you want to enable removal of entire CLI groups, clear the **Disable Group Removal** box. Otherwise, if this is selected, modifications can only be made to subcommands.
8. In the **Available** list, select the **CLI Command Lists** you want to include and click **→**. The **⇒** selects all the lists.
9. If you want to render the commands only if the listed elements are found during discovery, list them in **Advanced Rendering Conditions, Discovery Elements**. For example, only apply if the discovered interface description is "WAN Interface."
10. Optional: To add a **Post-Modify Condition** or a **Pre-Modify Condition**, click **Add Item+**, select from the drop-down list, and enter the appropriate regex.
11. Optional: If you want to restrict the CLI commands allowed, enter those in **Allowed CLI Commands (regex)**. If no commands are entered, Gluware will allow any command to be issued.
12. Save.



**NOTE:** You can also create a **CLI Command Group** by cloning an existing group. Simply select a **CLI Command Group** in the grid and click 



The screenshot shows the configuration interface for a CLI Command Group named "ios\_snmp-server-group". The page is titled "Instance" and has tabs for "\*Configuration" and "Attached Storage".






Key elements include:

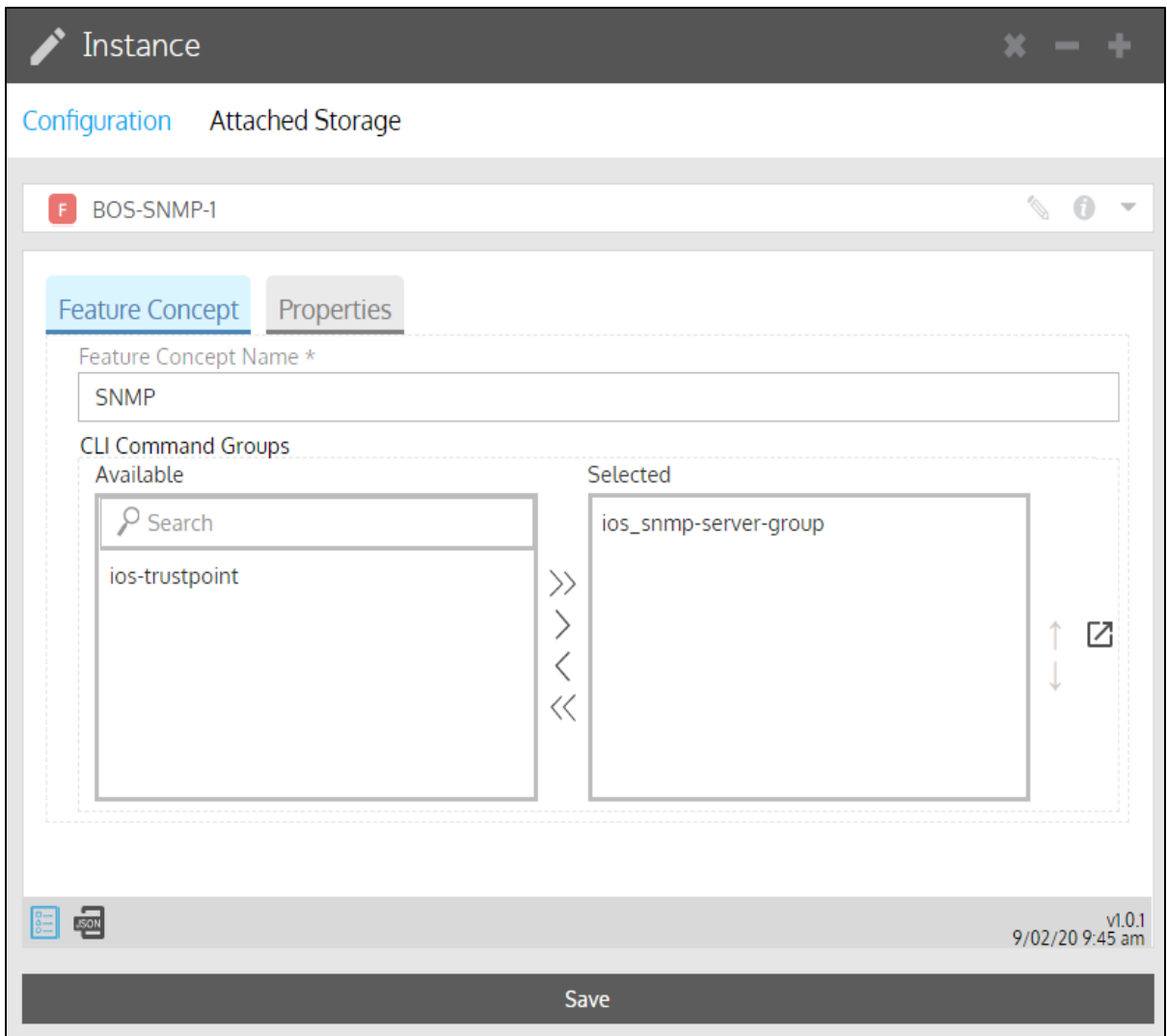
- Group Name:** ios\_snmp-server-group
- Naming Convention (regex):** A text input field containing ".+".
- Disable Group Removal:** A checked checkbox.
- CLI Command Lists:** A section with two columns: "Available" and "Selected".
  - Available:** Contains a search bar and the item "ios-trustpoints".
  - Selected:** Contains the item "ios\_snmp-server-cli".
  - Navigation:** Between the columns are arrows: >>, >, <, and <<. To the right of the Selected list are vertical arrows and a clone icon.
- Advanced Rendering Conditions:** A button that is currently selected.
- Allowed CLI Commands (regex):** A button.
- Footer:** Includes a "Save" button, a version number "v1.0.5", and a timestamp "5/17/23 8:26 am".

# Create a Feature

A **Feature** or **Feature Policy** reflects the structure and syntax of a CLI function on a specific network device.

The basic underlying code for a Feature is created using the Workflows wizard. More specific functionality is added using **Config Model Editor**.

1. Ensure you're in the organization you want to create a Feature for.
2. Go to  **Config Model Editor > Features**.
3. Select the type of **Feature** from the drop-down list.
4. Click .
5. In the Instance panel, click  and name and describe the **Feature** instance.
6. Name the **Feature Concept**.
7. In the **Available** list, select the **CLI Command Groups** you want to include and click . The  selects all the available CLI Command Groups.




8. Select **Properties**.

9. Fill in the form. These are the properties that are used in the CLI Command List.

The screenshot shows a web interface for configuring an SNMP instance. The title bar reads "Instance" with a pencil icon and window controls. Below the title bar, there are tabs for "Configuration" and "Attached Storage". The main content area is titled "BOS-SNMP-1" and has a sub-tab for "Properties". Under the "snmp" section, there are four input fields: "Location" (Boston), "Contact" (Jan Doh), "Read-only Community" (public), and "Write Community" (private). Each field has an "Add Item +" link to its right. At the bottom of the form, there are icons for "JSON" and "v1.0.1" and a timestamp "9/02/20 9:45 am". A large "Save" button is at the very bottom.



10. Save.

**NOTE:** You can also:

- Create a Feature instance by cloning an existing one. Simply select a **Feature** in the grid and click 
- Import an example Feature from the Gluware Knowledge Base at <https://support.gluware.com/hc/start> using **Import Package** in **Solutions Manager**.

# Create a Feature Binder

A Feature Binder is a collection of Concept Items. A Feature Binder is required if you want to use node state assessment.

1. Go to  **Config Model Editor > Globals**.
2. Select **Feature Binder** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the **Feature Binder** instance.
5. Select the device vendor from the drop-down list.
6. Select the operating system from the drop-down list.
7. Give the Feature Binder its internal name. The name cannot contain spaces or special characters.
8. Give the Feature Binder a display name.
9. Click **Add Concept Item +** and select a **Concept Item** from the list.
10. Add one or more additional **Concept Items**.
11. Save.

Instance

Configuration Attached Storage

G Unnamed-Feature Binder-1

Device Vendor  
Cisco Systems

Operating System  
IOS

Feature Name \*  
Feature Name  
This is a required field

Feature Display Name \*  
Feature Display Name  
This is a required field

Concept List  
[Add Concept Item +](#)

v1.0.0  
7/07/21 10:05 am

Save




# Create a Routed Port Map

**Routed Port Maps** allow you to associate a logical name, such as WAN, to physical interfaces (Interface Name) with the same role. The physical name might differ device to device, depending on the platform; but in Gluware, they are called by the logical name. For example, the logical WAN interface on Device1 is physical interface TenGigabitEthernet0/2/0 and GigabitEthernet0/1 on Device2.




During runtime, Gluware translates the value of WAN to the respective physical name (Interface Name) identified in the **Port Map** referenced by each device. Creating **Routed Port Maps** allows you to easily configure like ports with the same CLI. The more interface standards imposed by each organization, the fewer **Port Map** instances need to be created.

## Create your Logical Names

You'll want to decide what logical names make sense for your organization. Some examples are DATA, VOICE, ISP1, ISP2. Don't include spaces or special characters since these values are used as variables.

1. Go to  **Config Model Editor** > **Globals**.
2. Select **LAN Interface Name** or **WAN Interface Name** from the drop-down list; for example, DATA or WAN.
3. Click .
4. In the Instance panel, click  and name and describe the instance.
5. Describe the logical name.
6. Save.
7. Create additional logical names as needed.

## Create your Routed Port Maps

1. Go to  **Config Model Editor** > **Globals**.
2. Select **Routed Port Map** from the drop-down list.
3. Click .
4. In the Instance panel, click  and name and describe the instance.

5. Click **Add Port +**.
6. Select a logical name from the drop-down list.
7. Enter the interface name for the port that is on the device. For example, GigabitEthernet0/0/0.
8. For Juniper devices, enter the **Extended Interface Name**.
9. Save.



The screenshot shows a web interface for configuring an instance. At the top, there is a dark header with a pencil icon and the word "Instance". Below this, there are two tabs: "Configuration" (selected) and "Attached Storage". The main content area has a header with a green "G" icon, the text "ISR2921", and a pencil icon. Below this is a text input field labeled "Add Instance Description". The main section is titled "Port Map" and contains two port configuration blocks, each enclosed in a dashed border. The first block has a "Logical Name" dropdown menu with "ISP1" selected, an "Interface Name" text input with "GigabitEthernet0/0", and an "Extended Interface Name" text input with "Extended Interface Name". The second block has a "Logical Name" dropdown menu with "DATA" selected, an "Interface Name" text input with "GigabitEthernet0/1", and an "Extended Interface Name" text input with "Extended Interface Name".





# Create a Switched Port Map

**Switched Port Maps** allow you to associate a **CLI Command Group** or Groups to ports on a switch node. Creating these CLI Command Group templates for your network allows you to quickly and easily apply a specific configuration to like ports on your network switches. This not only makes configuration changes easier; it also helps ensure consistency.

## Create your Switched Port Naming Profiles

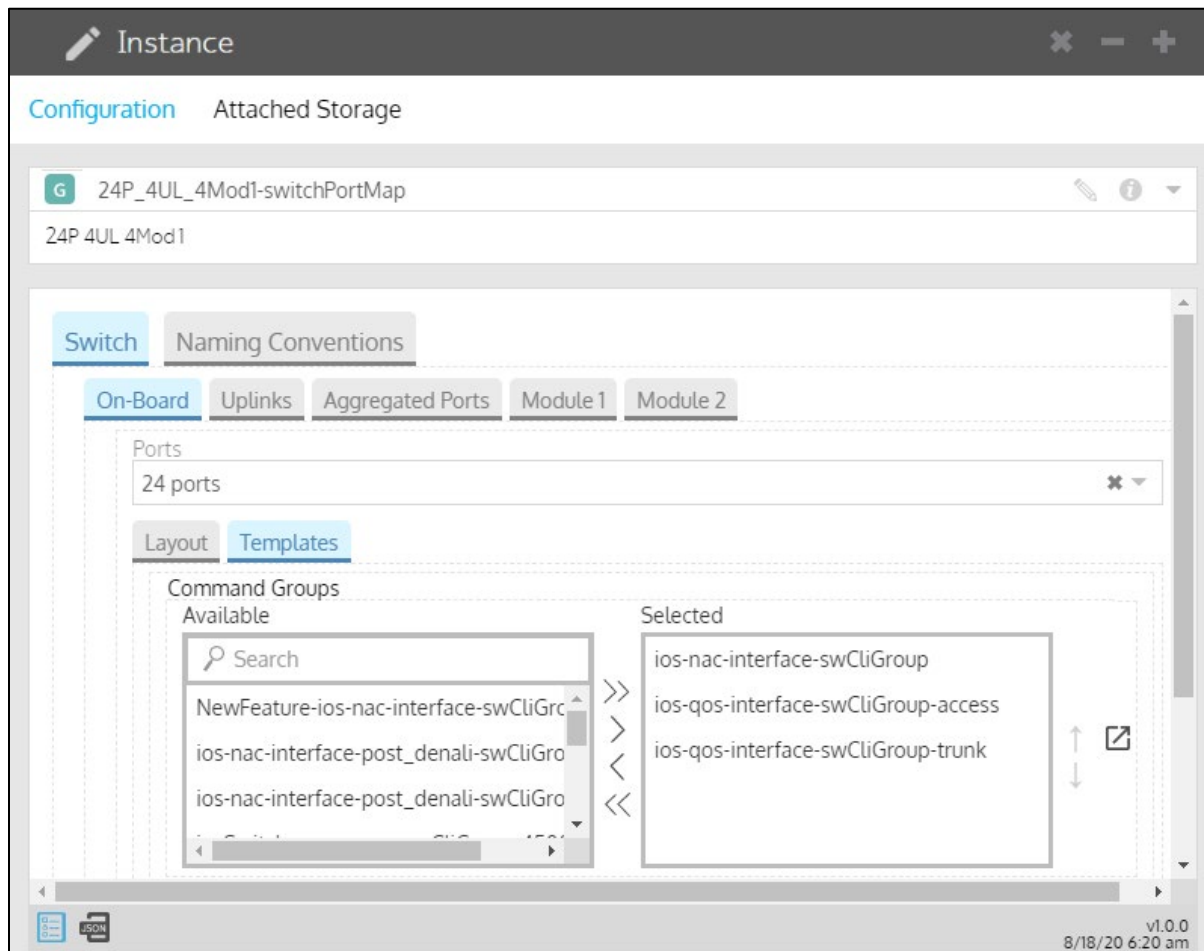
1. Go to  **Config Model Editor > Globals**.
2. Select **Switched Port Naming Profile** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the profile. Some name examples are onBoarding, uplinks, aggregatedPorts, module1, module2.
5. Select the **Port Type** from the drop-down list.
6. Select the **Mapping Mode** from the drop-down list, usually **inherited (from Switched Port Map)**.
7. Save.
8. Create additional naming profiles as needed.

## Create your Switched Port Maps



1. Go to  **Config Model Editor > Globals**.
2. Select **Switched Port Map** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the **Switched Port Map** instance.
5. Select the number of ports on the node from the drop-down list.
6. Select **Templates**.
7. In the **Available** list, select the **CLI Command Groups** you want to include in the template and click **→**. The **⇒** selects all the lists.
8. In the **Ports** drop-down list, select the ports you want to apply the template to.

## 9. Save.



**NOTE:** Alternatively, you can define **Switchport Settings** and then define the **Layout** in the Switched Port Maps. But using the Templates in the Switched Port Maps is faster and easier when there are many ports.



# Create an IPv4 address pool




1. Go to  **Config Model Editor > Domains**.
2. Select **IPv4 Address Pool** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name the instance.
5. For the **Master IP Prefix**, enter the subnet with CIDR block notation.  
For example, 10.222.1.0/24
6. Select an **Allocation Method** from the drop-down list: **Guest Pool**, **Host Pool**, or **Subnet Pool**.
7. For a **Host Pool**:
  - a. Click **Add Reservation +** and add an IP address.
  - b. Click **Add Node +** and select **Device**.
  - c. Enter the device's serial number.
  - d. Click **Add Range +** and enter the range of IP addresses.
8. For a **Subnet Pool**:
  - a. Select a subnet prefix length.
  - b. Click **Add Reservation +** and add the IP address of the subnet.
  - c. Optional: Click **Add Sharing Criterion +** and select **per Device**, **Site**, or **EVPN VTEP**.
    - i. For **per Device**, enter a serial number for the starting device and select the **Interface Name** from the drop-down list.
    - ii. For **per Site**, select the site from the drop-down list.
    - iii. For **per EVPN VTEP**, select from the drop-down list.
9. Create additional reservations as needed.
10. Save.


# Create an IP address plan

1. Go to  **Config Model Editor > Domains**.
2. Select **IP Address Plan** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the instance.
5. Click **Add Routed Interface +**
6. Select the interface from the drop-down list.
7. Click **Add Numbering Method +**
8. Select **IPv4** or **IPv6** from the drop-down list.
9. Select the numbering method: **Fixed Subnet**, **Host Pool**, **Shared Subnet Pool**, or **Subnet Pool**.
10. Add additional numbering methods and routed interfaces as necessary.
11. Save.

# Create an Assembly

**Assemblies** are the highest-level building block of config modeling and are used to determine how to provision nodes. **Assemblies** are directly attached to nodes and are specific to the device type (switch, router, firewall). Typically, you have as many **Assemblies** as you have individual device roles.

1. Ensure you're in the organization you want to create an Assembly for.
2. Go to  **Config Model Editor > Domains**.
3. Select the type of **Assembly** from the drop-down list.
4. Click .
5. In the Instance panel, click  and name and describe the **Assembly**.
6. Click **Add Feature +** and select a **Feature Policy** from the list.
7. Add additional **Feature Policies** as appropriate.
8. Select **Interfaces/Ports** and then select a port map and IP address plan from the drop-down lists.
9. Optional: Select **Boot** and then select an upgrade/downgrade policy and firmware catalog from the drop-down lists.
10. Save.

**NOTE:** You can also create an **Assembly** by cloning an existing one. Simply select an **Assembly** row in the grid and click .



# Example: IOS Router Assembly

The screenshot shows a web-based configuration interface for an IOS Router Assembly. At the top, there is a dark header bar with a pencil icon and the text "Instance". Below this, there are two tabs: "Configuration" (highlighted in pink) and "Attached Storage". The main content area is titled "BOS-iosRouterAssembly-1" and contains three sub-tabs: "Features" (highlighted in pink), "Interfaces/Ports", and "State". Under the "Features" tab, there is a section for "Optional Features" which includes a sub-section for "SNMP". Within the "SNMP" section, there is a text input field containing "BOS-SNMP-1" and a dropdown menu with a downward arrow. To the right of the input field is a small square icon with a plus sign. Below the "Optional Features" section is a blue link that says "Add Feature +". At the bottom of the interface, there is a dark grey bar with the text "Save". In the bottom right corner, there is a version number "v1.0.3" and a timestamp "9/28/23 2:39 pm".



# Assign a Routed Port Map and IP Address Plan to an Assembly or Node

**Routed Port Maps** and **IP Address Plans** can be assigned to an **Assembly** or to a **Node**. When assigned to the **Assembly**, all **Nodes** referencing that **Assembly** use the same information. However, if a device has a unique interface that is different than the organizational standard, it can have the **Port Map** and **IP Address Plan** assigned to the **Node** instance. If both are assigned, the one assigned to the **Node** instance supersedes the one assigned to the **Assembly**. Follow the appropriate steps for your implementation.

## Assign to an Assembly



1. Go to  **Config Model Editor > Domains**.
2. Select the type of **Assembly** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the **Assembly** instance.
5. Select **Interfaces/Ports** and then select the **Routed Port Map** from the drop-down list.
6. Select the **IP Address Plan** from the drop-down list.
7. Save.

## Assign to a Node

1. Go to  **Config Model Editor > Nodes**.
2. Select the type of **Node** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the **Node** instance.
5. Select **Associations** and then click **Add Node Specific Settings +**.
6. Select **Interfaces/Ports** and then select the **Port Map** from the drop-down list.
7. Select the **IP Address Plan** from the drop-down list.
8. Save.

# Create a CLI State Item

A CLI State Item allows you to define the way you want the show output to be parsed to extract only the relevant data from the output.

1. Go to  **Config Model Editor > Globals**.
2. Select **CLI State Item** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the **CLI State Item** instance.
5. Enter the CLI Command to extract the relevant information.
6. For the **Root Entry**,
  - Keep **Yes, with CLI output made of single lines for each entry** if the output is a flat structure.
  - Select **No, with CLI output made of distinct paragraphs** if the output is structured in sections/paragraphs.
7. To continue, find the appropriate section below.

## Yes, CLI output made of single lines for each entry

8. Name the group. Each CLI State Item is one group.
9. Click **Add Category +**.
10. Name the category. Each category includes a list of regex strings that will be applied against the show command output.
11. Click **Add Item +** under **List of Regex**.
12. Enter the regex you want to extract from the show command. All regex backreferences must be named groups. Numbered backreferences are not supported.
13. Optional: For the **Local Key field**, enter the named group that identifies each unique entry (the key). When one named group cannot be used to define the key, you can combine multiple named groups: use the + separator to make the key. You can also use a comma as a separator to define multiple keys. First one found wins.
14. Add additional categories accordingly.
15. Optional: To associate a friendly label to each CLI Command variable, click **Add Option +** under **Options**.
  - a. Select **CLI Command Parameters** from the drop-down list.



- b. Click **+** and enter the variable.
  - c. Double-click in the **Label** column and enter the friendly label for the variable.
  - d. Optional: Double-click in the **Description** column and enter a tooltip.
  - e. Add additional parameters accordingly.
16. Save.

The screenshot shows a web interface for configuring an instance. At the top, there's a header with a pencil icon and the word "Instance". Below that, there are two tabs: "Configuration" (selected) and "Attached Storage". The main content area is titled "G Unnamed-CLI State Item-3" and has a sub-header "Add Instance Description".

The form contains several fields:

- CLI Command \***: A text input field with the placeholder "CLI Command". It has a red border and a red error message below it: "This is a required field".
- Root Entry**: A dropdown menu with the selected option "Yes, with CLI output made of single lines for each entry".
- Group Name \***: A text input field with the placeholder "Group Name". It has a red border and a red error message below it: "This is a required field".
- Categories**: A dashed box containing an empty area and a blue button labeled "Add Category +".
- Options**: A dashed box containing an empty area and a blue button labeled "Add Option +".

## No, CLI output made of distinct paragraphs

8. Enter the regex that identifies each unique entry (the key). This regex can only include one group (backreference).
9. Name the group. Each CLI State Item is one group.
10. Click **Add Category+**.
11. Name the category. Each category includes a list of regex strings that will be applied against the show command output.
12. Click **Add Item+**.
13. Enter the regex you want to extract from the show command. All regex backreferences must be named groups. Numbered backreferences are not supported.
14. Add additional categories accordingly.
15. Optional: To associate a friendly label to each CLI Command variable, click **Add Option +** under **Options**.
  - a. Select **CLI Command Parameters** from the drop-down list.
  - b. Click **+** and enter the variable.
  - c. Double-click in the **Label** column and enter the friendly label for the variable.
  - d. Optional: Double-click in the **Description** column and enter a tooltip.
  - e. Add additional parameters accordingly.
16. Save.

# Example

The screenshot shows a configuration window titled "Instance" with a dark header bar containing a pencil icon and window controls. Below the header, there are two tabs: "Configuration" (active) and "Attached Storage".

The main content area is titled "interface-cliStateItem" and includes a sub-section "Add Instance Description".

The "CLI Command \*" field contains the text "sh interfaces".

The "Root Entry" dropdown menu is set to "No, with CLI output is made of distinct paragraphs".

The "Key Regex \*" field contains the regular expression: `(([a-zA-Z]+[0-1]) is (up|down), line protocol is (up|down))`.

The "Group Name \*" field contains the text "interfaces".

The "Categories" section contains a list with one item: "category1". Below this list is a "List of Regex" section with two entries:





- `(?<name>[a-zA-Z]+[0-1]) is (?<protocolStatus>up|down), line protocol is (?<lineProtocolStatus>`
- `[a-zA-Z]+, address is 046c.9d0a.e3[a-z]\d (?<value>\\([a-zA-Z]+ 046c.9d0a.e3[a-z]\d\\))`

At the bottom right of the "List of Regex" section, there is a blue link "Add Item +". At the bottom right of the "Categories" section, there is a blue link "Add Category +".

# Create a CLI State Assessment Policy

You need a CLI State Assessment Policy to assess the running state of a node. Each policy can invoke one or more CLI State Items.

You can assess the state of a node before and after provisioning or an OS upgrade. You can also assess the state on demand. Design your CLI State Assessment Policy with its purpose in mind.

1. Go to  **Config Model Editor > Globals**.
2. Select **CLI State Assessment Policy** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the **CLI State Assessment Policy** instance.
5. Click **+** and then click  to enter the policy info in a form.
6. Select a **CLI State Item** from the drop-down list.
7. Optional: Specify the optional arguments for the CLI Command associated with the CLI State Item, if any. Use a comma as a separator.
8. Optional: Select a **CLI Assessment Query** from the drop-down list.
9. Optional **Include Pattern**: Define an inclusive regex filter to apply against all the items discovered.
10. Optional **Exclude Pattern**: Define an additional level of filtering to apply against all the items discovered after they have been filtered by the **Include Pattern**.
11. Optional: Click **+**, click , and select additional **CLI State Items** to add to the policy.
12. Save.

Instance ✕ - +

\*Configuration Attached Storage

G Unnamed-cliStatePolicy- ✎ ⓘ ▾

#	Item	Arguments (optional)	Query	Include Pattern
1				.+

↑ ↓

✎ + 🗑

State Assessment Details

Item

Arguments (optional)

Query

Include Pattern





Exclude Pattern

v1.0.0  
2/17/20 12:15 pm

Save

# Create a CLI State Assessment Query

Creating a CLI State Assessment Query is optional. Queries are useful for filtering the results of the state assessment, so you have only the data you want to use.

1. Go to  **Config Model Editor > Globals**.
2. Select **CLI State Assessment Query** from the drop-down list.
3. Click **+**.
4. In the Instance panel, click  and name and describe the query instance.
5. From the **Mode** drop-down list,
  - Select **Simple** if there is one lookup table.
  - Select **Advanced** if you want multiple, inclusive lookup tables.
6. Select the **Query Type** from the drop-down list:
  - **Count** - Counts all occurrences.
  - **Simple Lookup (at least one match)**
  - **Inclusive Lookup (all need to match)**
7. Click **+** and then click  to enter the query info in a form.
8. Select the **Filter Type** from the drop-down list,
  - **Pattern** - Refines filtering done by the **CLI State Assessment Policy** for the node.
  - **Port Name** - Filters for a specific port name from the node's **Port Map**.
9. Enter the regex for the key to filter. Or enter the **Port Name**.
10. Enter the **Category** name from the **CLI State Item** for the node.
11. Enter the **Field Value** (the regex) from the **CLI State Item** for the node.
12. Optional: Click **+**, click , and enter additional query info to the form.
13. Save.

Instance ✕ - +

\*Configuration Attached Storage

Unnamed-cliStateQuery-1 ✎ ⓘ ▾

Fields

#	Filter Type	<span>✎</span> Filter Pattern/Port Nam	Category	<span>✎</span> Field Name
1	Pattern	.+		

↕  
↕

✎ + 🗑️

State Assessment Query Details

Filter Type  
 ✕ ▾

Filter Pattern/Port Name

Category



Field Name

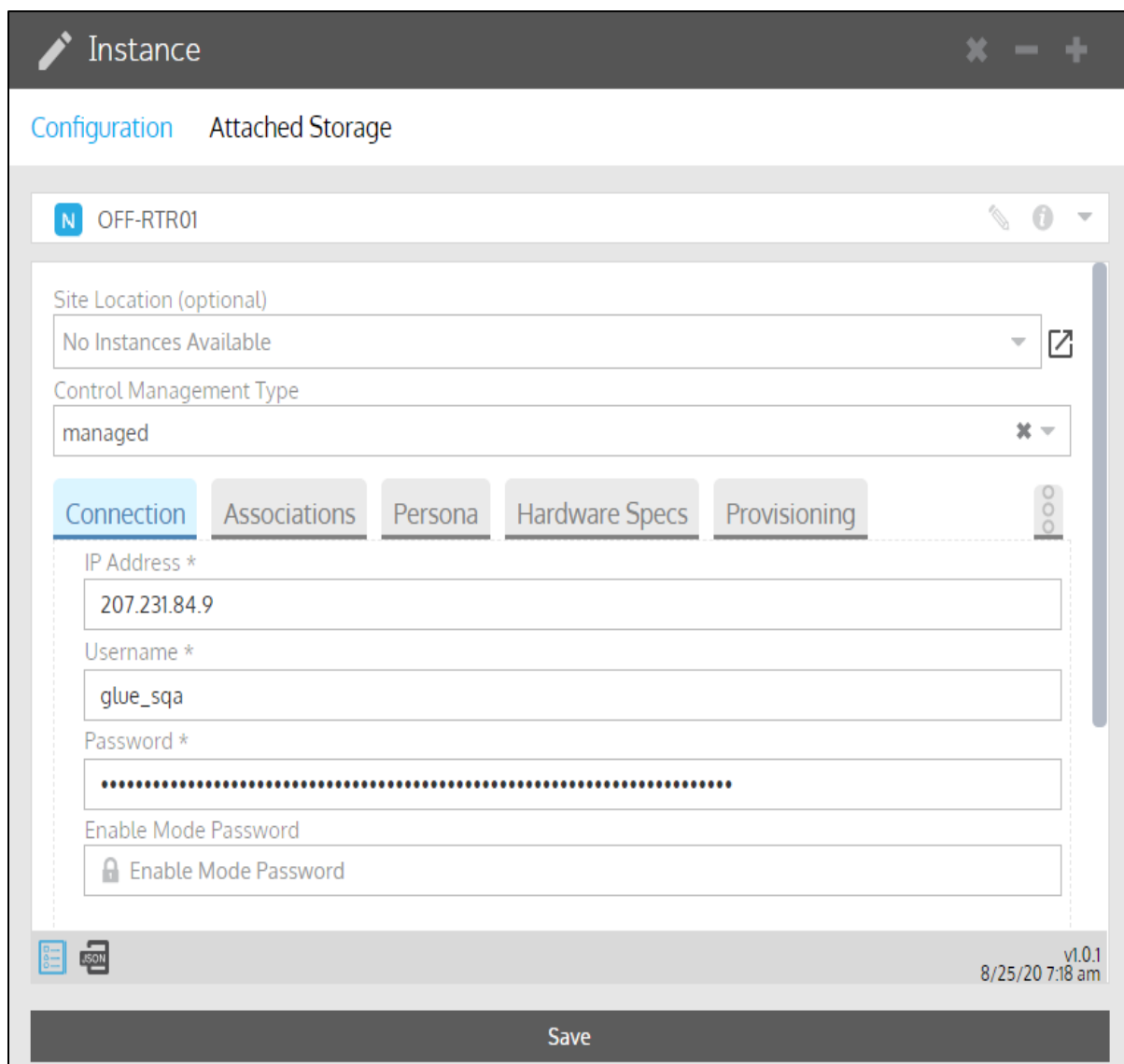
Field Value

JSON
v1.0.0  
2/17/20 9:34 am

Save

# Associate an Assembly with a node

1. Go to  **Config Model Editor > Nodes**.
2. Select the type of **node** from the drop-down list.
3. Select a **node** in the grid list.
4. Click .
5. Click **Associations** and then select an **Assembly** from the drop-down list.
6. Save.



The screenshot shows a web-based configuration interface for a node. At the top, there is a header bar with a pencil icon and the text "Instance". Below this, there are two tabs: "Configuration" (selected) and "Attached Storage". The main content area is titled "OFF-RTR01" and contains several configuration fields:


- Site Location (optional):** A dropdown menu showing "No Instances Available" with an external link icon.
- Control Management Type:** A dropdown menu showing "managed".
- Navigation Tabs:** A row of tabs including "Connection" (selected), "Associations", "Persona", "Hardware Specs", and "Provisioning".
- IP Address \*:** A text input field containing "207.231.84.9".
- Username \*:** A text input field containing "glue\_sqa".
- Password \*:** A password input field with masked characters.
- Enable Mode Password:** A checkbox labeled "Enable Mode Password" which is currently checked.

At the bottom of the form, there is a "Save" button. The footer of the interface shows a version number "v1.0.1" and a timestamp "8/25/20 7:18 am".



# Associate a CLI State Assessment Policy with an Assembly



You can associate a different CLI Assessment Policy for OS Management, Provisioning, or running on demand.

1. Go to  **Config Model Editor > Domains**.
2. Select the type of **Assembly** from the drop-down list.
3. Double-click an **Assembly** in the center grid to open the instance.
4. In the Instance panel, click **State**.
5. Click **Add Item+**.
6. Select when you want to assess the state:
  - **while performing an OS Management**
  - **On-Demand**
  - **while performing a Provisioning**
7. Select the **CLI State Assessment Policy** from the drop-down list.
8. Select from the drop-down list:
  - For OS management:
    - **After OS Management**
    - **Before and After OS Management**
    - **Before OS Management**
    - **Off (no assessment)**
  - For On-Demand:
    - **Abort on Errors**
    - **Ignore Errors**
    - **SYSLOG Message**
  - For Provisioning:
    - **After Provisioning**
    - **Before and After Provisioning**
    - **Before Provisioning**
    - **Off (no assessment)**
9. Save.

# Test your regular expression

A regular expression (regex) is a powerful tool for identifying sections of the configuration to act upon. You can use the Gluware **Regular Expressions validator** to test your regex and ensure it identifies the appropriate sections of the configuration for your purpose. You don't need to provision to see the effect of your regex. Simply paste your regex into the validator to see the section of the configuration that will be impacted. Make changes and immediately see the difference.

You'll need a **Config Model Editor** license to use the **Regular Expressions validator**.

1. Go to  **Config Model Editor** and click  at the bottom of the screen.
2. Enter the regular expression you want to test.
3. Select a view mode:
  - **Match Single Lines** - Finds any single lines in the configuration that match the regex and identifies the named groups by color. You can hover over the results to get details like the line number in the configuration and the length of the string.
  - **Match All Lines** - Finds matches that occur on more than one line.
  - **Match Sections** - Highlights entire sections of the configuration that match the regex. Specify the appropriate section delimiter: **default** (not indented line) or **!**

- Paste or type the text you want to test the regular expression on. The validator will highlight in color the named groups identified in the text. Hover over the highlights to see the details.

