



CHAPTER 8

Platform Manager Configuration

Platform Manager, which is a web-based application in Cisco HCM-F administrative interface, serves as an upgrade management client for Cisco Unified Presence, Cisco Unified Communications Manager, and Cisco Unity Connection. It allows users to configure the system server inventory as well as select, schedule, and monitor upgrade, switch-version or restart tasks of one or more servers across one or more clusters. You can also create groups of servers to help manage multiple clients and applications.

This chapter contains information on the following topics:

- [Configuration Checklist for Platform Manager, page 8-1](#)
- [How Platform Manager Assists in Upgrade and Application Task Management, page 8-3](#)
- [Limitations and Restrictions, page 8-3](#)
- [Best Practices, page 8-5](#)
- [Configuring Servers, page 8-6](#)
- [Configuring Server Groups, page 8-8](#)
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- [SDR Synchronization, page 8-10](#)
- [Unified Communications \(UC\) Applications Synchronization, page 8-10](#)
- [Tasks, page 8-11](#)
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Configuration Checklist for Platform Manager

Table 8-1 Configuration Checklist for Platform Manager

	Tasks	For More Information
Step 1	If you have not already done so, install the Cisco HCM-F platform, which installs Platform Manager.	Installation of Cisco HCM-F, page 2-1
Step 2	If you used Platform Manager in Cisco HCS 8.6(1), perform migration tasks.	<i>Upgrading the Components for Cisco Hosted Collaboration Solutions (HCS) 8.6(2)ES1</i>

Table 8-1 Configuration Checklist for Platform Manager

	Tasks	For More Information
Step 3	<p>If you have not already done so, activate Platform Manager through the CLI on the Cisco HCM-F platform. To activate Platform Manager, enter utils service activate <name of service> through the CLI on the Cisco HCM-F platform.</p> <p>If you have not already done so, enter utils services list through the CLI on the Cisco HCM-F platform to verify that the following services are running:</p> <ul style="list-style-type: none"> • Cisco Platform Manager service • Cisco CDM Database • Cisco Tomcat 	Command Line Interface for Cisco HCM-F, page 10-1
Step 4	If you have not already done so, activate the Platform SOAP Services or Platform Administrative Web Service on any of the Cisco Unified Presence, Cisco Unified Communications Manager, or Cisco Unity Connection servers you want Platform Manager to access. This can be done by CLI or the application interface. For more information on activating this service, review the documentation for the specific application.	Refer to the component documentation for information on how to activate this service.
Step 5	<p>Configure servers. Select Inventory > Servers then select Add Server to populate Platform Manager.</p> <p>Note You can add servers either by importing them, using SDR sync or entering each server individually. For more information see “SDR Synchronization” section on page 8-10 and “Import Servers” section on page 8-7.</p>	Configuring Servers, page 8-6
Step 6	<p>Configure server groups. Add the servers you want to maintain into your Platform Manager before creating server groups.</p> <p>Select Inventory > Server Groups, then Add Server Group to populate Platform Manager.</p>	Configuring Server Groups, page 8-8
Step 7	Configure file server. Select Inventory > File Servers , then Add File Server to populate Platform Manager.	Configuring File Servers, page 8-9
Step 8	Create tasks. Select the appropriate task you want to create and enter the appropriate details.	Tasks, page 8-11

How Platform Manager Assists in Upgrade and Application Task Management

This section describes how Platform Manager assists in the upgrade and management of your Cisco Unified Presence, Cisco Unified Communications Manager, and Cisco Unity Connection products. This section assumes that you have configured the system, as described in the [“Configuration Checklist for Platform Manager”](#) section on page 8-1.

How Platform Manager Works

Platform Manager is the catalyst for upgrade procedures and other tasks. It allows you to streamline all of your upgrade, install and restart activities but does not replace any existing processes you have in place. Prepare to perform your usual installation and upgrade procedures and use Platform Manager to execute those tasks from one central location.

Platform Manager organizes servers into server groups. All of the servers in a server group can be upgraded, switched, and restarted at the same time. Server groups are user defined and consist of servers from multiple clusters. All of the servers in a particular group, however, must have the same product. For example, users cannot mix Cisco Unified Communications Manager and other Unified Communication nodes in the same server group.

**Note**

You must create servers groups to successfully execute a task. A server group can have one or more servers. If you have an instance where you want to create a task for only one server, create a server group and include only that server.

