Crystal Point

OutsideView

System Administrators Guide

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System Administrators Guide

This guide is intended to help System Administrators deploy and administer OutsideView at their organization. For assistance on configuring and using OutsideView, please refer to the OutsideView Users Guide. For assistance creating or editing macros, please refer to the Visual CommBASIC Reference.

Deployment

OutsideView may be installed in either Desktop or Enterprise mode. If you are deploying OutsideView to several networked computers, an Enterprise mode installation will deliver features which greatly simplify deployment and client administration. A Desktop installation should be used only when installing to a few workstations or the workstations do not have network access.

❖ For installation instructions to standalone workstations click here.

❖ For instructions on deployment to multiple networked workstations, click here.

Administration:

For instructions on administration of user configurations, click here.

For instructions on license management, click here.

Installation

System Requirements

Operating Systems:

Windows 98, Windows NT (SP4), Windows ME, Windows 2000, Windows XP, Windows Server 2003

Hardware Requirements:

Workstation:

- 486 or greater processor

- At least 4 MB RAM

- CDROM Drive (Not required for Enterprise installations)

- TCP/IP, IPX/SPX, Multilan (NetBIOS) or serial connectivity

- 12 MB available disc space

  Server (Enterprise License, Media and Profile Shares)

- Microsoft NT Server 4.0 ,   Windows Server2000, Windows Server 2003

- Available disc space 30 MB

Desktop Installation

Note: This procedure is used for installing OutsideView CD onto a standalone PC. If you are installing OutsideView onto several networked workstations, you should perform an Enterprise installation.

To install OutsideView Desktop:

- Use Control Panel to uninstall any prior versions of OutsideView

- If the installation process does not auto-start after inserting the CDROM, launch Setup.exe from the root folder of the OutsideView CD.

- Click the button labeled "Desktop Installation" to begin the installation. The Installer will launch the desktop installation process.

- Proceed through installation by reading and following the instructions on each screen. Once you have completed a screen, click Next to go to the next screen.

  - Make sure you read and accept the terms in the End-User License Agreement (EULA) by clicking "Yes".

  - New features are described in the Release.txt file displayed

- The installation process will prompt you for a Serial Number and License Key. These numbers may be found on the CD packaging. Serial numbers and keys are in hexadecimal format (0 – 9 and a – f). If the characters "0" or "1" are present, they are either a zero (0) or a one (1). Serial number keys are case-sensitive.

  - The Typical installation works for nearly all users - it installs all components.

  - Select Compact only if you are using a PC with extremely limited hard drive space

  - Select Custom only if you are an experienced OutsideView user and know exactly which components you need to install and which you want to omit.

- After collecting all the necessary information, a progress indicator will appear and the program files will be installed.

- When installation is complete, click "Finish".

- Restarting your PC after installation is very rarely required. If a restart is necessary, a notice will appear on your screen.

Guardian File System Navigation

This topic applies only to Tandem hosts and requires a NonStop Kernel environment of D20 or later.

OutsideView's IXF and FTP transfer facilities allow graphical navigation of the NonStop Guardian file system. For details, see the FTP dialog mode. In order to offer users this functionality on

NonStop hosts, however, you must prepare one of two means for providing this directory information to OutsideView: either host hint files or the supplied scanning utility.

If these navigation-enabling options are not provided, users must specify exact system.volume.subvolume.file entries when transferring files. Depending on the technical level of your users or security concerns, you may not need to offer host navigation services.

Hint Files

Hint files apply to FTP, and optionally to IXF. (For IXF, the preferred method is the Host Scanning Utility, detailed in the next section.) Hint files are static snapshots of the Tandem's directory and file structure. OutsideView uses the hint files for navigating host directories and displaying available files.

To Use FTPHINTS and Create the Host Hint Files

1. Run OutsideView and establish a session to the desired host. You must be logged in and at the system or TACL prompt. Your logged-in user ID must also have super.xx or supervisor rights in order to create the necessary hint files.

2. Run FTPHINTS from the Util directory on the installation CD.

FTPHINTS uses the session to issue commands that create the necessary hint files. When users connect to the host and attempt IXF or FTP file transfers, those facilities in OutsideView access the hint files to allow graphical host navigation for both upload and download purposes. FTP transfers require hint files to offer this navigation; IXF transfers will use hint files if the host scanning utility (detailed below) is not detected.

About the Hint Files

The hint files (SYSMAP, DRVMAP, DIRMAP) are a snapshot of the host file system. If your file system changes (new and deleted volumes, etc.), you need to run FTPHINTS again to update the hint files. As a general rule when using hint files, you should run FTPHINTS frequently to make sure you keep the hint files current with the host's actual file system.

If SYSMAP, DIRMAP, and/or DRVMAP are missing from host, the behavior of the FTP client will change. Even without these files, the dialog box-based FTP will still work, but the user will be warned that a file is missing. This warning will appear in the Status message box and indicates that FTPHINTS, located in the Util directory on the installation CD, should be run.

❖ If DRVMAP is missing, the Folders box in the FTP dialog box will be empty.

❖ If DIRMAP is missing, the FTP client issues a LIST command to the host, which may take longer to complete than expected (it is a slower procedure than parsing the DIRMAP).

❖ If SYSMAP is missing, the Volumes and Folders dialog boxes will become disabled. However, the list of files should appear. When these dialog boxes are disabled, the user cannot browse to the desired files and must manually enter the desired path. If the user wishes to change both volume and subvolume, they must be done in two separate steps: volume, then subvolume. Typing in a new volume and subvolume at the same time will result in the subvolume information being ignored.

For more technical information on and for mapping limitations of this macro, see the topic on FTPHINTS Macro Details.

Host Scanning Utility

The host scanning utility applies only to IXF transfers. This utility, because it runs each time the IXF transfer facility is invoked, provides a dynamic view of the Tandem's volume and file structure. OutsideView uses the information supplied by the host scanning utility for navigating host volumes and displaying available files. The host scanning utility OVFSCAN is provided for your convenience, and is found in the UTIL directory on the CD.

Once you have installed OutsideView and OVFSCAN, the procedure for uploading it to your Tandem host and enabling it for execution is:

1. Run OutsideView and establish a session to the desired host. You must be logged in and at the TACL prompt.

2. Select Session: Transmit File from the menu. In the Local Files list, click OVFSCAN. The file name automatically appears in the Host Filename field. Enable the Binary option. If you are not already in the system area, enter the host system in the Host Target Directory field. (For example, if your host uses the default system area, the Target Directory field should show "$SYSTEM.SYSTEM.")

