Getting Started Workflow

This chapter explains the Getting Started workflow in Cisco Prime LMS. The LMS Getting Started workflow assistant helps you in performing the following tasks:

- Understanding the Procedure for Migrating Data
- Configuring E-mail, Cisco.com and Proxy Settings
- Configuring Multiserver Setup
- Checking Protocol, Security, Backup and Authentication Settings
- Managing Devices and Credentials
- Managing User Roles and Users in LMS
- Updating Software and Device Packages
- Performing Advanced Configurations and Settings

You can carry out these tasks in a sequential manner, using the Getting Started workflow. However, if you want to perform these tasks, independently, at different points in time, you can do so by selecting the required task from the Getting Started assistant pane on the right.

You can do the following from the Getting Started page:

- Configuring LMS Using the Getting Started Wizard
- Viewing LMS Dashboard
- Setting Getting Started as the Default Launch Page
Configuring LMS Using the Getting Started Wizard

The links at the bottom of the Getting Started page helps you to configure LMS using the wizard, or skip the wizard and launch the Device Status dashboard in LMS.

To configure LMS using the Getting Started wizard:

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**Step 1**
Login to Cisco Prime LMS by entering the User name and Password.

The Introduction page of the Getting Started workflow appears, displaying:

- What's New in LMS 4.0 and 4.1, which shows the enhancements, new technologies, and new features supported in LMS 4.0 and 4.1:
  
  LMS 4.1
  - Medianet
  - Smart Interactions
  - Device Profiling
  - IPSLA VO Support

  LMS 4.0
  - Improved Usability
  - EnergyWise
  - Identity
  - Monitoring
  - Auto Smartports
  - Smart Install
  - Report Center
  - Enhanced Troubleshooting Workflows
  - Template Center
  - Local Cisco Prime Authorization Mode

- The option to set Getting Started as the default page for next login (See Setting Getting Started as the Default Launch Page)

- The link to proceed with the step-by-step Getting Started wizard, beginning with Data Migration (See Understanding the Procedure for Migrating Data)

- The link to skip the remaining workflow and proceed to Device Status dashboard (See Device Status Dashboard)

**Step 2**
Proceed to **Data Migration** to view the data migration procedure.

The Data Migration page appears, displaying the steps for migrating data from an earlier version or the same version of LMS.

See **Understanding the Procedure for Migrating Data** for more information.
Step 3 Proceed to **General System Settings** to configure the following:
- E-mail Settings
- Cisco.com Credentials
- Proxy Settings

See Configuring E-mail, Cisco.com and Proxy Settings for more information.

Step 4 Proceed to **Multiserver Configuration** to view the current LMS server mode details. You can change the DCR and Single sign-on (SSO) server modes from this page.

See Configuring Multiserver Setup for more information.

Step 5 Proceed to **Other System Settings** to setup the LMS system.
The System Settings page appears, where you can configure the following:
- RCP and SCP settings
- Browser Server Security Mode setup
- Backup settings
- Authentication Mode settings

See Checking Protocol, Security, Backup and Authentication Settings for more information.

Step 6 Proceed to **Device Allocation Settings** for managing devices automatically and also managing devices using LMS functions.
The Device Allocation Settings page appears, displaying the following for allocating and managing devices:
- Device allocation settings—You can automatically allocate all devices or allocate devices based on policies. If you disable auto allocate all devices, then you must configure policies to allocate devices based on the policies.
- Functions that manage devices—You can select the LMS functions the will manage the devices.

See Managing Devices and Credentials for more information.

Step 7 Proceed to **Device Addition** and add devices to DCR, and to create credential sets and policies. You can:
- Create and manage credentials sets and assign them while adding devices.
- Configure policies based on the credential sets.
- Add devices to DCR using device discovery, add devices manually, or import devices using the bulk import option.

See Managing Devices and Credentials for more information.

Step 8 Proceed to **Manage Roles** to create and manage user roles in LMS. You can add, edit and delete roles for a user. You can assign LMS tasks for user roles.

See Managing Roles for more information.

Step 9 Proceed to **Manage Users** to manage users and their associated roles.
The Manage Users page appears.
You can add, edit and delete users and their associated roles. You can also set the authentication modes for users.

See Managing Users for more information.
Step 10 Proceed to **Software and Device Updates** to schedule and download software and device packages from Cisco.com.

The Software and Device Package page appears, allowing you to do the following:

- View the details of the software and device packages that are currently installed.
- Schedule jobs for downloading software updates and device packages.
- View the details of download jobs for software updates and device packages.

See [Updating Software and Device Packages and Migrating Data](#) for more information.

Step 11 Proceed to **Advanced Configuration**.

The Advanced Configurations page appears.

You can do the following configurations and settings from this page:

- Monitoring configurations—Select the Link Port groups or All Devices group and monitor the inter-link switches automatically.
- Configuration management—Deploy and manage configurations using Template Center.
- Identity configuration—Use the management functions, provided by LMS, that simplify and automate the Identity management lifecycle.
- EnergyWise configuration—Use the management functions, provided by LMS, that simplify and automate the energy management lifecycle of network infrastructure, and of devices attached to the network.
- Fault management—Manage faults by adjusting polling parameters.
- Collection settings—View and administer collection settings.
- User Role management—Manage Users and User Roles by assigning privileges to the users. User authorization is based on these privileges.
- Group administration—Create, manage, view, and delete device groups.

See [Performing Advanced Configurations and Settings](#) for more information.

Step 12 Click **Apply** to complete the Getting Started workflow in LMS.

The Device Status dashboard page appears, displaying the portlets.

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### Viewing LMS Dashboard

Dashboards provide you with a quick snapshot of specific functions in LMS. See [Dashboards in LMS](#) for more information.

### Setting Getting Started as the Default Launch Page

You can set the Getting Started page as the default page to appear whenever you login to LMS by unselecting the check box **Do not show Getting Started wizard at next login** in the Getting Started Introduction page. This option is selected by default.