Limitations and Restrictions

The following list describes the current limitations for Platform Manager.

- Platform Manager is not a diagnostic tool. An error message does appear on the task list page if a task fails; however, you should use your usual set of tools and procedures to diagnose and correct the problem.
- The SOAP services do not replace the existing OS Administration and CLI upgrade processes. You can still upgrade your servers using the application GUIs, or CLI commands. Platform Manager is just another way to upgrade, restart, or switch versions on the application servers.

Classifying Servers by Functionality

Platform Manager offers a wide range of different user-defined servers types to accommodate the management of potentially thousands of servers. You can tag servers with one or more roles such as publisher, subscriber, TFTP, music on hold, secondary TFTP, secondary music on hold to help classify the different servers in your system. You can then tag your servers with one or more server roles for easier identification. Server roles allow you to classify each server in your Platform Manager, making your task creation and viewing more efficient.

Server roles include:

- Call Processing

- Backup Call Processing
- Music on Hold
- TFTP
- Backup TFTP
- Primary Presence
- Secondary Presence
- Primary Voicemail
- Secondary Voicemail

**Note**

Server roles are labels to help users identify a server. Setting a server role does not activate any services. Mislabeling a server does not cause any service outages.

For configuration information on servers, see the [“Configuring Servers” section on page 8-6](#).

Using Server Groups

Server groups allow you to logically join together different servers that you want to perform tasks on as a group. You have the flexibility to group servers to accommodate the varied requests for installation, upgrades and restart tasks.

**Note**

A task is applied to all servers under the same server group. If you do not want to lose a service, do not put your Active Call Control server in the same server group as its backup when you run a switch version or reboot task.

Server groups allow you to logically combine various servers; for example, you can create server groups for the following areas:

- Server Group by Role - Create call processing server groups and a backup processing server group.
- Server Group by Product - Create product A and product B groups.
- Server Group by Customer and Product - Create customer A-product A and customer A-product B groups.

**Note**

You can have as many servers as you like in a group; however, all servers must be of the same product type. A server can be a member of more than one group.

Limitation in Server Groups

The following limitations apply when you create server groups:

- You cannot have multiple products in the same server group. For example, if you have a customer that has a Cisco Unified Communications Manager and a Cisco Unified Presence, you need to create two groups for this customer.
- You cannot have publisher servers in the same group as subscriber servers if you want to run upgrade or switch version tasks on the group. For example, if you want to upgrade all of a customer’s services, you need to create at least two groups: a publisher server group and at least one subscriber

server group to execute the task on the publisher servers before the subscriber servers. This does not apply to restart server tasks. Publishers and subscribers can be in the same group if that group is used for restart server task.

Why Create Tasks

Tasks are the main function of Platform Manager. After you have configured all of your servers and server groups within Platform Manager, you can create a variety of tasks that help you streamline any upgrade, switch version, or restart process. These tasks also help you to sequence various actions based on specific options you select.

For example, you may want your publisher servers to upgrade before your subscriber servers within a certain application group. Or you may want a specific group to upgrade before any other group. The create tasks pages can help you with this. For more specific information on tasks see the [“Tasks” section on page 8-11](#).

Filtering Your Data

Platform Manager has a powerful filtering capabilities to allow you to view specific information. The following pages have filter options available:

- Servers
- Server Groups
- File Servers
- Task List

Table 8-2 **Filtering Your Data in Platform Manager**

Field	Description
Quick Filter	View the data by any column on the page. For example, if you want to only see a specific customer servers, you can filter on a customer name. If you want to see all of your Unified CM servers, you can filter on product and only your Unified CM servers appear.
Advanced Filter	View data by multiple columns and multiple terms in the same column. For example, perhaps you want to see all the Unified CM and Cisco Unified Presence server groups for customer A and customer B. Add all of the details in the search boxes and your results appear.
Set Default Filter	Set a default view for your content. For example, you may want the Quick Filter screen to be the default view on the servers page to it does not have to load all of servers every time to you go the page.

Best Practices

The following are recommendations for configuring your systems as suggested by Cisco development and testing teams.

- Use the “[SDR Synchronization](#)” section on page 8-10 or the “[Import Servers](#)” section on page 8-7 functionality to populate the servers in your system if possible.
- Use your standard pre- and post- upgrading procedures when performing this action. Platform Manager simplifies this process for you.
- Create groups with multiple servers that you perform similar tasks on.
- When you name groups, keep the terminology simple and use easy-to-recognize names.
- Use the sequencing feature in a task when you want a second group of servers to wait until the first group is done before performing that task.