(.\*) Regular Expressions

Regular Expression

```
(?<deviceId>[^\s\w]{20})(?<localPort>[/\w]+)s+(?<holdTime>\d+)+s+(?<capability>[RBTCWPSO,]+)\s+(?<remotePortId>[/A-Za-z0-9]+)
```

Mode MATCH SINGLE LINES

Test String/CLI Number of Matches : 4

```

1 home-sw-1#show lldp neighbors
2 Capability codes:
3   (R) Router, (B) Bridge, (T) Telephone, (C) DOCSIS Cable Device
4   (W) WLAN Access Point, (P) Repeater, (S) Station, (O) Other
5 Device ID      Local Intf    Hold-time    Capability    Port ID
6 FGT60D4Q16052534  Gi1/0/14    120         R             internal1
7 AP03           Gi1/0/12    120         W             0
8 AP02           Gi1/0/11    120         W             0
9 AP01
10 Total entries

```

Match:	AP02	Gi1/0/11	120	W	0	1	63
Group "deviceId":	AP02					1	20
Group "localPort":		Gi1/0/11				21	8
Group "holdTime":			120			36	3
Group "capability":				W		47	1
Group "remotePortId":					0	63	1

Line Number: 8

## regex refresher

Find a single character x, y, or z: **[xyz]**

Find any character except x, y, or z: **[^xyz]**

Find a character in the range m-z: **[m-z]**

Find a character outside the range m-z: **[^m-z]**

Find a character in the range M-Z or m-z: **[M-Zm-z]**

Find any single character: **.**

Find any white space: **\s**

Find any non-white space character: **\S**

Find any digit: **\d**

Find any non-digit: **\D**

Find any word character: **\w**

Find any non-word character: **\W**

Find everything within: **(...)**

Find either x or z: **(x|z)**

Find zero or one z: **z?**

Find zero or more z's: **z\***

Find one or more z's: **z+**

Find five z's: **z{5}**

Find five or more z's: **z{5,}**

Find two to five z's: **z{2,5}**

Start of a string: **^**

End of a string: **\$**

Boundary of a word: **\b**

Boundary of a non-word: **\B**

New line: **\n**

Return: **\r**

Tab: **\t**

Null character: **\0**

## Match Single Lines example

(.\*) Regular Expressions

Regular Expression

crypto

Mode MATCH SINGLE LINES

Test String/CLI Number of Matches : 2

```
1 crypto ikev2 policy default
2 match fvrfr any
3 proposal default
4 interface Loopback40
5 description Management Interface
6 mtu 1514
7 crypto ikev3 policy nfault
8 match fvrfr any
9 proposal default
10 interface Loopback46
11 description Management Interface
12 mtu 1513
```

## Match Sections example

(.\*) Regular Expressions

Regular Expression

crypto

Mode MATCH SECTIONS Section Delimiter default



Test String/CLI Number of Matches : 2

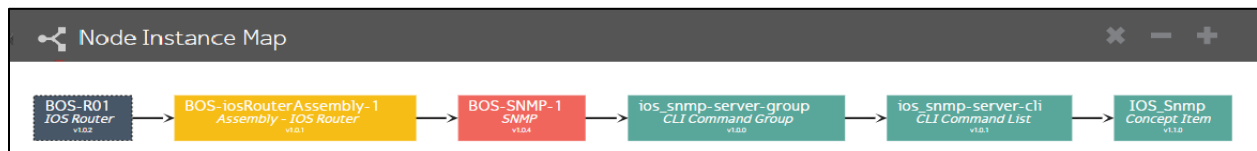
```
1 crypto ikev2 policy default
2 match fvrfr any
3 proposal default
4 interface Loopback40
5 description Management Interface
6 mtu 1514
7 crypto ikev3 policy nfault
8 match fvrfr any
9 proposal default
10 interface Loopback46
11 description Management Interface
12 mtu 1513
```

# View the relationships in your model


## View a Node Instance Map

You can see a diagram of the **Assemblies, Features, CLI Command Groups, CLI Command Lists, and Concept Items** that are currently associated with a node.

1. Go to  **Config Model Editor > Nodes**.
2. Select the type of node in the drop-down list.
3. Select a node in the grid.
4. Point to the bottom edge of the screen and select  to see a **Node Instance Map**.
5. Click-and-drag to reposition the map. Click and scroll up to enlarge the map.
6. Double-click on any item in the map to open and inspect the instance details.



## View referenced instances or types

1. In **Config Model Editor**, in any instance panel, click . The icon's tooltip explains where you will go.
2. Use the breadcrumbs at the top of the grid to return.

Name	Version	WIP
ios-trustpoints	v1.0.0	<input checked="" type="checkbox"/> Published
ios_snmp-server-cli	v1.0.1	<input checked="" type="checkbox"/> Published

**Instance** Configuration Attached Storage

ios\_snmp-server-cli

Associated Concept Item \*

IOS\_Snmp

CLI Commands



```
1 snmp-server community $context.snmp.readonlycommunity[*] RO
2 snmp-server community $context.snmp.writecommunity[*] RW
3 snmp-server location $context.snmp.location
4 snmp-server contact $context.snmp.contact
```


# Preview the modeled Feature

Preview will generate the new configuration for review, but not write it to the device. Three preview types are available:

- **Model Validation** - Performs a validation of the model configuration to ensure completeness of required properties and references.
- **Initial Preview** - Validates the model and creates a list of the CLI commands that would be generated to support this model. No analysis of the existing configuration is performed; no connection to the node is required.
- **Connected** - Model validation occurs but, in this case, the existing device configuration is analyzed and the CLI model generated is the difference between the existing CLI and the proposed CLI model. This option requires a connection to the device.

**NOTE:** If **Advanced Rendering Conditions** or custom fields are included in the CLI Command Group, you'll need a **Connected** preview.










1. Ensure you're in the organization you want to preview the model for.
2. Go to  **Config Model Editor > Nodes**.
3. Select the type of node from the drop-down list or filter the list.
4. Select the node you want to preview the model for in the grid list.
5. Click .
6. Select **Provisioning Utilities** to provision over the network.
7. Select **Preview Features**.
8. To run the preview now:
  - a. Click **Start Action**.
  - b. Optional: Enter a description to display in the summary.
  - c. Select the preview type: **Connected**, **Initial**, or **Model Validation**.
  - d. Optional: Enter information to include in the log entry.
  - e. Click **Proceed**.

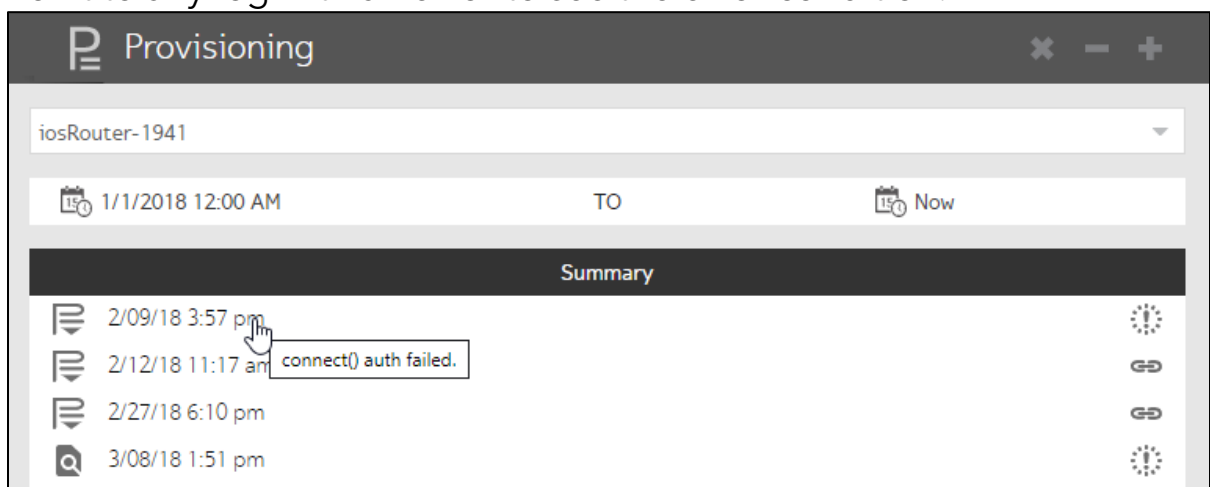
9. To schedule the preview:
  - a. Click **Schedule Action**.
  - b. Select **One Time** or **Repeating** and then specify the schedule.
  - c. Check the boxes of those to receive notification that the preview is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma.
  - d. Optional: Enter a description to display in the summary.
  - e. Select the preview type: **Connected**, **Initial**, or **Model Validation**.
  - f. Optional: Enter information to include in the log entry.
  - g. Click **Proceed**.
10. Enter optional identifying information for the **Log Comment**.
11. Click **Start Action**.
12. Click  to review the preview log.



# View a Config Model Editor device log

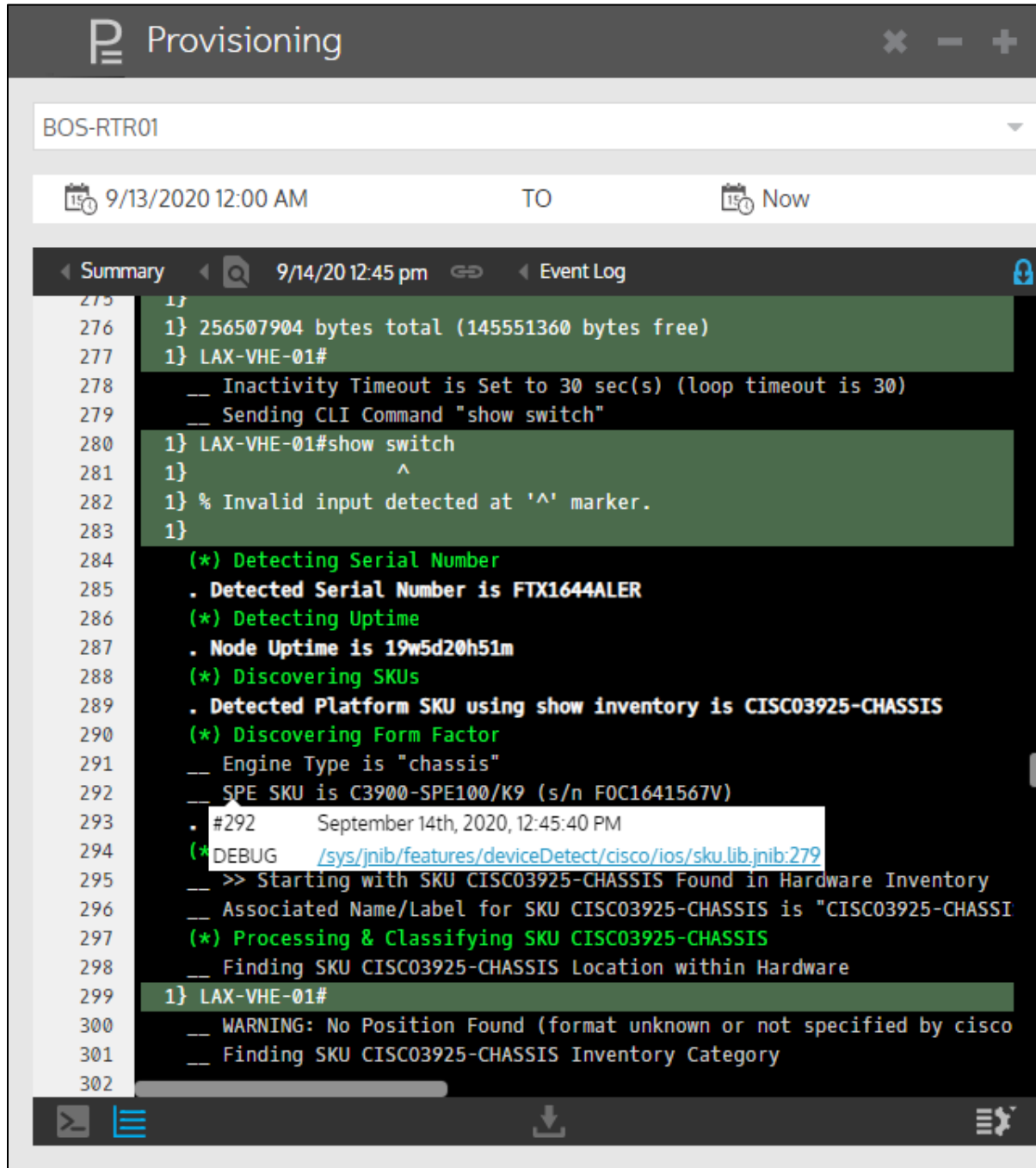
The **Config Model Editor** preview and provisioning logs include both Gluware errors and device errors. Use the logs to review and troubleshoot previews and provisioning.

1. Go to  **Config Model Editor > Nodes**.
2. Select the type of node from the drop-down list or filter the list.
3. Select a node in the grid and click . The **Provisioning** panel **Summary** lists all the logs for the selected node in chronological order. The list might include:
  -  Provisioning logs
  -  Preview logs including CLI models for the selected Preview mode (Model Validation, Initial, or Connected)
  -  Bootstrap logs for usbConnect provisioning
  -  OS management logs
4. Specify a date range for logs you want to review. Icons on the right show the status:
  -  Provisioning completed
  -  Provisioning error
  -  Provisioning canceled
5. Point to any log with an error to see the error condition.




6. Double-click a log to review it. Or, if provisioning is successful, go to **Config Drift and Audit** and take a snapshot to ensure the configuration is what you expect.


## Tips for reviewing the log



The screenshot shows a provisioning log viewer window titled "Provisioning" with a dropdown menu set to "BOS-RTR01". The log shows a session starting on 9/13/2020 at 12:00 AM and ending at 9/14/2020 at 12:45 pm. The log content includes:





```
275 1}
276 1} 256507904 bytes total (145551360 bytes free)
277 1} LAX-VHE-01#
278 __ Inactivity Timeout is Set to 30 sec(s) (loop timeout is 30)
279 __ Sending CLI Command "show switch"
280 1} LAX-VHE-01#show switch
281 1} ^
282 1} % Invalid input detected at '^' marker.
283 1}
284 (*) Detecting Serial Number
285 . Detected Serial Number is FTX1644ALER
286 (*) Detecting Uptime
287 . Node Uptime is 19w5d20h51m
288 (*) Discovering SKUs
289 . Detected Platform SKU using show inventory is CISC03925-CHASSIS
290 (*) Discovering Form Factor
291 __ Engine Type is "chassis"
292 __ SPE SKU is C3900-SPE100/K9 (s/n FOC1641567V)
293 . #292 September 14th, 2020, 12:45:40 PM
294 (*) DEBUG /sys/jnib/features/deviceDetect/cisco/ios/sku.lib.jnib:279
295 __ >> Starting with SKU CISC03925-CHASSIS Found in Hardware Inventory
296 __ Associated Name/Label for SKU CISC03925-CHASSIS is "CISC03925-CHASSI
297 (*) Processing & Classifying SKU CISC03925-CHASSIS
298 __ Finding SKU CISC03925-CHASSIS Location within Hardware
299 1} LAX-VHE-01#
300 __ WARNING: No Position Found (format unknown or not specified by cisco
301 __ Finding SKU CISC03925-CHASSIS Inventory Category
302
```

- When you see an error or warning, you may need to inspect the lines above it to determine the cause.
- Click  to pause scrolling.

- Click **Show Settings** to:
  - **Search for a text string** - Enter the text string and click **Enter**. Check the **Case-Sensitive** box to make the search case-sensitive. Clear the box to ignore case. Click > and < to see the occurrences found.
  - **Change the line label** - Select a line label from the Log Event # ▾ drop-down list. Select from:
    - Log Event #
    - Line Number
    - Timestamp
    - Time Passed
    - Event Duration
  - **Filter the log** - Click . Check or clear the boxes to display just the levels you want. All levels are displayed by default.
  - **See the source code file and line number that produced the log line** - Point to a line.

Log Levels	Description
<b>Error</b>	<b>A problem that must be fixed</b>
<b>Warning</b>	<b>A problem that did not stop the process but should be fixed</b>
<b>Task</b>	<b>The beginning or the end of a step</b>
<b>Checkpoint</b>	<b>A significant point in the code</b>
<b>Info</b>	<b>General info about the process that does not fit in the other logging categories</b>
<b>Response</b>	<b>The raw interaction between the Gluware engine and the device</b>
<b>Debug</b>	<b>Low-level informational log messages usually related to the internal state of</b>



Log Levels	Description
	code variables. It's specific to how the code is working, as opposed to how the process is proceeding

- Click  to cancel provisioning.
- Click  to display the log in CLI view. **Raw** reflects the line-by-line interactions with the device. **Processed** is a summary by feature. CLI view is helpful in troubleshooting errors.
- Click  to display the log in list view.
- When you see an error or warning, inspect the lines above it to determine the cause.
- Click  to download the provisioning bundle to a ZIP folder. You can add the ZIP folder to a Support ticket if you are not able to resolve all the issues.



# Provision nodes

**Best practice:** Preview your changes before provisioning nodes.


## Assign the provisioning type to the node

1. Ensure you're in the organization you want to provision nodes for.
2. Go to  **Config Model Editor > Nodes**.
3. Select the type of node from the drop-down list or filter the list.
4. Select the node you want to provision in the grid list.
5. Click .
6. Select **Provisioning**.
7. Select the type of provisioning. **advanced** is the default.
8. Save.

## Provision the node

1. Ensure you're in the organization you want to provision nodes for.
2. Go to  **Config Model Editor > Nodes**.
3. Select the type of node from the drop-down list or filter the list.
4. Select the node or nodes you want to provision from the grid list.
5. Click .
6. Check the boxes of the devices you want to provision.
7. Select **Provisioning Utilities** to provision over the network.
8. In the second drop-down list, select **Provision Features** to provision over the network.
9. To provision now:
  - a. Click **Start Action**.
  - b. Optional: Enter a description to display in the summary.
  - c. Optional: Enter information to include in the log entry.
  - d. Click **Proceed**.
10. To schedule provisioning:
  - a. Click **Schedule Action**.
  - b. Select **One Time** or **Repeating** and then specify the schedule.
  - c. Check the boxes of those to receive notification that provisioning is complete. Select from those listed or add




email addresses to **Other recipients**. Separate email addresses with a comma.

- d. Optional: Enter a description to display in the summary.
  - e. Optional: Enter information to include in the log entry.
  - f. Click **Proceed**.
11. Click  to review the provisioning log.

# Assess the state of a node

You can assess the state of a node before and after provisioning or an OS upgrade. You can also assess the state on demand. Specify which CLI State Assessment Policy to run by associating the appropriate policy with the node's Assembly.

Watch a demo of state assessment at <https://youtu.be/zkXxzMixgmU>

1. Go to  **Config Model Editor > Nodes**.
2. Select the type of node from the drop-down list.
3. Select the node or nodes you want to assess from the grid list.
4. Click .
5. Check the boxes of the nodes you want to assess.
6. In the first drop-down list, select **State Assessment Utilities** to test your CLI State Assessment Policy.
7. In the second drop-down list, select one of the following:
  - **Run On-Demand Policy**
  - **Run Provisioning Policy**
8. To run the state assessment now:
  - a. Click **Start Action**.
  - b. Optional: Enter a description to display in the summary.
  - c. Optional: Enter information to include in the log entry.
  - d. Click **Proceed**.
9. To schedule the state assessment:
  - a. Click **Schedule Action**.
  - b. Select **One Time** or **Repeating** and specify the schedule.
  - c. Check the boxes of those to receive notification that provisioning is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma.
  - d. Optional: Enter a description to display in the summary.
  - e. Optional: Enter information to include in the log entry.
  - f. Click **Proceed**.
10. Click  to review the assessment log.

# Model an interface

Step 1: [Create your logical names](#)

Step 2: [Create your \*\*Routed Port Map\*\*](#)

Step 3: [Create an \*\*IPv4 Address Pool\*\*](#)


Step 4: [Create an \*\*IP Address Plan\*\*](#)

Step 5: [Assign the \*\*Routed Port Map\*\* and \*\*IP Address Plan\*\* to an \*\*Assembly\*\* or \*\*Node\*\*](#)



# Package a Feature for distribution


You can package a Feature to install it in another organization.

1. Go to  **Workflows**.
2. Expand the **Design** folder and double-click **Network Feature Distribution**. You'll see a description of the workflow in the top pane.
3. Click **Next**.
4. Select **the Feature you want to package** and click **Next**.
5. In the **Available** list, select the Feature instances you want to package and click →. The ⇒ selects all the available instances.
6. Click **Next**.
7. Provide a package name and description.
8. To change the version numbering schema, select a schema from the **New Version** drop-down list.
9. Provide a version description.
10. Click **Finish**. This creates a capsule file in your Downloads folder. The file can be imported to another organization through Solutions Manager.

# Run a workflow in Config Model Editor

You can run a workflow in **Config Model Editor** that can operate on any Gluware construct (domain, feature, global, or node). Workflows can be designed to capture information, create, modify, edit, or delete. For example, a workflow could assign credentials to one or more nodes or retrieve features from devices.

These packages need to be installed to run workflows in **Config Model Editor**:

- **Gluware Core Solutions**
  - **Config Modeling Kit** for the appropriate vendor device
1. Ensure you're in the organization the workflow is installed in.
  2. Go to  **Config Model Editor** > **Nodes, Domains, Features**, or **Globals**, depending on the construct the workflow is designed to act on.
  3. Select the type of instance from the drop-down list.
  4. In the grid, right-click an instance to display the workflows available.
  5. Click on the name of the workflow. The **Workflows** panel opens to display the first workflow page.
  6. Follow the instructions on the workflow pages.


# Model an SNMP feature

## Step 1. Install packages

To model an SNMP feature for an IOS Router, you'll need to go to **Solutions Manager** and install the following packages in the organization that contains the devices you want to model:

- **Gluware Core Solutions**
- **Config Modeling Kit for Cisco IOS Router**

### Install (or update) the two packages


1. Ensure you're in the organization in which you want to install the packages.
2. Go to  **Solutions Manager > Available Packages**.
3. Open the Latest Releases folder.
4. Double-click the **Gluware Core Solutions** package.
5. If you see "Package is Currently Not Installed" or "Available Package Details" in the top pane,
  - a. Select **Preview** and then click **Preview Package Installation**.
  - b. Select **Install** and then click **Install Package**. You'll see "Installation Completed!" when the installation is successful. Any problems with the installation will appear as red error messages.
6. In the Package Explorer, double-click the **Config Modeling Kit for Cisco IOS Router** package.
7. If you see "Package is Currently Not Installed" or "Available Package Details" in the top pane,
  - a. Select **Preview** and then click **Preview Package Installation**.
  - b. Select **Install** and then click **Install Package**.

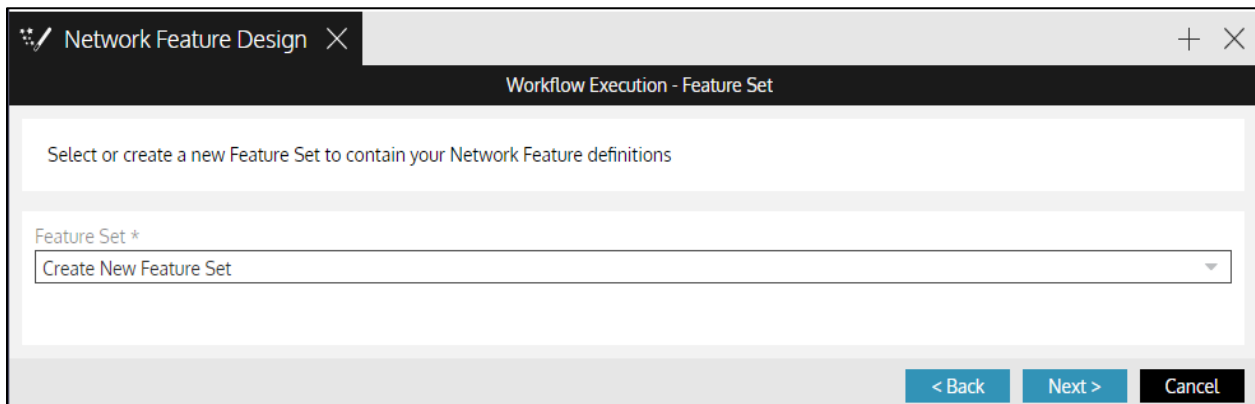
**Next:** Step 2. Design an SNMP Feature type

# Model an SNMP feature

## Step 2. Design an SNMP Feature type

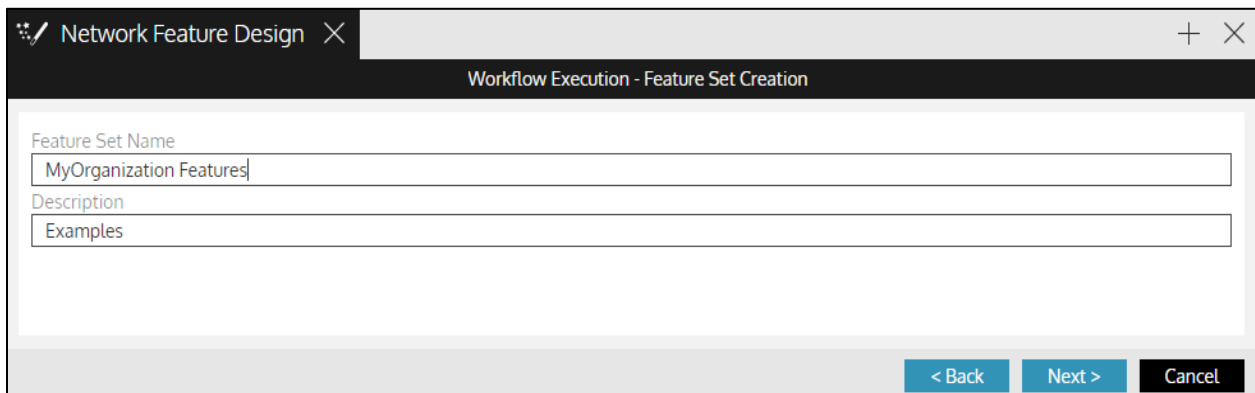
In **Workflows**, you'll set up a **Feature Set** for your organization that includes a form for an SNMP feature. You can add additional feature types to your organization's Feature Set at a later time by modifying the Feature Set.

1. Go to  **Workflows**.
2. Expand the **Design** folder, double-click **Network Feature Design**.
3. Click **Next**.
4. Select **Create New Feature Set** and click **Next**.



The screenshot shows a dialog box titled "Network Feature Design" with a close button (X) and window controls (+, X). The main title is "Workflow Execution - Feature Set". Below the title bar, there is a text prompt: "Select or create a new Feature Set to contain your Network Feature definitions". Underneath is a dropdown menu labeled "Feature Set \*" with the option "Create New Feature Set" selected. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

5. Name and describe the Feature Set and click **Next**.



The screenshot shows the same dialog box, but the title is now "Workflow Execution - Feature Set Creation". It contains two text input fields. The first is labeled "Feature Set Name" and contains the text "MyOrganization Features". The second is labeled "Description" and contains the text "Examples". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

6. Then create the SNMP Feature within the Feature Set: Name the feature, enter a display name, select IOS Router from the nodes list and click → . Then click **Next**.

The screenshot shows the 'Network Feature Design' application window. The title bar reads 'Network Feature Design' with a close button. Below the title bar, the subtitle is 'Workflow Execution - Feature Definition Details'. The main content area is divided into several sections:

- Network Feature Name:** A text input field containing 'snmp'.
- Feature Display Name (Gluware Control):** A text input field containing 'SNMP'.
- Description (Gluware Control):** A text input field containing 'Description (Gluware Control)'.
- Execution Group:** A dropdown menu with 'Default' selected.
- Node Types:** A tabbed interface with two tabs: 'Node Types' (active) and 'Feature Dependencies'.
- Available:** A list of node types with a search bar. The list includes: ASA Firewall (Cisco Systems), EX Switch (Juniper Networks), IOS Switch (Cisco Systems), NXOS Switch (Cisco Systems), and SRX Router (Juniper Networks).
- Selected:** A list containing 'IOS Router (Cisco Systems)'. Navigation arrows (right arrow, left arrow, double right arrow, double left arrow) are positioned between the 'Available' and 'Selected' lists. A vertical double-headed arrow is on the right side of the 'Selected' list.

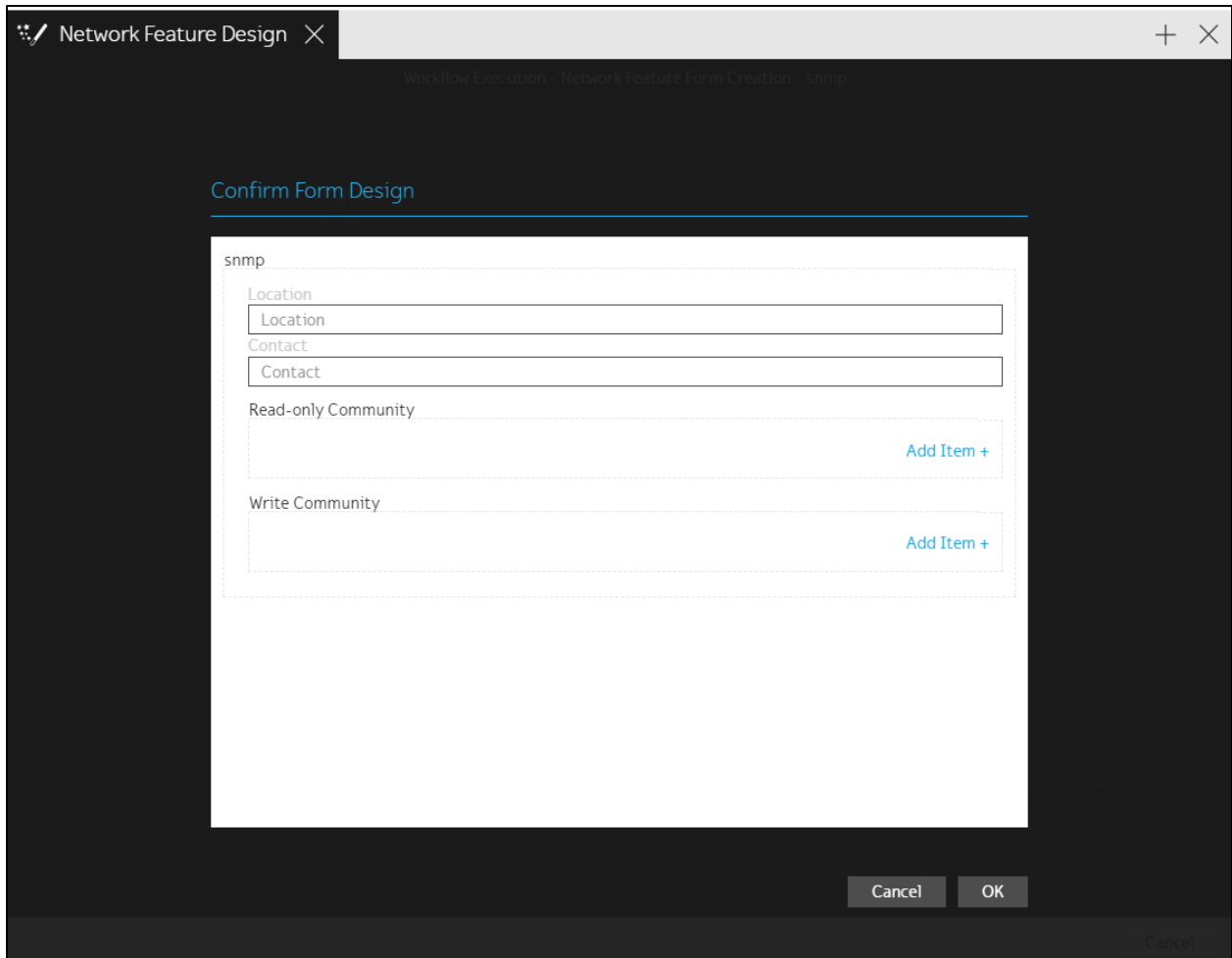
At the bottom right of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'.

7. Click **Add Section+**.
8. Click the **+** to set up the fields you want to see on the form for the feature. The field values can then be used within the CLI, allowing rendered values to be dynamic. In our example, Location, Contact, Read-only Community, and Write Community will appear in the feature you create. When you're done, click **Next**.

The screenshot shows the 'Form Creation' window for a feature named 'snmp'. The window title is 'Workflow Execution - Network Feature Form Creation - snmp'. The main area is titled 'Sections' and contains a 'Fields' table. Below the table is a dropdown menu for 'Allow multiple' set to 'Display List Format ( Default Format )'. At the bottom are navigation buttons: '< Back', 'Next >', and 'Cancel'.

#	Field Name	Field Label	Field Type	Description	Field Required
1	location	Location	String	location	
2	contact	Contact	String	contact	
3	readonlycommunity	Read-only Community	Array	community	
4	writcommunity	Write Community	Array	community	

9. Then you get to preview the form you just created. When the form looks good, click **OK**.



10. Publish it to your organization to make it available in **Config Model Editor** and click **Next**.

The screenshot shows a dialog box titled "Network Feature Design" with a sub-header "Workflow Execution - Feature Set Summary". The main content area is titled "Feature Set Summary" and contains a list item: "snmp.jtype → /sys/jnib/features/snmp/snmp.template.jnib". Below this, it says "Please select the next step" and lists three options: "Save Feature Set", "Modify Feature Set", and "Publish Feature Set". A "Next Step" dropdown menu is set to "Publish Feature Set". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

11. Add a version description and click **Finish**.

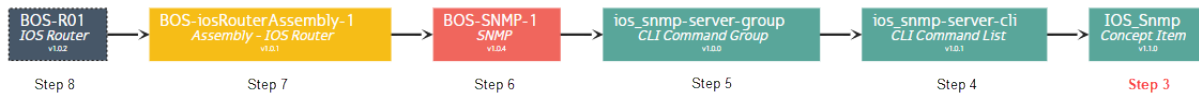
The screenshot shows a dialog box titled "Network Feature Design" with a sub-header "Workflow Execution - Publish Feature Set". The main content area is titled "Enter a name, description and version number for the distribution package". It contains several input fields: "Package Name" (MyOrganization Features), "Package Description" (Enter the desired package description), "Package ID" (Package ID), "Current Version" (0.0.1), "New Version" (0.0.2), and "Version Description" (Initial). There is also a checked checkbox for "Install package into current organization". At the bottom right, there are three buttons: "< Back", "Finish", and "Cancel".