3. Set any other required options, then click OK. The utility is uploaded to the specified system area.

4. Once uploaded, you must enable OVFSCAN as an executable file. Make sure you are in the system area, and then type the command: FUP ALTER OVFSCAN,CODE 100

   Notes

❖ When users connect to the host and attempt IXF file transfers, OutsideView uses OVFSCAN to allow graphical host navigation for both upload and download purposes.

❖ OVFSCAN requires a Tandem NonStop Kernel environment of D20 or later.

Enterprise Installation

Enterprise Overview

An Enterprise installation should be used whenever OutsideView is to be installed to several networked workstations. With an Enterprise installation, you will be able to:

♦ Reduce your administration costs by automatically installing and updating OutsideView Enterprise software across your organization from centralized network locations.

♦ Simplify user training and support by defining and administering user configurations and privileges from anywhere on the network.

♦ Monitor application usage and ensure license compliance with license administration tools.

Note: An Enterprise installation requires a different type of license than a Desktop installation. Enterprise licenses begin with the characters "NLPC" and contain a fixed number of per-seat or concurrent licenses.

The administrative features available in an Enterprise installation are determined by the process used for its installation. To create an installation which best suits the needs of your users, the following issues should be considered:

♦ Is your user community composed of groups with differing host access requirements?

♦ What capabilities to create or modify local connectivity parameters should users be allowed?

♦ Will the various business units at your organization acquire OutsideView licenses independently or is there a need to track usage by each user group?

♦ Is there a risk of unauthorized modification of Enterprise (shared by members of a user group) connectivity files?

Installation Process

The process for creating an OutsideView Enterprise installation consists of three basic steps:

♦ Creation of at least one network share point which is accessible by all OutsideView users

♦ Using the Enterprise setup application to populate the Media, Profile and License folders at the network share point(s). The Media folder contains an image of the CDROM installation files, the Profile folder contains the installation shortcut and configuration files for a group of OutsideView users, and the License folder contains one or more pools of OutsideView licenses.

♦ Installation of OutsideView at client workstations through execution of the silent install shortcut

Click here for a step-by-step guide through that process.

Automatic Updating

Enterprise installation also provides the convenience of automatic updates.

Each time a user launches OutsideView, the program checks the local files against those contained in the network Media and Profile shares. If the Profile share files have been changed through Supervisor Mode, the new files are automatically downloaded to the client workstation. If the Media share has been updated with a new version, all members of the Profile can be automatically and silently updated to that new version. For cases where the user may be on a low-bandwidth connection, an option in the User Privileges definition will allow the user to postpone the update. For instructions on updating the Media share, click here.

The contents of the default OutsideView Profile folders (Upload/Download/Components/Param/Macro) are also automatically updated. However, if you have created subfolders within these default folders, the subfolders will not automatically copy down to the local machines.

Create Network Shares

Enterprise installation requires creation of at least one shared folder (for instance, OVEnt) on a Windows NT, 2000 or 2003 server. If a single shared folder is created, the installation will create Media, Profile and License subfolders beneath that share. Client workstations must have read/change permissions to the license database. Since with NT security all subfolders of a share inherit the access rights of the top level share, all users must be given at least read/charge access to the shared folder. Using a single share point will, therefore, create an installation in which all users have read/change access to all shared configuration parameters. Most customers prefer this simpler installation method, but some customers choose to create an installation where access rights are more restricted.

To create a more secure installation, separate folders for the Media, Profile and License files may be created and shared with the following properties:

Folder	Suggested Name	Access
Media	OVMedia	Users: Read Only Administrators: Full Control
Profile	Descriptive of user group (e.g. DataENt or SysAdmin)	Users: Read Only Administrators: Full Control
License	OVLics	Users: Read/Change Administrators: Full Control

NOTE: If there is a possibility for multiple License Pools (this should apply to multiple profiles only), it is necessary to create each License share individually (e.g., DataLics, SysLics etc.). The same permissions are required for all the individual License shares. Multiple license pools may also be created within subfolders of a top-level share (e.g. OVLicPools\DataLics and OVLicPools\SysLics).

The next step is to Populate the Shares

Populate Share(s)

1. Launch Setup.exe from the root folder of the OutsideView CDROM.

2. Click the button labeled "Enterprise Installation" to begin setting up your Enterprise Installation.

3. Read and accept the terms in the End-User License Agreement (EULA) by clicking "Yes".

   NOTE: You will be reminded that you have to create at least one share to hold the OutsideView installation. To view information on definition of these shares and their access permissions, click on the button with the shared folder graphic. If you do not know how to create a share, you may now view the demonstration we have provided by clicking on the button with the video camera graphic.

4. Once the necessary share or shares have been created, click "Next". The Installer will launch the server installation process.
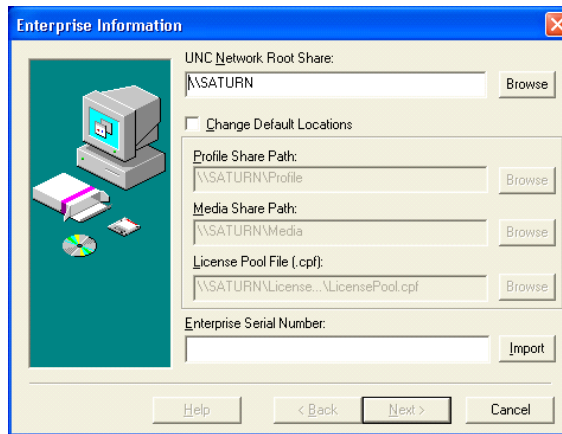
The Enterprise Information Screen appears. In this step, you're specifying where all the server-side components should be installed.

5. If you created one top-level network share, enter the UNC path or browse to that share. OutsideView will automatically create the directories it needs within that share. If you are creating a more secure installation with three (or more) shares, checking the "Change Default Locations" checkbox will allow you to specify the location/name of each share individually.

   CAUTION: It is essential that the share location be specified in UNC format. If the share is located on the local machine, however, the path may be returned in mapped drive format, such as D:\folder\subfolder\OV. In that case, type in the UNC path, such as \\servername\OV.

6. If you have an NLPC License Code, enter in the entire number at the bottom of the dialog where it says "NLPC-". Pay attention to the case, NLPC numbers are case-sensitive. If you received a License File, click the "Import" button. The Installer will prompt you to browse for your License File (.lic). The Installer will automatically extract the correct NLPC License Code from the License File.