Configuring Servers

Use the Server page to add, edit, delete, and manage servers.

**Note**

Use the Quick View button to the right of the IP address to see detailed server information.

Add a Server

To add a server, complete the following steps.

Step 1 Click the **Add Server** button.

Step 2 In the **Add Server** window complete the following fields:

- a. In the **Hostname/IP Address** field enter a valid hostname or IP address for the server that you want to add.
- b. Enter the current OS Admin username defined on the server in the **OS Admin Username** field.

**Note**

The username must be no more than 50 characters and begin with an alphanumeric character.

- c. Enter the current OS Admin password defined on the server in the **OS Admin Password** field.

**Note**

The password must be between 4 and 32 characters.

- d. Click **Next**.
- e. Enter a description of the customer for the server in the **Customer** field.
- f. If a publisher field appears, choose the FQDN of the first node for this server. If your Cisco Unified Communications Manager is version 8.6(2)ES1 or higher, this field is be auto-populated.
- g. Check the role that will be associated with the server from the **Server Roles** checklist.

**Note**

Server roles are labels to help users identify a server. Setting a server role does not activate any services. Mislabeling a server with not cause any service outages.

Step 3 Click **Save**.

Import Servers

Use the Import Servers feature located in **Administration > Import Servers** to import multiple servers from a .csv file. Each line of an import file defines a single Unified Communications server with six comma separated values: IP address, OS Administrator username, OS Administrator password, Customer name, server roles and FQDN of the first node. For 8.6(2)ES1 servers, you do not need to add FQDN of the first node.

To upload the .csv import file:

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- Step 1** SFTP to the Platform Manager server using the adminstftp account and the OS Administration password with any SFTP client.
- Step 2** Change directories to the import directory, and upload the import file.
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To import the servers:

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- Step 1** Follow the steps in the [“To upload the .csv import file:” section on page 8-7](#).
- Step 2** Select the import file that you uploaded from the **Import File** drop-down list box.
- Step 3** Check the **Overwrite a server if it already exists** check box if you want to overwrite existing server information that is in the import file.
- Step 4** Click **Start Import**.
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Note

Import files must be uploaded to the /common/adminstftp/import directory using SFTP before they can be imported. An import file will be removed automatically after it has been imported.

Manage Servers

You can perform a variety of actions on the Server page including filter, view, delete, and edit.

Use the **Show** drop-down or **Filter** button to filter the server display. You can view content using **Quick Filter**, **Advanced Filter**, or **All** selection from the drop-down list box. The **Set Default Filter** button defines what the Show menu will be when you load the page.

An Action column appears on the page for each server. [Table 8-3 on page 8-8](#) lists the options available in this column:

Table 8-3 *Actions on the Server Page*

Action	Detail
Delete	Click Delete delete a single server. Delete multiple servers by checking the check box next to each server that you want to delete and click the Delete button.
Edit	Click Edit to edit a server.

Configuring Server Groups

Use the Server Groups page to add, delete, and manage server groups.

Add a Server Group

To add a server group, complete the following steps.

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- Step 1** Click the **Add Server Group** button.
- Step 2** In the **Add Server Group** window complete the following fields:
- In the **Server Group Details** section, enter a name for the group and select a product type from the drop-down list. When you select a product type, only servers with the specified type are available to be added to the group.
 - In the **Add Servers to the Group** section, check the check box next to the available servers that you want to include in the group and click the right arrow to select the servers.
- Step 3** Click **Save**.
-

Manage Server Groups

You can perform a variety of actions on the Server Group page including filter, view, delete, and edit.

Use the **Show** drop-down or **Filter** button to filter the server display. You can view content using **Quick Filter**, **Advanced Filter**, or **All** selection from the drop-down list box. The **Set Default Filter** button defines what the Show menu will be when you load the page.

An Action column appears on the page for each server group. [Table 8-4 on page 8-9](#) lists the options available in the this column:

Table 8-4 *Actions on the Server Groups Page*

Action	Detail
View	Click View under the Actions column to view details about a specific server group.
Delete	Click Delete to delete a single server group. Delete multiple server groups by checking the check box next to each server group that you want to delete and click the Delete button.
Edit	Click Edit to edit a server group.