**Next:** Step 3. Select a Concept Item



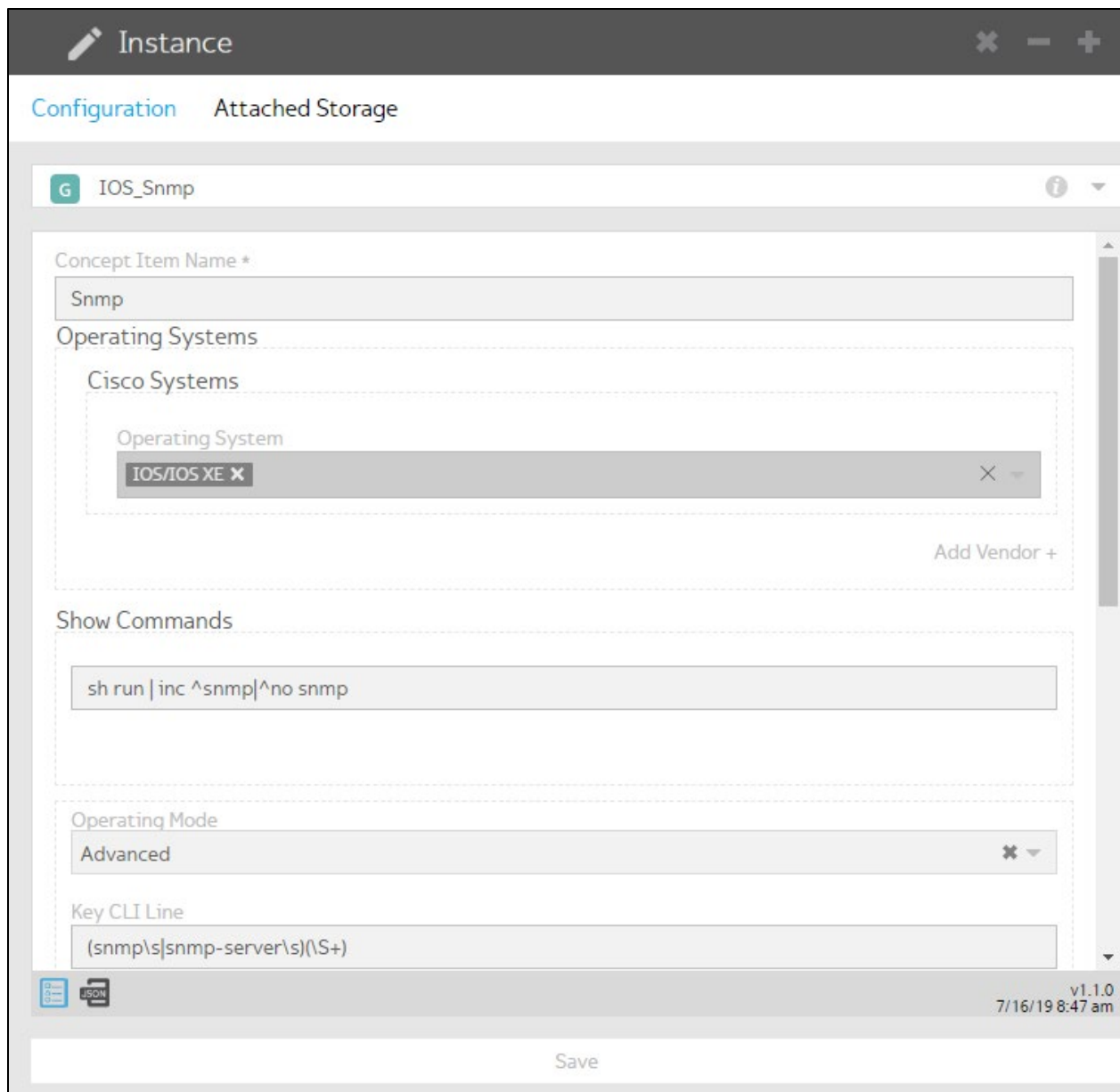
# Model an SNMP Feature

## Step 3. Select a Concept Item



Now you'll go to **Config Model Editor** and find the **IOS SNMP Concept Item**. The Concept Item lists the show commands that will be executed on the node. In this case, we ask for everything in the IOS router configuration related to SNMP.

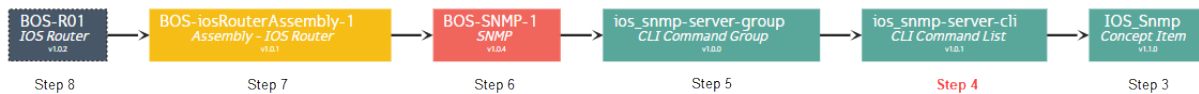
1. Go to  **Config Model Editor** > **Globals**.
2. Select **Concept Item** from the drop-down list.
3. Double-click the **IOS\_Snmp** instance in the grid list to view the details.



**Next:** Step 4. Create a CLI Command List for SNMP

# Model an SNMP feature



## Step 4. Create a CLI Command List for SNMP



In **Config Model Editor**, create your **CLI Command List** for SNMP. In our example, we are introducing variables:

```
snmp-server community  
$context.snmp.readonlycommunity[*] RO  
snmp-server community $context.snmp.writecommunity[*]  
RW  
snmp-server location $context.snmp.location  
snmp-server contact $context.snmp.contact
```

These variables will be resolved to the actual commands that will be run on the device.

1. Go to  **Config Model Editor > Globals**.
2. Select **CLI Command List** from the drop-down list.
3. Click **+**.
4. Click  in the Instance panel and name the list **ios\_snmp-server-cli**.
5. Select the **IOS\_Snmp** Concept Item from the drop-down list.
6. Type the list of CLI Command lines:

```
snmp-server community  
$context.snmp.readonlycommunity[*] RO  
snmp-server community  
$context.snmp.writecommunity[*] RW  
snmp-server location $context.snmp.location  
snmp-server contact $context.snmp.contact
```
7. Save.

The screenshot shows a configuration editor window titled "Instance" with a dark header bar. Below the header, there are two tabs: "Configuration" (selected) and "Attached Storage". The main content area is titled "ios\_snmp-server-cli" and contains the following elements:

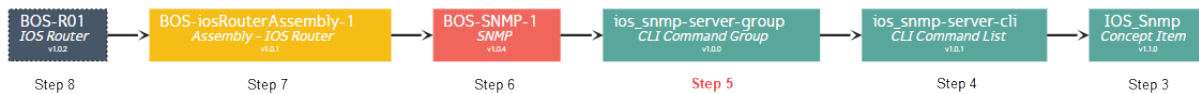
- An "Associated Concept Item \*" dropdown menu with "IOS\_Snmp" selected.
- A "CLI Commands" section with a list of four commands:

```
1 snmp-server community $context.snmp.readonlycommunity[*] RO
2 snmp-server community $context.snmp.writecommunity[*] RW
3 snmp-server location $context.snmp.location
4 snmp-server contact $context.snmp.contact
```
- A bottom status bar with a "Save" button, a version number "v1.0.1", and a timestamp "8/11/20 12:51 pm".

**Next:** Step 5. Create a CLI Command Group for SNMP

# Model an SNMP feature

## Step 5. Create a CLI Command Group for SNMP





Next, create the **CLI Command Group** for SNMP. You can associate more than one **CLI Command List** to a **CLI Command Group** but in our example, we only associate our one SNMP CLI Command List.

The list of allowed CLI Commands are the only commands that will be impacted if they are found in the configuration:

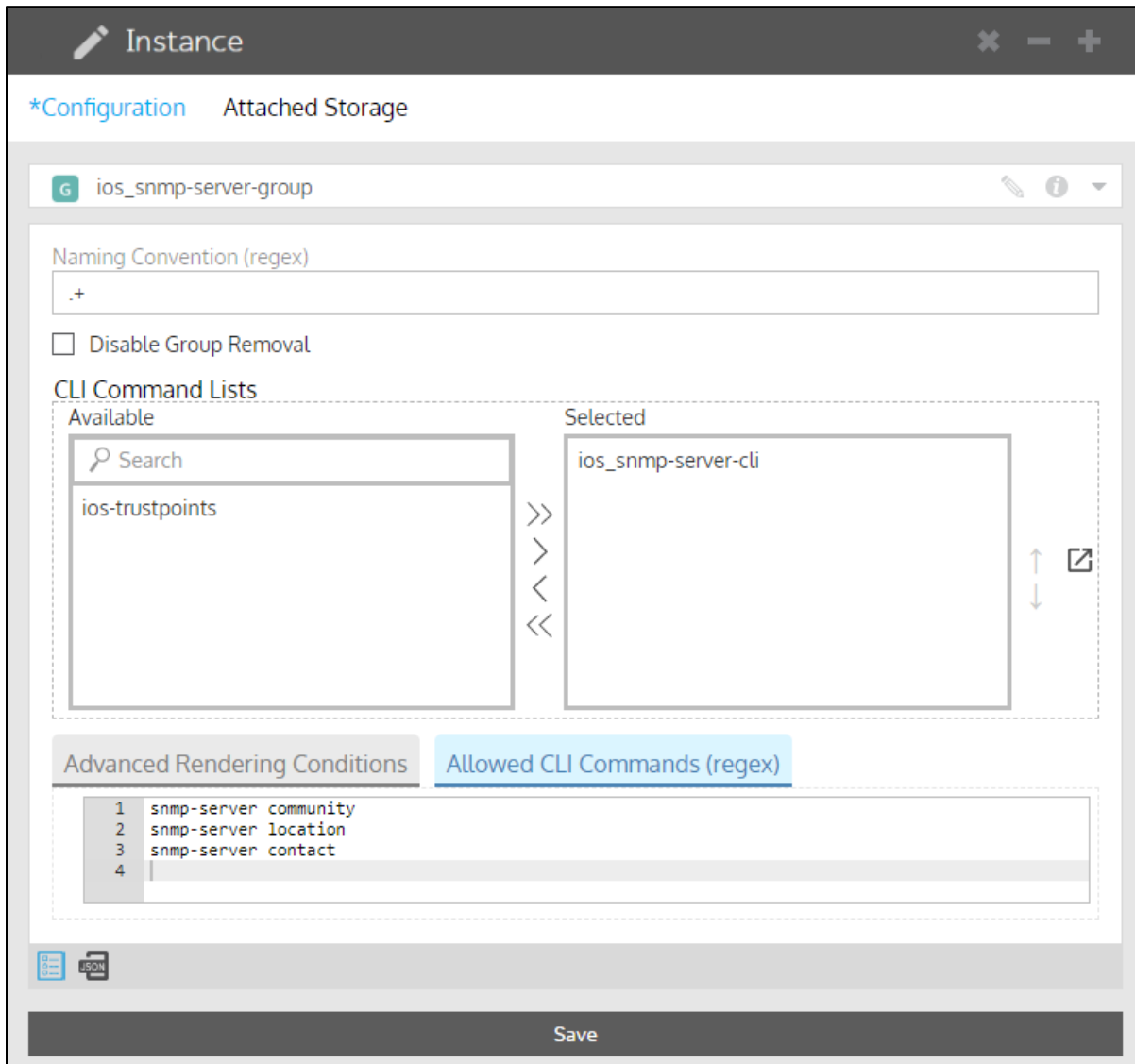
```
snmp-server community
snmp-server location
snmp-server contact
```

All other lines in the configuration will be left as they are found. If no commands are listed, Gluware will compare the model and the full list of commands returned from the Concept Item.

1. Go to  **Config Model Editor > Globals**.
2. Select **CLI Command Group** from the drop-down list.
3. Click **+**.
4. Click  in the Instance panel and name the group **ios\_snmp-server-group**.
5. Clear the **Disable Group Removal** box.
6. In the CLI Command **Available** list, select the **ios\_snmp-server-cli** and click **→**.
7. Click **Allowed CLI Commands (regex)** and type these commands in the box:

```
snmp-server community
snmp-server location
snmp-server contact
```

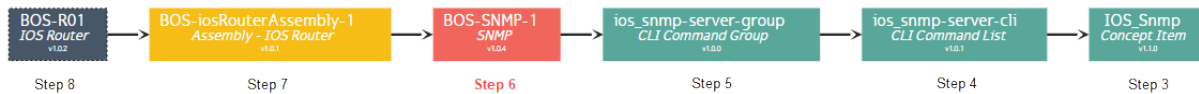
8. Save.



**Next:** Step 6. Create a Feature for SNMP

# Model an SNMP feature

## Step 6. Create a Feature for SNMP



1. Go to **Config Model Editor > Features**.
2. Select **SNMP** from the drop-down list.
3. Click **+**.
4. Click in the Instance panel and name the Feature **BOS-SNMP-1**.
5. Select the **ios\_snmp-server-group** CLI Command Group and click **>**.

Instance

Configuration Attached Storage

F BOS-SNMP-1

Feature Concept Properties

Feature Concept Name \*

SNMP

CLI Command Groups

Available

Search

ios-trustpoint

Selected

ios\_snmp-server-group

Save

v1.0.1  
9/02/20 9:45 am

6. Then select **Properties** and fill out the form to specify the values for the variables you want to provision.

The screenshot shows a web interface for configuring an instance named "BOS-SNMP-1". The interface has a dark header with a pencil icon and the word "Instance". Below the header, there are two tabs: "Configuration" and "Attached Storage". The main content area is titled "BOS-SNMP-1" and has two sub-tabs: "Feature Concept" and "Properties". The "Properties" tab is active and contains a form for configuring SNMP settings. The form is enclosed in a dashed border and includes the following fields:

- snmp** (Section Header)
- Location**: A text input field containing "Boston".
- Contact**: A text input field containing "Jan Doh".
- Read-only Community**: A text input field containing "public". To the right of this field is a blue link labeled "Add Item +".
- Write Community**: A text input field containing "private". To the right of this field is a blue link labeled "Add Item +".

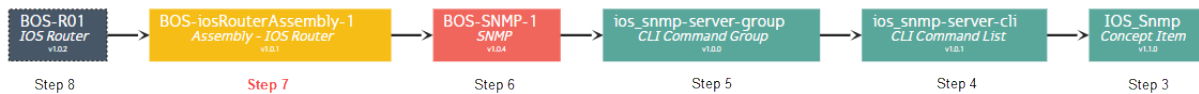
At the bottom of the form, there are icons for "JSON" and "v1.0.1". The date and time "9/02/20 9:45 am" are displayed in the bottom right corner. A large "Save" button is located at the very bottom of the interface.

**Next:** Step 7. Create an Assembly for your IOS routers



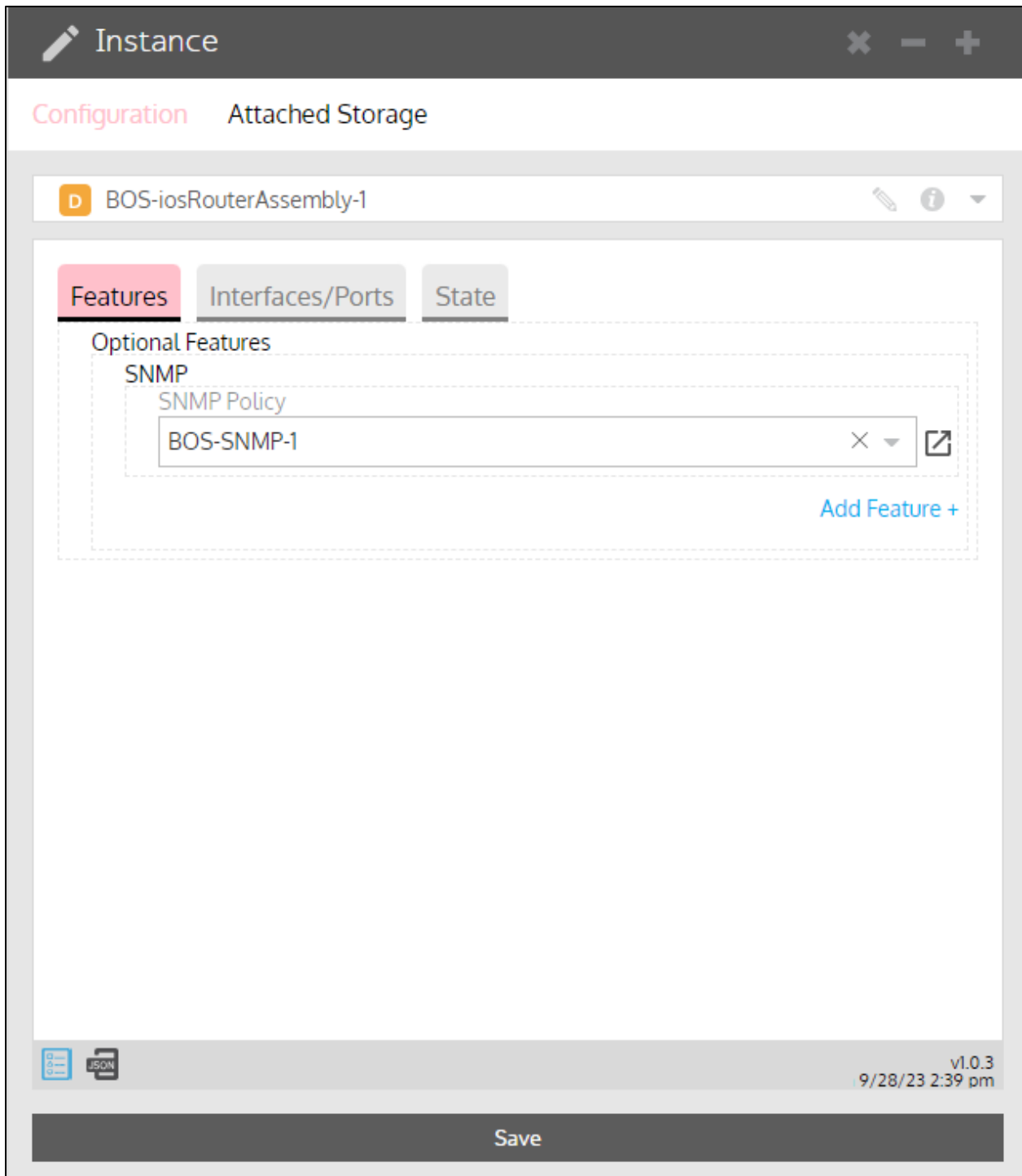
# Model an SNMP feature

## Step 7. Create an Assembly for your IOS routers



Create the **Assembly** for your IOS routers. The Assembly gathers all the feature policies that you want to standardize on a device. For example, you may have a Banner feature, an NTP feature, and an Interface feature, in addition to the SNMP feature, referenced in your Assembly for your IOS routers. All the features will be provisioned on the nodes that are linked to the Assembly.

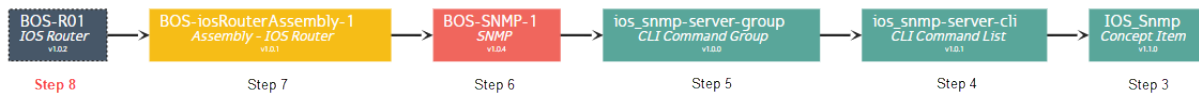
1. Go to **Config Model Editor > Domains**.
2. Select **Assembly - IOS Router (Cisco Systems)** from the drop-down list.
3. Click **+**.
4. Click in the Instance panel and name the Assembly **BOS-iosRouterAssembly-1**.
5. Click **Add Feature +** and select the **BOS-SNMP-1** feature policy from the list.
6. Save.




**Next:** Step 8. Associate the Assembly with nodes

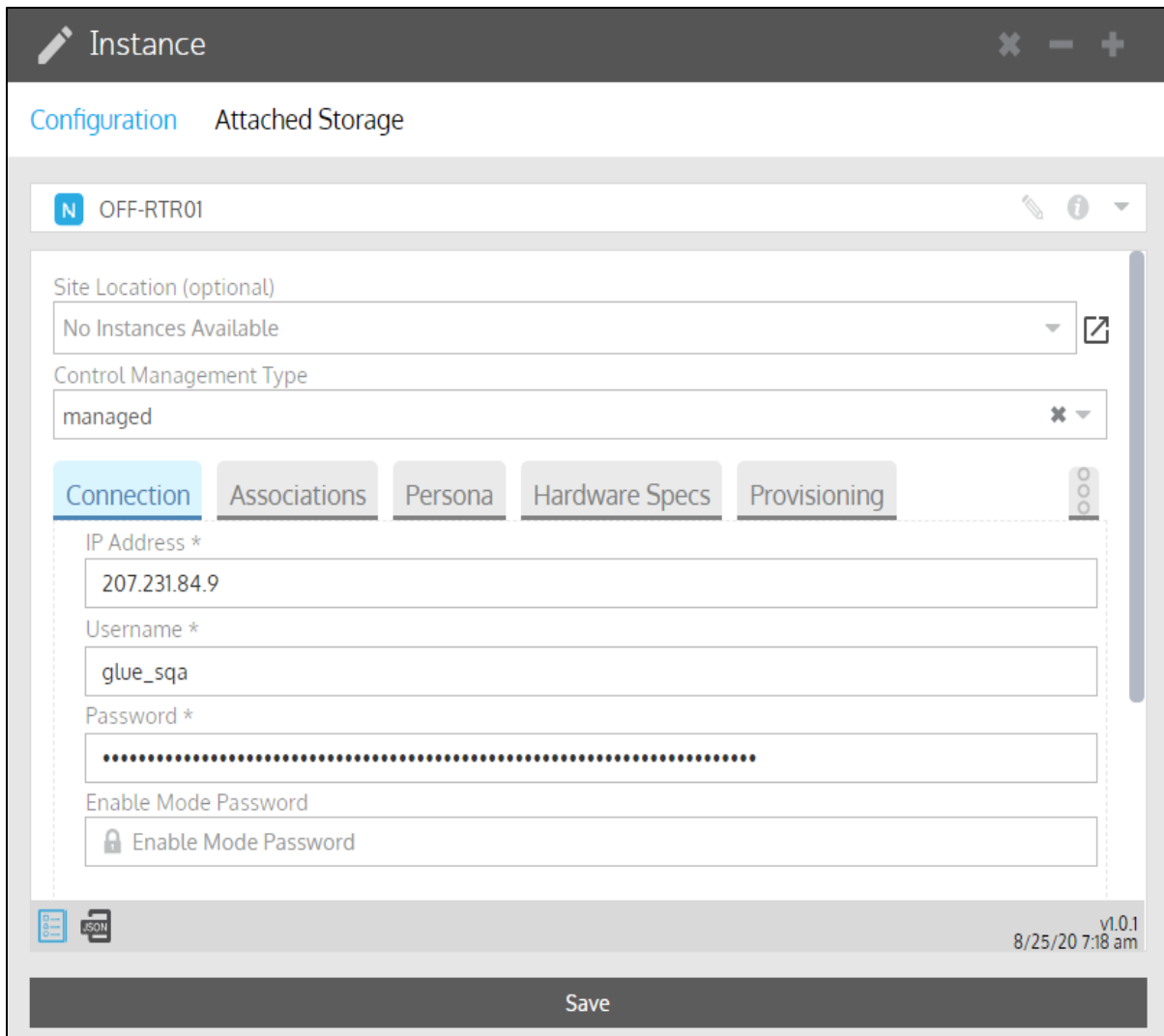
# Model an SNMP feature

## Step 8. Associate the Assembly with nodes



Now you are ready to associate the IOS router Assembly you created with the nodes that represent your IOS routers. Associate the Assembly with all the router nodes you want provisioned with the SNMP feature policy you created.


1. Go to  **Config Model Editor > Nodes**.
2. Select **IOS Router (Cisco Systems)** from the drop-down list.
3. Double-click a router node (**BOS-R01** node shown here) in the grid list to open the instance.
4. Select **Associations** and then select the **BOS-iosRouterAssembly-1** Assembly Policy from the drop-down list.
5. Save.

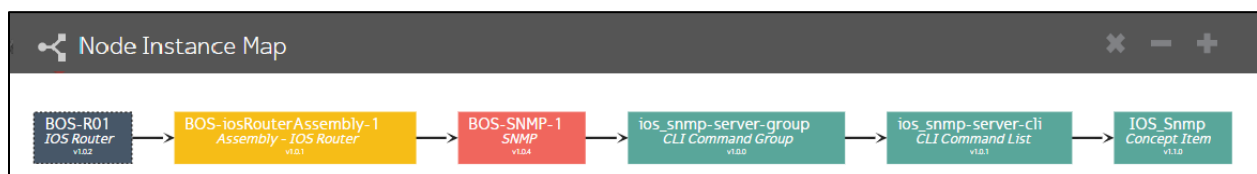


**Next:** Step 9. View the relationships in your SNMP model

# Model an SNMP feature

## Step 9. View the relationships in your SNMP model

To check that you have all the required components in your model, with your node selected, point to the bottom of the screen in **Config Model Editor** and click . You'll see a map of the components in your model. It should look something like this:




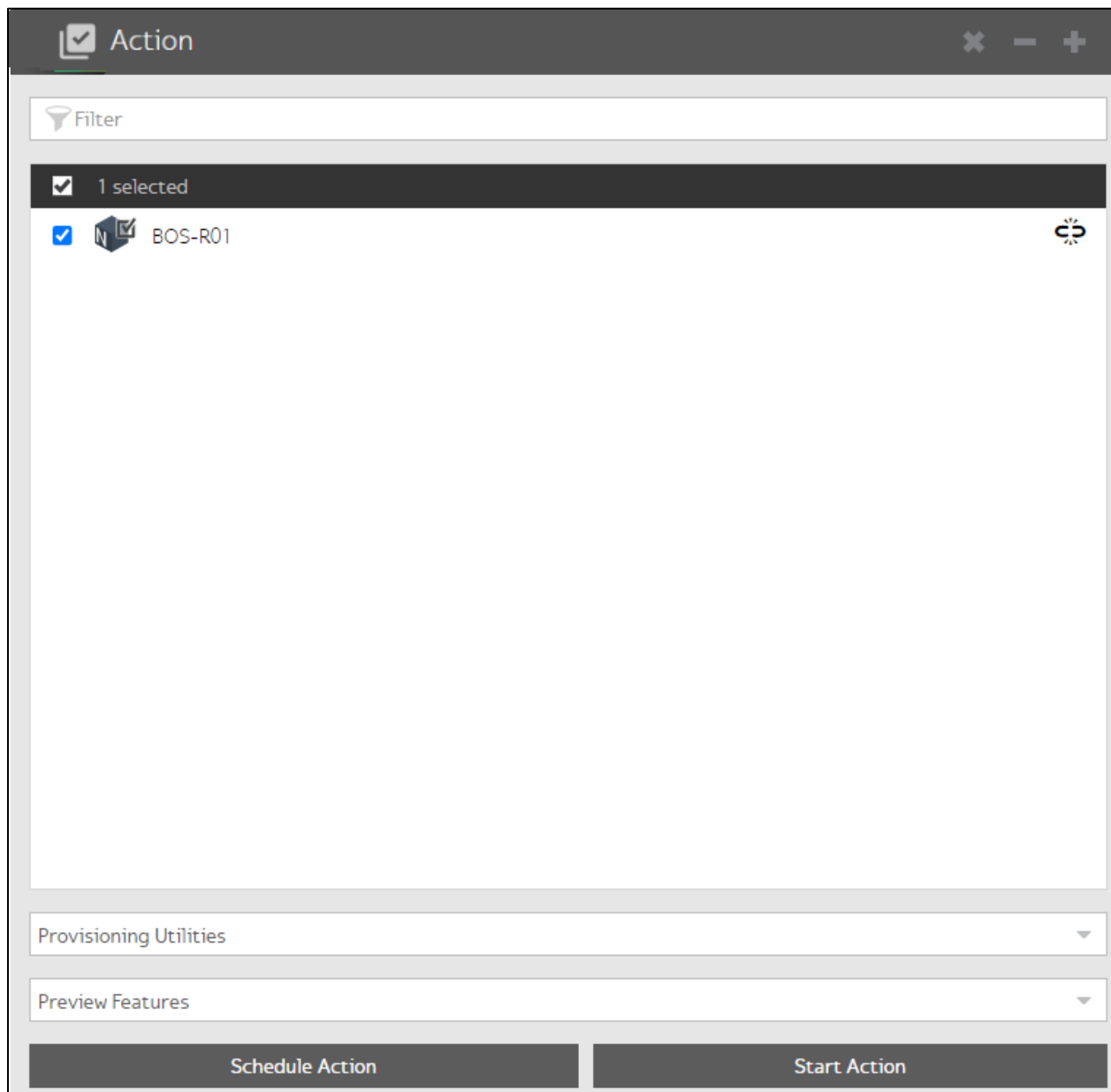
When you have all the components in place, you can preview how the model impacts the node.

**Next:** Step 10. Preview the SNMP Feature

# Model an SNMP feature



## Step 10. Preview the SNMP Feature

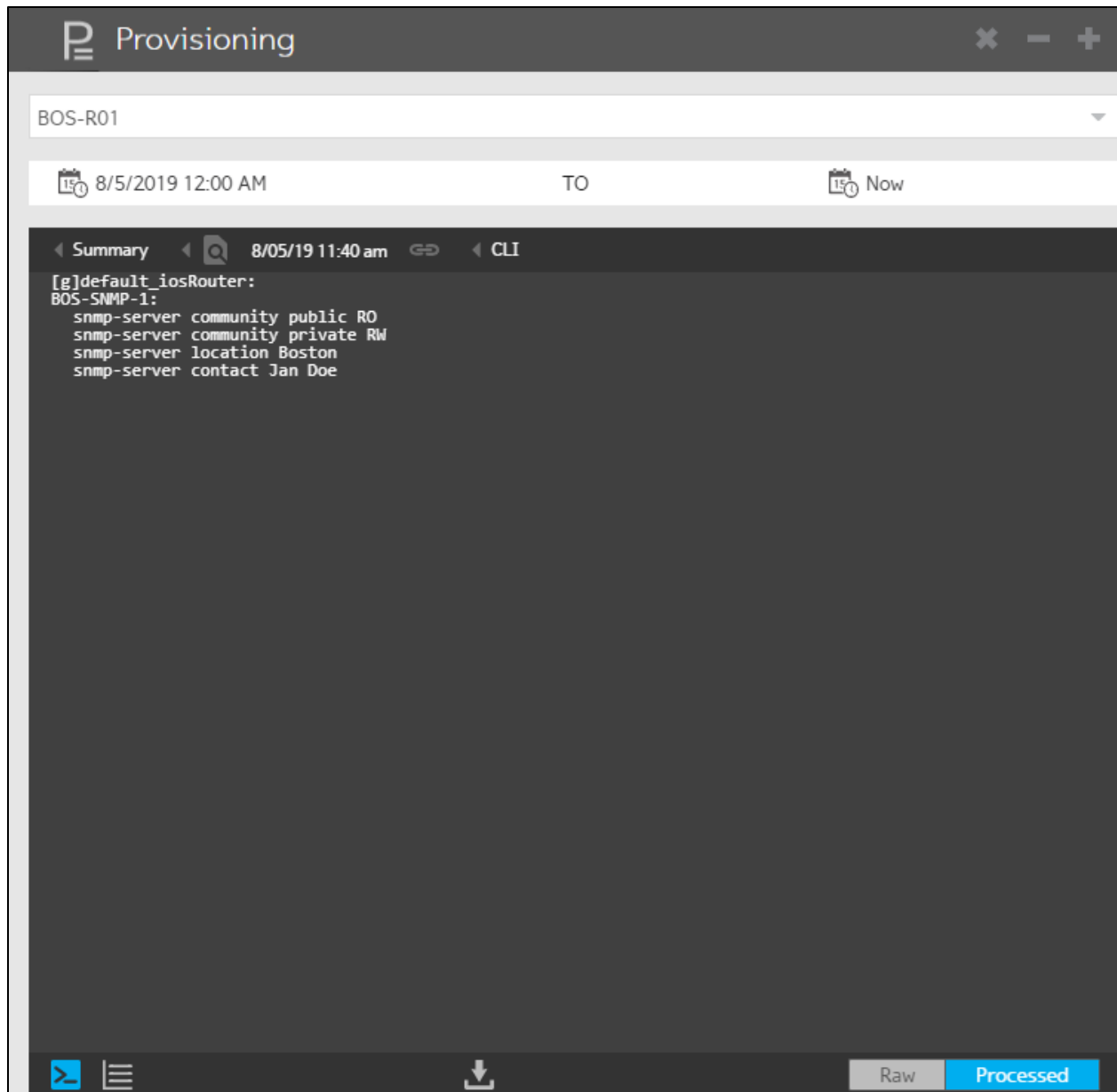
1. With the **BOS-R01** node Instance panel open, click  and check the node's box.
2. Select **Provisioning Utilities** and **Preview Features** and click **Start Action**.



3. Select **Connected** and click **Proceed**.

The screenshot shows a dark-themed window titled "Action". At the top right of the window are standard window control icons (close, minimize, maximize). Below the title bar, there is a "Preview Name" section with a text input field containing the placeholder text "Enter description to display in summary (optional)". Below this is a "Select preview type" section with three radio button options: "Connected" (selected), "Initial", and "Model Validation". Below the radio buttons is a "Log Comment" section with a text input field containing the placeholder text "Enter Informational Log Entry (optional)". At the bottom of the window, there are two buttons: "Schedule Action" and "Start Action", and a large "Proceed" button at the very bottom.

4. Click , double-click on the log listed, click , and then click **Processed**. This shows you what would be placed on the configuration as a result of the model.



See “View a Config Modeling Editor device log” for tips on reviewing the log.


When your model is complete and no errors surface when you preview, you can provision the new configuration.