   Once you've entered your share(s) and entered/imported the correct License Code, the "Next" button will be enabled.

7. Click "Next" to proceed.

   The next phase defines what components will be installed to client workstations as well as the installation location. OutsideView is **not** being installed during this phase.

   During this "virtual" installation, the choices you make are recorded to create a Silent Install script, also known as a response file.

   NOTE: No licenses will be consumed during this "virtual" installation.

   The full-screen install process launches as if you were actually performing an installation on a workstation.

8. Make sure you read the Release Notes for important information not contained elsewhere in the documentation.

9. You will be prompted to enter in a Profile Descriptive Name: enter in a name that will help you remember which user group this Profile is for. If you're not creating multiple profiles, just use the default name "Standard". If you are using multiple profiles, use a name descriptive of the group (e.g., "DataEnt"). Follow these instructions to create your first User Profile.
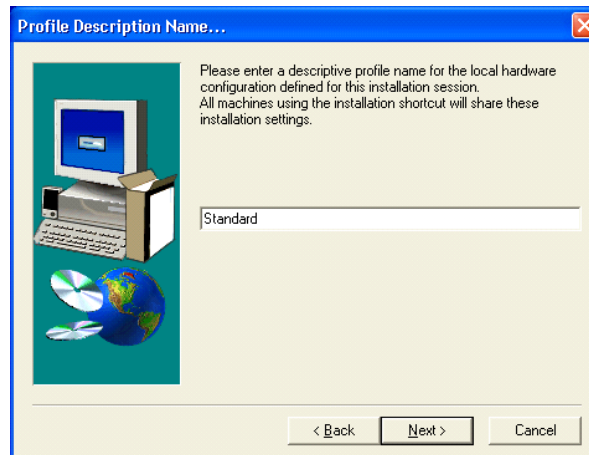
10. Select the type of installation to perform:

Typical	The default installation, installs all OutsideView components and Help files. This is the preferred way of installation.
Custom	The only condition under which you would use a custom installation is if disk space is at a premium and you know for sure that no profile will EVER use the components that were restricted during the installation. NOTE: If you restrict installation of certain components, be sure to completely uninstall any previous versions of OutsideView before running the custom install on that user PC. (The custom install will not copy down unselected components – neither will it remove them if they already exist on the client.)
Compact	This is not a preferred way of installation; choose it only if user's PCs have extremely limited hard drive space.

11. Select the desired Program Folder.

You have finished recording this User Profile's installation information.

12. Click "Finish". Be patient - this step may take a few moments as the Installer will now:

❖ Automatically copy an image of the installation files to the location you defined for the Media share.

❖ Create a License Pool in the folder you defined for the License share and fill your License Pool with licenses from the License File.

❖ Create a Profile directory containing the profile you just finished configuring.

13. When the Installer has finished, leave "Display installation icons" checked and click "Finish". The Installation Icons [three shortcuts and two configuration (.dat and .iss) files] will appear in their own window (the Profile Install window).

Prior to actually installing OutsideView to your end users, you may wish to define the OutsideView configuration files (e.g. sessions, workspaces and macros) or user privileges to be applied to all members of a Profile. For the instructions on this task, see the Supervisor Mode topic.

Definition of Profile settings may also be performed after client installation.

❖ For instructions to install to end-user workstations, click here.

❖ For instructions to install to a WTS/Citrix application server, click here.

Client Installation

These instructions are for installation onto end-user workstations. For the instructions to install onto a WTS/Citrix application server, click here.

NOTE: In Windows 2000 networks, administrative privileges are required to install the client-side product, even via the Silent Install script.

To install OutsideView onto their workstation, client users will simply run the Silent Install shortcut located in the "Install" subfolder of their profile. As the name implies, no user intervention (e.g. entry of license information) is required to create this installation. When OutsideView is launched for the first time on a client PC, it will 'check out' a license from the License Pool defined for the user's profile. If this is a static, or per-seat license, the client will retain that license until it is manually recovered via the LicenseView utility. If the license is a concurrent license, it will be released each time the client properly exits the OutsideView application.

Creating Multiple Profiles

A user Profile defines the installation script, user configuration files, user privileges and license pool used by a group of OutsideView users. If your population of OutsideView users includes groups with different host access or application usage requirements (e.g. developers and data entry personnel), you should consider separate OutsideView user Profiles for each group. Defining multiple user Profiles will allow you to easily deploy and manage host connectivity tools that are tailored to the needs of diverse user groups

To create additional user Profiles, it is necessary to re-execute the process for Populating Shares. In that process, the Enterprise serial number must be re-entered (no duplicate licenses are created), and a unique name must be assigned to the Profile (e.g. DataEnt, SysAdmin`).

To create additional user Profiles, it is necessary to re-execute the process for Populating Shares. In that process, the Enterprise serial number must be re-entered (no duplicate licenses are created), and a unique name must be assigned to the Profile (e.g. DataEnt, SysAdmin`).

The more-advanced technical types may, if they wish, bypass the install wizards and GUIs and replicate profiles in a more direct manner. Merely copy an entire existing profile folder (i.e., Standard) to a folder of another name (i.e. New_profile) on the same level. Then edit the setup.iss file (in Notepad) within the newly created folder to point to the new locations, and edit the properties of the Supervisor Mode and the Silent Install shortcuts within the new profile to point to their new locations. You may then modify any existing permissions, configurations files, and profile membership data via the Supervisor mode of the new profile.

WTS/Citrix Server Installation

NOTE: Prior to attempting to install OutsideView onto a WTS/Citrix server, perform an Enterprise install and check via standard workstation (non-Citrix) that all profiles, configuration files and silent install scripts operate properly in that environment.

Uninstalling previously published OutsideView instances from Citrix

NOTE: As with any Citrix environment, the uninstall of the OutsideView application itself must be performed in an identical manner on all members of the Citrix server farm.

1. Logon as administrator

2. Open Citrix Management Console (Start -> Programs -> Citrix -> Management Console)

3. Log into Management Console as administrator

4. To delete published instance of OutsideView, select Application

5. Select specific OutsideView application to uninstall, right-click and select Delete Published Application

Installing OutsideView

NOTE: If you have more than one server in the Citrix server farm, all servers need to have identical installations/configurations of the OutsideView. Just follow the steps below to set up each server.