Configuring File Servers

Use the File Servers page to add, edit, delete, and manage FTP/SFTP file servers.

Add a File Server

To add a file server, complete the following steps.

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- Step 1** Click **Add File Server** button.
- Step 2** Enter the following information in the **Add File Server** window:
- a. Enter the file server name in the **File Server** field.



Note The file server ID must contain no special characters. It may contain spaces, hyphens and underscores.

- b. Enter the hostname or IP address of the new file server in the **Hostname/IP Address** field.
- c. Enter the path to the files on the file server in the **Directory** field.
- d. Enter the **Username** and **Password** required to access the file server.
- e. Select either **SFTP** or **FTP** server type.



Note You can use the **Show Files** button to view all of the files in the specified directory.

- Step 3** Click **Save**.
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Manage File Servers

You can perform a variety of actions on the server group page including filter, view, delete, and edit.

Use the **Show** drop-down or **Filter** button to filter the server display. You can view content using **Quick Filter**, **Advanced Filter**, or **All** selection from the drop-down list box. The **Set Default Filter** button defines what the Show menu will be when you load the page.

An Action column appears on the page for each server group. [Table 8-5 on page 8-10](#) lists the options available in the this column:

Table 8-5 **Actions on File Servers Page**

Action	Detail
View	Click View under the Actions column to view details about a specific file server.
Delete	Click Delete to delete a single file server. Delete multiple file servers by checking the check box next to each file server that you want to delete and click the Delete button.
Show Files	Click to view all of the files. You can also browse a file server by checking the check box next to the file server in the list display and clicking the Show option.
Edit	Click Edit to edit a file server.

SDR Synchronization

Use SDR Synchronization to update server inventory information with Unified Communications Application data stored in your Shared Data Repository (SDR). This is the best way to populate your Platform Manager server inventory with the servers from the SDR database. Server information such as hostname, customer, and OS admin credentials are synched through the Shared Data Repository. Synchronize with the Shared Data Repository by clicking the **Sync Now** button. To schedule recurring syncs, indicate a start time and a frequency and click **Save**. The lower half of the screen shows the result of the latest Shared Data Repository synchronization.



Note

In order to sync information from your application to your Platform Manager, you must have a PLATFORM Credential set up either using Default Credential or set in the individual virtual machine.

Unified Communications (UC) Applications Synchronization

Use the UC Applications Synchronization page to keep Platform Manager up to date with OS changes such as active version and installed options made on the UC applications in the server inventory. Synchronize data for all servers immediately by clicking the **Sync Now** button. To schedule recurring syncs, indicate a start time and frequency and click **Save**. The lower half of the page shows the result of the latest server synchronization.

Tasks

Tasks are used to upgrade, switch versions, or restart groups of servers. You can create various tasks to perform on server groups in your Platform Manager. The following sections describes how to create various tasks.

- [Create A New Install/Upgrade Task, page 8-11](#)
- [Create a Switch Version Task, page 8-12](#)
- [Create a Restart System Task, page 8-12](#)

Create A New Install/Upgrade Task

Use the Upgrade Install Wizard to create and manage installation and upgrade tasks.



Tip

Server groups containing both publisher and subscriber servers cannot be used for upgrade tasks.

Create a new installation or upgrade task to automatically run on one or more server groups at scheduled times.

- Step 1** Enter a task name and click **Next**.
- Step 2** Select one or more of server groups from the list of available groups in the left pane and click the arrow buttons to move them to the **Selected Server Groups** list.
- Step 3** Click **Next**.
- Step 4** Select a file server from the drop-down list and click the **Show Files** button. **Hostname**, **Directory**, **Type** and **User Name** populate automatically.



Note

The upgrade wizard only shows files that are valid for every server added to the task.

- Step 5** Click the **Show Files** button to retrieve a list of patches or COP files that can be used to upgrade.
- Step 6** Select the valid file that you want to apply to your server group upgrade and click **Next**.
- Step 7** Check the **Automatically switch to the new version after a successful upgrade** check box if you want to automatically switch to the upgraded partition
- Step 8** Use the **Sequence the Server Groups** section to set the date, time and sequence for the upgrade tasks to be executed on the servers. Each server group can start at a specific time or after another server group.
- Step 9** Click **Next**.