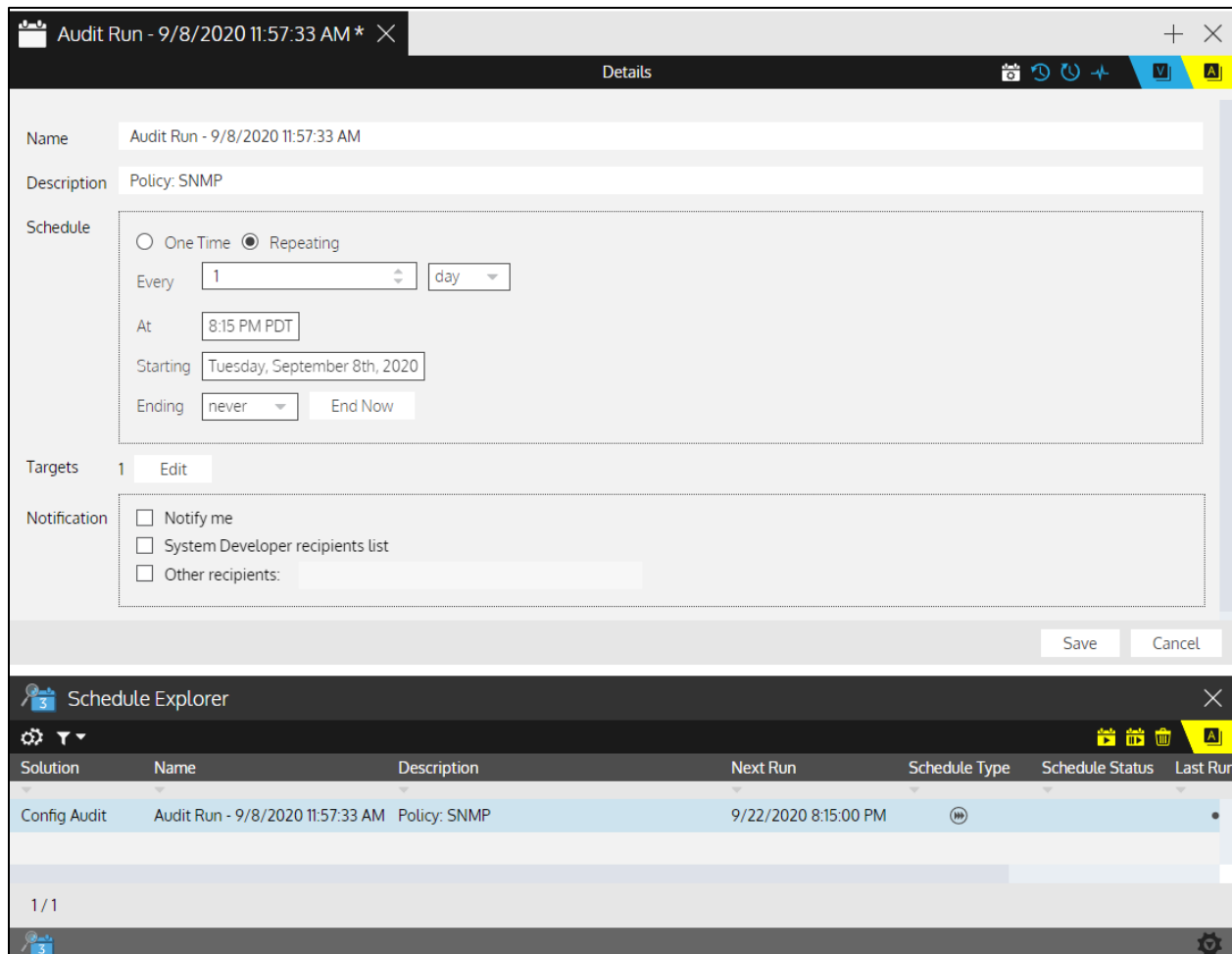
# Export reports using Data Export

**Data Export** allows you to export the following lists in CSV format. The lists are exported to your Downloads folder.




- **Cisco Extended Inventory Device List** - Lists all the Cisco devices in the current organization and provides discovered details about the devices and their components.
- **Cisco Inventory License List** - Lists all the Cisco devices in the current organization and provides license details about the device.
- **Config Drift and Audit Device List** - Lists the Config Drift status and last capture dates for all devices.
- **Device Manager Device List** - Lists all the devices that have been added to Device Manager and the hardware and software attributes.
- **IP Numbering List** - Lists all assigned addresses from IPv4 Address Pool instances and all static IP addresses assigned by IP Numbering instances for the organization. The export extracts that information on a node-by-node basis.
- **IP Reservations List** - Lists the IPv4 Address Pools for the current organization, identifies all allocated and currently used IP Address Reservations from each pool, and extracts the details to the export.
- **Most Recent IMD Workflow Logs** - Contains the most recent execution logs from the Intelligent Model Discovery workflow.
- **Network Discovery Result List** - Lists all network-discovered devices.
- **Node List** - Lists all configured nodes in the current organization that the requester has permissions to manage.
- **Gluware User List** - Lists all the Gluware users in an organization.

1. Go to  **Data Export** and select the type of list you want to export from the drop-down list.
2. Click **Run and Download Export**. This exports the list as a CSV file to your Downloads folder.





# Schedules quick reference





## Actions

-  Run Now - Execute the selected scheduled action immediately
-  Pause/Resume - Toggle between pausing or resuming the selected scheduled action (only for single schedule selection)
-  Delete Schedules - Delete the selected schedule




## Views

-  Details - View the configuration details of the selected schedule
-  Schedule History - View previously executed actions for the schedule
-  Future Occurrences - View an activity timeline for the next 10 scheduled runs
-  Activities - View all previous actions involving the schedule



## Schedule types

-  Repeating schedule
-  One-time schedule

## Schedule statuses

-  Active
-  Paused
-  Completed

## Last run statuses

-  Successful
-  Skipped




# Manage schedules

Once you schedule an action, you can manage the schedule in **Schedules**. The actions that support scheduling include:




- Taking a Config Drift snapshot
- Running a Config Audit policy
- Rebooting a device
- Provisioning a device
- Previewing a device provisioning
- Executing a custom script
- Renewing device certificates
- Executing custom scripts
- Performing an OS upgrade
- Assessing the state of a device
- Getting updates from the Cisco API Console.
- Running a data retention policy
- Running a Network RPA workflow

Data Retention and Cisco API Console schedules can only be modified through **System Settings**. All other schedules can be modified in **Schedules**.



## View the logs of a scheduled action

1. Go to  **Schedules** and double-click a scheduled action.
2. Click  to see when the scheduled was run.
3. Click  for the action you want to view the log for.
4. Click **Back**.



## View a schedule's history

1. Go to  **Schedules** and double-click a scheduled action.
2. Click  to see when the scheduled was run.
3. Click  to see all previous actions involving the schedule.




## View future scheduled runs

1. Go to  **Schedules** and double-click a scheduled action.
2. Click  to see the next 10 scheduled runs.




## Run a scheduled action now

1. Go to  **Schedules** and select a scheduled action.
2. Click .
3. Click **Confirm**.

## Pause a scheduled action


1. Go to  **Schedules** and select a scheduled action.
2. Click .
3. Click **Confirm**. The **Schedule Status** changes to .

## Resume a schedule

1. Go to  **Schedules** and select a paused action.  appears in the **Schedule Status** column of the schedule.
2. Click .
3. Click **Confirm**.

## Modify a schedule




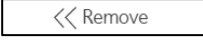

Data Retention and Cisco API Console schedules can only be modified through system settings. All other schedules can only be modified in **Schedules**. Only schedules that have not ended can be modified.

1. Go to  **Schedules** and double-click a scheduled action.
2. Modify the schedule as needed.
3. Check a **Notification** box to send an email when the scheduled action is complete. Select from those listed or add email addresses to **Other recipients**. Separate email addresses with a comma.
4. Click **Save**.



## Add or remove target devices



In **Schedules**, you can change the devices that most scheduled actions will act upon.

**Note:** You can't change the target devices for an **OS Manager** plan action (Transfer Image Only or Deploy New Image) in **Schedules**. You'll need to edit the OS plan to change target devices.

1. Go to  **Schedules** and double-click a scheduled action.
2. Click  if **Details** are not displayed.
3. Click **Edit** next to **Targets** to change the target devices.
4. Do any of the following:
  - Select an **Available Device** and click 
  - Select a **Selected Device** and click 
  - Click 
  - Click **Convert to dynamic target list** and **Confirm** to filter the list of targets. Select a property, relational operator, and value from the drop-down lists.
    - Click **Add rule** and click **AND** or **OR** to add a logical operator.
    - Click **Add group** to add nested rules.
5. Click **Back**.

## Delete a schedule

**Note:** Some system schedules cannot be deleted. To disable a **Data Retention** schedule, go to  **Settings** > **Data Retention**. To disable **Cisco API Console** updates, go to  **Settings** > **Integrations**.

1. Go to  **Schedules** and select a scheduled action.
2. Click  to delete the schedule.
3. Click **Confirm**.
4. Click **OK** when you see the message that the schedule is deleted.

# System settings overview

Gluware systems may include some number of logically separated organizations—typically companies, regions, or service providers. Each organization has users with roles and permissions assigned to them.

**Settings** is where you create, update, and delete organizations and users, and manage licenses and File Servers.

## Organization and site management

[Add or update organizations](#)

[Configure Gluware to interact with LDAP](#)

[Configure Gluware to interact with RADIUS](#)

[Configuring single sign-on authentication](#)

[Gluware roles and permissions](#)

[Install a Gluware license](#)

[Delete a Gluware license](#)

[View license expiration dates and device counts](#)

[Add Gluware users](#)

[Customize roles and permissions](#)

[Set default emails for notifications](#)

[Restrict the devices a role can manage](#)

[Connect to the Gluware Distribution Center](#)

[Enable/disable a system banner](#)

[Customize dashboards](#)

[Manage zones for Gluware Zone Engines](#)

[Configure SMTP and proxy settings](#)

[Establish credentials](#)

[Manage credentials](#)

[Generate a GluAPI client ID and password](#)

[Manage your GluAPI client ID and password](#)

[Manage data retention](#)

[Set up custom fields](#)

[Monitor configuration changes](#)

[Set up automatic snapshots](#)

[Customize command sets](#)

## **Integration**

[Set up Cisco API Console integration](#)

[Set up NIST NVD API integration](#)

[GluAPI integration](#)

[Configure a new credentials vault](#)

[Set up StackStorm integration](#)

## **OS management**

[Enable/disable a File Server](#)

[Troubleshoot a File Server](#)

[Modify a File Server](#)



[Delete a File Server](#)

[Enable the OS Catalog](#)

[Set up guidelines for OS plans](#)

## **Profile management**


[Add your photo to Gluware](#)

[Customize the row selection color](#)

# Add or update organizations

Gluware settings allows you to add organizational structure to your Gluware system with parent/child relationships. A best practice is to create users in your parent organization and add devices to a child organization.

When creating a new organization, the **Gluware Core Solutions** package is installed.

1. Go to  **Settings** > **Organization** > **Organizations**.
2. Select an organization to update from the drop-down list or click **Add Organization** to create a new organization.
3. Enter a name for the organization and a description.
4. Select the parent organization from the **Provider** drop-down list.
5. Select a user authentication mechanism:
  - Select **Gluware** to authenticate users through the Gluware server or if you are using single sign-on.
  - Select **LDAP** or **RADIUS** to use your existing user credentials. See "Configure Gluware to interact with LDAP" or "Configure Gluware to interact with RADIUS" for details.
6. Click **Create**.
7. Click **Yes** to add the base level Gluware Solution packages to your organization. Click **No** if you want to create the organization with no packages installed, for example for testing a Beta package.
8. Click **OK**.

Add/Select Organizations

MyOrganization Add Organization+

Organization Information

Name  
MyOrganization

Description  
Organization for technical documentation

Provider  
GLUWARE INTERNAL 5.1

Distribution Center  
 Create private and shared Distribution Areas

User Authentication Mechanism  
 Gluware  LDAP  RADIUS

Delete Cancel Save

**Note:** Only check the **Create private and shared Distribution Areas** box if Gluware asks you to.

# Configure Gluware to interact with LDAP

If your network implements LDAP, configure Gluware to interact with your LDAP implementation. Gluware lets you access your LDAP servers from Gluware systems and leverage your existing LDAP implementations to organize and manage user access and privileges within Gluware.saml

LDAP users will be mapped to Gluware users during the Gluware user authentication process. This means that a corresponding user in Gluware is not created until the user successfully signs in to Gluware for the first time. This also means that if your company is already LDAP-enabled, once you have established a business relationship with Gluware, you can create your Gluware user accounts on an as-needed basis.

The user authentication process in Gluware determines if, and how, to map an LDAP user with a Gluware user for the following scenarios:


- If the user already exists in the Gluware database, and the user is not flagged as coming from LDAP, Gluware will authenticate the entered password against the password stored in Gluware.
- If the user already exists in the Gluware database, and the user is flagged as coming from LDAP, Gluware will establish a connection with the LDAP server for the user's Gluware organization. It will then search for the user on the LDAP server, and
  - If the user exists in LDAP, the user will be authenticated by attempting to bind to the user entry in LDAP using the supplied password. If this succeeds, then Gluware checks the user LDAP entry for any updates to mapped attributes and updates the user in Gluware appropriately.
  - If the user no longer exists in LDAP, then Gluware flags the user as deactivated.
- If the user does not exist in the Gluware database, and the user name includes the domain name (for example, [user@domain.org](#)), and a Gluware organization is found with a matching domain name, Gluware will connect to the LDAP server for the org and search for

the user. If the user exists in LDAP, it will bind to the user using the supplied password. If the bind succeeds, then Gluware will create a user with the appropriate LDAP attributes.


The [@domain.org](#) portion of the user name entered by the user will always be included in the user name in the Gluware system, even if it is stripped off for LDAP authentication. If an LDAP entry for a user does not have an email address to map to the Gluware user, then the user name (along with the [@domain.org](#)) will be used as the user's email address in Gluware.

If an LDAP configuration is removed for an organization and a user flagged as coming from LDAP tries to sign in to Gluware, then the user will be updated as deactivated. If a user that came from LDAP is marked as deactivated in Gluware and later that user attempts to sign in and is successfully authenticated with LDAP, then the user will be reactivated.

## Establish the LDAP credential

1. Go to  **Settings > Credentials**.
2. Enter a name for the credential. It will appear in Gluware as the reference. For example, it will appear in **Device Details**.
3. Describe the credential.
4. Select **Gluware System Secret** from the drop-down list.
5. Enter the username and secret for the **Gluware System Secret**.
6. Click **Create**.

## Configure LDAP

1. Go to  **Settings > Organization > Organizations**.
2. Select an organization from the drop-down list.
3. Select **LDAP** as the user authentication mechanism.
4. Configure the following settings and then click **Save**.

Field	Description
LDAP Domain	<p>The unique domain name all users of the organization include in their username when signing in to Gluware. For example, the user <a href="#">jandy@gluware.com</a> has an LDAP Domain of <a href="#">gluware.com</a></p> <p>To require a domain name on sign in, enter the domain name. <b>Note:</b> Do not include the @ sign. For example, enter <a href="#">gluware.com</a>. The user signs in with <a href="#">jandy@gluware.com</a></p> <p>To require only the user without the domain name on sign in, enter an asterisk (*). For example, enter *. The user signs in with <a href="#">jandy</a>.</p>
Send username to LDAP server without domain	Strips the <a href="#">@domain.org</a> off the username. Users still sign in to Gluware using <a href="#">user@domain.org</a> .
Disable creation of local users	Limits new users to only those in LDAP
Host	Host name or IP address of the LDAP server. If you are using LDAPS, this name should match the server certificate
Port	Port of the LDAP server: 389 or 636 (SSL)
Admin Distinguished Username	Read-only Admin Distinguished Username used to search for user entries; for example, CN=gluServiceAccount,CN=Users,DC=contoso,DC=local

Field	Description
Admin User Password Credential	Gluware System Secret used to bind to the Admin Distinguished Username. Establish this Gluware System Secret in <b>Settings &gt; Credentials</b>
Base Distinguished Name	Location where the server will look for user accounts; for example, CN=Users,DC=contoso,DC=local
Username Attribute	LDAP attribute name where the user name is stored in a user entry. Additional entries can be used if proxies are needed to access a device
Test LDAP Connection	Allows you to test the LDAP configuration and connection for an org before saving it
LDAP user filter (Optional)	An optional LDAP filter applied to the search when searching for a user entry to bind to; for example, (&(objectCategory=person)(memberOf=CN=securityGroup,CN=Users,DC=contoso,DC=local))
Use SSL	Select if you are using LDAPS
Skip server identity check	When selected, accepts any certificate offered to Gluware. If not selected, the certificate on the LDAP server must match the certificate in the Certificate field (below)

Field	Description
Certificate (Required for SSL or Start TLS)	The certificate for the LDAP server. If the connection to the LDAP server is encrypted using TLS, then this is a string in PEM format of the TLS certificate
Custom Email Attribute	The LDAP attribute that contains the user's email address; for example, mail. If you don't specify an email address, Gluware will use the username and domain name since this is a required field. <b>Note:</b> If you supply a value for Custom Email Attribute, the field will NOT be editable and you cannot override the value pulled from LDAP
Custom First Name Attribute	LDAP attribute name where a user's first name is stored in a user entry. <b>Note:</b> If you supply a value for Custom First Name Attribute, the field will NOT be editable and you cannot override the value pulled from LDAP
Custom Last Name Attribute	LDAP attribute name where a user's last name is stored in a user entry. <b>Note:</b> If you supply a value for Custom Last Name Attribute, the field will NOT be editable and you cannot override the value pulled from LDAP
Role Attribute	Optional LDAP attribute used to set the role; for example, memberOf. If Role Attribute is assigned, the role cannot be modified in Gluware <b>Settings &gt; User &gt; Manage Users</b>
Map Role Attribute Value	When selected, allows you to create up to five LDAP security groups and map each group to a role



Field	Description
Default Role	If the role is not specified, or the LDAP user entry does not include the Role Attribute, then this will be the default role given to a new Gluware user and the role can be modified in Gluware <b>Settings &gt; User &gt; Manage Users</b>
Organization Visibility Attribute	An optional LDAP attribute, including vendor-specific attributes, that contains a string of "ALL," a comma-separated string of organization names, or the "HOME" organization; for example, you can use the "info" attribute and enter Org1,Org2, Org3 in the Users Notes field on the Telephones tab in Active Directory
Default Organization Visibility	If the Control Org Visibility is not specified, or the LDAP user entry does not include the Org Visibility Attribute, then this will be the default Org Visibility given to a new Gluware user. This can be a string with a value of "ALL" or "HOME" or an object with organization IDs as its keys

# Configure Gluware to interact with RADIUS

If your network implements RADIUS, configure Gluware to interact with your RADIUS implementation. Gluware lets you access your RADIUS servers from Gluware systems and leverage your existing RADIUS implementations to organize and manage user access and privileges within Gluware.

RADIUS users will be mapped to Gluware users during the Gluware user authentication process. This means that a corresponding user in Gluware is not created until the user successfully signs in to Gluware for the first time. This also means that if your company is already RADIUS-enabled, once you have established a business relationship with Gluware, you can create your Gluware user accounts on an as-needed basis.

The user authentication process in Gluware determines if, and how, to map a RADIUS user with a Gluware user for the following scenarios:


- If the user already exists in the Gluware database, and the user is not flagged as coming from RADIUS, Gluware will authenticate the entered password against the password stored in Gluware.
- If the user already exists in the Gluware database, and the user is flagged as coming from RADIUS, Gluware will establish a connection with the RADIUS server for the user's Gluware organization. It will then search for the user on the RADIUS server, and
  - If the user exists in RADIUS, the user will be authenticated by attempting to bind to the user entry in RADIUS using the supplied password. If this succeeds, then Gluware checks the user RADIUS entry for any updates to mapped attributes and updates the user in Gluware appropriately.
  - If the user no longer exists in RADIUS, then Gluware flags the user as deactivated.
- If the user does not exist in the Gluware database, and the user name includes the domain name (for example, [user@domain.org](#)),

and a Gluware organization is found with a matching domain name, Gluware will connect to the RADIUS server for the org and search for the user. If the user exists in RADIUS, it will bind to the user using the supplied password. If the bind succeeds, then Gluware will create a user with the appropriate RADIUS attributes.


The [@domain.org](#) portion of the user name entered by the user will always be included in the user name in the Gluware system, even if it is stripped off for RADIUS authentication. If a RADIUS entry for a user does not have an email address to map to the Gluware user, then the user name (along with the [@domain.org](#)) will be used as the user's email address in Gluware.

If a RADIUS configuration is removed for an organization and a user is flagged as coming from RADIUS tries to sign in to Gluware, then the user will be updated as deactivated. If a user that came from RADIUS is marked as deactivated in Gluware and later that user attempts to sign in and is successfully authenticated with RADIUS, then the user will be reactivated.

## Establish the RADIUS credential

1. Go to  **Settings** > **Credentials**.
2. Enter a name for the credential. It will appear in Gluware as the reference. For example, it will appear in **Device Details**.
3. Describe the credential.
4. Select **Gluware System Secret** from the drop-down list.
5. Enter the username and secret for the **Gluware System Secret**.
6. Click **Create**.

## Configure RADIUS

1. Go to  **Settings** > **Organization** > **Organizations**.
2. Select an organization from the drop-down list.
3. Select **RADIUS** as the user authentication mechanism.
4. Configure the following settings and then click **Save**.

Field	Description
RADIUS Domain	<p>The unique domain name all users of the organization include in their username when signing in to Gluware. For example, the user <a href="#">jandy@gluware.com</a> has a RADIUS domain of <a href="#">gluware.com</a></p> <p>To require a domain name on sign in, enter the domain name. <b>Note:</b> Do not include the @ sign. For example, enter <a href="#">gluware.com</a>. The user signs in with <a href="#">jandy@gluware.com</a></p> <p>To require only the user without the domain name on sign in, enter an asterisk (*). For example, enter <a href="#">*</a>. The user signs in with <a href="#">jandy</a>.</p>
Send username to RADIUS server without domain	Strips the <a href="#">@domain.org</a> off the username. Users still sign in to Gluware using <a href="#">user@domain.org</a> .
Disable creation of local users	Limits new users to only those in RADIUS
Primary Host	Host name or IP address of the RADIUS server
Primary Port	Port of the RADIUS server
Secondary Host	Host name or IP address of the secondary RADIUS server
Secondary Port	Port of the secondary RADIUS server

Field	Description
Request Timeout (Milliseconds)	Time allowed for the request to the RADIUS server to respond
Request Retries	Number of times a connection to the RADIUS server will be attempted
RADIUS Server Secret Credential	Gluware System Secret for the Gluware RADIUS client. Establish this Gluware System Secret in <b>Settings &gt; Credentials</b>
Test RADIUS Connection	Allows you to test the RADIUS configuration and connection for an Org before saving it
Custom Email Attribute	Read-only Admin Distinguished Username used to search for user entries. <b>Note:</b> If you supply a value for Custom Email Attribute, the field will NOT be editable and you cannot override the value pulled from RADIUS
Custom First Name Attribute	A RADIUS attribute, including vendor-specific attributes, where a user's first name is stored. <b>Note:</b> If you supply a value for Custom First Name Attribute, the field will NOT be editable and you cannot override the value pulled from RADIUS
Custom Last Name Attribute	A RADIUS attribute, including vendor-specific attributes, where a user's last name is stored. <b>Note:</b> If you supply a value for Custom Last Name Attribute, the field will NOT be editable and you cannot override the value pulled from RADIUS


Field	Description
Role Attribute	A RADIUS attribute, including vendor-specific attributes, that contains the role for the user. If Role Attribute is assigned, the role cannot be modified in Gluware <b>Settings &gt; User &gt; Manage Users</b>
Map Role Attribute Value	When selected, allows you to create up to five RADIUS security groups and map each group to a role
Default Role	If the role is not specified, or the RADIUS user entry does not include the Role Attribute, then this will be the default role given to a new Gluware user and the role can be modified in Gluware <b>Settings &gt; User &gt; Manage Users</b>
Default Organization Visibility	This will be the default Org Visibility given to a new Gluware user. This can be a string with a value of "ALL" or "HOME" or an object with organization IDs as its keys
Enable Accounting	Enables record keeping of sign in/sign off activity

# Configure single sign-on authentication

Gluware supports SAML (Security Assertion Markup Language) and OAuth (Open Authorization) authentication.

Your identity provider can usually provide an XML or JSON metadata document that contains the information you need for configuring SSO.

## Notes:

- **Organization Visibility** is set to ALL for all users and can't be modified as part of the single sign-on configuration. To limit **Organization Visibility**, go to  **Settings > User > Manage Users**, select a user, and then select **Some** for **Organization Visibility**.
- You enable SAML or OAuth in your topmost organization. Child organizations must have any LDAP or RADIUS settings removed. And once SAML or OAuth is configured, LDAP and RADIUS cannot be enabled in child organizations.

## Configure SAML authentication

You'll need to provide the following information to the identity provider:

**Audience (Entity ID):** `https://<Gluware-FQDN>/sso/saml/metadata`

**ACS (Consumer) URL Validator:** `https://<Gluware-FQDN>/.*`

**ACS (Consumer) URL:** `https://<Gluware-FQDN>/saml/callback`

**Single Logout URL:** `https://<Gluware-FQDN>/sso/saml/logout`

**Login URL:** `https://<Gluware-FQDN>/saml/login`

**Basic** SAML settings work for most implementations. If the **Basic** settings aren't sufficient, contact Gluware support at [support@gluware.com](mailto:support@gluware.com) for help using **Advanced** settings.

Single Sign-On

User Single Sign-On Mechanism  
 Disabled  SAML  OAuth

SAML Settings

Basic  Advanced

Entry Point

Issuer

Name ID Format

Certificate

Decryption Private Key

Sign out URL

User Management

Disable creation of local users

Username Attribute

Email Attribute

First Name Attribute

Last Name Attribute

Role Attribute

Default Role

Cancel Save

1. Ensure you're in the topmost (root) organization.
2. Go to **Settings > Global > Single Sign-On**.
3. Select **SAML**.
4. Select **Basic**.
5. Enter the **Entry Point**, the URL used to initiate a Single Sign On (SSO) with the identity provider.



6. Enter the **issuer**, the URL of the identity provider.
7. Enter the **name ID format**, the format for the user identity that will be sent by the identity provider. The default is an email address ("urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress").
8. Paste the public X.509 **certificate** in Base-64 encoded format for the identity provider.
9. Optional: Enter the private **decryption private key** used to secure the communication between the identity provider and Gluware.
10. Enter the **sign-out URL**, the URL used to initiate a Single Log Out (SLO) with the identity provider.
11. Optional: Click in the **Disable creation of local users** box to limit new users to only those in SAML. Any existing users remain.
12. Enter the SAML attribute name where the username is stored in a user entry. Additional entries can be used if proxies are needed to access a device.
13. Enter the SAML attribute that contains the user's email address; for example, `mail`. If you don't specify an email address, Gluware will use the username and domain name since this is a required field.
14. Enter the SAML attribute that contains the user's first name.
15. Enter the SAML attribute that contains the user's last name.
16. Optional: Enter the SAML attribute used to set the role; for example, `memberOf`. If **Role Attribute** is assigned, the role cannot be modified in Gluware **Settings Users > Manage Users**.
17. Enter the default role to assign to the new user if the role is not specified or the SAML user entry does not include the Role Attribute. The role can be modified in Gluware **Settings > User > Manage Users**.
18. Save.

## Configure OAuth authentication

You'll need to provide the following information to the identity provider:

**Sign-in redirect URI:** `https://<Gluware-FQDN>/sso/oauth/callback`

**Basic** OAuth settings work for most implementations. If the **Basic** settings aren't sufficient, contact Gluware support at [support@gluware.com](mailto:support@gluware.com) for help using **Advanced** settings.

### Single Sign-On

User Single Sign-On Mechanism  
 Disabled  SAML  OAuth

#### OAuth Settings

Basic  Advanced

Authorization URL

Client ID

Client Secret

PKCE

Scope

Token Url

User Profile URL

#### User Management

Disable creation of local users

Username Attribute

Email Attribute

First Name Attribute

Last Name Attribute

Role Attribute


Default Role  
Read-Only Admin ▼

Cancel Save

1. Ensure you're in the topmost (root) organization.
2. Go to **Settings > Global > Single Sign-On**.
3. Select **OAuth**.
4. Select **Basic**.

5. Enter the **Authorization URL**, The URL used to initiate a Single Sign On (SSO) with the identity provider.
6. Enter the **Client ID**, the public identifier generated by the identity provider to uniquely identify Gluware.
7. Enter the **Client Secret**, the shared secret generated by the identity provider.
8. Check the **PKCE** box if using Proof Key for Code Exchange to provide additional security.
9. Enter the **Scope**, the scope assigned to users that allows them to sign in to Gluware using OAuth2 as defined in the identity provider.
10. Enter the **Token URL**, the URL used to request access tokens from the identity provider.
11. Enter the **User Profile URL**, the URL to retrieve user profiles from the identity provider.
12. Optional: Click in the **Disable creation of local users** box to limit new users to only those in OAuth. Any existing users remain.
13. Enter the OAuth attribute name where the username is stored in a user entry. Additional entries can be used if proxies are needed to access a device.
14. Enter the OAuth attribute that contains the user's email address; for example, `mail`. If you don't specify an email address, Gluware will use the username and domain name since this is a required field.
15. Enter the OAuth attribute that contains the user's first name.
16. Enter the OAuth attribute that contains the user's last name.
17. Optional: Enter the OAuth attribute used to set the role; for example, `memberOf`. If **Role Attribute** is assigned, the role cannot be modified in Gluware **⚙️ Settings > User > Manage Users**.
18. Enter the default role to assign to the new user if the role is not specified or the OAuth user entry does not include the Role Attribute. The role can be modified in Gluware **⚙️ Settings > User > Manage Users**.
19. Save.


# Gluware roles and permissions

Roles and permissions are assigned in  **Settings** > **User** > **Manage Users**. You can use the standard Gluware roles, define custom roles, or use a combination of standard and custom roles.

At least one person in each organization must be a **Superuser**. Superusers can add and remove permissions from any other user in the organization.

**NOTE:** If roles are defined by LDAP or RADIUS, roles cannot be modified in  **Settings** > **User** > **Manage Users**.

## Assign a Superuser

1. Ensure you're in the organization you want to assign the Superuser in.
2. Go to  **Settings** and select **User** > **Manage Users**.
3. Add a user or search for an existing user.
4. Check the **Superuser Privileges** box.
5. Click **Create** or **Save**.

## Gluware standard roles

**DV** = Dashboard Viewer

**RA** = Read-Only Admin

**OA** = Operations Admin

**WA** = Write Admin

**SA** = System Admin

**SD** = System Developer

## Permissions assigned to standard roles

<b>Dashboard</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Dashboard Solution	✓	✓	✓	✓	✓	✓
Create Private Dashboards			✓	✓	✓	✓
Create Public Dashboards				✓	✓	✓
Moderate Public Dashboards					✓	✓
<b>RPA Workflows</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access RPA Solution		✓	✓	✓	✓	✓
Moderate RPA Public Workflows					✓	✓
Develop Private Workflows				✓	✓	✓
Execute Private Workflows					✓	✓
Promote Private Workflows					✓	✓
Execute Level 1 Production Workflows			✓	✓	✓	✓
Develop Level 1 Workflows				✓	✓	✓
Promote Level 1 Workflows					✓	✓

<b>RPA Workflows</b> continued	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Execute Level 2 Production Workflows				✓	✓	✓
Develop Level 2 Workflows				✓	✓	✓
Promote Level 2 Workflows					✓	✓
Execute Level 3 Production Workflows				✓	✓	✓
Develop Level 3 Workflows				✓	✓	✓
Promote Level 3 Workflows					✓	✓
Execute Level 4 Production Workflows					✓	✓
Develop Level 4 Workflows					✓	✓
Promote Level 4 Workflows					✓	✓
Execute Level 5 Production Workflows						✓
Develop Level 5 Workflows						✓
Promote Level 5 Workflows						✓
Run and Schedule Workflows			✓	✓	✓	✓
Import Workflow Tasks			✓	✓	✓	✓

<b>Config Model Editor</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Config Model Editor Solution		✓	✓	✓	✓	✓
Create and Edit Globals, Domains, and Features				✓	✓	✓
Create and Delete Nodes			✓	✓	✓	✓
Delete Globals, Domains, Features, and Nodes				✓	✓	✓
Edit Nodes			✓	✓	✓	✓
Terminal Access Using Device Credentials					✓	✓
View JSON Format						✓
<b>Provisioning</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Actions within Config Model Editor			✓	✓	✓	✓
Allow Configuration Changes			✓	✓	✓	✓
View Logs and Download Bundles		✓	✓	✓	✓	✓

<b>Workflows</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Workflows Solution		✓	✓	✓	✓	✓
Run Level 1 Workflows - custom workflows for Read-Only Admins		✓	✓	✓	✓	✓
Run Level 2 Workflows - custom workflows for Operations Admins			✓	✓	✓	✓
Run Level 3 Workflows - custom workflows for Write Admins				✓	✓	✓
Run Level 4 Workflows - Design and Operate workflows created in the Workflows Solution, plus custom workflows for System Admins					✓	✓
Run Level 5 Workflows - custom workflows for System Developers						✓



<b>Config Drift and Audit</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Config Drift and Audit Solution		✓	✓	✓	✓	✓
Manage Level 1 Audit Policies				✓	✓	✓
Run and Schedule Level 1 Audit Policies			✓	✓	✓	✓
Manage Level 2 Audit Policies				✓	✓	✓
Run and Schedule Level 2 Audit Policies			✓	✓	✓	✓
Manage Level 3 Audit Policies					✓	✓
Run and Schedule Level 3 Audit Policies					✓	✓
Run and Schedule Device Captures			✓	✓	✓	✓
<b>Data Export</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Data Export Solution		✓	✓	✓	✓	✓

<b>OS Manager</b>	DV	RA	OA	WA	SA	SD
Access OS Manager Solution		✓	✓	✓	✓	✓
Allow Image Validation Override					✓	✓
Manage Catalogs					✓	✓
Manage OS Plans					✓	✓
Require Use of Catalogs (when enabled)			✓	✓		
Run and Schedule OS Plans			✓	✓	✓	✓
<b>Device Manager</b>	DV	RA	OA	WA	SA	SD
Access Device Manager Solution		✓	✓	✓	✓	✓
Create and Delete Devices				✓	✓	✓
Edit Devices			✓	✓	✓	✓
Reboot Devices			✓	✓	✓	✓
Run Device Discovery			✓	✓	✓	✓
Update Device Support Data			✓	✓	✓	✓
View Device Vendor Support Data		✓	✓	✓	✓	✓
View and Download Device Activity Logs			✓	✓	✓	✓

<b>Topology</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Manage Topology Solution					✓	✓
Access Topology Solution		✓	✓	✓	✓	✓
<b>Data Explorer</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Data Explorer Solution			✓	✓	✓	✓
Generate Data From Explorer Templates			✓	✓	✓	✓
Manage Data Explorer Templates					✓	✓
Moderate Public Data Explorer Templates					✓	✓
<b>Gluware API</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Create Client ID and Secrets for Gluware API Users						✓
Include Device Credentials in API Responses						✓
<b>File Server</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access File Server Solution		✓	✓	✓	✓	✓
Manage Files					✓	✓

<b>Schedules</b>	DV	RA	OA	WA	SA	SD
Access Schedules Solution		✓	✓	✓	✓	✓
<b>Settings - Credentials</b>	DV	RA	OA	WA	SA	SD
Access Credentials Settings					✓	✓
Manage Credentials					✓	✓
Export Credentials					✓	✓
Reveal Credential Secrets					✓	✓
<b>Settings - Global and Organization</b>						
Access Organizations Settings		✓	✓	✓	✓	✓
Manage Auto Capture					✓	✓
Manage Custom Fields					✓	✓
Manage Dashboards					✓	✓
Manage Data Retention Policies					✓	✓
Manage Globals					✓	✓
Manage Integrations					✓	✓
Manage Licenses					✓	✓
Manage Logging					✓	✓

