Creating Dashboards and Reports for Customers

ScienceLogic version 8.6.0

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Chapter 1

Creating a Customer Dashboard

Overview

This chapter describes how an administrative user can create a dashboard that can be viewed by customers.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ( ).
- To view a page containing all of the menu options, click the Advanced menu icon ( ).

NOTE: To prevent customers from editing shared dashboards, you should grant customers "view" access only to these dashboards.

This chapter includes the following topics:

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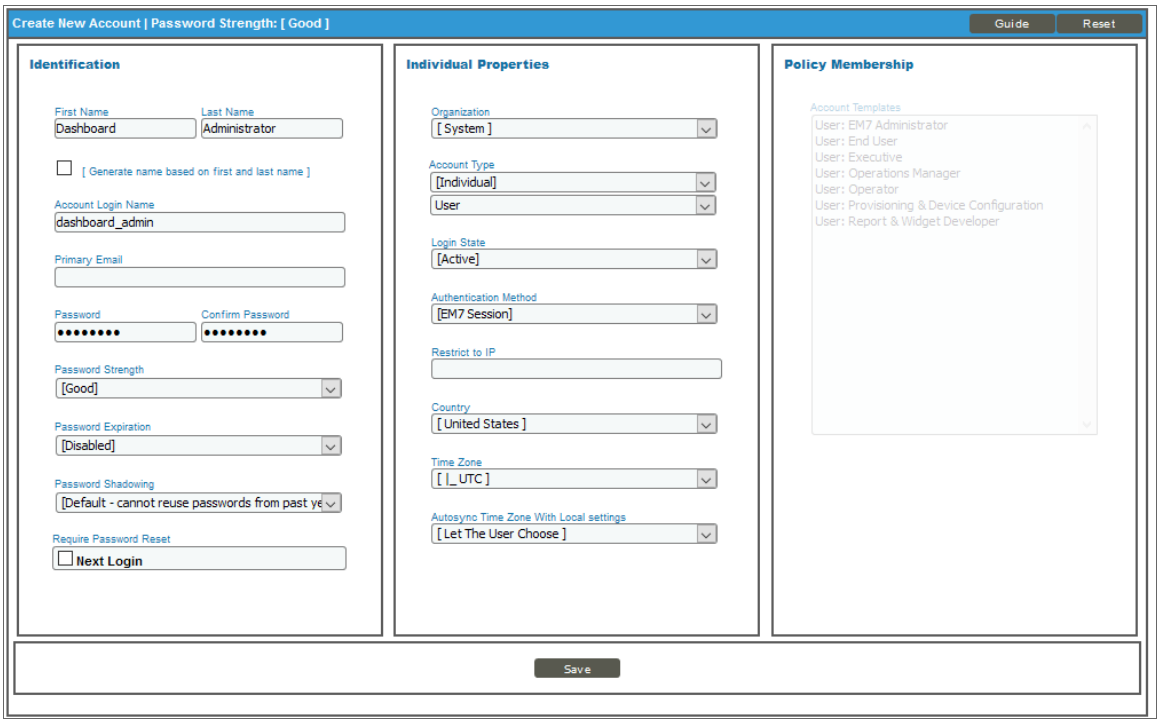
Creating a User Account for Creating Dashboards

To create a dashboard that customers can view, a best practice is to create a user account specifically for creating dashboards. Make this user account a member of all organizations so that the dashboard is viewable to customers from all organizations when it is shared. In general, use this separate user account instead of your own user account to ensure that no other entities, such as device groups or IT services, are inadvertently shared.

To create the dashboard user account:

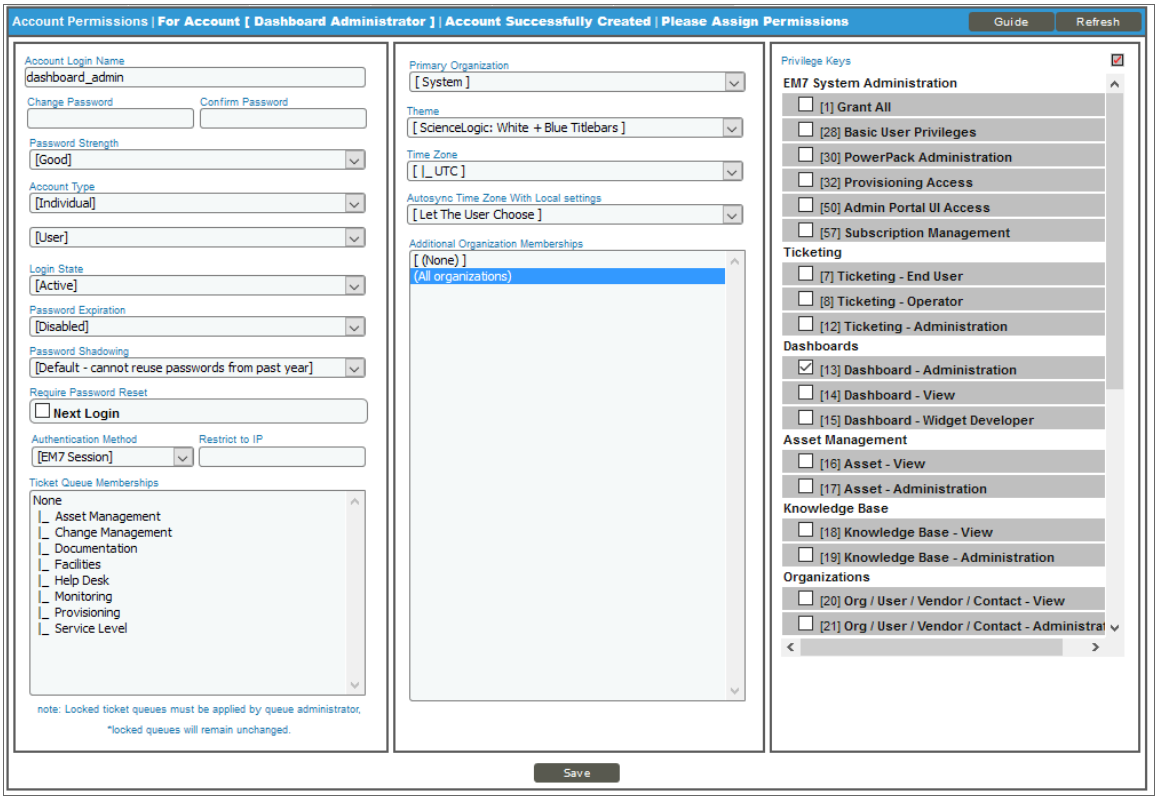
1. Go to the **User Accounts** page (Registry > Accounts > User Accounts).
2. Click the **[Create]** button. The **Create New Account** page appears.



3. On the **Create New Account** page, complete the following fields:
   - ***First Name***. Type a first name for this account, such as "Dashboard".
   - ***Last Name***. Type a last name for this account, such as "Administrator".
   - ***Account Login Name***. Type the user name you will type at login, such as "dashboard_admin".
   - ***Password***. Type a password for the user account.
   - ***Confirm Password***. Type the password again.
   - ***Require Password Reset***. Uncheck this checkbox.
   - ***Organization***. Select *System* from the drop-down list.

- ***Account Type***. In the two drop-down lists, select *Individual* and *User*.
- Use the default settings in the remaining fields.

4. Click the **[Save]** button to create the new user account. The **Account Permissions** page for the new user account appears.



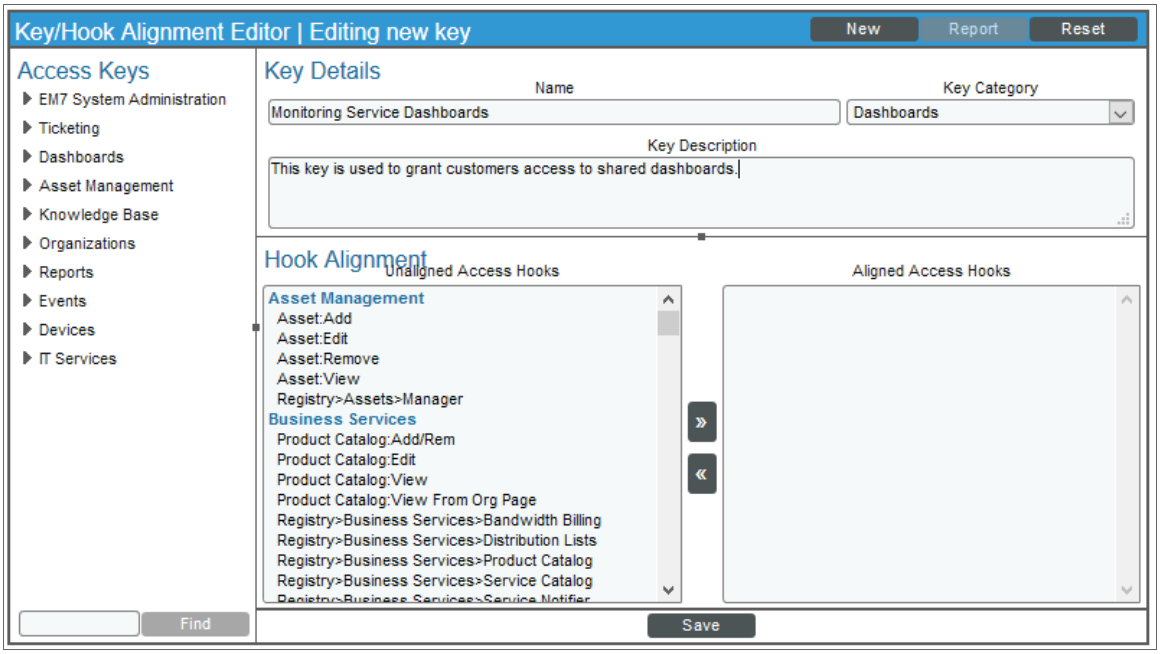
5. Under ***Additional Organization Memberships***, select *(All organizations)*. The *(All organizations)* option allows organizations that are added at a later date to access the dashboards that this user creates.
6. Under ***Privilege Keys***, select the checkbox for the default *Dashboard - Administration* access key.
7. Click the **[Save]** button.