Option 1:

1. Open Control Panel, select Add/Remove Programs

2. Choose Add New Programs

3. Select CD or floppy, click Next and go to Browse (set file type to 'All files')

4. Browse to the location of silent install shortcut

5. Select the file, click Open, click Next

6. Silent install will start

7. When completed, back out and click Finish

Option 2:

1. Select Start -> Run

2. Enter 'change user /install'

3. Navigate to silent install shortcut and double-click on the file to start the installation

4. After installation is completed, select Start ->Run

5. Enter 'change user /execute'

After installing OutsideView onto each server, test the successful installation

1. Select Start -> Programs -> OutsideView 7.x -> OutsideView

2. Configure OutsideView 'Edit -> Application Settings' to be identical on all servers

3. Click Ok and close OutsideView

Publishing OutsideView client for use by Citrix clients

NOTE: Only needs to be done once, it applies to entire farm.

1. Open Citrix Management Console

2. Select Application and right-click

3. Select Publish Application

4. Wizard Screen 1 - Welcome to the Application Publishing Wizard:

5. Display Name: OutsideView

6. Application Description: Mainframe connection tool

7. Click Next

    Wizard Screen 2 - Specify What to Publish:

8. Select Application

9. Command Line: i.e.: C:\Program Files\Crystal Point\OutsideView32\outside32.exe

10. File of Type: Executable

11. Working directory: Leave as displayed; i.e.: C:\Program Files\Crystal Point\OutsideView32 (set file type to 'Executable')

12. Click Next

    Wizard Screen 3 - Program Neighborhood Settings:

13. Accept all defaults

14. Click Next

    Wizard Screen 4 - Specify Application Appearance:

15. Accept all defaults

16. Click Next

    Wizard Screen 5 - Specify ICA Client Requirements:

17. Accept all defaults

18. Click Next

    Wizard 6 - Specify Servers:

19. Add all farm members

20. Accept all defaults otherwise

21. Click Next

Wizard Screen 7 - Specify Users:

22. Specify users as per company policies

23. Click Finish

LicenseView Installation

LicenseView is a utility for the management of OutsideView license pools and should only be installed to the OutsideView administrator's workstation. To install LicenseView, simply execute Setup.exe in the LicenseView folder on the CDROM or in the Media share.

The preferable method for running LicenseView is by executing the LicenseView shortcut in the Profile Install subfolder. In this manner, LicenseView is updated whenever new updates are loaded to the Media share and you are assured of running the most current version.

Updating to New Versions

To update all OutsideView users with Enterprise installations to a new release of the application, it is only necessary to update the Media share accessed by those installations.

Note: These instructions apply only for updating to new Maintenance releases (e.g. moving from version 7.2b to version 7.2c).

To update to a new release of OutsideView:

1. Copy the contents of the Profile and License share points to another location.

2. Delete the contents of the Media, Profile and License shares (do not delete the folders themselves).

3. Perform the operations to populate the shares using the new installation media.

4. Copy the saved images of the Profile and License shares back into the share points.

The auto-update feature has been disabled for Citrix and Windows Terminal Server environments due to the fact than there may be no active users while performing an auto-update. In those environments, update each terminal server in the same manner that the applications were originally installed; while no users are using OutsideView, run the Silent Install via the Add Programs wizard within the Control Panel. If the descriptive Information contained in the Published Citrix Application becomes out of date, delete and re-publish the application.

Example Installation

To give you an idea of some of the capabilities of an OutsideView Enterprise installation, here is an example of an installation designed to meet the needs of two groups with widely different requirements, sales and programmers. Sales group members are intermittent users with limited PC or Windows skills and require access to a single host application for their tasks. Programmer group

members are frequent users who require full access to the capabilities of OutsideView and the host. Members of both groups may require host access from any available workstation.

Note: Two Enterprise license numbers (beginning with NLPC) must be obtained from Crystal Point; concurrent licenses for the Sales profile and per-seat licenses for the Programmers profile.

1. Create single network share point (as described in the Create Network Shares topic).

2. Create a "Sales" user profile with a separate license pool containing concurrent licenses (as described in the Populate Shares topic.

3. Create a "Programmers" user profile with a separate license pool containing per-seat licenses (as described in the Populate Shares topic.

4. Install OutsideView to the administrator's PC using the Silent Installation shortcut in either profile (as described in the Client Installation topic).

5. Using OutsideView launched in the Supervisor mode of the Sales profile:

   ❖ Define and save a workspace containing a single session with a defined service or startup macro (as described in the OutsideView Users Guide):

   ❖ Set User Privileges (as described in the User Privileges topic) allowing:
   Single instance of the application
   Single session open

   Disallow editing of:
   Workspaces
   Sessions
   Macros

   And define the previously saved workspace to be opened.

   ❖ Assign members to the Sales profile (as described in the Assign Users to Profiles topic)

6. Using OutsideView launched in the Supervisor mode of the Programmers profile:

   ❖ Define and save a workspace containing a single session that starts a command prompt.

   ❖ Leave User Privileges open (full rights)

   ❖ Assign members to the Programmers profile.

7. Using LicenseView, set e-mail alerts for the two different license pools (as described in the License Alerts topic).

Enterprise Administration

User Profile Administration

Supervisor Mode

NOTE: OutsideView must be first installed to the workstation prior to running the "Supervisor Mode" shortcut. After the Enterprise share points have been populated, OutsideView may be installed to any workstation by executing the "OutsideView Silent Installation Shortcut" in the install subfolder of any profile.

Supervisor mode is a launch mode for OutsideView in which the default location for any save operation is the Profile share point. A "Supervisor Mode" shortcut is automatically created in the Install subfolder of each Profile. Running that shortcut will launch OutsideView in Supervisor Mode and any save operations will be to the Profile containing that shortcut. This architecture allows administration of user profiles from any installation of OutsideView on your network.

The OutsideView title bar will indicate "[Supervisor]" when launched in Supervisor Mode.

Supervisor Mode allows creation and modification of OutsideView configuration files (sessions, workspaces, macros, etc.) which are to be deployed to members of the profile. The Privileges defined for a profile will apply whenever OutsideView is launched. If the Privileges are defined to disallow creation or editing of session, workspace or macro files, it will be necessary to enter Override Mode to allow that functionality.

For instructions on creating OutsideView sessions, workspaces and other user configuration files, please see the OutsideView Users Guide. For instructions on creating or editing Visual CommBasic macros, please see the Visual CommBasic Reference.