	DV	RA	OA	WA	SA	SD
Manage Organizations					✓	✓
Manage OS Management					✓	✓
Manage Roles					✓	✓
Manage Syslog					✓	✓
Manage Zones					✓	✓
Run Data Retention Policies					✓	✓
<b>Settings - User</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Manage All Users					✓	✓
View All Users	✓	✓	✓	✓	✓	✓
<b>Solutions Manager</b>	<b>DV</b>	<b>RA</b>	<b>OA</b>	<b>WA</b>	<b>SA</b>	<b>SD</b>
Access Solutions Manager Solution		✓	✓	✓	✓	✓
Install Packages					✓	✓

# Permissions descriptions

Dashboard	Description
Access Dashboard Solution	Allow use of Gluware dashboards
Create Private Dashboards	Allow the creation of dashboards available only to the creator
Create Public Dashboards	Allow the creation of dashboards available to all users of the organization
Moderate Public Dashboards	Allow allow deletion of other's public dashboards
<b>RPA Workflows</b>	
Access RPA Solution	Allow use of Gluware Network RPA
Moderate RPA Public Workflows	Allow modification and deletion of public workflows created by other users
Develop Private Workflows	Allow private workflows to be created
Execute Private Workflows	Allow private workflows to be run
Promote Private Workflows	Allow private workflows to be promoted from test to production
Execute Level 1 Production Workflows	Allow public level 1 workflows to be run
Develop Level 1 Workflows	Allow public level 1 workflows to be created
Promote Level 1 Workflows	Allow public level 1 workflows to be promoted from test to production
Execute Level 2 Production Workflows	Allow public level 2 workflows to be run

Develop Level 2 Workflows	Allow public level 2 workflows to be created
Promote Level 2 Workflows	Allow public level 2 workflows to be promoted from test to production
Execute Level 3 Production Workflows	Allow public level 3 workflows to be run
Develop Level 3 Workflows	Allow public level 3 workflows to be created
Promote Level 3 Workflows	Allow public level 3 workflows to be promoted from test to production
Execute Level 4 Production Workflows	Allow public level 4 workflows to be run
Develop Level 4 Workflows	Allow public level 4 workflows to be created
Promote Level 4 Workflows	Allow public level 4 workflows to be promoted from test to production
Execute Level 5 Production Workflows	Allow public level 5 workflows to be run
Develop Level 5 Workflows	Allow public level 5 workflows to be created
Promote Level 5 Workflows	Allow public level 5 workflows to be promoted from test to production
Run and Schedule Workflows	Allow workflows to be run and scheduled
Import Workflow Tasks	Allow workflow tasks to be imported

<b>Config Model Editor</b>	
Access Config Model Editor Solution	Allow use of Gluware Config Model Editor
Create and Edit Globals, Domains, and Features	Allow config modeling constructs to be created and modified
Create and Delete Nodes	Allow nodes to be added and removed
Delete Globals, Domains, and Features	Allow config modeling constructs to be deleted
Edit Nodes	Allow nodes to be modified
Terminal Access Using Device Credentials	Allow use of device username and password when using the terminal
View JSON Format	Allow the JSON for config modeling constructs to be viewed in the Config Model Editor Instance panel
<b>Provisioning</b>	
Access Actions within Config Model Editor	Allow read-only access to Config Model Editor and provisioning actions to be run and scheduled
Allow Configuration Changes	Allow configuration changes through provisioning device and state assessment utilities on selected nodes
View Logs and Download Bundles	Review config modeling logs and download provisioning bundles



<b>Workflows</b>	
Access Workflows Solution	Allow use of Gluware Workflows
Run Level 1 Workflows	Allow workflows with authorization level wizard-read to be run
Run Level 2 Workflows	Allow workflows with authorization level wizard-write to be run
Run Level 3 Workflows	Allow workflows with authorization level wizard-operate to be run
Run Level 4 Workflows	Allow workflows with authorization level wizard-admin to be run
Run Level 5 Workflows	Allow workflows with authorization level wizard-develop to be run

<b>Config Drift and Audit</b>	
Access Config Drift and Audit Solution	Allow use of Gluware Config Drift and Audit
Manage Level 1 Audit Policies	Allow level 1 audit policies to be created, modified, and deleted
Run and Schedule Level 1 Audit Policies	Allow level 1 audit policies to be scheduled to run and run on demand
Manage Level 2 Audit Policies	Allow level 2 audit policies to be created, modified, and deleted
Run and Schedule Level 2 Audit Policies	Allow level 2 audit policies to be scheduled to run and run on demand
Manage Level 3 Audit Policies	Allow level 3 audit policies to be created, modified, and deleted
Run and Schedule Level 3 Audit Policies	Allow level 3 audit policies to be scheduled to run and run on demand
Run and Schedule Device Captures	Allow configuration snapshots to be scheduled to run and run on demand
<b>Data Export</b>	
Access Data Export Solution	Allow use of Gluware Data Export to download Gluware data reports

<b>OS Manager</b>	
Access OS Manager Solution	Allow use of Gluware OS Management
Allow Image Validation Override	Allow the option to skip the API image compatibility check in OS plans
Manage Catalogs	Allow image catalogs to be created, modified, and deleted
Manage OS Plans	Allow OS plans to be created, modified, and deleted
Require Use of Catalogs (when enabled)	If OS Catalogs are enabled in <b>Settings</b> , require OS catalogs to be used as the source of images for OS plans
Run and Schedule OS Plans	Allow OS plans to be scheduled to run and run on demand

<b>Device Manager</b>	
Access Device Manager Solution	Allow use of Gluware Device Manager
Create and Delete Devices	Allow devices to be added and removed from Gluware
Edit Devices	Allow devices to be modified
Reboot Devices	Allow devices to be restarted
Run Device Discovery	Allow Discover Devices to be run
Update Device Support Data	If enabled in System Settings, allow Cisco Bulletins, Security Advisory counts, and SmartNet contract details to be retrieved from the Cisco API Console
View Device Vendor Support Data	Allow Cisco Bulletins, Security Advisory counts, and SmartNet contract details to be read
View and Download Device Activity Logs	Allow device logs to be downloaded
<b>Topology</b>	
Manage Topology Solution	Allow use of Topology
Access Topology Solution	Allow annotations to be added, labels to be managed, and diagrams to be exported

<b>Data Explorer</b>	
Access Data Explorer Solution	Allow use of Data Explorer
Generate Data From Explorer Templates	Allow reports to be run from Data Explorer templates
Manage Data Explorer Templates	Allow creation, modification, and deletion of Data Explorer templates
Moderate Public Data Explorer Templates	Allow modification and deletion of public Data Explorer templates created by other users
<b>Gluware API</b>	
Create Client ID and Secrets for Gluware API Users	Allow creation of credentials for Gluware API users
Include Device Credentials in API Responses	If GluAPI integration is enabled in System Settings, allow device credentials to be included in the response
<b>File Server</b>	
Access File Server Solution	Allow use of Gluware File Server
Manage Files	Allow image files to be added, modified, and deleted from File Servers
<b>Schedules</b>	
Access Schedules Solution	Allow Gluware schedules to be viewed; allow schedules for tasks the user is allowed to run to be modified and deleted

<b>Settings - Credentials</b>	
Access Credentials Settings	Allow use of Gluware Credentials settings
Manage Credentials	Allow credentials to be added, modified, and deleted
Export Credentials	Allow credentials to be exported
Reveal Gluware Credential Secrets	Allow credentials to be revealed in plain text
<b>Settings - Global and Organization</b>	
Access Organizations Settings	Allow use of Gluware Settings
Manage Command Sets	Allow custom command sets and redaction expressions to be added, modified, and deleted
Manage Custom Fields	Allow custom fields to be added, modified, and deleted
Manage Dashboards	Allow specific dashboard preferences for an organization
Manage Data Retention Policies	Allow data retention policies to be set up, modified, and deleted
Manage Globals	Allow access to global settings
Manage Event Triggers	Allow automatic snapshots to be set up for selected actions. Allow events to trigger RPA workflows
Manage Inbound Syslog	Allow monitoring of syslog messages to be set up to catch configuration changes

Manage Integrations	Allow access to integration settings
Manage Licenses	Allow Gluware licenses to be installed and removed and expiration dates and device counts to be viewed
Manage Logging	Allow access to logging settings
Manage Organizations	Allow organizations to be added, modified, and deleted
Manage OS Management	Allow access to OS management settings including File Servers
Manage Roles	Allow roles to be created, modified, and deleted
Manage Vaults	Allow credential vaults to be created, updated, and deleted
Manage Zones	Allow zones to be created for Gluware Zone Engines
<b>Settings - User</b>	
Manage All Users	Allow Gluware users to be added, modified, and deleted
View All Users	Allows all users in the organization to be viewed

<b>Solutions Manager</b>	
Access Solutions Manager Solution	Allow use of Gluware Solutions Manager
Install Packages	Allow installation of new and updated Gluware packages

# Install a Gluware license

Gluware licenses are used to manage:

- The Gluware solutions available to you
- The maximum number of devices in your Gluware system
- The expiration date of your evaluation period or product licenses

Only Gluware **Settings** is available until your license is installed. You'll need to create your organizations and add System Admin users, then install your Gluware license.

**Important** You usually install your Gluware licenses in your parent (topmost) organization. All child organizations share these licenses and the pool of devices. If you install a license in a child organization, licenses from the parent organization no longer apply to the child organization.

Once you install a license in an organization, you cannot move it to a different organization.

## Request a Contract ID from Gluware

1. Ensure you're in the organization you want to install the license in. This is usually your parent (topmost) organization.
2. Go to **Settings > Organization > Licensing**. You should see your system name and system token.
3. Click **Copy info to clipboard**. This copies the system name and token to your clipboard.
4. Send an email to [licensing@gluware.com](mailto:licensing@gluware.com) that includes
  - The **System Name** and **System Token** that you copied
  - The **name, email, and phone number** of the person to receive the license via email



Licenses

System Name: MyOrganization  
System Token: 12abc3-def4-56ghjk-7lmno8-pqr910-stu11 Copy info to clipboard

All dates below are displayed using the UTC time standard. Licenses start at midnight UTC and expire at 11.59pm UTC.

**Current Usage Summary**

Solution	Licenses Assigned	Licenses Available	Expiration Date	Days Left
No License Summary Usage Available				

**Activated Licenses**

Contract ID	License Type	Activation Date	Expiration Date	Device Limit	Action
No Active Licenses Available					

Add License

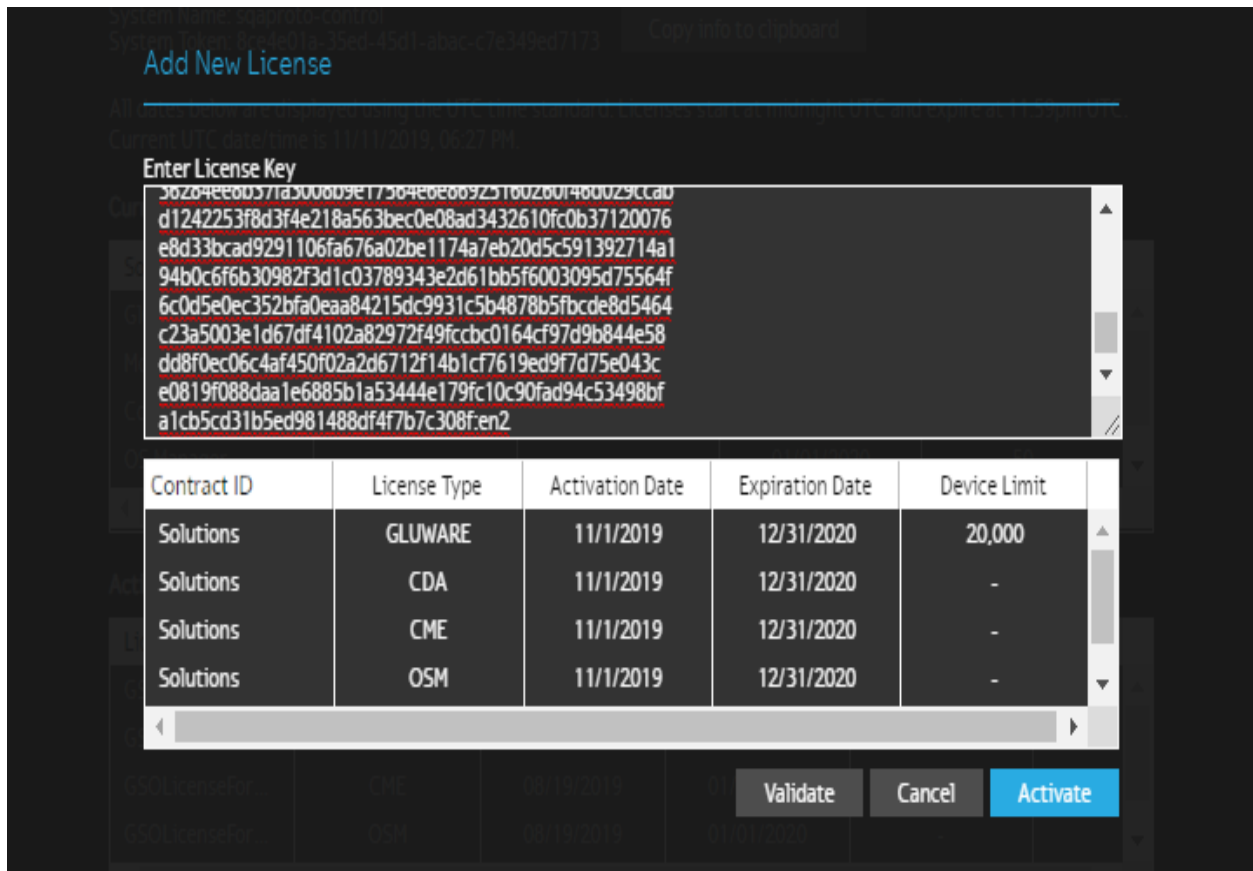
**Expired Licenses**

Contract ID	License Type	Activation Date	Expiration Date	Device Limit
No Expired Licenses Available				

## Install the license

When you receive the license key from Gluware, return to system settings to install it.

1. Ensure you're in the organization you want to install the license in. This is usually your parent (topmost) organization.
2. Go to **Settings > Organization > Licensing**.
3. Click **Add License**.
4. Paste the contract ID you received from Gluware in the space provided and click **Validate**.



5. **Important:** Verify

- No error messages are displayed
- The organization displayed at the top of the screen is the organization you want to install the license in
- The license information displayed matches your sales order

6. If there are any error messages you can't resolve or any info is incorrect, click **Cancel** and contact [licensing@gluware.com](mailto:licensing@gluware.com) immediately. If all looks correct, click **Activate**.

When installed, you'll see the license in the **Activated Licenses** list. As a license nears expiration or your device count nears capacity, a warning message will notify you. Your data is not lost, even if the license expires, but it will no longer be accessible through Gluware.

## Licenses

System Name:  
System Token:

Copy info to clipboard

All dates below are displayed using the UTC time standard. Licenses start at midnight UTC and expire at 11.59pm UTC.  
Current UTC date/time is 02/06/2023, 10:35 PM.

### Current Usage Summary

Solution	Licenses Assigned	Licenses Available	Expiration Date	Days Left
Glware	61,531	Unlimited	Perpetual	
Config Model Editor	-	-	Perpetual	
Config Drift & Audit	-	-	Perpetual	
OS Manager	-	-	Perpetual	
Workflows	-	-	Perpetual	



### Activated Licenses

Contract ID	Solution Key	Activation Date	Expiration Date	License Limit	Action
JR-System	GLUWARE	01/01/2023	Perpetual	Unlimited	
JR-System	CDA	01/01/2023	Perpetual	-	
JR-System	CME	01/01/2023	Perpetual	-	
JR-System	OSM	01/01/2023	Perpetual	-	
JR-System	RPA	01/01/2023	Perpetual	-	

# Delete a Gluware license

If you install a Gluware license in the wrong organization, you can delete it. However, you'll need to request a replacement license from [licensing@gluware.com](mailto:licensing@gluware.com) if you want to install it in another organization.

**WARNING!** Deleting a license deletes access to the devices and device information associated with the license.

1. Ensure you're in the organization you installed the Gluware license in.
2. Go to  **Settings** > **Organization** > **Licensing**.
3. In the **Active Licenses** list, click  beside the license you want to delete.
4. Click **Confirm**.

Licenses



System Name: I-SQA-Control  
System Token: b6e27a89-cb7a-4ad1-8ca1-a98b3dd35d74 Copy info to clipboard

All dates below are displayed using the UTC time standard. Licenses start at midnight UTC and expire at 11.59pm UTC.  
Current UTC date/time is 02/06/2023, 09:59 PM.

**Current Usage Summary**

Solution	Licenses Assigned	Licenses Available	Expiration Date	Days Left
Gluware	61,531	Unlimited	Perpetual	
Config Model Editor	-	-	Perpetual	
Config Drift & Audit	-	-	Perpetual	
OS Manager	-	-	Perpetual	
Workflows	-	-	Perpetual	

**Activated Licenses**

Contract ID	Solution Key	Activation Date	Expiration Date	License Limit	Action
JR-System	GLUWARE	01/01/2023	Perpetual	Unlimited	
JR-System	CDA	01/01/2023	Perpetual	-	
JR-System	CME	01/01/2023	Perpetual	-	
JR-System	OSM	01/01/2023	Perpetual	-	
JR-System	RPA	01/01/2023	Perpetual	-	

**Expired Licenses**

Contract ID	Solution Key	Activation Date	Expiration Date	License Limit

# View license expiration dates and device counts


In system settings, you can see:

- All the Gluware licenses for the organization
- The number of devices you are licensed for in Gluware
- The number of devices still available for you to add
- The expiration date of each license
- Any expired licenses

**Notes:** For licensing purposes, a device is defined to be an individual (physical or virtual) router, firewall, Wide Area Network (WAN) acceleration device or a switch; however, in the case of a switch, each blade will consume one device license. For example, a switch chassis with two blades is equal to two devices, a chassis with four blades will consume four device licenses, etc.

As your license nears expiration or your device count nears the limit, you'll see a warning message. Data is not lost, even if the license expires, but it will no longer be accessible in Gluware.

Licenses expire at 11:59:59 UTC.

1. Ensure you're in the organization you installed the Gluware license in.
2. Go to  **Settings** > **Organization** > **Licensing**.

## Licenses

System Name: ISQA-CONTROL  
System Token: b6e27a89-cb7a-4ad1-8ca1-a98b3dd35d74

Copy info to clipboard

All dates below are displayed using the UTC time standard. Licenses start at midnight UTC and expire at 11.59pm UTC.  
Current UTC date/time is 07/01/2021, 02:36 PM.

### Current Usage Summary

Solution	Licenses Assigned	Licenses Available	Expiration Date	Days Left
Gluware	1,275	48,725	Perpetual	
Config Modeling	-	-	Perpetual	
Config Drift & Audit	-	-	Perpetual	
OS Manager	-	-	Perpetual	
Workflows	-	-	Perpetual	

### Activated Licenses

Contract ID	License Type	Activation Date	Expiration Date	License Limit	Action
ISQA-GSO-01	GLUWARE	05/17/2020	Perpetual	50,000	
ISQA-GSO-01	CDA	05/17/2020	Perpetual	-	
ISQA-GSO-01	CME	05/17/2020	Perpetual	-	
ISQA-GSO-01	OSM	05/17/2020	Perpetual	-	
ISQA-GSO-01	WKF	05/17/2020	Perpetual	-	


Add License

# Add Gluware users

If your organization does not use LDAP or RADIUS to authenticate users, users can be authenticated through the Gluware server. A best practice is to create users in your parent organization and add devices to a child organization.

At least one person in each organization must have **Superuser Privileges**. Superusers can add and remove permissions for any other role in the organization.

**Note:** A user's roles and permissions can have a big impact on what features and actions are available to the user, especially if you customized roles.

1. Go to  **Settings** > **User** > **Manage Users**.
2. Click **Add User+**.
3. Enter the user name, first name, last name, and a unique email address.
4. Select a role from the drop-down list to refine the user's permissions.
5. Optional: Check the **Superuser Privileges** box to allow the user to add and remove permissions for all other roles in the organization.
6. To limit the Gluware organization the user has permissions for, select **Some** and then select an organization from the drop-down list. **All** gives access to the current organization and all its child organizations.
7. Optional: Select **Enable 2FA**. Users must enter a 2FA code provided by a third-party authentication application to access devices.

8. Password options:

- Select **User Defined** if you want the user to establish their password. The user will receive an email with instructions on how to set their password.
- Select **Set Password** if you want to manage the user's password. Enter a password and confirm it.

9. Click **Create**.

Edit My Profile    Manage Users

Add/Select Users

New User Information

Username\*

First Name\*

Last Name\*

Email\*  
✉ Email Address

Role\*

Superuser Privileges

Organization Visibility\*

Some    All

Security Options\*

Enable Two-Factor Authentication (2FA)

User Defined    Set Password

Cancel   Create




# Customize roles and permissions

You can add new roles and refine permissions to meet your organization's needs. Custom roles are then available, along with the standard Gluware roles, to assign to users.


You can restrict access to a Gluware Solution that you are licensed for, such as **Config Drift and Audit** or **Config Model Editor**. And you can specify view-only or management (read-write) permissions. You can also limit visibility to specific devices and specify email addresses to receive specific notifications. For example, you can create a role to manage only devices in a specific region or from a specific vendor.

If a custom role is shared, the role is inherited in child organizations. However, roles can only be managed in the organization they are created in.

**Note:** If you add custom roles and use LDAP or RADIUS for authentication, you'll need to add the custom role to the **Map Role Attribute Value** in  **Settings** > **Organization** > **Organizations**. You'll also need to add the value in your active directory.

## Create a custom role

For more information about of each permission, see the "Permission descriptions" topic.

1. Ensure you're in the organization you want to create the role in.
2. Go to  **Settings** > **Organization** > **Roles**.
3. Click **Add New Role +**.
4. Enter a name for the custom role.
5. Optional: Select from the drop-down list a standard Gluware role, or one of your custom roles, to base the new role on. This copies the role's permissions to the custom role you are creating. You can then add or remove permissions to easily customize the new role.
6. Click **Create**.

7. Optional: Revise the description of the new role.

**Define Role**

Name  
Western Region Operators

Description  
Monitor and administer the Western Region

Enabled  Shared

Compare with Operations Admin

Permissions

	Role	Compare	Match
Dashboard	✓		
Access Dashboard Solution	✓	✓	✓
Create Private Dashboards	✓	✓	✓
Create Public Dashboards	✓		✗
Moderate Public Dashboards	✓		✗
RPA Workflows	–		
Access RPA Solution	✓	✓	✓

8. Optional: Clear the **Enabled** box if you don't want to assign users to the role now.

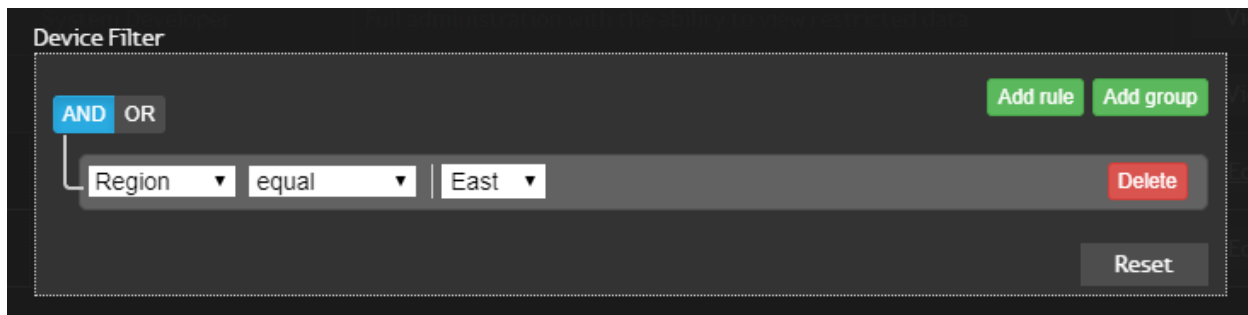
9. Optional: Check the **Shared** box if you want child organizations to inherit the custom role.

10. The **Compare with** column shows the permissions for the role selected from the drop-down list. The **Match** column indicates when the new role's permission is the same as the role you are comparing it to. To assign permissions to the new role, do one of the following:

- Double-click in the **Role** column and clear or check each permission you want to change for the new role.
- Double-click the ✓ or – for the Solution/category to clear or check all permissions in the category. The – indicates that not all permissions in the category are currently assigned to the role. You can only give permissions in the category that you yourself have; so ✓ for the category gives all the permissions that you have, which may not be all the permissions in the category. Permissions with a gray ✓ can't be changed.

**Note:** If you prohibit access to a Gluware solution (e.g. **Config Model Editor**), the permissions within that solution will also be prohibited even though they may still be checked in the permissions list.

- Optional: Use the **Device Filter** to restrict the devices that the role can manage.
  - Select a field from the drop-down list, select a condition from the drop-down list, and then enter a term. Fields will include the organization's custom fields. Custom fields are shared if the role is also shared.
  - Click **Add rule** and click **AND** or **OR** to add a logical operator.
  - Click **Add group** to add a nested rule.
  - To clear a filter, click **Reset**.



The screenshot shows the 'Device Filter' interface. At the top left, there are two buttons: 'AND' (highlighted in blue) and 'OR'. To the right are two green buttons: 'Add rule' and 'Add group'. Below these is a filter rule configuration area with three dropdown menus: 'Region', 'equal', and 'East'. A red 'Delete' button is positioned to the right of the 'East' dropdown. At the bottom right of the filter area is a grey 'Reset' button.


**Note:** If your organization restricts the devices a role can manage, it's possible a user can add devices that the user cannot later manage. Once devices are discovered, devices may appear or disappear from a user's device list.

- Optional: Double-click, type one or more email addresses to set as the default for a specific notification, and press **Enter**. Separate email addresses with a comma. These default emails assigned to the user's role will be presented as an optional recipient when the action is scheduled.

Email Notification Recipients			
	Email Addresses	Compare	Match
Global			<input checked="" type="checkbox"/>
Config Model Editor			
Preview Features			<input checked="" type="checkbox"/>
Provision Features			<input checked="" type="checkbox"/>
Custom Script			<input checked="" type="checkbox"/>
Renew Certificate			<input checked="" type="checkbox"/>
Update Watchdog			<input checked="" type="checkbox"/>
NSA Provisioning Policy			<input checked="" type="checkbox"/>
NSA OS Management Policy			<input checked="" type="checkbox"/>
NSA On-Demand Policy			<input checked="" type="checkbox"/>
Config Drift and Audit			
Capture Snapshot			<input checked="" type="checkbox"/>
Device Audit			<input checked="" type="checkbox"/>
OS Management			
OS Upgrade			<input checked="" type="checkbox"/>
Device Manager			
Data Explorer			<input checked="" type="checkbox"/>
Device Reboot			<input checked="" type="checkbox"/>
Network RPA			
Email notification task			<input checked="" type="checkbox"/>


- Save.

## Modify a custom role

1. Ensure you're in the organization that the custom role was created in.
2. Go to  **Settings** > **Organization** > **Roles**.
3. Click **Edit** beside the role you want to change.
4. Clear the **Enabled** box if you want to keep the role but won't use it at this time.
5. Check the **Shared** box if you want child organizations to inherit the custom role. Or clear the box to restrict the role to the current organization.
6. To change permissions, do one of the following:
  - Double-click in the **Role** column and clear or check each permission you want to change.
  - Double-click the **✓** or **–** for the Solution/category to clear or check all permissions in the category. The **–** indicates that not all permissions in the category are currently assigned to the role. You can only give permissions in the category that you yourself have; so **✓** for the category gives all the permissions that you have, which may not be all the permissions in the category. Permissions with a gray **✓** can't be changed.
7. Use the **Device Filter** to restrict the devices that the role can manage. Or clear the existing filter.
8. Double-click and add, change, or remove email addresses for each notification you want to change. Press **Enter** after each change.
9. Save.

## Remove a custom role

You can't delete a standard Gluware role or a role that has users assigned to it.

1. Ensure you're in the organization that the custom role was created in.
2. Go to  **Settings** > **Organization** > **Roles**.
3. Click **Delete** beside the role you want to remove.
4. Click **Confirm**.

# Set default emails for notifications


Email notifications may be sent when scheduled actions are completed.

The actions that support scheduling and notifications include:

- Taking a Config Drift snapshot
- Running a Config Audit policy
- Provisioning a device
- Previewing a device provisioning
- Renewing device certificates
- Executing custom scripts
- Executing an OS plan
- Transferring OS images
- Transferring OS images and rebooting devices
- Assessing the state of a device

The default email assigned to the user's role will be presented as an optional recipient when the action is scheduled.

## Set default emails

1. Ensure you're in the organization that the custom role was created in.
2. Go to  **Settings** > **Organization** > **Roles**.
3. Click **Edit** beside the role you want to set default emails for.
4. Double-click in the Email Addresses column, type one or more email addresses, and press **Enter**. Separate email addresses with a comma. These default emails assigned to the user's role will be presented as an optional recipient when the action is scheduled.

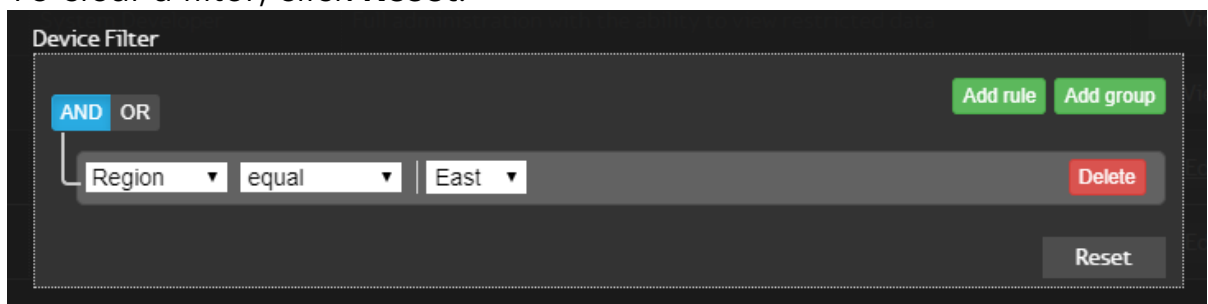
Email Notification Recipients	
	Email Addresses
Global	
Model Editor	
Preview Features	
Provision Features	
Custom Script	
Renew Certificate	
Update Watchdog	
NSA Provisioning Policy	
NSA OS Management Policy	
NSA On-Demand Policy	
Config Drift and Audit	
Capture Snapshot	
Device Audit	
OS Management	
OS Upgrade	
Device Manager	
Device Reboot	

5. Save.

# Restrict the devices a role can manage

You can limit the devices that a role can manage to specific types of devices or locations of devices. You can use a combination of custom roles and custom fields to restrict management of specific devices to specific users. For example, you can create a role, Operators - East Region, and restrict that role to managing devices assigned the custom field, Region, with a value of East.

1. Ensure you're in the organization that the custom role was created in.
2. Go to **Settings > Organization > Roles**.
3. Click **Edit** beside the role for which you want to define the devices that can be managed.
4. Use the **Device Filter** to define the devices that the role can manage.
  - Select a field from the drop-down list, select a condition from the drop-down list, and then enter a term. Fields will include the organization's custom fields. Custom fields are shared if the role is also shared.
  - Click **Add rule** and click to add a logical operator (**AND/OR**).
  - Click **Add group** to add a nested rule.
5. To clear a filter, click **Reset**.



The screenshot shows the 'Device Filter' interface. At the top, there are two buttons: 'Add rule' and 'Add group'. Below these, there are two options for logical operators: 'AND' (selected) and 'OR'. A rule is defined with the field 'Region', the condition 'equal', and the value 'East'. There is a 'Delete' button next to the rule. At the bottom right, there is a 'Reset' button.

6. Save.


**Note:** If your organization restricts the devices users can manage, it's possible a user can add devices that the user cannot later manage. Once devices are discovered, devices may appear or disappear from a user's device list.




# Enable/disable a system banner

You can create a custom banner that is displayed on sign-in for all users. For example, you can use the banner for corporate governance policy requirements. You can choose to display it on the user's first sign-in only or on every sign-in.

## Enable a system banner

1. Ensure you're in the parent (topmost) organization.
2. Go to  **Settings** > **Global** > **Banner**.
3. Check the **Enable System Banner** box.
4. Enter the text to display as the banner using HTML markup. These HTML tags are supported:  
h1, h2, h3, h4, h5, h6, p, span, a, img, i, b, strong, em, ul, ol, li.
5. Define the acceptance and refusal button text.
6. Select how often you want the banner to be displayed:
  - On every sign-in
  - Only on first sign-in per user
7. Click **Preview**.
8. Save.

## Disable a system banner

1. Ensure you're in the parent (topmost) organization.
2. Go to  **Settings** > **Global** > **Banner**.
3. Clear the **Enable System Banner** box.
4. Save.

## Reset a system banner

You can clear all acceptances and re-collect them. For example, if you change the system banner you can ensure all users acknowledge the change.



1. Ensure you're in the parent (topmost) organization.
2. Go to  **Settings** > **Global** > **Banner**.

3. Click **Reset User Acknowledgements**.
4. Click **Reset**.

# Customize dashboards


## Brand your dashboard

You can add an image to the title bar of your dashboards. The image can be inherited by all child organizations or can be specific to each organization.

1. Ensure you're in the organization you want to enable/disable dashboards for.
2. Go to  **Settings** > **Organization** > **Dashboards**.
3. Check the **Enable custom Dashboard Images** box.
4. Click , select your image file, and click **Open**.
5. Click and drag or zoom to optimize the image.
6. Click **Add**.
7. Click **Save**.


## Change your dashboard theme

The background of your dashboard and widgets can be light or dark. A dark background is often favored for a large communal display.


1. Go to  **Settings** > **User** > **Edit My Profile**.
2. Select the **Light** or **Dark** theme.
3. Click **Save**.
4. Click **OK**.

## Enable/disable a dashboard carousel

You can have your favorite dashboards rotate in the display.

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. Set the **Delay (seconds)** to determine how long each of your favorite dashboards will display. Select **Disable** to view one dashboard at a time.
3. Click **Save**.
4. Click **OK**.

## Enable/disable keyboard shortcuts

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. Check or clear the **Keyboard Shortcuts** boxes.
3. Click **Save**.
4. Click **OK**.