Creating an Access Key to Control Dashboard Access

To restrict access to the dashboard, you can create an access key that a user must be granted to view the dashboard. This access key will not contain any access hooks.

To create an access key:

1. Go to the **Access Keys** page (System > Manage > Access Keys).
2. Click the **[Key Manager]** button. The **Key/Hook Alignment Editor** page appears.

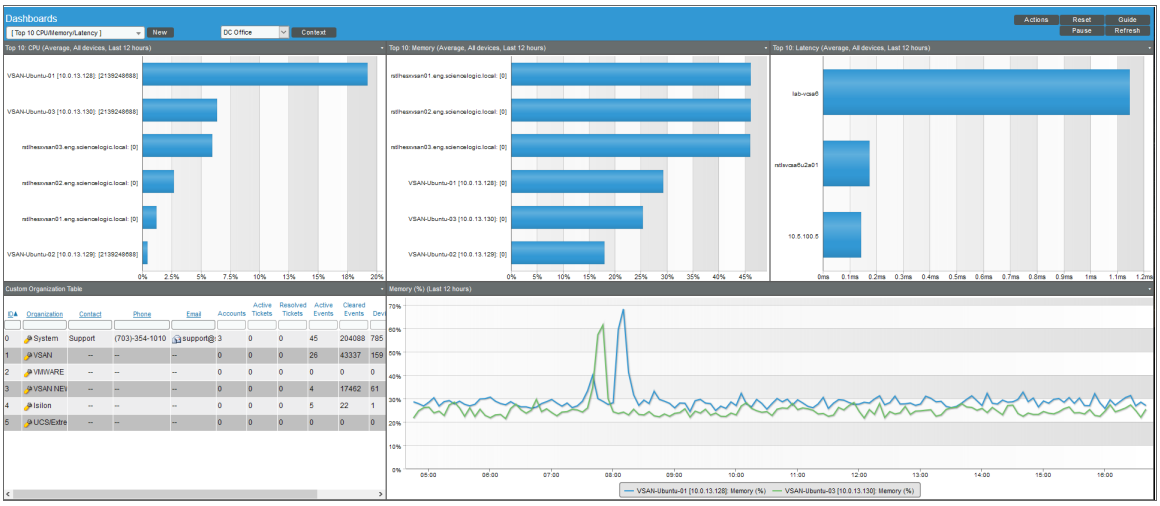


3. On the **Key/Hook Alignment Editor** page, click the **[New]** button.
4. Complete the following fields:
   - ***Name***. Type a name for this access key, such as "Monitoring Service Dashboards".
   - ***Key Category***. Select *Dashboards* from the drop-down list.
   - ***Key Description***. Type a description of this key, such as "This key is used to grant customers access to shared dashboards."
5. Click the **[Save]** button to save the access key.

NOTE: You can grant the new access key to only the customers that you want to have access to your dashboard.