Override Mode

Troubleshooting a user's local OutsideView configurations or administration of user Profiles may require overriding the permissions defined in the Profile's Privileges. An Override Mode is provided to allow full rights to modify or create OutsideView configuration files regardless of the permissions defined. It is also necessary to enter Override Mode to modify the Privileges for a user Profile. To enter Override Mode:

1. Select Edit/Application Settings and click on the Settings tab.

2. In the Settings tab, select the check box for "Enable Override Mode" and click "OK".

3. In the "Enter Override Password" dialog, enter the password (the default password is "crystal") and click "OK".

Once you have entered Override Mode, the OutsideView title bar will indicate "[Override] or "[Supervisor Override]" if in Supervisor mode. It is strongly recommended to change the Override Mode password to something other than the default. To change the Override Mode password:

1. Select Edit/Application Settings and click on the "Client Administration" tab.

2. Select the "Change Override Password" checkbox and click "OK".

3. Complete the fields in the "Change Supervisor Override Password" dialog and click "OK".

User Privileges

To modify the User Privileges for members of an OutsideView user profile, OutsideView must be in Supervisor/Override mode.

❖ For instructions on launching OutsideView in Supervisor mode, click here

❖ For instructions on entering Override mode, click here.

To access the User Privileges dialog, select **Edit: Application Settings** and click on the User Privileges tab.
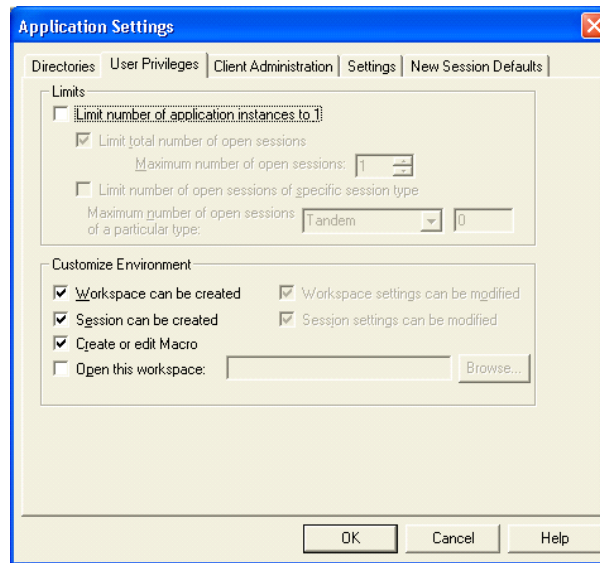
This is an itemized description of the User Privileges settings and their impact on OutsideView behavior on client PCs.

User Privileges – Interpretation of Settings

❖ **Limit number of application instances to 1**: This allows users to start only one instance of OutsideView at a time. One instance must be closed before another can be opened.

❖ **Limit total number of open sessions**: This is a restriction to be applied on Open Session and New Session to restrict the number of sessions a user can have open simultaneously. If a retained but not-yet-open session is selected, and the limit would be exceeded if the session were opened, a dialog box displays stating that the limit would be exceeded and the user must first close a session before proceeding.

The number of independent FTP sessions is not limited by this setting; users can have any number of FTP-only sessions open.

❖ **Limit number of open sessions of specific session type**: Like the previous restriction, this restricts the number of sessions of a particular emulation type that a user can open. If this setting is changed while a user has more than the specified number of session open, this setting will take effect the next time OutsideView is launched.

❖ **Workspace can be created / workspace can be modified**: The valid combinations of these settings are listed below.

Workspace can be created?	Workspace can be modified?	Disallowed operations	Allowed operations
Yes	Yes	No restrictions	All
Yes	No	<invalid setting combination>	<invalid setting combination>
No	Yes	New Workspace… Close Workspace Session: Load or Session: Unload Changing of workspace startup macro	Save Workspace… Save Workspace As… Modification of toolbars (including macro bindings) Modification of workspace settings
No	No	New Workspace… Close Workspace Session: Load or Session: Unload Changing of workspace startup macro Save Workspace… Save Workspace As… Editing of toolbars (including macro mappings)	Repositioning and changing active set of toolbars Modification of workspace settings

❖ **Session can be created / session settings can be modified**: The valid combinations of these settings are:

Sessi on(s) can be creat ed?	Sess ion setti ngs can be mod ified ?	Disallowed operations	Allowed operations
Yes	Yes	No restrictions	Anything and everything
Yes	No	<invalid setting combination>	<invalid setting combination>
No	Yes	New Session…	Save Session…
		Changes to IO, Protocol or Emulator types (on Session tab of Session Settings dialog box)	Save Session As…
			Modifications to Emulator settings
		Changing of session startup macro	Modifications to color scheme, toolbars, keyboard map (and creation of same)
		Changing of language setting	
		Modifications to any IO and Protocol settings	Modifications to property pages (Summary Information) of color, toolbar, keyboard map and session files
			Repositioning and sizing session window, including maximizing, minimizing and closing the session window
No	No	New Session…	Repositioning and sizing session window, including maximizing, minimizing and closing the session window
		Save Session…	
		Save Session As…	
		Changing of session startup macro	Repositioning and changing active set of toolbars via View: Toolbars)
		Changing of language setting	
		All Session Settings are read-only. This means	

the following are not
allowed:

1. Modifications to
Emulator, I/O or Protocol
settings

2. Modifications to or
creation of color scheme
and keyboard map

3. Modifications to
toolbars via the Session
Settings dialog box

4. Modifications to
property pages
(Summary Information)
of color, toolbar,
keyboard map and
session files

Editing of toolbars
(including mapping
macros)

❖ **Create or Edit macro**: If unchecked, the Macro Editor menu item is disabled.

❖ **Open this workspace**: This allows a network administrator to specify what workspace a client PC
    should open when the OutsideView application is launched. This setting will be overridden by
    command line arguments that start a specific session, workspace, or macro.

❖ **Purge all local OutsideView settings on startup?** If this "pristine mode" setting is enabled, the
    local Component, Param, and Macro directories are purged and reloaded from the network when
    OutsideView starts up.

Files marked read-only will NOT be deleted. Nothing is deleted if there is a problem in copying files
down from the network.

❖ **Product updates can be postponed?** This enables the Update Available query box. If this option is
    not checked, the user is not offered the option of declining the program update.