# Manage zones for Gluware Zone Engines

If you install Gluware Zone Engines, you can assign these engines to a zone. Then each device can preferentially run jobs on the zone's engine or engines when they are ACTIVE.

If a device is **locked** to a zone, jobs will only run on the engines in that zone. Should those engines become INACTIVE, jobs will not run until the engines are ACTIVE again.

**Note:** All child organizations share the zone. It's best to add the zone in the same organization that your Gluware licenses are installed in so that devices in all child organizations can use the zone. If you enable a zone in a child organization, zones from the parent organization can be disabled in the child organization.

Engine Zones

Zones


Manage Zones for this Organization

Enable	Display Name	Default	Zone	Current State	Engine Count	Action
✓	System	✓	System	ACTIVE	4	

[Add Zone+](#)


Save Cancel

## Add a new zone


1. Recommended: Ensure you're in the organization in which your Gluware licenses are installed.
2. Go to  **Settings** > **Organization** > **Zones**.
3. Check the **Manage Zones for this Organization** box.
4. Click **Add Zone+**.
5. Name the zone and provide a display name.
6. Save.
7. Install the Gluware Zone Engine in this zone. Refer to the *Gluware Installation Guide* for help.

## Set the default zone

If devices are not assigned to a zone, jobs will run on the default zone.

1. Ensure you're in the organization in which your zones are managed.
2. Go to  **Settings** > **Organization** > **Zones**.
3. Double-click in the **Default** column beside the zone and check the box.
4. Save.

## Disable a zone

1. Ensure you're in the organization in which your zones are managed.
2. Go to  **Settings** > **Organization** > **Zones**.
3. Clear the **Enable** box beside the zone.
4. Save.


# Configure SMTP and proxy settings

Without SMTP options set, Gluware cannot send emails such as password reset and system notifications but will otherwise operate successfully.

The format for email sent by Gluware is *displayName <emailAddress>*. For example, [Corp <notify@yourcorp.com>](#). The user would receive the email from Gluware, but the reply would go to [notify@yourcorp.com](#).


## Configure SMTP settings

**Basic** SMTP settings work for most implementations. If the **Basic** settings aren't sufficient, contact Gluware support at [support@gluware.com](mailto:support@gluware.com) for help using **Advanced** settings.

1. Ensure you're in the parent topmost (root) organization.
2. Go to  **Settings > Global > Configuration**.
3. Enter the **Email Server Host**. This is the mail server host name or IP address for the SMTP server.
4. Enter the **Email Server Port**, the port number for SMTP traffic.
5. Optional: Enter the **Proxy to the Email Server**.
6. Enter the **Email Server Username**. This is the user account used to authenticate with the SMTP server when sending emails.
7. Enter the **Email Server Password Credential**, the Gluware System Secret for the SMTP username account.
8. Select the **Transport Security: SMTP** or **SMTPS**.
9. Enter the **Sender Email Address**, the return email address for any mail sent from the Gluware server.
10. Verify the **Gluware URL**, the URL of your primary Gluware server (FQDN or IP address)
11. Save.
12. Send a test email:
  - a. Click **Send Test Email**.
  - b. Enter the recipient's email address.
  - c. Click **Send Test Email**.

## Configure proxy settings

Basic proxy settings work for most implementations. If the **Basic** settings aren't sufficient, contact Gluware support at [support@gluware.com](mailto:support@gluware.com) for help using **Advanced** settings.

1. Enter the **HTTP Proxy**.
2. Enter the PEM encoded X.509 certificate(s) if using HTTPS.
3. Save.
4. Test the connection to the Gluware Distribution Center at <https://glulab.gluware.com/GluLabServer> :
  - a. Click **Test Proxy connection**.
  - b. Click **OK**.



# Configure a new credentials vault

The default credentials vault is the Gluware vault, but you can also configure a third-party vault, CyberArk, to store credentials. You'll need to configure the third-party vault for each organization.

Ensure that the Core Solutions package is installed in the organization.

## Establish credentials for the vault

1. Go to **Settings > Credentials**.
2. Click **Add Credential +**.
3. Enter a name for the credential. It will appear in Gluware as the reference. For example, in **Device Details**.
4. Describe the credential.
5. Select **Gluware System Client Key** for the **Type** from the drop-down list.
6. Enter the **Gluware System Client Key**, the client certificate entered in CyberArk.
7. Click **Create**.

## Add a vault

**Notes:** Regarding client certificates:

- Applications can authenticate with either a self-signed certificate or a certificate signed by a Certificate Authority (CA). For more information, refer to Central Credential Provider web service configuration.
- Certificate attribute authentication is configurable through the REST API only.
- For certificate attribute authentication, SubjectAlternativeName must be one of the following: "DNS Name"/ "IP Address"/ "URI" / "RFC822"


1. Go to **Settings > Organization > Vaults**.
2. Click **Add Vault +**.

3. Enter a user-friendly name for the vault.
4. Paste the URL of the vault in the **Base URL** field. For example, paste the URL of the CyberArk Enterprise Platform Vault.
5. Paste the server-side certificate in the **Root CA** field.
6. Paste the client certificate in the space provided.
7. Select the **Gluware System Client Key** you established in **Credentials** for the client certificate.
8. Enter the username for connecting to the vault.
9. Select the **Gluware System Secret** password for that username.
10. For the **Default Application ID**, enter an application name for the integration.
11. Optional: Click **Test Connection** to make sure Gluware can access the vault.
12. Click **Create**.

# Establish credentials


You can establish credentials one by one or import them using a CSV file and the template provided. You'll need the **Gluware Core Solutions** package installed.

## Add a credential

1. Go to  **Settings** > **Credentials**.
2. Click **Add Credential +**.
3. Enter a name for the credential. It will appear in Gluware as the reference. For example, in **Device Details**.
4. Describe the credential.
5. Select the type of credential from the drop-down list. The defaults types are:
  - Client Key** - Key used in making an API connection when integrating to a third-party system
  - Device API Key** - Key used in making a REST API connection
  - Device Username Password** - Key used when making a device CLI connection
  - Enable Mode Password** - Key used for device enable mode password
  - Gluware System Client Key** - Key used for a client certificate
  - Gluware System Secret** - The password used in Gluware **Settings Secret** - Used anywhere an `@Display.password` is used in a JType
6. Enter the secret or username and secret for the credential.
7. Click **Create**.

## Import credentials

You can import credentials as a plain text file or an encrypted file exported from Gluware.

1. Go to  **Settings** > **Credentials**.
2. Click **Import**.
3. Click **Download CSV Template**.
4. Add credentials to the template. Columns marked with \*\* are required.

### **For the Gluware vault, the columns are:**

**Name** - A name for the credential to be used as a reference

**Description** - A description of the credential

**Source** - The provider of the credentials vault: Gluware

**Type** - The type of credential: Device API Key, Device Username Password, Enable Mode Password, Generic Secret, Gluware System Secret

**Username** - The device username

**Password** - The device password

**API Key** - The API key for making a REST connection

**Secret** - The password for use in Gluware **Settings** or the @Display.password

### **For the CyberArk vault, the columns are:**

**Name** - A name for the credential to be used as a reference

**Description** - A description of the credential

**Source** - The provider of the credentials vault: CyberArk or user-defined

**Type** - The type of credential: Device API Key, Device Username Password, Enable Mode Password, Gluware System Secret, Gluware system Client Key, Secret

**App ID** - Application name registered with CyberArk

**Safe** - The group of accounts


**Account** - CyberArk account

**Query** - The query parameters to retrieve the credential details

5. Do one of the following:
  - Drag and drop the CSV file into **Credentials** and click **OK**.
  - Click **Import from File**, select the template file or the files you want to import, click **Open**, and then click **OK**.



## Manage credentials

### Edit credentials

1. Go to  **Settings** > **Credentials**.
2. Click **Edit** beside the credential you want to update.
3. Make your changes and click **Update**.

### Reveal a secret


With the proper permissions, you can reveal a secret in plain text and the secret can be copied to the clipboard.

1. Go to  **Settings** > **Credentials**.
2. Click **Edit** beside the credential you want to reveal.
3. Click  next to the secret.

### Export credentials


You can export credentials and import them into a different Gluware system. For example, you can export credentials from a test system and import them to a production system.

The downloaded file with the credentials is encrypted.


1. Go to  **Settings** > **Credentials**.
2. Click **Export**.
3. Enter a passphrase that is at least 16 characters. You'll enter this passphrase when you import the credentials.

## Import credentials

You can import credentials as a plain text file or an encrypted file exported from Gluware.



1. Go to  **Settings** > **Credentials**.
2. Click **Import**.
3. Do one of the following:
  - Drag and drop the CSV file into **Credentials** and click **OK**.
  - Click **Import from File**, select the template file or the files you want to import, click **Open**, and then click **OK**.
4. If importing an encrypted credentials file you exported from Gluware, enter the passphrase that was created on exporting and click **OK**.

## Delete credentials

1. Go to  **Settings** > **Credentials**.
2. Click **Delete** beside the credential you want to update.
3. Make your changes and click **Confirm**.


# Generate a GluAPI client ID and password

You can generate up to three OAuth 2.0–compliant client IDs and passwords for GluAPI sign on.

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. Click **Add API Credential**. An OAuth 2.0–compliant ID and password are generated.
3. The password won't be displayed again. Click  and save these credentials as sensitive information.
4. Click **OK**.
5. Optional: You can change the **Name** and **Expiration Date**. Double-click in the cell, make the change, and save.



# Manage your GluAPI client ID and password

## Change the name or expiration date

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. In the **API Credentials** section, double-click in the **Name** or **Expiration Date** column and make the change.
3. Save.

**Note:** Changing the expiration date to a date earlier than the current date disables the credential.

## Delete a GluAPI client ID and password

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. In the **API Credentials** section, click  for the ID you want to delete.
3. Save. The GluAPI client ID and OAuth 2.0 token are both deleted.

**Note:** When your Gluware username is deleted, any associated GluAPI client ID and OAuth 2.0 tokens are also removed. When your Gluware username is disabled, any associated GluAPI client IDs are also disabled and OAuth 2.0 tokens are removed.




# Manage data retention

**Important** Set up data retention to keep Gluware running smoothly by eliminating outdated and ephemeral information from the Gluware database.

Think carefully about what makes sense for your organization to reduce confusion and keep Gluware running optimally. For example, while compliance may require that you retain logs from successful provisioning of a device for 6 months or more, failed provisioning logs are only needed until troubleshooting is complete and could be eliminated after a few days or weeks.

By default, the policy specified in the parent organization is inherited in all child organizations. However, each organization can have their own policy, schedule settings, and data retention settings.

1. Ensure you're in the organization you want to manage data retention for.
2. Go to  **Settings > Organization > Data Retention**.
3. Check the **Enable Unique Data Retention Policy for this Organization** box if you want a unique policy for this organization. Otherwise, the policy inherited from the parent organization is displayed.
  - a. Select **Manual** to only run the policy at will.
  - b. Select **Scheduled** and set the frequency to automate the policy.
4. Specify the maximum number of records to retain by double-clicking the **Count** cell.
5. Specify the maximum age of the records to be retained by double-clicking the **Age** cell. Entering **0** for **Age** disables retention.
6. Save.

Data Retention

Enable Unique Data Retention Policy for this Organization

Run Options

Manual  Scheduled

Data Retention Policy

Category	Description	Previe...	Count	Age	Action
Successful Provisioning Logs	Logs from successful Config Model Editor provisioning actions	0	10	180	Preview Run Now
Failed Provisioning Logs	Logs from failed Config Model Editor provisioning actions	0	1	180	Preview Run Now
Preview Logs	Logs from Config Model Editor preview actions	0	1	180	Preview Run Now
Device Logs	Logs from various device activities (Capture, Discovery, OSM, etc.) associated with devices	0	10	180	Preview Run Now
Captured Configs	Captured device configurations	0	10	180	Preview Run Now
Activity	Recorded device activities	0	10	180	Preview Run Now

Preview All Run All Now Cancel Save

## Data Retention category descriptions

### Deleted organizations

When an organization is deleted in **Settings > Organization > Organizations**, the data belonging to the organization is marked as deleted and remains in the database until you run Data Retention. The organization data includes:

Custom field settings

Dashboard settings

Data retention settings

Event settings (syslog and automatic configuration snapshots)

Integration settings (Cisco support API credentials)

Gluware licenses

Organization settings

OS Manager settings

Custom role settings

Zone settings

Users

Dashboards

Devices and device activity

Discovered and captured device configurations

Network discovery details, results, and activity

Config Audit policies, executions, results, and activity  
File server directory names, file names and associated metadata  
OS Catalogs and activity  
OS Manager plans, executions, and activity  
Data Explorer templates, results, and activity  
Schedule details, future occurrences, history, and activity  
Ad Hoc queries and results  
Work results and logs  
Job logs  
Loaded solution packages  
Config Model Editor nodes, features, globals, domains, and scripts  
Provisioning logs

The **Deleted Organizations** category is only available at the topmost Gluware organization. An organization that is a provider of one or more other organizations cannot be deleted, so there is no risk of data retention deleting data that is actively being shared, such as Custom Fields and Roles, with child organizations.

Data that is shared by a parent organization with a child organization belongs to the parent organization and will not be deleted when Data Retention removes the data for a deleted child organization.

If a child organization is deleted followed by the deletion of the parent organization, running Data Retention processes the child organization first. A subsequent execution cleans up the parent organization's data.

## Deleted Instances

When **Config Model Editor** nodes, features, globals, domains, and scripts are deleted they are marked as deleted but remain in the database. Running data retention permanently removes these instances based on the count and age criteria.

This category is only available at the topmost Gluware organization and applies to deleted instances in all organizations in the Gluware system.

## Successful Provisioning Logs

Deletes successful provisioning logs that match the count and age criteria. The count criteria is the minimum number of the most recent logs retained per node. The provisioning types are:

- Provision Features
- Renew Certificate
- Revoke Certificate
- All OS Management provisioning

This category only applies to logs associated with devices in the organization where data retention is run.

## Failed Provisioning Logs

Deletes failed provisioning logs that match the count and age criteria. The count criteria is the minimum number of the most recent logs retained per node. The provisioning types are:

- Provision Features
- Renew Certificate
- Revoke Certificate
- All OS Management provisioning

This category only applies to logs associated with devices in the organization where data retention is run.

## **Preview Logs**

Deletes failed preview provisioning logs that match the count and age criteria. The count criteria is the minimum number of the most recent logs retained per node.

This category only applies to logs associated with devices in the organization where data retention is run.

## **Device Logs**

Deletes all job logs associated with a device, including network discovery, device discovery, snapshots, ad hoc queries, policy audits, reboots, etc. that match the count and age criteria. The count criteria is the minimum number of the most recent logs retained per node.

This category only applies to logs associated with devices in the organization where data retention is run.

## **Captured Configs**

Deletes configuration snapshots from captures that match the count and age criteria. The count criteria is the minimum number of the most recent snapshots retained per node. The configuration marked as default is always retained.

This category only applies to snapshots associated with devices in the organization where data retention is run.

## **Activity**

Deletes activity events of devices that match the count and age criteria. The count criteria is the minimum number of the most recent activity events retained per device.

This category only applies to activity associated with devices in the organization where data retention is run.

## **Audit Results**

Deletes data related to the execution of audit policies, including results, work logs, work results, and work reports that match the count and age criteria. The count criteria is the minimum number of the most recent audit results retained per audit policy.

This category only applies to audit results associated with devices in the organization where data retention is run.

## **Audit Policy Activity**

Deletes activity events of audit policies that match the count and age criteria. The count criteria is the minimum number of the most recent activity events retained per audit policy.

This category only applies to audit policy activity associated with devices in the organization where data retention is run.

## **Completed OS Management Plans**

Deletes completed OS plans, plan executions, execution results, all associated logs, and the activity that match the count and age criteria. The count criteria is the minimum number of the most recent completed OS plans retained per plan.

This category only applies to OS plans and activity in the organization where data retention is run.

## **File and File Server Activity**

Deletes File Server file activity records that match the count and age criteria. The count criteria is the minimum number of the most recent file activity records retained per File Server.

This category only applies File Server file activity records in the organization where data retention is run.

## **Schedule Activity and History**

Deletes activity and history of scheduled tasks that match the count and age criteria. This includes the work logs, work results and work reports associated with the scheduled tasks associated with the schedule history. The count criteria is the minimum number of the most recent activity events and historical executions retained per schedule.

This category only applies to schedule activity and history associated with devices in the organization where data retention is run.

## **Exhausted Schedules**

Deletes schedules that no longer have future occurrences that match the count and age criteria. This includes schedule details, schedule activity, schedule history, and the work logs, work results, and work reports associated with the scheduled tasks' history. The count criteria is the minimum number of exhausted schedules retained for the organization.

This category only applies to exhausted schedules associated with devices in the organization where data retention is run.

## **Failed Production Workflow Instances**

Deletes failed Network RPA production workflow instances that match the count and age criteria. The count criteria is the minimum number of failed Network RPA production workflow instances retained for the organization.

This category only applies to failed Network RPA production workflow instances in the organization where data retention is run.

## **Successful Production Workflow Instances**

Deletes successful Network RPA production workflow instances that match the count and age criteria. The count criteria is the minimum

number of successful Network RPA production workflow instances retained for the organization.

This category only applies to successful Network RPA production workflow instances in the organization where data retention is run.

### **Failed Test Workflow Instances**

Deletes failed Network RPA test workflow instances that match the count and age criteria. The count criteria is the minimum number of failed Network RPA test workflow instances retained for the organization.

This category only applies to failed Network RPA test workflow instances in the organization where data retention is run.

### **Successful Test Workflow Instances**

Deletes successful Network RPA test workflow instances that match the count and age criteria. The count criteria is the minimum number of successful Network RPA test workflow instances retained for the organization.

This category only applies to successful Network RPA test workflow instances in the organization where data retention is run.

### **Connection Management Results**

Deletes the results and logs for the work that determines the connections between devices used in Topology that match the count and age criteria.

This category only applies to Topology results and logs in the organization where data retention is run.




## Other Data Retention fields

Field	Description
Preview	Number of records that would be purged based on the current retention policy. Populated by clicking <b>Preview</b>
Count	Minimum number of records to retain for the category. For a device-specific category, number of records to retain for the category per device
Age	Maximum age for the record to be retained. For example, if age = 30, then entries older than 30 days will be purged. 0 disables retention by age
Function	Description
Run Now	Purges the category now. Click in the cell and then click <b>Confirm</b>
Preview	Populates the count of records to purge for the current organization only in the Preview column
Preview All	Populates the count of records to purge for the current organization only in the Preview column
Run All Now	Runs the data retention policy for all categories for the current organization and any child organizations that inherit it

# Connect to the Gluware Distribution Center

If the Gluware Distribution Center is disabled, you can enable it and test the connection. External access is required.

1. Ensure you're in the topmost (root) organization.
2. Go to **Settings > Global > Configuration**.
3. Check the **Enable Distribution Center** box.
4. Save.
5. Click **Test Distribution Center connection**. This checks the connection to at <https://glulab.gluware.com> 
6. Go to **Settings > Organization > Organizations**.
7. Check the **Create private and shared Distribution Areas** box.
8. Click **Save** and **OK**.

# Set up custom fields

Custom fields can be created for each organization or shared from parent to child organizations. Devices in **Device Manager** all maintain their own values for the set of custom fields. The fields can be used to identify aspects of your network or business for use in filtering large numbers of devices in Gluware.

1. Ensure you're in the organization you want to set up custom fields for.
2. Go to **Settings > Organization > Custom Fields**.
3. Click **Add Custom Field +**.
4. Double-click in each cell of the new row to describe your custom field.
5. To change the order in which the custom field appears in **Device Manager - Device Details**, drag the **☰** for the custom field to re-order it.
6. Save.

Custom Fields										
	Enabled	Shared	Field Name	Data Type	Type Options	Default Value	Description	Device Only	Groupable	Action
	✓	✓	Console IP	String			Address of console server	✓	✓	🗑️
	✓	✓	Console Port	String			Port on console server	✓		🗑️
	✓	✓	PDU IP	String			Address of PDU	✓	✓	🗑️
	✓	✓	PDU Port	String			Port on PDU	✓		🗑️
	✓	✓	Location	Dropdown	LAB, MR1, MR2, ...		Lab Location	✓	✓	🗑️
☰	✓		Vendor Operations	Boolean		FALSE		✓	✓	🗑️
☰	✓		Region	Dropdown	North, South, Ce...	East	Geographic regions	✓		🗑️
☰	✓		Site Mgr	String			Contact for site			🗑️

[Add Custom Field +](#)

Cancel Save

Column	Description
Enabled	Adds this field to every device in the organization
Shared	Specify whether this field will be shared with subordinate organizations. When shared, child organizations cannot make changes to it
Field Name	Name for the field
Data Type	Specify the type of the field: <b>String</b> , <b>Boolean</b> , <b>Number</b> , or <b>Dropdown</b>
Type Options	<p>For <b>String</b> data types, enter optional regex that will be validated against</p> <p>For <b>Number</b> data types, specify whether to accept integers only and the range of acceptable numbers</p> <p>For <b>Dropdown</b> data types, specify the values that can be selected and click the click check mark to save</p>
Default Value	Optional: displayed default for the field
Description	Displayed field description
Device Only	Add the custom field to devices only. Double-click and clear the checkbox to add the custom field to the organization's sites
Groupable	Add the custom field to the <b>Group By</b> option in the <b>Device Explorer</b> filter

<b>Column</b>	<b>Description</b>
Action	Deletes the custom field

## Monitor configurations changes

Gluware can monitor the syslog to catch configuration changes. Changes are displayed in **Device Manager** in the **Configured Type** column.

The devices currently supported for syslog monitoring are listed at <https://gluware.com/supported-platforms/>

You'll need to enable syslog monitoring for each organization. We recommend configuring the message logging level **Informational** on devices.

Syslog messages may get dropped if

- We can't match the format (*See the list of Gluware syslog filters below*)
- If the source IP address does not match the IP address of a managed device in the organization

## Notes:

You can forward syslog messages to Gluware via an intermediary syslog-ng server. You may want to use syslog-ng filters to forward only the appropriate messages. See the syslog-ng documentation for details.


## Basic example

```
# Configure syslog server to listen on the network
source s_net {
    network(
        port(514)
        transport("udp")
        flags(no-parse)
    );
};

# Configure Gluware Control as a destination
destination d_gluwareSyslogng {
    syslog-ng(
        server("<gluware control ip address")
        port(<gluware control syslog port for
organization>)
        transport("udp")
    );
};

# Configure syslog server to forward received network traffic to
Gluware Control
log { source(s_net); destination(d_gluwareSyslogng); };
```

## Monitor configuration changes in the syslog

1. Ensure you're in the organization you want to monitor configuration changes in.
2. Go to  **Settings > Organization > Events**.
3. Check the **Activate syslog for this organization** box. Gluware assigns the port number that the devices will use to send logs. Port numbers assigned range from 32000 to 32300. Only UDP is supported.
4. If you have **Automatic Configuration Snapshots** enabled for configuration changes monitored by syslog, enter the number of minutes to ignore duplicate syslog messages after the first message is received. Entering 0 does not ignore duplicate messages. The snapshot is taken after the wait time you enter.
5. Save.

When there are configuration changes, SYSLOG appears in the **Configured Type** column in **Device Manager**. The user who made the change, the time of the change, and the message sent are also displayed (**Configured By**, **Configured On**, and **Configured Info**).

Configured Info	Configured Type	Configured By	Configured On
Oct 27 20:49:49.753 UTC: %VSHD-5-VSHD_SYSLOG_CONFIG_I: Configured from vty by admin on 10.4.96.43@pts/0	SYSLOG	Configured	27/10/2020 16:11:33
42:34: %SYS-5-CONFIG_I: Configured from console by cisco on vty0 (172.16.10.37)	SYSLOG	by	27/10/2020 08:29:58
%SYS-5-CONFIG_I: Configured from console by glue_sqa on vty1 (172.16.10.37)	SYSLOG	glue_sqa	27/10/2020 10:05:51
%SYS-5-CONFIG_I: Configured from console by console	SYSLOG	console	02/11/2020 12:45:15
%SYS-5-CONFIG_I: Configured from console by cisco on console	SYSLOG	cisco	21/10/2020 17:13:38
%SYS-5-CONFIG_I: Configured from console by cisco on vty5 (172.16.10.37)	SYSLOG	cisco	27/10/2020 08:50:29
%SYS-5-CONFIG_I: Configured from console by cisco on vty3 (172.16.10.37)	SYSLOG	cisco	27/10/2020 08:52:44
%SYS-5-CONFIG_I: Configured from console by cisco on vty3 (10.1.100.106)	SYSLOG	cisco	28/10/2020 10:24:02



## Configure devices for syslog monitoring

You'll need to configure each device that you want to monitor. Here are some examples.

### Cisco devices

```
logging host <Gluware IP address> transport udp port  
<Gluware Org port number> logging trap notifications
```

**Note:** Notifications have different levels. `notifications` is a default you can use but you may want a higher or lower level.

**Example:** `logging host 10.1.100.84 transport udp port 32003`

```
logging source-interface <Mgmt Interface> [vrf <mgmt vrf>]
```

**Example:** `logging source-interface FastEthernet0/0 vrf VRF-MGMT`

### Juniper devices

```
host <Gluware IP address> {  
  any notice;  
  <Gluware Org port number> ;  
  source-address <Mgmt Interface>;  
}
```

### HPE Aruba devices

```
logging <Gluware IP address> oobm  
logging <Gluware IP address> udp <Gluware Org port number>  
logging facility syslog  
logging severity info  
logging notify running-config-change
```


## Gluware syslog filters

```
filter f_changeConfigCiscoLike { match("CONFIG_I"
value("MESSAGE")); };
filter f_changeConfigCiscoASALike { match("end configuration"
value("MESSAGE")); };
filter f_changeConfigJuniper { match("UI_COMMIT"
value("MESSAGE")) and
not match("UI_COMMIT_COMPLETE" value ("MESSAGE")) and not
match("UI_COMMIT_PROGRESS" value ("MESSAGE"));
};
filter f_changeConfigPaloAlto { match(",CONFIG,"
value("MESSAGE")) and match(",commit," value("MESSAGE")); };
filter f_changeConfigFortinet { match("action=Edit"
value("MESSAGE")); };
filter f_changeConfigHpeAruba{
match("modified" value("MESSAGE")) or match("configuration
changed" value ("MESSAGE"));
};
filter f_rebootCisco { match("REBOOT" value("MESSAGE")) or
match("BOOTTIME" value("MESSAGE")) or
match("RESTART" value("MESSAGE")) or match("HA_CONFIG_SYNC-6-
BULK_CFGSYNC_SUCCEED" value("MESSAGE")) or
match("PFMA-2-BOX_ONLINE" value("MESSAGE")) or match("SYS-6-
LOGGINGHOST_STARTSTOP" value("MESSAGE"));
};
filter f_rebootJuniper { match("BOOTPD_VERSION"
value("MESSAGE")); };
```

# Enable syslog logging for Gluware activities

Gluware can log user activity, device activity, and system events to an external syslog server.

## Enable logging

1. Go to  **Settings > Logging**.
2. Check the **Enable Syslog** box if enabling for a child organization (not for the root or topmost organization).
3. Enter the IP address of the **Destination Host**.
4. Check the boxes for the events that you want to log. Checking the **Events** box selects all User Activity, Device Activity, and System Activity events.

## Configure UDP

1. Click **Configuration**.
2. Enter the **Destination Port** number. The default for syslog is 514.
3. Click **Test Syslog Connection** to send a test message to the server. Check your syslog server to verify a message is received.
4. Click **Back**.
5. Save.

## Configure TCP

1. Click **Configuration**.
2. Enter the **Destination Port** number. The default for syslog is 514.
3. Select **TCP**.
4. Enter the connection idle **Timeout** in milliseconds.
5. Click **Test Syslog Connection** to send a test message to the server.
6. Click **Back**.
7. Save.

## Configure TLS

1. Click **Configuration**.
2. Enter the **Destination Port** number. The default for syslog is 6514.
3. Select **TLS**.
4. Enter the connection idle **Timeout** in milliseconds.
5. Optional: For mutual authentication,
  1. Enter the **Client TLS Key**.
  2. Paste the **Client TLS Certificate**.
6. Click **Add Certificate+**, double-click in the **Certificate** column, and paste the **Server TLS Certificate**. If issued by a certificate authority, include the entire certificate chain.
7. Check the **Skip Server Identity Check** box to accept any certificate offered to Gluware by the syslog server. If not selected, the certificate on the syslog server must match the certificate in the Server TLS Certificate field.
8. Click **Test Syslog Connection** to send a test message to the server.
9. Click **Back**.
10. Save.

## Outbound syslog messages

The Gluware Solution names used in these messages are:

Config Drift

Device Explorer

Device Manager

OS Manager

Organization Settings

## User activity messages

SystemName: "<SystemName>": EventCode 10101: EventCategory "User Activity": EventSubcategory "General": EventDescription "User Sign In": Username: "<Username>": ClientIp: "<IpAddress>": Message "The user named '<Username>' logged in"

SystemName: "<SystemName>": EventCode 10102: EventCategory "User Activity": EventSubcategory "General": EventDescription "User Sign In Failure": Username: "<Username>": ClientIp: "<IpAddress>": Message "The user named '<Username>' failed login"

SystemName: "<SystemName>": EventCode 10103: EventCategory "User Activity": EventSubcategory "General": EventDescription "User Sign Out": Username: "<Username>": ClientIp: "<IpAddress>": Message "The user named '<Username>' logged out"

SystemName: "<SystemName>": EventCode 10104: EventCategory "User Activity": EventSubcategory "General": EventDescription "User Logout Inactivity": Username: "<Username>": ClientIp: "<IpAddress>": Message "The user named '<Username>' was logged out due to inactivity"

SystemName: "<SystemName>": EventCode 10105: EventCategory "User Activity": EventSubcategory "General": EventDescription "Change Organization": Username: "<Username>": ClientIp: "<IpAddress>": SwitchedFromOrgName "<Org1>": SwitchedToOrgName "<Org2>": Message "The user named '<Username>' switched from org '<Org1>' to '<Org2>'"

SystemName: "<SystemName>": EventCode 10106: EventCategory "User Activity": EventSubcategory "General": EventDescription "Change Solution": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": SwitchedFromSolution "<Solution1>": SwitchedToSolution "<Solution2>": Message "The user named '<Username>' switched from the solution '<Solution1>' to '<Solution2>' in the organization '<OrgName>'"

## Device activity messages

SystemName: "<SystemName>": EventCode 20101: EventCategory "Device Activity": EventSubcategory "Device Manager": EventDescription "Run Device Detection": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": TargetCount "<Count>": Message "The user named '<Username>' started device discovery for <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20102: EventCategory "Device Activity": EventSubcategory "Device Manager": EventDescription "Run Network Discovery": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": StartingIp "<IpAddress>": Message "The user named '<Username>' started a network discovery with a starting IP of <IpAddress> in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20103: EventCategory "Device Activity": EventSubcategory "Device Manager": EventDescription "Run Import Devices": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": TargetCount "<Count>": Message "The user named '<Username>' started the import of <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20104: EventCategory "Device Activity": EventSubcategory "Device Manager": EventDescription "Run Reboot Device": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": TargetCount "<Count>": Message "The user named '<Username>' started the reboot of <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20105: EventCategory "Device Activity": EventSubcategory "Device Manager": EventDescription "Run Ad-Hoc Query (show commands only)": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": TargetCount "<Count>": Message "The user named '<Username>' started an ad hoc query for <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20201: EventCategory "Device Activity": EventSubcategory "Config Drift and Audit": EventDescription "Run Audit Device": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PolicyName "<PolicyName>": DeviceCount "<Count>": Message "The user named '<Username>' started the policy named '<PolicyName>' for <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20202: EventCategory "Device Activity": EventSubcategory "Config Drift and Audit": EventDescription "Run Capture Configuration": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": SnapshotName "<SnapshotName>": DeviceCount "<Count>": Message "The user named '<Username>' started a capture named '<SnapshotName>' for <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20301: EventCategory "Device Activity": EventSubcategory "Config Model Editor - Provisioning": EventDescription "Provision Features": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": NodeName "<NodeName>": Message "The user named '<Username>' requested the provisioning of all features on the node named '<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20302: EventCategory "Device Activity": EventSubcategory "Config Model Editor - Provisioning": EventDescription "Execute Custom Script": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": ScriptName "<ScriptName>": NodeName "<NodeName>": Message "The user named '<Username>' executed the script named '<ScriptName>' on the node named '<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20303: EventCategory "Device Activity": EventSubcategory "Config Model Editor - Provisioning": EventDescription "Renew Certificate": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": NodeName "<NodeName>": Message "The user named '<Username>' requested a certificate renewal for the node named '<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20401: EventCategory "Device Activity": EventSubcategory "Config Model Editor - OS Management": EventDescription "Transfer OS Image": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": NodeName "<NodeName>": Message "The user named '<Username>' requested a transfer of an image to the node named '<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20402: EventCategory "Device Activity":  
EventSubcategory "Config Model Editor - OS Management": EventDescription  
"Upgrade OS Image and Reboot Device": Organization: "<OrgName>": Username:  
"<Username>": ClientIp: "<IpAddress>": NodeName "<NodeName>": Message "The  
user named '<Username>' requested an upgrade and reboot of the node named  
'<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20403: EventCategory "Device Activity":  
EventSubcategory "Config Model Editor - OS Management": EventDescription  
"Reboot Device": Organization: "<OrgName>": Username: "<Username>": ClientIp:  
"<IpAddress>": NodeName "<NodeName>": Message "The user named  
'<Username>' requested the reboot of the node named '<NodeName>' in the  
organization '<OrgName>'"

SystemName "<SystemName>": EventCode 20504: EventCategory "Device Activity":  
EventSubcategory "Config Model Editor - Device Terminal": EventDescription  
"Connected to a Device from Gluware Terminal": Organization "<OrgName>":  
Username "<Username>": ClientIp "<IpAddress>": NodeName "<NodeName>":  
Message "The user named '<Username>' connected a Gluware terminal to the node  
named '<NodeName>' in the organization '<OrgName>'"