Creating a Dashboard that Enforces Organization Restrictions

This example describes how to create the following dashboard, which can be shared with multiple users:



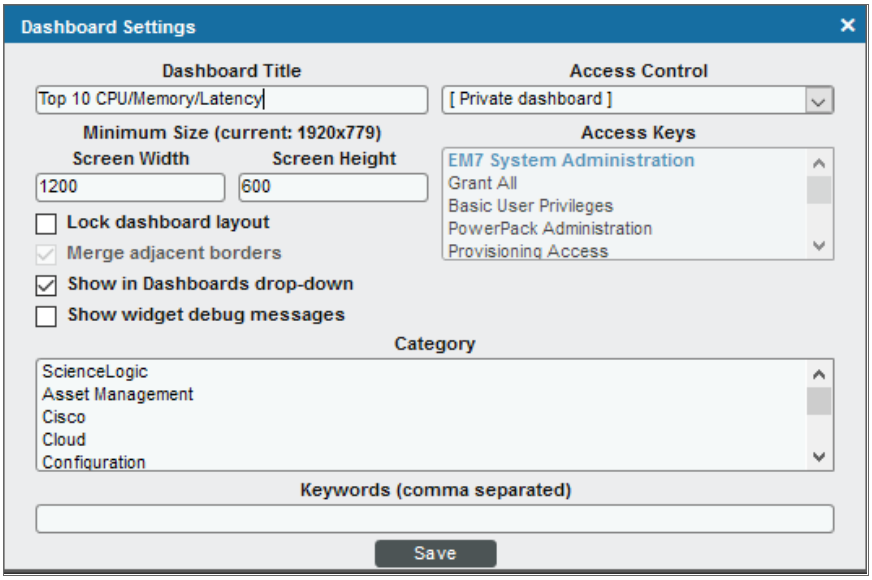
The dashboard contains:

- Three instances of the Leaderboard/Top-N widget across the top of the dashboard. These three widgets display the following bar graphs:
    - The 10 devices with the highest CPU utilization. By default, this widget displays the top 10 devices system-wide.
    - The 10 devices in the system with the highest memory utilization. By default, this widget displays the top 10 devices system-wide.
    - The 10 devices in the system with the highest latency. By default, this widget displays the top 10 devices system-wide.
- An instance of the Custom Table widget at the bottom-left of the dashboard. This widget is configured to display only organizations to which the user viewing the dashboard belongs. The user viewing the dashboard can select one or more organizations in this widget. When a user selects one or more organizations, the three Leaderboard/Top-N widgets update to display the top 10 devices from the selected organizations.
- An instance of the Multi-series Performance widget at the bottom-right of the dashboard. This widget is configured to read and display up to eight device performance metrics that are set in the context. The user viewing the dashboard can select the performance metrics in this widget by selecting one or more bars in the Leaderboard/Top-N base widgets.

Creating and Configuring the Dashboard

To create and configure the basic settings for the shared dashboard:

1. Go to the **Classic Dashboards**page (Dashboards > Classic Dashboards).
2. In the top left of the **Dashboards** page, click the **[New]** button. A blank dashboard is created with a default name.
3. Click the **[Actions]** menu, and then click *Configure Dashboard*. The **Dashboard Settings** page appears:

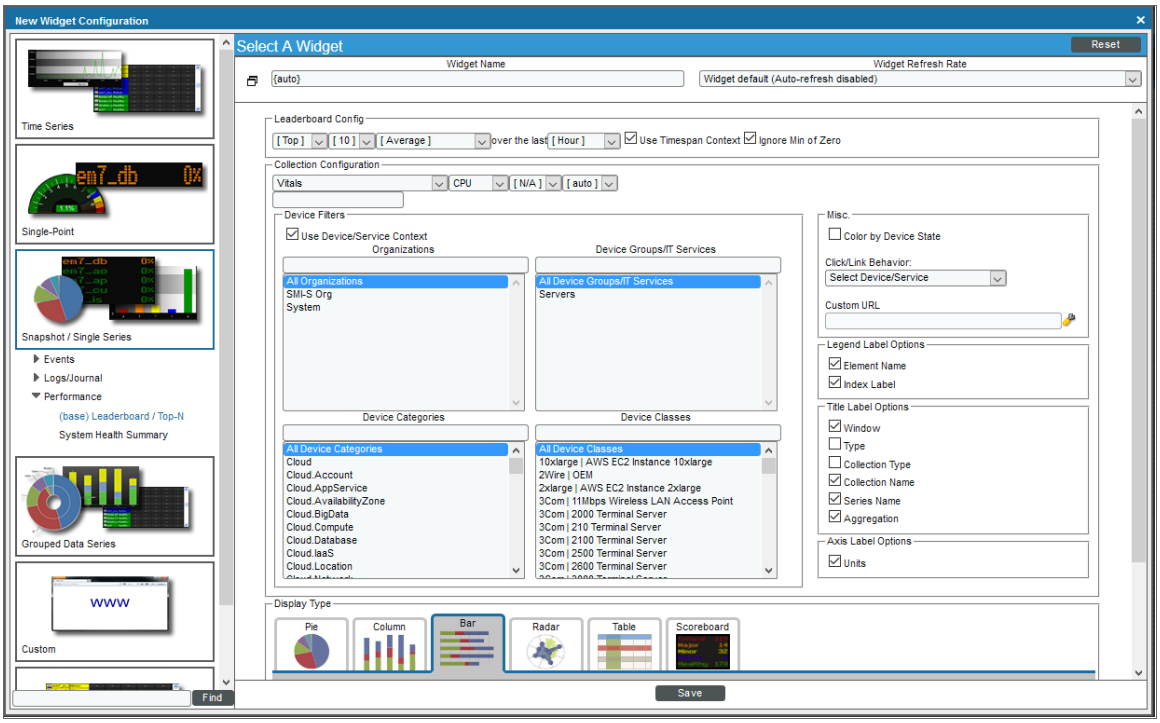


4. Type a name for the dashboard in the ***Dashboard Title*** field. This example uses "Top 10 CPU/Memory/Latency" as the name of the dashboard.
5. For this example, you can leave the remaining fields set to their default value.
6. Click the **[Save]** button to save the new name for the dashboard and close the **Dashboard Settings** page.

Adding and Configuring the Leaderboard/Top-N Widgets

To add the three Leaderboard/Top-N widgets to the dashboard:

1. Click and hold in the top-left corner of the dashboard, then drag the widget that appears so that it is half the height and one-third of the width of the dashboard. When you release the mouse button, the **New Widget Configuration** page appears.



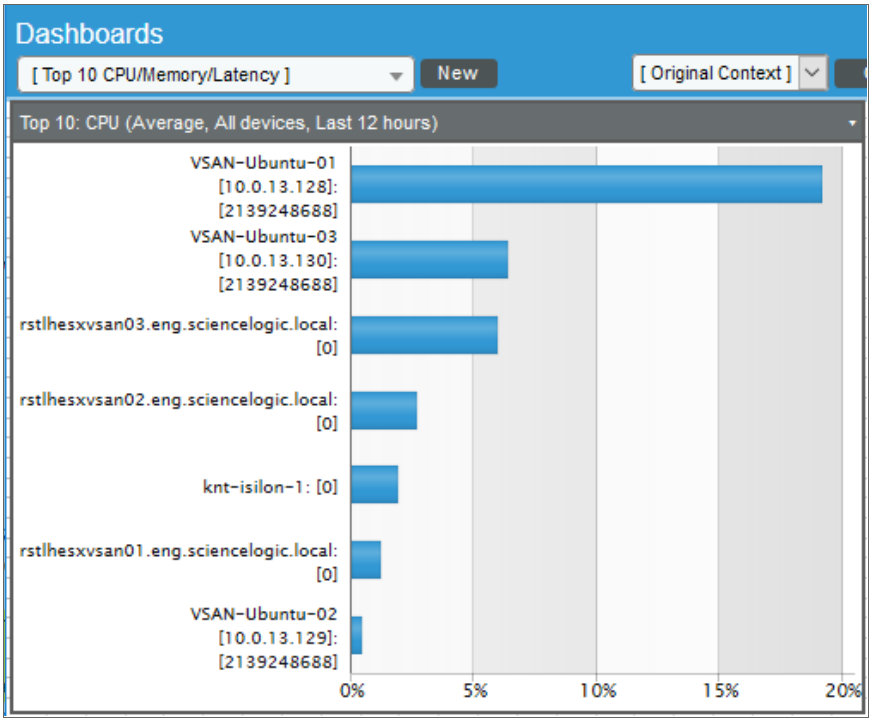
2. In the left NavBar, click the **[Snapshot/Single Series]** button. Expand the ***Performance*** category and select ***(base) Leaderboard / Top-N***.

> **TIP**: If your SL1 system contains a large number of widgets and you need to filter the results in the left NavBar, type "Leaderboard" in the field at the bottom of the NavBar and click the **[Find]** button.