Program updates can be postponed, but network configuration file updates cannot. Since there are so
few network configuration files, the download time will be almost unnoticeably short. To allow for
different clock settings across machines, and to prevent the clients from spoofing configuration
files, the network files are copied down to the PC if they have different modified dates (earlier or
later) or different file sizes. Only files that differ in one or both of these values are copied. This
copying feature allows you to roll back configuration changes network-wide; simply change the
configuration on the Profile Server and let OutsideView propagate it down through the network as
users launch the program.

The update and pristine-mode settings are executed before program files are launched; these settings
are always applied to the local configuration even if the user attempts to run in supervisor mode.
Processing these settings before redefining the network path ensures that, once OutsideView has
launched, a user's changes to these settings cannot disable them.

Assign Users to Profiles

By default, an OutsideView user will receive the configuration files and privileges defined in the Profile from which the workstation was installed. As with NT user profiles, however, an OutsideView user Profile can be roaming in which the user will receive the configuration and privileges they were assigned regardless of which workstation they are logged onto.

One application of this feature is for a single workstation to be used across two shifts by two users in which each user receives the sessions and workspaces defined in their profile.

To assign NT users or groups to an OutsideView Profile:

1. Launch OutsideView in Supervisor Mode for the target OutsideView Profile

2. Enter Override Mode

3. Enter Client Administration
     (Edit, Application Settings, Client Administration tab)

4. Using the Add Button, add users or user groups
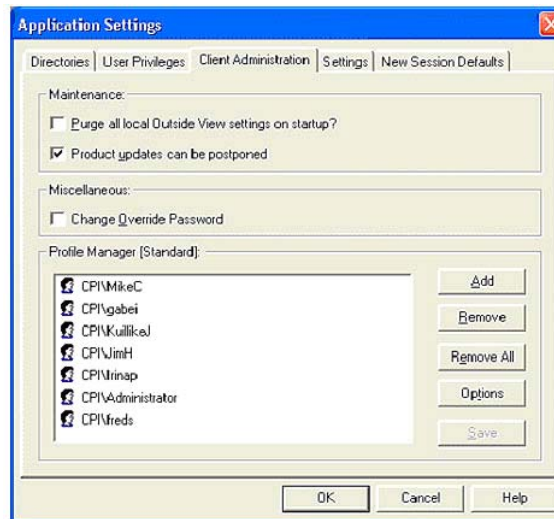
The user name and group assignments are stored in the file profile_users in the Profile folder (e.g. \\servername\OVEnt\Profile).

The format of profile_users file is:

[<Profile Name 1>]

Path=<fully qualified UNC path to license pool e.g.
\\server\OVEnterprise\Licenses\LicensePool1.cpf>
User=<domain>\<user name1>
User=<domain>\<user name2>
User=<domain>\<user name3>
…
Group=<domain>\<group name1>
Group=<domain>\<group name2>
…

[<Profile Name 2>]

Path=<fully qualified UNC path to license pool e.g.
\\server\OVEnterprise\Licenses\LicensePool2.cpf>
User=<domain>\<user name4>
User=<domain>\<user name5>
User=<domain>\<user name6>
…
Group=<domain>\<group name3>
Group=<domain>\<group name4>
…

Note: This file may also be created and/or edited in any text editor such as Notepad.

The way the file is accessed is that, on startup, the OutsideView client looks for the file and, if it exists, searches through it top-to-bottom for a match against User name. If it finds a match, it is satisfied (first match wins) and that is the profile used. If no match is found to User name, it searches again top-to-bottom for a match with Group membership. Again, first match wins and that is the profile used. If no match is found for user or group name or if the file was not found, OutsideView will revert to the Profile from which the Silent Install shortcut was invoked for that PC.

Licensing

Licensing Overview

All OutsideView Enterprise clients obtain their licenses from the license pool defined in their profile. These pools may be automatically created during the Enterprise Install process or may be manually created using LicenseView.

License Types

OutsideView Enterprise licenses are purchased as either per-seat or concurrent types.

Per-seat licenses are reserved by a workstation on the first launch of OutsideView and will be permanently bound to that workstation unless manually released using LicenseView.

Concurrent licenses are reserved by a workstation when OutsideView is launched and released back to the pool when OutsideView is properly terminated by the user. That license then becomes available to another user. One concurrent license will allow any number of instances of OutsideView to execute at that workstation. If OutsideView is not properly terminated (e.g. due to a workstation crash), the license may be manually released using LicenseView.

SSL/TLS Encryption support is an option for either license type. The types of Enterprise Licenses currently available are:

❖ Per-seat

❖ Per-seat Encrypted

❖ Concurrent

❖ Concurrent Encrypted

Warning: You must not mix license types in a single pool. All licenses in a particular pool must be of the same type.

OutsideView Desktop licenses are also available with or without the encryption option.

License Pool Operation

On each launch of OutsideView, an attempt is made to contact the license pool. If a license is not available on the local workstation, an attempt is made to find an available license and check it out. If the workstation had previously checked out a per-seat license, the reservation is renewed for 7 days. If the workstation acquires a concurrent license on the launch of OutsideView, that license is checked back into the pool when OutsideView is properly terminated.

If the license pool cannot be accessed by an OutsideView client, it will continue to operate using its last acquired license for the length of the reservation period (7 days). This functionality eliminates license pool as a possible single point of failure.

If the workstation is to be removed from the network for an extended period (more than 7 days) and continued operation of OutsideView is required, the license may be made available offline. Click here for instructions on making a license available offline.

License Pool Administration

The LicenseView utility provides the following functionality:

View license status: View the state of all licenses to determine the availability of any license.

Create new license pools

Create New Pools: Multiple license pools will allow usage by different user groups or business units to be independently tracked and managed.

Export Licenses: You may export Enterprise licenses for Desktop use or to other license pools.

Import Licenses: You may import Desktop licenses, licenses in other license pools or add new licenses to your existing pools.

Import Licenses: You may import Desktop licenses, licenses from other pools or add new licenses to an existing pool.

Releasing Licenses: Release licenses bound to particular users or workstations for use by other users.

Synchronizing licenses : The license pool may be synchronized to reflect the current license usage.

Generating usage reports: Quickly generate reports of OutsideView license usage.

Make a license available offline for cases where the workstation will be disconnected from the network for an extended period.

License Administration

View License Status

The list of icons at the far left of the LicenseView window shows you what state a license is in: Checked Out or Checked In. A license having a status of Checked Out (with the red icon) is being used by a workstation and is not available. A license having a status of Checked In (green icon) is available for use.