Note

If you are performing a refresh upgrade, do not select the **Automatically switch to the new version** option.

- Step 10** Use the **Review and Schedule the Task** section to verify the details of the task you created.
- Step 11** Click **Finish** to schedule the task.

**Note**

If you are performing a refresh upgrade, do not click the **Reboot** button while the task is running.

Create a Switch Version Task

Use the Switch Version Task Wizard to create and manage switch version tasks.

Create a switch version task to automatically switch one or more server groups to the upgraded version at scheduled times.

-
- Step 1** Enter a name for the task in the **Task Name** box and click **Next**.
 - Step 2** Select one or more of server groups from the list of available groups in the left pane and click the arrow buttons to move them to the **Selected Server Groups** list.
 - Step 3** Click **Next**.
 - Step 4** Select the installed version that you want to switch to by selecting the radio button for either **Inactive Version** or **Specific Version**. If you select **Specific Version** you must specify a build number. If the inactive version installed does not match the build number specified, the switch will not occur.
 - Step 5** Click **Next**.
 - Step 6** Use the **Sequence the Server Groups** section to set the date, time and sequence for the switch version tasks to be executed on the servers. Each server group can start at a specific time or after another server group.
 - Step 7** Click **Next**.
 - Step 8** Use the **Review and Schedule the Task** section to verify the details of the task you created.
 - Step 9** Click **Finish** to schedule the task.
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Create a Restart System Task

Use the Restart System Task Wizard to create and manage restart system tasks.

Create a restart system task to automatically restart one or more server groups to at scheduled times.

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- Step 1** Enter a name for the task in the **Task Name** box and click **Next**.
 - Step 2** Select one or more of server groups from the list of available groups in the left pane and click the arrow buttons to move them to the **Selected Server Groups** list.
 - Step 3** Click **Next**.
 - Step 4** Use the **Sequence the Server Groups** section to set the date, time and sequence for the switch version tasks to be executed on the servers. Each server group can start at a specific time or after another server group.
 - Step 5** Click **Next**.
 - Step 6** Use the **Review and Schedule the Task** section to verify the details of the task you created.

Step 7 Click **Finish** to schedule the task.

Task List

The Tasks window displays a list of tasks created with the following wizards:

- Upgrade/Install Task Wizard
- Switch Version Task Wizard
- Restart System Task Wizard

Task status also appears on this page. Tasks can be in the following states:

Table 8-6 Task Status

Status	Description
Scheduled	The task is scheduled for the future.
Started	The task is started.
Successful	The task was successful.
Failed	The task failed.
Cancelled	The task was cancelled.
Cancelling	The task is in the process of being cancelled.
Failed to Cancel	The task did not cancel.
Failed to Schedule	The task did not get scheduled.

You can perform a variety of actions on the task list page including filter, view, cancel and delete.

Use the **Show** drop-down or **Filter** button to filter the server display. You can view content using **Quick Filter**, **Advanced Filter**, **History**, or **All** selection from the drop-down list box. The **Set Default Filter** button defines what the Show menu will be when you load the page.

An Action column appears on the task list page. [Table 8-7 on page 8-13](#) lists the options available in the this column:

Table 8-7 Actions on Task List Page


Action	Detail
View	Click View under the Actions column to view details about a specific task.
Cancel	Click Cancel to stop a task from running.
	 <p>Note This action is only available for tasks that have not been run.</p>

Table 8-7 **Actions on Task List Page**

Action	Detail
Delete	Click Delete to delete a task. Delete tasks by checking the check box next to each task that you want to delete; then, click the Delete button. You can only delete tasks that are completed or canceled.
History	Click History to view a list of activities that have occurred for a task.

Generate Reports

Use the Generate Reports feature to generate reports that detail the current state of the server inventory.

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- Step 1** Enter a unique name for your report in the **Report File** field.
- Step 2** Click the **Generate Report** button. Reports are created on the server in the /common/adminsftp/log directory.
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To download a report:

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- Step 1** SFTP to the Platform Manager server using the **adminsftp** account and the **OS Administration password** with any SFTP client.
- Step 2** Navigate to the log directory, and download the report.
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Related Topics

- [Introduction to Cisco Hosted Collaboration Mediation Fulfillment, page 1-1](#)
- [The Cisco HCM-F Administrative Interface, page 5-1](#)
- [Command Line Interface for Cisco HCM-F, page 10-1](#)