SystemName "<SystemName>": EventCode 20505: EventCategory "Device Activity":  
EventSubcategory "Config Model Editor - Device Terminal": EventDescription  
"Command Sent to Device from Gluware Terminal": Organization "<OrgName>":  
Username "<Username>": ClientIp "<IpAddress>": NodeName "<NodeName>":  
Command "<Command>": Message "The user named '<Username>' sent the  
command '<Command>' from the Gluware terminal to the node named  
'<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20601: EventCategory "Device Activity":  
EventSubcategory "OS Manager": EventDescription "Validate Plan": Organization:  
"<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PlanName  
"<PlanName>": TargetCount "<Count>": Message "The user named '<Username>'  
started the validation of the plan named '<PlanName>' for <Count> devices in the  
organization '<OrgName>'"



SystemName: "<SystemName>": EventCode 20602: EventCategory "Device Activity":  
EventSubcategory "OS Manager": EventDescription "Deploy New Image":  
Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>":  
PlanName "<PlanName>": TargetCount "<Count>": Message "The user named  
'<Username>' started the plan named '<PlanName>' for a deployment to <Count>  
devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 20603: EventCategory "Device Activity":  
EventSubcategory "OS Manager": EventDescription "Transfer Image Only":  
Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>":  
PlanName "<PlanName>": TargetCount "<Count>": Message "The user named  
'<Username>' started the plan named '<PlanName>' for a file transfer to <Count>  
devices in the organization '<OrgName>'"

## System activity messages

SystemName: "<SystemName>": EventCode 30101: EventCategory "System  
Activity": EventSubcategory "Settings": EventDescription "Change Global Settings":  
Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>":  
Message "The user named '<Username>' updated global settings in the organization  
'<OrgName>'"

SystemName: "<SystemName>": EventCode 30102: EventCategory "System  
Activity": EventSubcategory "Settings": EventDescription "Add Organization":  
Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>":  
CreatedOrg "<OrgName>": Message "The user named '<Username>' created the  
organization named '<OrgName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30103: EventCategory "System  
Activity": EventSubcategory "Settings": EventDescription "Change Organizational  
Settings": Username: "<Username>": ClientIp: "<IpAddress>": UpdatedOrg  
"<OrgName>": Message "The user named '<Username>' updated the organization  
named '<OrgName>'"

SystemName: "<SystemName>": EventCode 30104: EventCategory "System  
Activity": EventSubcategory "Settings": EventDescription "Delete Organization":  
Username: "<Username>": ClientIp: "<IpAddress>": DeletedOrg "<OrgName>":  
Message "The user named '<Username>' deleted the organization named  
'<OrgName>'"

SystemName: "<SystemName>": EventCode 30105: EventCategory "System Activity": EventSubcategory "Settings": EventDescription "Add User": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": CreatedUsername "<Username>": Message "The user named '<Username>' created the user named '<Username>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30106: EventCategory "System Activity": EventSubcategory "Settings": EventDescription "Change User Settings": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": UpdatedUsername "<Username>": Message "The user named '<Username>' updated the user named '<Username>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30107: EventCategory "System Activity": EventSubcategory "Settings": EventDescription "Delete User": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": DeletedUsername "<Username>": Message "The user named '<Username>' deleted the user named '<Username>' in the organization '<OrgName>'"

SystemName "<systemName>": EventCode 30150: EventCategory "System Activity": EventSubcategory "Credentials": EventDescription "Add Credentials": Organization "<orgName>": Username "<userName>": ClientIp "<clientId>": CredentialsName "<credentialsName>": Message "The user named '<userName>' created the credentials named '<credentialsName>' in the organization '<orgName>'"

SystemName "<systemName>": EventCode 30151: EventCategory "System Activity": EventSubcategory "Credentials": EventDescription "Change Credentials Settings": Organization "<orgName>": Username "<userName>": ClientIp "<clientId>": CredentialsName "<credentialsName>": Changes [Replace <propertyName> "<valueBefore>" -> "<valueAfter>", ...]: Message "The user named '<userName>' updated the credentials named '<credentialsName>' in the organization '<orgName>'"

SystemName "<systemName>": EventCode 30152: EventCategory "System Activity": EventSubcategory "Credentials": EventDescription "Delete Credentials": Organization "<orgName>": Username "<userName>": ClientIp "<clientId>": CredentialsName "<credentialsName>": Message "The user named '<userName>' deleted the credentials named '<credentialsName>' in the organization '<orgName>'"

SystemName "<systemName>": EventCode 30153: EventCategory "System Activity": EventSubcategory "Credentials": EventDescription "Reveal Credentials": Organization "<orgName>": Username "<userName>": CredentialsName "<credentialsName>": Message "The user named '<userName>' revealed the credentials named '<credentialsName>' in the organization '<orgName>'"

SystemName: "<SystemName>": EventCode 30201: EventCategory "System Activity": EventSubcategory "Solutions Manager": EventDescription "Import Package": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": CapsuleName "<CapsuleName>": Message "The user named '<Username>' started the import of the capsule named '<CapsuleName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30202: EventCategory "System Activity": EventSubcategory "Solutions Manager": EventDescription "Install Package": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PackageName "<PackageName>": PackageVersion "<PackageVersion>": Message "The user named '<Username>' started the install of the package '<PackageName> <PackageVersion>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30301: EventCategory "System Activity": EventSubcategory "Device Manager": EventDescription "Add/Clone Device": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": DeviceName "<DeviceName>": Message "The user named '<Username>' created the device named '<DeviceName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30302: EventCategory "System Activity": EventSubcategory "Device Manager": EventDescription "Edit Device": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": DeviceName "<DeviceName>": Message "The user named '<Username>' updated the device named '<DeviceName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30303: EventCategory "System Activity": EventSubcategory "Device Manager": EventDescription "Delete Device": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": DeviceName "<DeviceName>": Message "The user named '<Username>' deleted the device named '<DeviceName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30401: EventCategory "System Activity": EventSubcategory "Config Drift and Audit": EventDescription "Set Default Snapshot": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": DeviceCount "<Count>": Message "The user named '<Username>' started the setting of the default configuration for <Count> devices in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30402: EventCategory "System Activity": EventSubcategory "Config Drift and Audit": EventDescription "Add/Clone Audit Policy": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PolicyName "<PolicyName>": Message "The user named '<Username>' created the policy named '<PolicyName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30403: EventCategory "System Activity": EventSubcategory "Config Drift and Audit": EventDescription "Edit Audit Policy": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PolicyName "<PolicyName>": Message "The user named '<Username>' updated the policy named '<PolicyName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30404: EventCategory "System Activity": EventSubcategory "Config Drift and Audit": EventDescription "Delete Audit Policy": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PolicyName "<PolicyName>": Message "The user named '<Username>' deleted the policy named '<PolicyName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30501: EventCategory "System Activity": EventSubcategory "OS Manager": EventDescription "Add/Clone OS Plan": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PlanName "<PlanName>": Message "The user named '<Username>' created the plan named '<PlanName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30502: EventCategory "System Activity": EventSubcategory "OS Manager": EventDescription "Edit OS Plan": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PlanName "<PlanName>": Message "The user named '<Username>' updated the plan named '<PlanName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30503: EventCategory "System Activity": EventSubcategory "OS Manager": EventDescription "Delete OS Plan": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": PlanName "<PlanName>": Message "The user named '<Username>' deleted the plan named '<PlanName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30504: EventCategory "System Activity": EventSubcategory "OS Manager": EventDescription "Add/Clone Catalog": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": CatalogName "<CatalogName>": Message "The user named '<Username>' created the catalog named '<CatalogName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30505: EventCategory "System Activity": EventSubcategory "OS Manager": EventDescription "Edit Catalog": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": CatalogName "<CatalogName>": Message "The user named '<Username>' updated the catalog named '<CatalogName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30506: EventCategory "System Activity": EventSubcategory "OS Manager": EventDescription "Delete Catalog": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": CatalogName "<CatalogName>": Message "The user named '<Username>' deleted the catalog named '<CatalogName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30601: EventCategory "System Activity": EventSubcategory "Workflows": EventDescription "Run Workflow": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": WorkflowName "<WorkflowName>": JnbName "<JnibName>": NodeName "<NodeName>": Message "The user named '<Username>' the workflow named '<WorkflowName>' launched the JNIB named '<JnibName>' on the node named '<NodeName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30701: EventCategory "System Activity": EventSubcategory "Config Model Editor": EventDescription "Add/Clone Instance": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": Construct "<Construct>": TypeName "<TypeName>": InstanceName "<InstanceName>": Message "The user named '<Username>' created a <Construct> of type '<TypeName>' named '<InstanceName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30702: EventCategory "System Activity": EventSubcategory "Config Model Editor": EventDescription "Edit Instance": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": Construct "<Construct>": TypeName "<TypeName>": InstanceName "<InstanceName>": Message "The user named '<Username>' updated a <Construct> of type '<TypeName>' named '<InstanceName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30703: EventCategory "System Activity": EventSubcategory "Config Model Editor": EventDescription "Delete Instance": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": Construct "<Construct>": TypeName "<TypeName>": InstanceName "<InstanceName>": Message "The user named '<Username>' deleted a <Construct> of type '<TypeName>' named '<InstanceName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30801: EventCategory "System Activity": EventSubcategory "File Server": EventDescription "Add File": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": FileName "<FileName>": Message "The user named '<Username>' started the upload of the file named '<FileName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30802: EventCategory "System Activity": EventSubcategory "File Server": EventDescription "Edit File": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": FileName "<FileName>": Message "The user named '<Username>' updated information about the file named '<FileName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30803: EventCategory "System Activity": EventSubcategory "File Server": EventDescription "Delete File": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": FileName "<FileName>": Message "The user named '<Username>' deleted the file named '<FileName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30901: EventCategory "System Activity": EventSubcategory "Schedules": EventDescription "Add Schedule": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": ScheduledFrom "<SolutionName>": WorkType "<TaskName>": ScheduleName "<ScheduleName>": Message "The user named '<Username>' created a <ScheduleType> schedule named '<ScheduleName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30902: EventCategory "System Activity": EventSubcategory "Schedules": EventDescription "Edit Schedule": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": ScheduledFrom "<SolutionName>": WorkType "<TaskName>": ScheduleName "<ScheduleName>": Message "The user named '<Username>' updated a <ScheduleType> schedule named '<ScheduleName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30903: EventCategory "System Activity": EventSubcategory "Schedules": EventDescription "Pausing/Resume Schedule": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": ScheduledFrom "<SolutionName>": ScheduleAction "<Paused/Resumed>": ScheduleName "<ScheduleName>": Message "The user named '<Username>' <Paused/Resumed> the schedule named '<ScheduleName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 30904: EventCategory "System Activity": EventSubcategory "Schedules": EventDescription "Delete Schedule": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": ScheduledFrom "<SolutionName>": WorkType "<TaskName>": ScheduleName "<ScheduleName>": Message "The user named '<Username>' deleted a <ScheduleType> schedule named '<ScheduleName>' in the organization '<OrgName>'"

SystemName: "<SystemName>": EventCode 31001: EventCategory "System Activity": EventSubcategory "API": EventDescription "API Access": Organization: "<OrgName>": Username: "<Username>": ClientIp: "<IpAddress>": HttpMethod "<GET>": HttpPath "<URI>": Message "The user named '<Username>' requested the Gluware API with an HTTP <GET> to '<URI>' in the organization '<OrgName>'"

## Messages from the Gluware primary server

You can configure a Gluware primary or disaster recovery server to send system secure messages such as SSH logins to your external syslog server using UDP or TCP. TLS is not supported.

1. Open `/var/gluware/gluware_chef_attributes.json` for editing.
2. Look for the following block in the JSON:

```
"rsyslog": {  
  "protocol": "udp",  
  "Port": 514,  
  "server_ip": null  
}
```

3. Update the `"protocol"`, `"port"` and `"server_ip"` values to configure remote log shipping, for example:

```
"rsyslog": {  
  "protocol": "[upd | tcp]",  
  "Port": <syslogServerPort>,  
  "server_ip": "<syslogServerIP>"  
}
```

4. Reconfigure the host: `sudo gluwarectl reconfigure`



# Customize command sets

You can customize the command sets for use in **Config Drift**, **Config Audit**, and **Ad hoc query**. Command sets can consist of a list of CLI commands or REST API GET calls.

A **Configuration** command set results in the **Latest Config Snapshot**, used in the drift detection. These snapshots create a history so you can compare the latest snapshot to the default snapshot or to any other point in time. Any change you make to a **Configuration** command set results in drift since different data is collected.


If a **Configuration** command set is not defined for a vendor/OS combination, the Gluware **Standard** commands are run. When there **is** a **Configuration** command set for a vendor/OS, then the **Standard** commands are no longer used—unless you selected it as a part of the custom **Configuration** command set.

An **Operational** command set results in the **Latest Operational Snapshot** and is not used in drift detection. The results, however, can be queried by audit rules and ad hoc queries. There are no Gluware standard operational commands.

Every capture action executes all **Configuration** and **Operational** command sets that match the device's vendor/OS.

You can [view the results](#) of the command sets in the Device Snapshot view.

## Create custom command sets

1. Go to  **Settings** > **Organization** > **Discovery & Capture**.
2. Click **Add Command Set +**.
3. Name the command set.
4. Select a vendor from the drop-down list.
5. Select an OS from the drop-down list.

6. Select how you want to use the command set:
  - **Configuration** - Results in a Config Snapshot. Snapshots are saved in history and are used for drift detection. Results of these command sets can be audited
  - **Operational** - Results in an Operational Snapshot. No history is kept (overwrites the previous snapshot). Drift detection is not done. Results of these command sets can be audited
7. Select whether the command set will include CLI commands or REST API calls.
8. Optional: Check the **Run Gluware standard commands** box if you want to use Gluware's preconfigured commands **and** add additional CLI commands or redactions.
9. Do one of the following:
  - For CLI commands:
    - a. Enter the list of CLI commands you want to use to return configuration information. If you selected **Run Gluware standard commands**, the CLI commands you enter will be run **in addition to** the standard commands.
    - b. Optional: Click > to select a **Concept Item** to limit the lines of the configuration to analyze.
    - c. Optional: Click > to select a redaction expression to eliminate information that will cause false positives in the configuration drift status.
  - For REST API:
    - a. Click > to select a REST sync item call from the **RSI list**.
    - b. Optional: Enter the full URL of the GET call you want to run **in addition to** the RSI you selected.
    - c. Optional: Click > to select a redaction expression to eliminate information that will cause false positives in the capture status.
10. Save.

## Create redaction expressions

You can create redaction expressions that are vendor and OS agnostic. The redaction can be a regular expression in a replace function. Redaction expressions can be assigned to a custom command set.

1. Go to **Settings** > **Organization** > **Discovery & Capture**.
2. Click **Add Redaction Expression +**.
3. Name the redaction expression.
4. Enter the regex for what you want to redact in the results. For example, enter `username (.*)`
5. Enter the substitution. For example, enter `<removed>`
6. Clear any boxes to amend the redaction:
  - **Case insensitive** - Ignores case; unchecked, matches case
  - **Multiline** - Finds the boundaries; unchecked, the entire target is considered one string
  - **Global** - Finds all occurrences; unchecked, finds only the first occurrence
7. Test your redaction by entering a test string and then click **Test**.
8. Save.

## Export and import custom command sets

You can export custom command sets and redaction expressions you create in one Gluware organization and import them into a different organization.

1. Go to **Settings** > **Organization** > **Discovery & Capture**.
2. Click **Export**. A JSON file containing all the custom command sets and redaction expressions is downloaded.
3. Go to the organization you want to add the command sets and redaction expressions to.
4. Click **Import**.
5. Do one of the following:
  - Drag and drop the JSON file onto the **Discovery & Capture** screen and click **OK**.
  - Click **Import from File**, select the JSON file you want to import, click **Open**, and then click **OK**.

# Set up automatic snapshots


You can set up Gluware to take a snapshot automatically after the following actions occur:

- A change recorded in the syslog. Gluware must be set up to monitor syslog changes
- Reboot of devices in **Device Manager**, **Config Model Editor**, or **OS Manager**
- Feature provision in **Config Model Editor**
- Custom script execution in **Config Model Editor**
- Certificate renewal in **Config Model Editor**
- OS image deployment in **OS Manager**

Every capture action executes all Configuration and Operational command sets that match the device's vendor and OS. If no command sets are defined for the vendor/OS, the Gluware Standard commands are used.

You can view the snapshots taken in **Config Audit and Drift**.

**Note:** You cannot trigger both a snapshot and a workflow for the same action.

1. Go to  **Settings > Events**.
2. Check the **Enable Triggers for this Organization** box.
3. For each action you want to trigger an automatic snapshot, double-click in the **Snapshot** column and check the box.
4. If you enable automatic snapshots for **Syslog - Configuration Change**,
  - a. Ensure the **Activate Syslog for this organization** box is checked.
  - b. In the **Ignore duplicate messages within (minutes)** field, enter the number of minutes to ignore syslog messages after the first message is received. The snapshot is taken after the wait

time you enter. Entering 0 does not ignore duplicate messages and a snapshot is taken after each message.

5. Save.

Events

Syslog Inbound

Activate Syslog for this Organization

Port  
32000

Ignore duplicate messages within (minutes)  
6

Event Triggers

Enable Event Triggers for this Organization

	Snapshot	Workflow
Device Manager		
Device Reboot		None
Syslog		
Configuration Change		None
Device Reboot		None
Config Model Editor - Provisioning		
Provision Features		None
Execute Custom Script		None

Cancel Save

# Set up Cisco API Console integration

When enabled in system settings, Device Manager can display Cisco Bulletins, Security Advisory counts, and SmartNet contract details. Updates can be performed manually or can be scheduled. In addition, the Cisco Automated Software Distribution API is used in **OS Manager** validation.

You'll first need to register Gluware under **My Applications** in the **Cisco API Console**. Select **Client Credentials** and the following API's:


- Cisco PSIRT openVuln API
- Hello API
- Bug API 2.0
- EOX V5 API
- Product Info API 1.0
- Serial Number to Information API Version 2
- Software Suggestion API V2
- Cisco Automated Software Distribution API V4

When you complete the registration, you'll see the **Client Support API Client ID** and **API Secret**. You'll enter them in Gluware system settings.

Gluware uses <https://cloudsso.cisco.com/as/token.oauth2> to authenticate and then uses <https://api.cisco.com/> to retrieve data. External access is required.

Watch an overview of Cisco API Console integration

<https://www.youtube.com/watch?v=vr61a6Kj3L8>

1. Go to  **Settings > Organization > Integrations**.
2. Check the **Enable Cisco API Console** box and click **Confirm**.
3. Enter the **Client Support API Client ID** and **API Secret**.
4. Click **Test Cisco Support API Connectivity**.
5. To schedule checks for updates, check the **Enable Schedule** box and specify when to check for updates. The schedule will also apply to **NIST NVD API** updates if those are also enabled.

6. Save.

Integrations

Support Data

Cisco API

Enable Cisco API

Cisco Support API Client ID

Cisco Support API Secret

Test Cisco Support API Connectivity

NIST NVD API

Enable NVD API

NVD API Key (optional)

Test NVD API Connectivity

Enable Schedule

Every 1 day

At 11:59 PM

StackStorm

Enable StackStorm

StackStorm URL

StackStorm API Key

Test StackStorm API Connectivity

Reload StackStorm Packs



Cancel Save

## Set up NIST NVD API integration

When enabled in **Settings, Device Manager** can display NIST (National Institute of Standards and Technology) NVD (National Vulnerability Database) Advisories. The devices currently supported are listed at <https://gluware.com/supported-platforms/>  Advisories can be retrieved as needed or can be scheduled.


Requesting an NVD API key is optional, but it allows you to make more API requests. Without the API key, you can make 10 requests in a minute. With the API key, you can make up to 100 requests in a minute.

Go to <https://nvd.nist.gov/developers/request-an-api-key> to request an API key. When you request an API key, you'll receive an email with your key.

Gluware uses this URI to fetch the NIST NVD advisories: <https://services.nvd.nist.gov/rest/json/cves>  External access is required. Parameters added to the request URI to obtain advisories for specific vendors and devices are detailed at <https://nvd.nist.gov/developers> 

Watch a video about NIST NVD API integration at <https://www.youtube.com/watch?v=vr61a6Kj3L8> 

**Note:** To get vulnerability information on Cisco devices, enable Cisco API integration. NIST NVD API won't check Cisco devices.

1. Go to  **Settings > Organization > Integrations.**
2. Check the **Enable NVD API** box and click **Confirm.**
3. Optional: Enter the **NIST NVD API Key.**
4. Click **Test NVD API Connectivity.**



- To schedule requests for updates, check the **Enable Schedule** box and specify when to requests updates. The schedule will also apply to **Cisco API** updates if those are also enabled.
- Save.

Integrations

**Support Data**

**Cisco API**

Enable Cisco API

Cisco Support API Client ID

Cisco Support API Secret

Test Cisco Support API Connectivity

**NIST NVD API**

Enable NVD API

NVD API Key (optional)

Test NVD API Connectivity

Enable Schedule

Every

At

**StackStorm**

Enable StackStorm

StackStorm URL

StackStorm API Key

Test StackStorm API Connectivity    Reload StackStorm Packs

Cancel    Save

# GluAPI integration

**GluAPI** allows you to write scripts to access Gluware device and organization data. GluAPI adheres to REST architectural principles, has predictable, resource-oriented URLs, and uses HTTP response codes to indicate API errors. Built-in HTTP features, like HTTP authentication and HTTP verbs, are understood by off-the-shelf HTTP clients.

GluAPI supports cross-origin resource sharing, allowing you to interact securely with the API from a client-side web application. JSON is returned by all GluAPI responses, including errors.

GluAPI documentation can be found on your system at

`<yourGluwareSystem>/api-docs/`

or



<http://api-control.gluware.com/api-docs/>

Examples of GluAPI usage are available on GitHub at <http://github.com/gluware>

Access to GluAPI functionality depends on your role and permissions.


# Generate a GluAPI client ID and password

You can generate up to three OAuth 2.0-compliant client IDs and passwords for GluAPI sign on.

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. Click **Add API Credential**. An OAuth 2.0-compliant ID and password are generated.
3. The password won't be displayed again. Click  and save these credentials as sensitive information.
4. Click **OK**.
5. Click **Save**.
6. Optional: You can change the **Name** and **Expiration Date**. Double-click in the cell, make the change, and save.



## Manage your GluAPI client ID and password

### Change the name or expiration date

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. In the **API Credentials** section, double-click in the **Name** or **Expiration Date** column and make the change.
3. Save.

**Note:** Changing the expiration date to a date earlier than the current date disables the credential.

## Delete a GluAPI client ID and password

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. In the **API Credentials** section, click  for the ID you want to delete.
3. Save. The GluAPI client ID and OAuth 2.0 token are both deleted.


**Note:** When your Gluware username is deleted, any associated GluAPI client ID and OAuth 2.0 tokens are also removed. When your Gluware username is disabled, any associated GluAPI client IDs are also disabled and OAuth 2.0 tokens are removed.

# Set up StackStorm integration

When enabled in **Settings**, the **Network RPA Task Library** can include StackStorm workflows. Ensure the packs you want are installed and configured in StackStorm.

Once StackStorm is enabled in **Settings**, StackStorm packs can be retrieved on demand.

**Note:** StackStorm tasks are only available in the one organization in which you load them.

1. Go to  **Settings** > **Organization** > **Integrations**.
2. Ensure you are in the organization in which you want to use Stackstorm tasks. The tasks will on be available in one organization.
3. Check the **Enable StackStorm** box and click **Confirm**.
4. Paste your **StackStorm URL** and **StackStorm API Key** in the fields provided.
5. Click **Test StackStorm API Connectivity**.
6. Click **Reload StackStorm Packs** to add your packs to the Gluware Network RPA Task Library.
7. Save.

## Integrations

### Support Data

#### Cisco API

Enable Cisco API

Cisco Support API Client ID

Cisco Support API Secret

Test Cisco Support API Connectivity

#### NIST NVD API

Enable NVD API

NVD API Key (optional)

Test NVD API Connectivity

Enable Schedule

Every

At

### StackStorm

Enable StackStorm

StackStorm URL

StackStorm API Key

Test StackStorm API Connectivity

Reload StackStorm Packs

Cancel


Save

## Enable/disable a File Server

Once configured, you can enable or disable a File Server any time.


1. Ensure you're in the organization in which the File Server was added.

**Note:** You cannot enable or disable a File Server from a child organization.

2. Go to  **Settings > Organization > OS Manager.**
3. Click **Edit** beside the File Server you want to enable or disable.
4. Check or clear the **Enable File Server** box.
5. Save.

## Troubleshoot a File Server

Refreshing a master File Server puts it into a configuring state, re-initializes it and its connections to any remote Files Servers, and then restarts syncing.

1. Ensure you're in the organization in which the File Server was added.
2. Go to  **Settings > Organization > OS Manager.**
3. Click **Download File Server Activity.** A CSV file of the last 30 day's activity is sent to your Downloads folder.
4. Click **Refresh** beside the File Server you want to troubleshoot.
5. Click **Confirm.**

# OS Manager

## File Servers

Enabled	Name	ID	IP Address	Status	Usage	Actions
<input checked="" type="checkbox"/>	ESQA-MA	MAIN	10.1.25.7	IN_SYNC	28%	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Refresh</a>
<input checked="" type="checkbox"/>	ESQA-RE	REMOTE	10.1.25.8	IN_SYNC	28%	<a href="#">Edit</a> <a href="#">Delete</a>

[Download File Server Activity](#)

## Protocols

Administrative Port

SCP Port

FTP Port

Anonymous FTP

TFTP Port

### SSH Kex Algorithms

diffie-hellman-group14-sha256 ✕ diffie-hellman-group16-sha512 ✕ diffie-hellman-group18-sha512 ✕  
diffie-hellman-group-exchange-sha256 ✕ curve25519-sha256@libssh.org ✕ diffie-hellman-group1-sha1 ✕

### SSH Ciphers

aes128-ctr ✕ aes192-ctr ✕ aes256-ctr ✕ aes128-gcm@openssh.com ✕ aes256-gcm@openssh.com ✕  
chacha20-poly1305@openssh.com ✕ 3des-cbc ✕

### MACs

hmac-sha2-256-etm@openssh.com ✕ hmac-sha2-512-etm@openssh.com ✕ umac-128-etm@openssh.com ✕  
hmac-sha1 ✕

Enable SSH v1 Protocol

[Reset SSH to defaults](#)

## Catalog

Enable Catalog

## Plan Execution

Linear Job Execution

Abort on Failure - Greater than  %

[Cancel](#)

[Save](#)



# Modify a File Server

You can enable/disable a File Server, change the name, ID, and IP address. You can also enable or disable ports and change port assignments.

1. Ensure you're in the organization in which the File Server was added.

**Note:** You cannot modify a File Server from a child organization.

2. Go to  **Settings** > **Organization** > **OS Manager**.

3. Click **Edit** beside the File Server you want to modify.

OS Manager

File Servers

Enabled	Name	ID	IP Address	Status	Usage	Actions
<input checked="" type="checkbox"/>	ESQA-MA	MAIN	10.1.25.7	IN_SYNC	28%	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Refresh</a>
<input checked="" type="checkbox"/>	ESQA-RE	REMOTE	10.1.25.8	IN_SYNC	28%	<a href="#">Edit</a> <a href="#">Delete</a>

[Download File Server Activity](#)

Protocols

Administrative Port: 2022

SCP Port: 22

FTP Port: 21

Anonymous FTP

TFTP Port: 69

SSH Kex Algorithms

diffie-hellman-group14-sha256 X diffie-hellman-group16-sha512 X diffie-hellman-group18-sha512 X  
diffie-hellman-group-exchange-sha256 X curve25519-sha256@libssh.org X diffie-hellman-group1-sha1 X

SSH Ciphers

aes128-ctr X aes192-ctr X aes256-ctr X aes128-gcm@openssh.com X aes256-gcm@openssh.com X  
chacha20-poly1305@openssh.com X 3des-cbc X

MACs

hmac-sha2-256-etm@openssh.com X hmac-sha2-512-etm@openssh.com X umac-128-etm@openssh.com X  
hmac-sha1 X

Enable SSH v1 Protocol

[Reset SSH to defaults](#)

Catalog

Enable Catalog

Plan Execution

Linear Job Execution

Abort on Failure - Greater than  %

[Cancel](#) [Save](#)


4. Check or clear the **Enable File Server for this Organization** box.
5. Change the name, ID, or IP address.
6. Change port assignments.

7. Check or clear the **FTP Port** box or the **TFTP Port** box to enable or disable those ports. These ports are optional.

**Note:** It takes several minutes for a port to be enabled or disabled in the backend.

8. Only if necessary: Make changes to the encryption algorithms by removing or adding algorithms in the **SSH Kex Algorithms**, **SSH Ciphers**, and **MACs** boxes. Click **Reset SSH to defaults** to return to Gluware's standards.

**Warning!** Some encryption algorithms may expose security vulnerabilities but may be required by older devices or firmware.


9. Check or clear the **Enable SSH v1 Protocol** box. SSH v2 Protocol is always enabled, regardless of this setting.
10. Save.
11. **If the IP address changed:**
  - a. From a command shell on the File Server, run `sudo glwarectl reconfigure`
  - b. Return to  **Settings > Organization > OS Manager**.
  - c. Click **Refresh** beside the name of the File Server with the updated IP address.
  - d. Click **Confirm**.

# Delete a File Server


When you delete a master File Server, any Remote File Servers will also be deleted.

1. Ensure you're in the organization in which the File Server was added.

**Note:** You cannot delete a File Server from a child organization.

2. Go to  **Settings > Organization > OS Manager**.
3. Click **Delete** beside the File Server you want to remove.
4. Click **Confirm**.


**Warning!** If you delete a master File Server accidentally, you'll need to add the File Server again and then refresh it:

1. Ensure you're in the organization you want to add the master File Server to.
2. Go to  **Settings > Organization > OS Manager**.
3. If you are adding the master File Server in a child organization, check the **Enable New Master File Server for this Organization** box.
4. Ensure the **FTP Port**, **SCP Port**, and **TFTP Port** settings are correct.
5. Click **Add File Server+**.
6. Enter a name and IP address for the server.
7. Save.
8. From a command shell on the File Server, run `sudo glwarectl reconfigure`.
9. Return to  **Settings > Organization > OS Manager**.
10. Click **Refresh** beside the name of the File Server.
11. Click **Confirm**.

# Enable the OS Catalog

The Catalog allows you to associate files on the File Server with a SKU. This helps ensure that only the files appropriate to a device are available for deployment on that device. The use of a Catalog is optional.

Each organization must enable its own Catalog—you cannot share a Catalog with a child organization.

1. Ensure you're in the organization you want to enable the Catalog for.
2. Go to  **Settings** > **Organization** > **OS Manager**.
3. Check the **Enable Catalogs** box.
4. Save.

## OS Manager

### File Servers

Enable File Servers for this Organization

Enabled	Name	ID	IP Address	Status	Usage
<input checked="" type="checkbox"/>	I-SQA-MAIN	MAIN	10.1.100.107	IN_SYNC	91%
<input checked="" type="checkbox"/>	I-SQA-REMOTE	REMOTE	10.1.100.108	IN_SYNC	91%

### Port Settings

Administrative Port

SCP Port

FTP Port

Anonymous FTP

TFTP Port

### SSH Protocols

#### SSH Kex Algorithms

diffie-hellman-group14-sha256 x diffie-hellman-group16-sha512 x diffie-hellman-group18-sha512 x diffie-hellman-group-exchange-sha256 x  
curve25519-sha256@libssh.org x

#### SSH Ciphers

aes128-ctr x aes192-ctr x aes256-ctr x aes128-gcm@openssh.com x aes256-gcm@openssh.com x chacha20-poly1305@openssh.com x

#### MACs

hmac-sha2-256-etm@openssh.com x hmac-sha2-512-etm@openssh.com x umac-128-etm@openssh.com x

Enable SSH v1 Protocol

Reset SSH to default settings

### Image Selection & Validation

- Enable Catalog
- Enable vendor API image validation

### Plan Execution

- Linear Job Execution
- Abort on Failure - Greater than  %


Cancel

Save

# Set up guidelines for OS plans

Upgrade plans allow you to safely upgrade specific devices. You can schedule upgrades to occur at the optimal time on as many devices as is appropriate.

Each organization must set up its own guidelines—you cannot share guidelines with a child organization.

1. Go to  **Settings > Organization > OS Manager**.
2. Check the **Enable Catalog** box to associate files on the File Server with a SKU, ensuring that only the files appropriate to a device are available for deployment on that device.
3. Check the **Enable vendor API image validation** box if you have API integration enabled and you want to check image compatibility.
4. Check the **Linear Job Execution** box if you want the devices impacted by the plan to be updated one at a time.
5. Check the **Abort on Failure** box and select a percentage of failures if you want to halt plan execution when a percentage of devices are unable to be updated.
6. Save.

## OS Manager

### File Servers

Enable File Servers for this Organization

Enabled	Name	ID	IP Address	Status	Usage
<input checked="" type="checkbox"/>	I-SQA-MAIN	MAIN	10.1.100.107	IN_SYNC	91%
<input checked="" type="checkbox"/>	I-SQA-REMOTE	REMOTE	10.1.100.108	IN_SYNC	91%

### Port Settings

Administrative Port

SCP Port

FTP Port

Anonymous FTP

TFTP Port

### SSH Protocols

#### SSH Kex Algorithms

diffie-hellman-group14-sha256 × diffie-hellman-group16-sha512 × diffie-hellman-group18-sha512 × diffie-hellman-group-exchange-sha256 × curve25519-sha256@libssh.org ×

#### SSH Ciphers

aes128-ctr × aes192-ctr × aes256-ctr × aes128-gcm@openssh.com × aes256-gcm@openssh.com × chacha20-poly1305@openssh.com ×

#### MACs

hmac-sha2-256-etm@openssh.com × hmac-sha2-512-etm@openssh.com × umac-128-etm@openssh.com ×

Enable SSH v1 Protocol

Reset SSH to default settings

### Image Selection & Validation

- Enable Catalog
- Enable vendor API image validation

### Plan Execution

- Linear Job Execution
- Abort on Failure - Greater than  %

Cancel

Save





## Customize the Gluware menu

You can hide Gluware Solutions you're not licensed for and the names of Gluware Solutions. When you hide Gluware Solutions, only the Solution icon is displayed.

1. Click your initial or photo in the Gluware title bar.
2. Point to **Preferences**.
3. Select the **Show** or **Hide** for the **Unlicensed solutions** and **Solution names** menu options.


## Add your photo to Gluware

You can replace your initials in the Gluware title bar with a photo.

1. Got to  **Settings** > **User** > **Edit My Profile**.
2. Click , select your photo file, and click **Open**.
3. Save.

## Customize the row selection color

Customizing the color of rows selected in a grid, such as in the **Device Explorer**, can improve accessibility.