🔴 **R** Checked Out   🟢 **U** Checked In

🟢 **R** Checked out and   ⚪ **X** Expired
         Expired
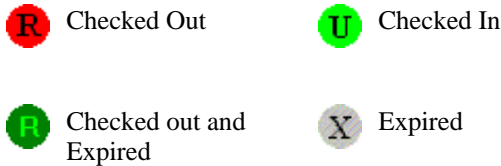
Creating License Pools

You can use the License Wizard to set up a new OutsideView license pool. You can then add licenses to the new pool.

1. On the menu bar, select File: New Pool.

2. In the dialog box, enter a path or browse to the location where you want the license pool to be located.

3. Type in a name for the new license pool, and click Next.

   NOTE: Each license pool must be a separate folder.

   You now have the option of leaving this pool empty or importing licenses immediately. If you want to leave the pool empty, you're done. In most cases, you will want to import the licenses right away.

4. To import licenses, click Import licenses from an enterprise license file/NLPC number. Then click Next.

5. In the Get Enterprise License File dialog box, enter an NLPC (Network License Pool Code) number or click Browse to locate a valid enterprise license file. Then click Next.

6. Read the information in the confirmation dialog box, and click Finish.

Importing Licenses

The Import feature of LicenseView may be used to:

❖ Import a Desktop License

❖ Import licenses from another Enterprise License Pool.

❖ Add new licenses from a supplied NLPC number or License file.

Should you purchase additional OutsideView licenses, these licenses will arrive as a license file or NLPC (Network License Pool Code) number.

To import licenses from another Enterprise License Pool

To import a Desktop license:

1. Open the target license pool in LicenseView then select **Licenses: Import: Desktop License…**

2. In the Imort License dialog, enter the Serial Number and License Key values for the Desktop License.

3. Click OK.

To import licenses from another Enterprise License Pool:

Open the target license pool in LicenseView then select **Licenses: Import: Enterprise License(s) from a License Pool….**

1. In the License Wizard – Open License File dialog, enter the fully qualified UNC path to the external license pool and click OK.

2. In the License Wizard – Select Licenses dialog, select the licenses to be imported (use Ctrl+click to select multiple licenses).

3. Click OK.

4. Verify the information in the confirmation dialog box, and click Finish.

To add OutsideView licenses to an existing license pool from an NLPC number or license file:

1. Open the target license pool in LicenseView, and then click **Licenses: Import: Enterprise License(s) from a License File/NLPC number**.

2. Enter the NLPC number or click Browse to enter a path to the license.

3. Click Next.

4. Verify the information in the confirmation dialog box, and click Finish.

Exporting Licenses

The Export License feature of LicenseView may be used to:

❖ Export Enterprise licenses for Desktop installations

❖ Export licenses to another License Pool

To export Enterprise licenses for Desktop installations:

1. Open the license pool containing the licenses to be exported in LicenseView.

2. Select **Licenses: Export: License(s) to Desktop**.

3. The Export Licenses dialog will open displaying the serial number, License Number and Expiration Date values for the selected licenses. Selecting Print will print these values. Selecting OK will display a warning dialog verifying that the licenses are to be exported. Clicking Ok will close both dialogs and remove the licenses from the Enterprise pool.

To export licenses to another license pool:

1. Open the license pool containing the licenses to be exported in LicenseView.

2. Select **Licenses: Export: License(s) to Enterprise Pool**.

3. In the License Wizard – Open License File dialog, enter the fully qualified UNC file name of the target license pool and click OK.

4. Verify the information in the Export to Enterprise dialog and click Next.

5. Verify the information in the Confirmation dialog and click Finish.

Releasing Licenses

To release the binding of a particular license to a user/workstation:

1. Start LicenseView and open the license pool (*.cpf) containing the license.

2. Select the license in the list of licenses then select Licenses/Undo Check Out…

3. Click "OK" in the "Licenses Properties…" dialog

4. Click "Yes" in the "LicenseView – Undo Checkout" dialog

The binding of that license to a particular user/workstation will be released.

To release the bindings for all licenses in a pool:

1. Start LicenseView and open the license pool (*.cpf) containing the licenses.

2. Select Licenses/Release All Licenses.

All licenses in the pool will be available for check-out.

Checking a License Out

While the process of assigning licenses to users is usually performed automatically whenever a user starts OutsideView, LicenseView also allows manual check-out of a license..

 To check out a license to a particular user or computer:

1. Open the license pool and click to select any available license.

   Note: A red icon means that the license is already checked out to someone else and therefore not available.

2. On the menu bar, click Licenses: Check Out.

   The license properties dialog box appears.

3. Under Check Out Information, click Browse to select the computer name. Then click OK.

Synchronize the License Pool

There are some cases when a license pool's status can get out of sync with the actual state of the network. For example, a server can crash or become corrupted by a virus.

When you synchronize the license pool, LicenseView sends a message across the network asking for the name of all the machines that are currently connected to the license pool. Once that list is compiled, LicenseView then updates (checks out) the licenses in the pool, matching them with the appropriate machine name.

To synchronize a license pool:

1. Launch LicenseView and open the pool (File/Open Pool…)

2. Select Licenses/Synchronize

Make a license available offline

These instructions will allow a client Enterprise installation of OutsideView to continue operation when disconnected from the network for an extended period. The process of assigning licenses to users is usually performed automatically whenever a user starts OutsideView.

To make a license available offline:

1. Open the license pool in LicenseView

2. Select the license currently checked out to the workstation

3. Right click on the license and select Properties
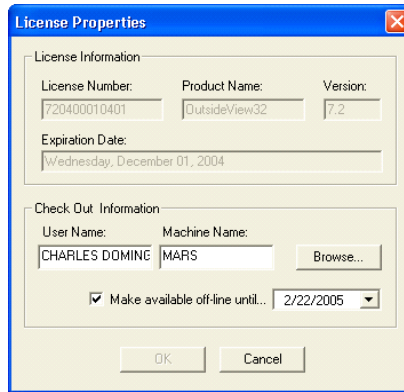
4. Check the "Make available offline until… box and define a date past the last date the workstation will be reconnected to the network.

License Reports

LicenseView provides various report options so you can better keep track of license activity. To quickly print the current state of the license pool, just click File: Print.

1. To Generate a Custom Report

2. On the menu bar, click Licenses: Report.

3. Select the criteria for your report:

> ❖ To see all license activity that occurred on and between a set of dates, specify a date range.

> ❖ To see all activity for a particular license, specify a license number.

> ❖ To see all the license activity for a certain user, specify a user name.

4. Under Select column headers to view, select the information that you want to see on your report, and click OK. The report you asked for will be generated on-screen.

5. Click Cancel to close it or click Print to print it out.

License Alerts

LicenseView supports automatic email alerts when the number of available licenses hits a low count mark or a percentage of all licenses. The email is sent by the client workstation when OutsideView is launched.
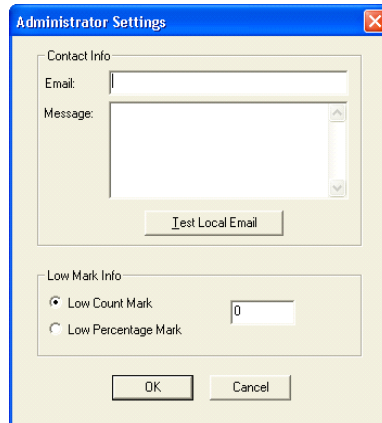
Note: This feature is supported only with the Outlook mail client.

To define an email license alert:

1. Open the license pool for which you wish to enable alerts in LicenseView

2. Select Edit/Administrator Settings to open the dialog shown above.

3. Enter the email address of the license administrator and a message to be included in the body of the email.

4. Select whether the alert will be on a Low Count Mark or Low Percentage Mark and enter the value to be tested.

Note: The email functionality may be tested by clicking the "Test Local Email" button. This will send a test message from the current user to the license administrator.

5. Click OK.

Support

Contact Support

Help us help you. Crystal Point is committed to supporting all users running the current version of OutsideView. We strive to maintain a turnaround of one business day for help requests.

In order to maintain this high level of quality support, we ask that you help us reduce call volumes by:

❖ Trying to find the solution in the online help.

❖ Checking the OutsideView error log. This log may have information that helps identify where your problem is occurring.

❖ Checking our online Technical Support site. We have a searchable AnswerBook online.

❖ Asking your System Administrator or Help Desk. Administrators are likely to be familiar with your particular question or problem – they're your best source for immediate answers or solutions.

❖ If none of the above steps work, you or your Administrator can contact Crystal Point. Our Technical Support staff may ask you to create a trace file; for directions, you can read the section on creating a trace file.

For your convenience, there are several methods for contacting Technical Support. Voice services are available from 7:00 AM to 5:00 PM Pacific time, Monday through Friday (except holidays). You can also access our electronic services, including the AnswerBook, on our website at www.crystalpoint.com 24 hours a day, seven days a week.

Address Crystal Point, Inc.
22232 17th Avenue SE, Suite 301
Bothell, WA 98021-7425 USA

Phone   (425) 806-1143

Fax   (425) 487-3773

Diagnostic Tools

Diagnostic Traces

A diagnostic trace file may be requested by Crystal Point Technical Support when diagnosing a problem that goes beyond basic troubleshooting. The trace file will contain all telnet traffic between your host and OutsideView for the duration that tracing is active.

If the trace file by the same name already exists, OutsideView will ask for confirmation before overwriting the file. If the answer is Yes, the saved file is overwritten. If the answer is No, the trace process is cancelled.

If any other errors occur opening a trace file, or opening and writing to a save file, then an error message displays describing the error, and the trace file setting will be turned off automatically.

To Create a Trace File

1. If there is no active session, either open a previous session or initiate a new session. Bring the session that you will run the trace on into focus.

2. Click the Session Settings button on the toolbar, or select Session: Session Settings from the menu.

3. Click the Capture link on the Category list.

4. In the Diagnostic Trace group box, click the To File checkbox. This will enable the Trace function.

5. Specify a file name. Trace information will be saved in this file. You can also click the Browse button to navigate to a different drive or directory.

6. Click the OK button. OutsideView will close this dialog box and begin the diagnostic trace.

7. Starting from a command prompt (e.g., a TACL prompt) perform the steps required to duplicate the error.

8. To terminate tracing, open the Capture dialog box once again (by following steps 2 and 3) and uncheck the To File checkbox in the Diagnostic Trace group box. This will close the trace file. The trace file will be located in the Capture folder (the default) or the folder set in step 5.

Once you have created a trace file, you can email it to our Technical Support staff as an attachment.

Media Share

The Media Share is a shared network folder which contains an image of the CDROM installation files.

Profile Share

The Profile Share is a shared network folder with subfolders for each user profile (e.g. Standard, Admin, Developers, etc). The user profile subfolders contain silent installation and supervisor mode shortcuts as well as session, workspace, macro and other user configuration files.

License Share

The License Share is a shared network folder which contains one or more OutsideView license pools. Each license pool must be in its own subfolder (e.g. \OVLicenses\DevLicenses and \OVLicenses\DataEntLicenses).

FTPHints Macro Details

Hint files are needed for FTP because remote directory listings do not give information about the data volumes or subvolumes that are present on your host. And there is no command to provide this information. Without the hint file structure, the user must have prior knowledge of where the files reside on your system or expand network.

The FTPHINTS macro automates the creation of the necessary hint file navigation structure on your host, or hosts in an expand network.

To run this macro you should have super privileges and, if in an expand network, have network access permissions. The macro interacts with a TACL prompt and uses the "System", "Volume", "Dsap", and "Fup" commands to accomplish its task.

As an illustration, assume you have two hosts in an expand network with two data drives each. The following hint files will be created by the FTPHINTS macro:

\first.$system.subvols.sysmap

\first.$system.subvols.drvmap

\first.$system.subvols.dirmap

\first.$data1.subvols.dirmap

\first.$data2.subvols.dirmap

\second.$system.subvols.sysmap

\second.$system.subvols.drvmap

\second.$system.subvols.dirmap

\second.$data3.subvols.dirmap

\second.$data4.subvols.dirmap

The "sysmap" file lists the systems in your expand network. The "drvmap" file lists the data drives or master volumes on your system. The "dirmap" file lists the subvolumes under the current drive or master volume.

As the system administrator, you should periodically run this macro to keep the hint files current with the actual contents of your host(s).

Notes

The FTPHINTS macro has the following limits:

❖ 24 DrvMaps (which would equate to disk volumes on a system)

❖ 254 SysMaps (which would equate to nodes, or systems on an expanded network)

❖ Requirement for NSK version D20 or greater

❖

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