1. Go to  **Settings** > **User** > **Edit My Profile**.
2. In the **My Colors** section, select a row selection color from the drop-down list. You can select one of the suggested colors or specify an RGB, HSL, or HEX color value. The color's tint is used when you point to a row and is displayed as the **Row Highlight**.
3. Click **Save**.
4. Click **OK**.

## External access for features and support

Using Gluware on prem can provide isolation from internet access and the related associated exposure and threats. However, there are a few maintenance implications that come from internet isolation including how to update packages and how to remotely troubleshoot performance issues.

There are three options for internet access:

- **None** - No internet access
- **Intermittent** - Internet access allowed only during limited time frames
- **Persistent** - Internet access available

Packages provide the custom- and system-level config modeling types (Feature, Domain, Global, Node, Script) as well as sample configurations used to model and configure networks. Access to install or update these packages from the Gluware Distribution Center requires outgoing access through TCP port 443.

If you have persistent access through your firewall for traffic on this port, you can update packages from the Gluware Distribution Center at any time.

If you have intermittent access to the internet, you need to schedule firewall access for allowing outgoing TCP traffic on port 443. Then you can install packages using Solutions Manager and shut down the firewall access for TCP port 443 until you need to install packages again.

If you have no access to the internet, follow these instructions to install packages locally:

1. Contact Gluware and download the supplied `capsule[uniqueID].zip` file to a local file system with direct access to your Gluware system.
2. Copy the supplied capsule file to the `/var/gluware/package-repo` directory.

**Example:**

```
cp capsule[uniqueID].zip /var/gluware/package-repo
```

Once the downloaded package has been copied to the `package-repo` directory on your Gluware system, you can install the package using Solutions Manager.

When you need Gluware Support or troubleshooting help, if sharing logs and errors is not sufficient, scheduling a video conference with Support may be necessary. To allow remote access of Gluware desktop to Support during these sessions, plan for VPN access for Support.

# Gluware system services

Gluware is configured and built using Chef™, a configuration management tool used to automate the creation and configuration of systems.

There are a handful of core services and transaction types in Gluware. Some background on each will help you understand the relevance of services and logs to your Gluware system performance tuning and system maintenance activities.

Component	Description
Agent Manager	The service that communicates with the back end (Mongo, etc.) and processes requests from deployed agents running on nodes
archivesrv	The data retention policy engine
Browser	The means by which your Gluware users will interact with Gluware once it is configured and operational
Camunda	A process orchestration engine for Network RPA
GluAPI	The Gluware REST API that allows you to access Gluware device and organization data
HTTP-Eve	The HTTP container that exposes all the internal RESTful services used by Gluware to facilitate interaction with the Agent and JNIB technologies

<b>Component</b>	<b>Description</b>
MongoDB®	One of two databases in the Gluware back end that is used to store the highly customizable data models defined by the developer
MySQL®	One of two databases in the Gluware back end that is used to store the relational portions of the system data and allows for ACID (Atomicity, Consistency, Isolation, Durability) reliable database transactions
NGINX®	HTTP server used to host the Gluware Web application and to load balance all Web Socket connections and RESTful requests
NIBServer	The service responsible for managing Gluware provisioning requests, events, and logging, determining if they are previews that generate logs and CLI, or actual provisioning actions on nodes
Nodes	The network devices being managed with Gluware
ntpd	The network time protocol service used for time synchronization
RabbitMQ®	The service that provides a messaging queue to coordinate internal events between other Gluware processes
RADIUS	Provides authentication services that are used for node sign-in authentication

<b>Component</b>	<b>Description</b>
reactorsrv	Runs periodic tasks for managing file server statuses, managing engine zone statuses, updating Gluware licenses, and renewing Gluware CA certificates. Propagates node property changes to devices. Propagates provisioning statuses to node properties. Listens for various system events to produce outbound syslog events
rpa-communicator	Relays information and orders between Network RPA and the Camunda service
StackStorm	The process that communicates with the external StackStorm installation
trigsrv	The Gluware scheduler service
tusd	The file transfer service used by the Gluware primary server to upload files to the Gluware File Servers
worksrv	The entity worker service used for managing Gluware jobs
WS-Eve	The Web Socket container that is used to establish internal Web Socket connections between the server (system) and the client (browser); this socket provides access to all the system functionality except for Provisioning and Provisioning Logs (see NIBServer)

# Manage Gluware system services

The combination of services and logs provide your primary means of maintaining Gluware. Status and control of different services are described below.

The format for the utility is:

```
sudo gluwarectl <action> [options]
```

**NOTE:** Action names are case insensitive; e.g., `radiusSecret` and `radiussecret` produce the same result.

## Services actions

### **restart** [glue|all]

Restart specified services

`glue` – Only operates on Gluware services such as WSEVE, HTTPVE, and GluAPI (default)

`all` – All services (Eve, etc.) plus RabbitMQ, MongoDB, MySQL, radiusd, and ntpd

### **start**

Start all system services

### **status**

Display the status for all system services

### **stop** [glue|all]

Stop specified services; default is `glue`

`all` is glue services (Eve, etc.) and RabbitMQ, MongoDB, MySQL, radiusd, and ntpd

## Configuration and information actions

### **activity**

Display current Gluware Engine job status. Provide a count of engines connected to your Gluware server and current activity by job category (see "Gluware engine tuning" for a description of job categories)

```
configureProxy [http|https|ftp|all|disable] <host>  
<port> <username> <password> <domain>
```

Reconfigure the proxy used to access external network resources

```
configureTimezone <timezone> or configtz <timezone>
```

Set the time zone for the system. Should match a value from `timedatectl list-timezone`

```
licenseRequestInfo or lic
```

Display information necessary for requesting a Gluware license

```
upgradePlatform [-t] <upgrade-bundle file or URL> [bundle-  
path]
```

Upgrade a Gluware server. Use the `[-t]` option to download the upgrade bundle but not run the upgrade. If using a URL, specify the optional `[bundle-path]` to place the downloaded bundle in that directory. By default, the bundle is downloaded to `/data/tmp`

Logs `gluwarectl` versions before and after the upgrade. Scans `/var/log/chef-client.log` and the upgrade log for errors, using an array of keywords defined in `gluwarectl`. Displays an error summary. The relevant portion of `/var/log/chef-client.log` and `chef-stacktrace.out` are included in the upgrade log if errors are detected. Logs `gluwarectl status` after the upgrade



## **radiusSecret**

Display the system RADIUS token

## **reconfigure** or **rec**

Reconfigure the system based on the parameters set in the `gluware_chef_attributes.json` file with the option to bypass the confirmation prompt

## **setInactivityTimeout** <minutes>

Set the maximum idle time to wait before a Gluware session times out; default is 20 minutes

## **showEnvironment**

Display information and status for all servers connected to the Gluware Primary Server (the environment)

## **versions** or **ver**

Display all relevant Gluware version information

## Data actions

### **dataBackup** [backup-path] [-l]

Back up all Gluware databases and associated data to a backup set in directory `[backup-path]`. If `[backup-path]` is not specified, the current working directory is used. Use the `[-l]` (lite) option to create a backup that excludes all logs and log-related collections to share with Gluware Support. When the lite option is used, the resulting filename includes `backup-lite`

### **datarestore** <filename>

Restore the Gluware databases from a specified backup file

## `resetDRData`

Resets the MongoDB replicaset data on the Disaster Recovery Server when a `dataRestore` action is performed using a backup that was created in a different Gluware environment

## Data replica actions

### `promoteDRServer`

Promote a Gluware Disaster Recovery Server instance from standby mode to active

## OS user management actions

### `addUser <username>`

Create a new system user within the glueadmin group

### `deleteUser <username>`

Delete a system user that is a member of the glueadmin group

## Security actions

### `checkIpsecCaCert`

Check whether the CA certificate is valid. **Enter** displays the certificate text. **CTRL+C** halts the display of the text

### `checkIpsecTunnelCert`

Check whether the tunnel/host certificate is valid. **Enter** displays the certificate text. **CTRL+C** halts the display of the text

### `updateCert <cert-file> <key-file>`

Replace default self-signed certificate and private key with signed certificate and private key

**updateIpsecCerts** <CAcertfile> <hostcertfile> <hostcertkey>

Replace the CA certificate and host key/cert pair used for IPsec authentication. Be sure to replace the certificate on each VM

## Diagnostics actions

**sysCheck** or **sys**

Display detailed system and service level status and health indications

**report**

Create an encrypted, compressed archive of all relevant status, logs, and configuration of the system to be sent to Gluware Support while troubleshooting

**clean**

Remove extraneous data and crash dump files

## Advanced actions

**allowPing** [true|false]

Allow this system to respond to ping (ICMP) requests

true - Allow

false - Don't allow

**createDisk** <device> <mount>

Create and mount a new filesystem in a Gluware on prem server

**Note:** To utilize **createDisk** you must be familiar with Linux file systems and how to create virtual drives in your hypervisor

**exportOrg [-o|-a] <organization-name> [exclude-nodes]**

Export data from an organization in Gluware to an encrypted data archive file that can be used to import the data to an organization on a different Gluware system, or on the same system with a different name. [exclude-nodes] allows you to export organization instance data without including any node instances

- o - Export only instance data (default)
- a - Export all data

**gluwareEngineTuning or get**

Modify performance settings for the locally configured Gluware Zone Engines

**importOrg [-o|-a] organization-name organization-name-in-data-archive data-archive-file**

Import data from an organization in the data archive file to an organization on a Gluware system

- o - Import only instance data (default)
- a - Import all data

**scheduleBackup enable <backuppath> <mailto> <minute> <hour> <day> <month> <dayofweek>**

Run data backups on a scheduled basis, as opposed to running gluwarectl data backup manually (uses Linux cron syntax)  
backuppath - Location where data backups will be written  
mailto - Email address for sending task notifications  
minute - 0-59; minute of the hour the task will start  
hour - 0-23; hour during a day the task will start  
day - 1-31 or \*; day during a month the task will start. \* is every day  
month - 1-12; month during a year the task will start  
dayofweek - 0-6; day of the week the task will start. 0 is Sunday

**scheduleBackup disable**

Disable a scheduled backup

`unmount` `<mount>`

Unmount the device mounted using the `createDisk` action

# Restart Gluware services

You may need to restart services:

- After you make configuration changes
- After you run a configuration upgrade, e.g., `sudo gluwarectl reconfigure`
- When one of the services is stopped or not working. This can be determined by opening a terminal session with Gluware and typing `sudo gluwarectl status`
- When one of the services you believe to be running has stopped listening. You can determine this by opening a terminal session with Gluware and typing `nmap localhost`. This will tell you which ports are currently open. They should be the same ports that you saw the services are listening to in the previous step. For the current system these are port(s) 80, 123, 443, 22, 25, 3306, 8045, 8042, 805x

If in any of these circumstances you determine that your Gluware services need to be started or restarted, open a terminal session with Gluware and enter:

```
sudo gluwarectl [status|stop|start|restart]
```

# Set the Gluware system date or time

You can use `timedatectl` to display or set the Gluware system date or time. The format for the utility is:

```
sudo timedatectl <action> [options]
```

## `timedatectl` actions

### `status`

Show current system clock and RTC settings

### `show`

Show current system clock and RTC settings in machine readable form

### `set-time` [time]

Set the system time in the format 2019-10-30 18:17:16

### `set-timezone` [timezone]

Specify the system time zone

### `list-timezones`

Lists the available time zones

### `set-local-rtc` [0|1]

`0` - configures the Gluware system to maintain the RTC in universal time; `0` is the recommended setting.

`1` - maintains the RTC in local time and is not fully supported as it may cause problems, for example, with daylight saving adjustments

**Note:** This also synchronizes the RTC from the system clock unless you include the `--adjust-system-clock` option.

## Create and mount a new file system

The `gluwarectl createDisk` action enables the creation and mounting of a new file system on a Gluware-based server. The intended use is to extend the capability in an On Prem system for storing data backups, upgrade packages, etc.

The `createDisk` action will create a single, primary XFS (Extents File System) partition on a *device* that utilizes all available space on that device (please note that the virtual disk should be sized accordingly). The partition will be made available in *mount* (e.g., the mount point).

```
sudo gluwarectl createDisk <device> <mount>
```

**NOTE:** <device> is a block device that maps to a virtual disk, created in the VM host environment, and bound to the Gluware VM (e.g., added as a new disk in the settings). A disk that maps to device must first be created in the VM host environment and attached to the VM. In order to utilize `createDisk` you must be familiar with how to create virtual drives in your hypervisor and have familiarity with Linux file systems.

In the VMware console, edit settings for the target system and select **Add hard disk**. Configure the new virtual disk according to Gluware system needs, save settings, and start the system. Sign in as the local user and run `lsblk` to obtain the name of the block device that is mapped to the virtual disk.



## Example

```
lsblk
NAME MAJ:MIN RM SIZE RO TYPE MOUNTPOINT
fd0 2:0 1 4K 0 disk
sda 8:0 0 16G 0 disk
-sda1 8:1 0 8G 0 part /
-sda2 8:2 0 1K 0 part
-sda5 8:5 0 8G 0 part
-crypt--data 253:0 0 8G 0 crypt /data
sdb 8:16 0 12G 0 disk
sr0 11:0 1 1024M 0 rom
```

`sdb` in this example is shorthand for `/dev/sdb` and is the new device. Run `sudo glwarectl createDisk /dev/sdb/mydata` where `/mydata` is the top-level directory name used to access the new file system (e.g., the mount point). Upon completion, a 12 GB partition named `/dev/sdb1` will be created and mounted as `/mydata`. In addition, the new entry will be added to `/etc/fstab`.

Running `lsblk` again yields:

```
NAME MAJ:MIN RM SIZE RO TYPE MOUNTPOINT
fd0 2:0 1 4K 0 disk
sda 8:0 0 16G 0 disk
-sda1 8:1 0 8G 0 part /
-sda2 8:2 0 1K 0 part
-sda5 8:5 0 8G 0 part
-crypt--data 253:0 0 8G 0 crypt /data
sdb 8:16 0 12G 0 disk
-sdb1 8:17 0 12G 0 part /mydata
sr0 11:0 1 1024M 0 rom
```

# Configure SNMP v2

## Enable and configure SNMP v2 on your Gluware system

1. Edit the following settings in

```
/var/gluware/gluware_chef_attributes.json
```

Add settings as needed.

```
glue_environment.service_admin_email - Maps to  
syslocation in snmpd.conf
```

```
glue_onprem.enable_snmpd - Enables and runs, or disables and  
stops the snmpd service
```

```
snmp_v2c.community_string - Maps to the rocommunity  
COMMUNITY parameter in snmpd.conf
```

```
snmp_v2c.source_ip - Optional IP filter that maps to the  
rocommunity SOURCE parameter in snmpd.conf
```

```
snmp_v2c.syslocation - Maps to syslocation in snmpd.conf
```

**Note:** If a section is already present, such as "glue\_onprem", don't add it twice. Just add any needed properties to it.

2. Run 'sudo glwarectl reconfigure'

This manages the state of the SNMPD service, and causes the following settings in `gluware_chef_attributes.json` to be written to `/etc/snmp/snmpd.conf`:

```
rocommunity <community_string> [<source_ip>]
```

```
syslocation <syslocation>
```

```
syscontact <service_admin_email>
```

## Example

gluware\_chef\_attributes.json snippet:

```
{
"glue_environment": {
"service_admin_email": "friend@gluware.com"
}
"glue_onprem": {
"enable_snmpd": true
},
"snmp_v2c": {
"community_string": "my-readonly-community-string",
"source_ip": "172.16.10.0/24",
"syslocation": "Midtown Datacentre"
}
}
```

## Display the status of the snmpd service

- Run `systemctl status snmpd`

For more information, see <http://www.net-snmp.org/docs/man/snmpd.conf.html>

# Change Gluware system passwords

Use standard Linux commands to change passwords in Gluware. Sign in via a terminal session as the user you created when installing Gluware and enter:

```
passwd
```

If you need further assistance, issue the `man` command.

# Change Gluware system certificates

When Gluware and IPsec tunnel certificates expire or are revoked, you can replace them. The Gluware certificate is used for secure web access to the Primary Gluware system. IPsec tunnel certificates are used to establish secure connections between a Gluware Primary Server and a Gluware Disaster Recovery Server or Gluware Zone Engine. Each server in your Gluware configuration needs its own certificate; however, the same certificate on the Gluware Primary Server can be configured for the IPsec tunnel and the web server.

## Requesting certificates

To facilitate HTTPS connections using SSL/TLS that are fully trusted by browsers, you may need to generate a certificate request to, and subsequently install a signed certificate from, your corporate Certificate Authority (CA) or related security resources in your corporate infrastructure. Contact your security team to identify and follow their existing process for getting your signed certificate.

Alternatively, a best practice is to use the OpenSSL resources on the CentOS based platform to generate a key pair, integrate it into a certificate request (which is forwarded to the appropriate corporate security resource), and then install the signed certificate that is returned by your CA in response to that request. In all the instructions below, where you see a reference to <your FQDN>, you will need to insert the actual FQDN for your Gluware system.

**NOTE:** The signing process must include the **server\_cert** extension.

Also, if you're planning to use the IP address for the box (instead of the FQDN), then you must configure the **SubjectAltName** property and **alt\_names options**.

If you're planning to use the certificate to update your IPsec tunnel certificates, then you must ensure that the FQDN, host name, and IP address for each system are listed as Subject Alternate Names. In addition, the IPsec tunnel authorization requires all peer certificates to have the **digitalSignature** or **nonRepudiation keyUsage** flags set.

## If using a self-signed certificate

To generate the key pair, sign in to Gluware via a terminal session using the local user account you created. Execute the following commands:

```
mkdir ~/certs
cd ~/certs
mkdir ~/certs/private
openssl genrsa -aes256 -out private/<yourFQDN>.key.pem
2048
chmod 400 private/<yourFQDN>.key.pem
```

**NOTE:** You will be prompted to enter a passphrase to protect the key that is generated at this point.

To generate the certificate request, while still signed in to Gluware, execute the following commands:

```
cd ~/certs
openssl req -key private/<yourFQDN>.key.pem -new
-sha256 -out private/<yourFQDN>.csr.pem
```

You will then be prompted for the key pair passphrase that you created in the previous step. Once the passphrase has been provided, you will be

prompted for the following information that will be used to populate the certificate request file:

```
Country Name (2 letter code) [XX]: Example - <US>
State or Province Name (full name) [ ]: Example - <CA>
Locality Name (e.g., city) [Default City]: Example -
<Sacramento>
Organization Name (e.g., company) [Default Company
Ltd]: Example - <yourOrg>
Organizational Unit Name (e.g., section) [ ]: Example -
<Your Org Unit>
Common Name (e.g., your name or your server's hostname)
[ ]: Example - <yourFQDN>
Email Address [ ]: Example - <yourOrg.yourCorp.com>
Optional Attribute: An optional company name [ ]:
Example - <companyAlias>
```

Now that the certificate request has been successfully created, email the file (<yourFQDN>.csr.pem) to your security team to complete your certificate request.

## If using a PKS#12 certificate

You'll need to extract the certificate and private key from the PKS#12 file and save them in PEM format to install Gluware. You'll be prompted for the PKS#12 file password. You can encrypt the private key by removing the `-nodes` flag from the command. Add `-nocerts` or `-nokeys` to output only the private key or certificate.

Execute the following command to extract the certificate from the PKS#12 file:

```
openssl pkcs12 -in <userProvidedFile.p12> -out
<certificateFilename>.crt -nodes
```

Execute the following command to extract the private key from the PKS#12 file:

```
openssl pkcs12 -in <userProvidedFile.p12> -out  
<privateKeyFilename>.key -nodes -nocerts
```

## Removing the private key password

Once you receive the signed certificate back from your security team, perform the following step.

Because the installed cert will be used by a service, you don't want the installed private key to use a passphrase. It may be useful while the files are in transit; but once it is on the system, you'll want to remove the passphrase, if it exists, by entering the following command:

```
openssl rsa -in onPrem-control.local.key.pem -out  
onPrem-control.local.nocrypt.key.pem
```

This will prompt for the passphrase for the existing key file, then write it without a passphrase to a new file.

## Configuring the web server to use a certificate

Now, execute the following command to import the certificate into Gluware:

```
sudo glwarectl updateCert <certificateFilename>.cert  
<privateKeyFilename>.key
```

## Configuring IPsec certificates

Execute the following command on all the Gluware servers (the Gluware Primary Server, the Gluware Disaster Recovery Server, and all Gluware Zone Engines):

```
sudo glwarectl updateipsecerts <CA-cert>  
<certificateFilename>.cert <privateKeyFilename>.key
```



# Change Gluware system configurations

If you change your Gluware system configuration after the initial installation, for example, after changing host name, IP address, etc., sign in via a terminal session and enter:

```
sudo gluwarectl reconfigure
```

# Gluware engine tuning

The Gluware engine processes jobs requested by your Gluware server. These include Previews, Provisioning, Config Drift captures, Device discoveries, OS upgrades, and Workflows that interact with devices. In order to maximize throughput, Gluware places each job in a category (queue) based on size and expected duration and then submits the jobs to one of several message broker queues serviced by the Gluware engine. One or more Gluware engines then process requests by interacting with the message broker.

The job categories are:

**Large** - Jobs of long duration, such as SDWAN provisioning

**Medium** - These include **Config Model Editor** provisioning

**Small** - Config Drift captures and Device Discovery

**Extra small** - Workflows

**Network Discovery** - All network discovery requests

**Config Model Editor Scripts** - All scripts run from **Config Model Editor**

**OS upgrade validations** - All OS plan validation requests

**OS upgrade transfers** - All OS transfer requests

**OS upgrade deployments** - All OS upgrade requests

Each Gluware engine service uses these requests and can run multiple jobs simultaneously. Because the number of jobs running at any one time can also affect performance, each job category is assigned a prefetch value - this is the number of jobs the engine will process from any given queue at the same time.

The Gluware server runs two Gluware engines by default. More engines can be added to a Gluware server's infrastructure by installing an additional Gluware engine. Each additional Gluware engine runs two engines. The default engine settings are:

## Engine 0

Job Category	Enabled/Disabled	Prefetch
Large	Enabled	10 (maximum 10)
Medium	Enabled	30 (maximum 50)
Small	Enabled	30 (maximum 50)
Extra small	Enabled	30 (maximum 50)
Network Discovery	Enabled	30 (maximum 50)
Config Model Editor scripts	Enabled	20 (maximum 50)
OS upgrade validations	Enabled	10 (maximum 20)
OS upgrade transfers	Enabled	10 (maximum 20)
OS upgrade deployments	Enabled	10 (maximum 20)
		<b>Total = 180 (maximum 300)</b>

## Engine 1

Job Category	Enabled/Disabled	Prefetch
Large	Disabled	0 (maximum 10)
Medium	Enabled	30 (maximum 50)
Small	Enabled	30 (maximum 50)
Extra small	Enabled	30 (maximum 50)
Network Discovery	Enabled	30 (maximum 50)
Config Model Editor scripts	Enabled	20 (maximum 50)
OS upgrade validations	Enabled	10 (maximum 20)
OS upgrade transfers	Enabled	10 (maximum 20)
OS upgrade deployments	Enabled	10 (maximum 20)
		<b>Total = 170</b> (maximum 300)

Using the engine tuning action, you can disable engines and queues, and change the number of jobs that will run concurrently on any given queue (the prefetch value).

To change performance parameters for one or more of the locally running engines, while signed in to Gluware or your additional Gluware engine system via a terminal session, enter:

```
sudo glwarectl glwareEngineTuning
```

Select the engine to tune, configure the queues within the engine, and then save the engine configuration.

## Performance tuning

Adding CPUs and memory to Gluware will improve its performance. For each incremental CPU that is added, another instance of the WS-Events service is spawned, increasing the capacity of Gluware to service user interactions. However, for the new WS-Eve service to be spawned and assigned to the new CPU, Gluware needs to be reconfigured. To reconfigure, sign in to your Gluware system via a terminal session and enter:

```
sudo glwarectl reconfigure
```

# Back up Gluware systems

Back up your Gluware system databases regularly as an important part of system administration. All data is backed up using the `gluwarectl databackup` command (scheduled or on demand), including:

- The entire contents of MongoDB and MySQL DB: instances, models, configurations, schedules, device job and provisioning log files, administrative data (organizations, users, licenses)
- All capsule files located in `/var/gluware/packagerepo`
- All package files managed by Gluware Engines
- Gluware platform information:  
`/var/gluware/gluware_chef_attributes.json`

## Scheduled backup

The `gluwarectl` action `scheduleBackup` creates or modifies a scheduling task to run data backups on a regular basis.

The supported options are listed below. If either the **path** or **mailto** command line parameters are omitted, the default value will be used. We recommend the **[minute hour day month dayofweek]** options be specifically timed to minimize network performance load for other business needs.

## To schedule backups

1. Ensure the local time is accurate on the Gluware Primary Server.
2. Sign in via a terminal session and enter:  
`sudo gluwarectl scheduleBackup enable [path mailto minute hour day month dayofweek]`

At least one of the time values must be included in the parameters. The default values are:

**path** - Default is `/var/backup`

**mailto** - Default is the current user

**[minute, hour, day, month, dayofweek]** - Specify at least **month** and **day** or **dayofweek**

**minute** - 0-59

**hour** - 0-23

**day** - 1-31

**month** - 1-12 or **jan, feb, mar, apr...**

**dayofweek** - 0-6 where Sunday = 0; or **sun, mon, tue, wed, thu, fri, sat**

## Examples

Schedule a backup to run every day at 10:00 UTC:

```
gluwarectl scheduleBackup enable /mydisk/backups  
fred@virtualsys.com 0 10
```

Schedule a backup to run on the 5th day of every month at 10:00 UTC:

```
gluwarectl scheduleBackup enable /mydisk/backups  
fred@virtualsys.com 0 10 5
```

Schedule a backup to run on the 5th day of January at 10:00 UTC:

```
gluwarectl scheduleBackup enable /mydisk/backups  
fred@virtualsys.com 0 10 5 1
```

Schedule a backup to run every Sunday of every week at 10:00 UTC:

```
gluwarectl scheduleBackup enable /mydisk/backups  
fred@virtualsys.com 0 10 "" "" sun
```

Schedule a backup to run every Sunday of every week at 10:00 UTC, using the default backup location and setting email to the current user:

```
gluwarectl scheduleBackup enable "" "" 0 10 "" "" sun
```

## Discontinue scheduled backups

To discontinue scheduled backups, enter:

```
gluwarectl scheduleBackup disable
```

## On demand backup

To back up both MongoDB and MySQL DB, which includes both system configuration and User/Org data, sign in to your Gluware system via a terminal session and enter:

```
sudo gluwarectl databackup [backup path] [-1]
```

`backup path` - Use an external partition

`[-1]` - Create a "lite" backup that excludes all logs and log-related collections for sharing with Gluware Support

After execution, the backup will be in have the file name <Gluware instance name>.<date and time>.tgz or <Gluware instance name>backup-lite.<date and time>.tgz.

## Archive backups

Create a script to copy off and delete the backups based on company practices.

### Example WINSCP script

```
# Connect
open sftp://user:password@host/ -hostkey=*
# Change remote directory
cd /home/user
# Download file to the local directory d:\
get *.tgz -delete c:\backups
# Disconnect
close
Exit
```



Save the script to the C:\Program Files (x86)\WinSCP\folder. To run the script, enter:

```
Winscp.com /ini=nul /script=downloadBackUp.txt
```

## **Back up Gluware VMs**

Leverage your existing VM infrastructure backup procedures such as VMware Snapshots or the VMware Data Recovery application to ensure that Gluware Control VM server states are backed up.

## Restore Gluware systems from a backup

To restore your backup, sign in to Gluware via a terminal session and enter the following command, followed by the fully qualified filename and path to the restore file:

```
sudo glwarectl datarestore
```

**Note:** You cannot restore the databases from a Gluware Disaster Recovery Server to the Gluware Primary Server. To utilize the data in the Disaster Recovery Server, promote the Disaster Recovery Server.

# Promote the Disaster Recovery Server

If the primary Gluware server becomes unresponsive, the Gluware Disaster Recovery Server can be configured as the Gluware Primary Server.

To promote the Disaster Recovery Server to the Gluware Primary Server:

- Sign in to the Disaster Recovery Server as the system administrator and enter  
`sudo glwarectl promoteDRServer`


Once the Disaster Recovery Server has been promoted to the Gluware Primary Server, it cannot be demoted. The former Primary Server can no longer be used.

To preserve infrastructure relationships (firewall, etc.) and support for processes like USB Provisioning,

1. Sign in to the **Gluware Disaster Recovery Server** (now the **Gluware Primary Server**).
2. Change the IP address to match the IP address that was originally used for the **Gluware Primary Server**.
3. If you have **Gluware Zone Engines** running in the same environment, sign in to each **Gluware Zone Engine** as the system administrator and enter  
`sudo glwarectl reconfigure`
4. If you have **Gluware file servers** running in the same environment, sign in to each **file server** as the system administrator and enter  
`sudo glwarectl reconfigure`
5. On the new **Gluware Primary Server**, enter  
`sudo glwarectl reconfigure`  
All existing configurations that existed for the original **Primary Server** VM are preserved.

To re-establish a Disaster Recovery Server, re-install the Gluware VM image and configure it as a Disaster Recovery instance.

## Purge data

1. Go to  **Settings** > **Organization** > **Data Retention**.
2. Ensure you are in the organization you want to purge the data for.
3. Optional: Double-click the **Archive** cell and check the box to create an archive file for the data. If **Archive** is not selected, the data will be purged.
4. Click **Run Now** next to the data you want to purge or click **Run All Now** to purge all the data.

## System reports

When you need to troubleshoot your Gluware system with Gluware Support, sign in to Gluware via a terminal session and enter:

```
sudo gluwarectl report
```

This creates an encrypted, compressed archive file including all the relevant log and configuration files in the folder you run the utility from. Send this report to Gluware Support ([support@gluware.com](mailto:support@gluware.com)) to facilitate troubleshooting.

## Monitor SSH lockouts

A new background service is introduced in Gluware 4.3 that detects brute force login attacks. If an SSH log in for any user fails due to five incorrect password attempts within a 5-minute period, the user's IP address is prevented from making any more login attempts for 5 minutes. Once the 5-minute suspension period has expired, clients from the blocked IP address are once again allowed to make login requests.

You can configure `rsyslog` in `/var/gluware/gluware_chef_attributes.json` to log and monitor lockout notifications. The name of the lockout service is `fail2ban`.

# Upgrade Gluware

We'll notify you of a system version upgrade or an emergency patch when it becomes available. You'll be instructed how to obtain a copy of the upgrade bundle and be provided with release notes describing the impact and detailed instructions for performing the upgrade.

Before installing the upgrade:

- Check that your system continues to meet the minimum requirements for Gluware operation and use.
- Save any unsaved work and close any open software (this doesn't include any of the Gluware services). The Gluware services can remain running and the upgrade process will manage them collectively.
- **IMPORTANT** - Perform a full backup of your system and specific configuration. See "Back up Gluware systems" for guidance.

Perform the steps below for each Gluware server that comprises your infrastructure. The best practice is to upgrade your Gluware servers in the order below; however, once the Gluware Primary Server is upgraded, you can upgrade Gluware Zone Engines and File Servers concurrently.

1. Gluware Primary Server
2. Disaster Recovery Server
3. Gluware Zone Engines
4. Gluware File Servers

To upgrade:

1. Sign in to the Gluware server you are updating via a terminal session using the system administrator local user account credentials. (This is the CentOS user that the system administrator uses to administrate the Gluware system.)
2. Assess the health of the Gluware environment by issuing the `sudo glwarectl showEnvironment` command on the **Gluware Primary Server** or the **Disaster Recovery Server**. The status of each of the servers in your Gluware environment is displayed. If there is

an error or warning for any server, investigate and correct the problem before upgrading by issuing the `sudo glwarectl status` command on the server.

3. Do one of the following:

- Download the upgrade package `glware-control-upgrade-5.2.xxx.tar.gz.enc` and copy it to the Gluware server you are updating. Then issue the `sudo glwarectl upgradePlatform <upgrade-bundle-filename>` command.

**Example:** `sudo glwarectl upgradePlatform glware-control-upgrade-5.2.250.tar.gz.enc`

- Download and upgrade in one operation by specifying the upgrade bundle URL: Issue the `sudo glwarectl upgradePlatform <upgrade-bundle-URL> [bundle-path]` command. By default, the upgrade bundle is placed in `/data/tmp`.

**Example:** `sudo glwarectl upgradePlatform URL/glware-control-upgrade-5.2.250.tar.gz.enc /myDirectory`

4. Check the upgrade results. If errors are reported or you notice errors during the upgrade, consult the upgrade results log file named `Upgrade_<server type>.<datetime>.log`, where `<server type>` is one of the following:

- `Primary` for a Gluware Primary Server
- `DisasterRecovery` for a Gluware Disaster Recovery Server
- `ZoneEngines` for a Gluware Zone Engine
- `MainFileServer` for a main File Server
- `RemoteFileServer` for remote File Servers

5. In your browser, clear cache and cookies using **Ctrl+Shift+R/⌘+Shift+R**.

## Extend a virtual drive

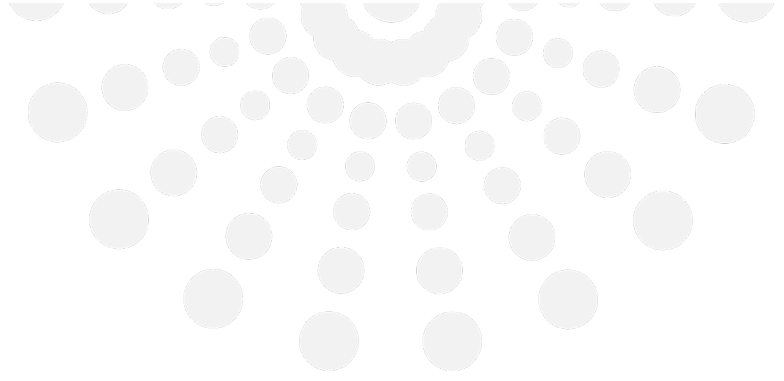
To extend the virtual drive for `/data`:

1. From vCenter, shut down the VM.
2. Remove any snapshots.
3. Increase the size of Hard disk 1.
4. Start the VM.
5. Sign in to the Gluware system via a terminal session using the system administrator local user account credentials.
6. Run `sudo glwarectl reconfigure`.
7. Optional: Depending on your policy, ask the vCenter administrator to take a snapshot of the VM.

**Notes:** `/data` will use the size of hard disk 1 minus 16 GB. Gluware doesn't support multiple drives.







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