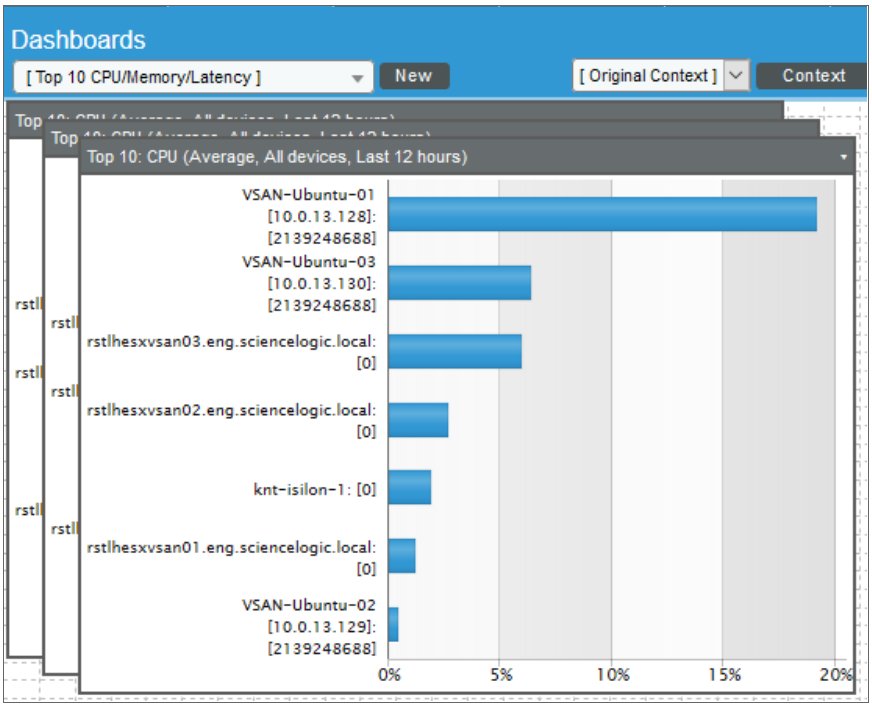
3. Supply values in the following fields:
   - ***Widget Name***. Leave "{auto}" in this field. SL1 automatically generates a title for the widget based on what is currently being displayed in the widget.
   - In the first field under **Collection Configuration**, select *Vitals*.
   - In the second field under **Collection Configuration**, select *CPU*. The dashboard will display the devices with the highest CPU Utilization.

- ***Use Device/Service Context***. Select this checkbox. If you select this checkbox and other widgets on the dashboard define which devices should be displayed on the dashboard, this widget will evaluate only those selected devices when determining the devices with the highest CPU utilization. In this example, the Custom Table widget will define which devices should be displayed by allowing the user to select one or more organizations; when one or more organizations are selected, this widget will display only devices in those organizations.
- ***Click/Link Behavior***. Select *Select Device/Service*. When you select a value in this field, you are defining what will happen when a user clicks on the widget. When *Select Device/Service* is selected and a user clicks on a value in the widget, the widget defines the performance metric that will be displayed in the other widgets in the dashboard. In this example, the Multi-series Performance widget is configured to display the selected performance metric.
- ***Display Type***. Select *Bar* to make the widget display a horizontal bar graph.
- For this example, you can leave the remaining fields set to their default value.

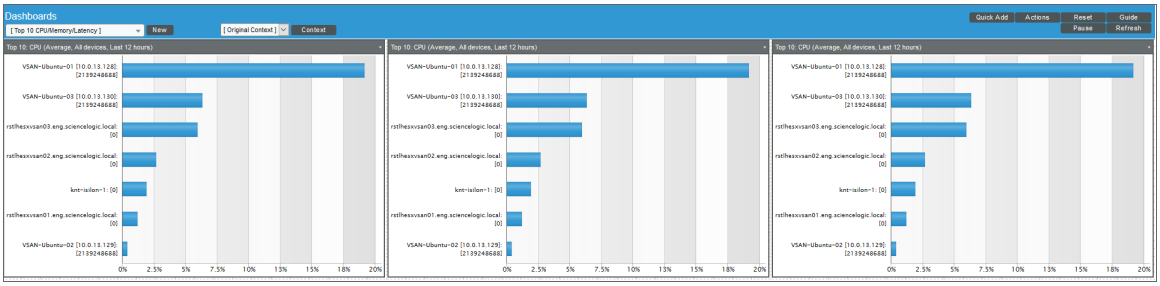
4. Click the **[Save]** button and close the **New Widget Configuration** page. The widget displays a bar graph that includes the 10 devices in the system with the highest CPU utilization:



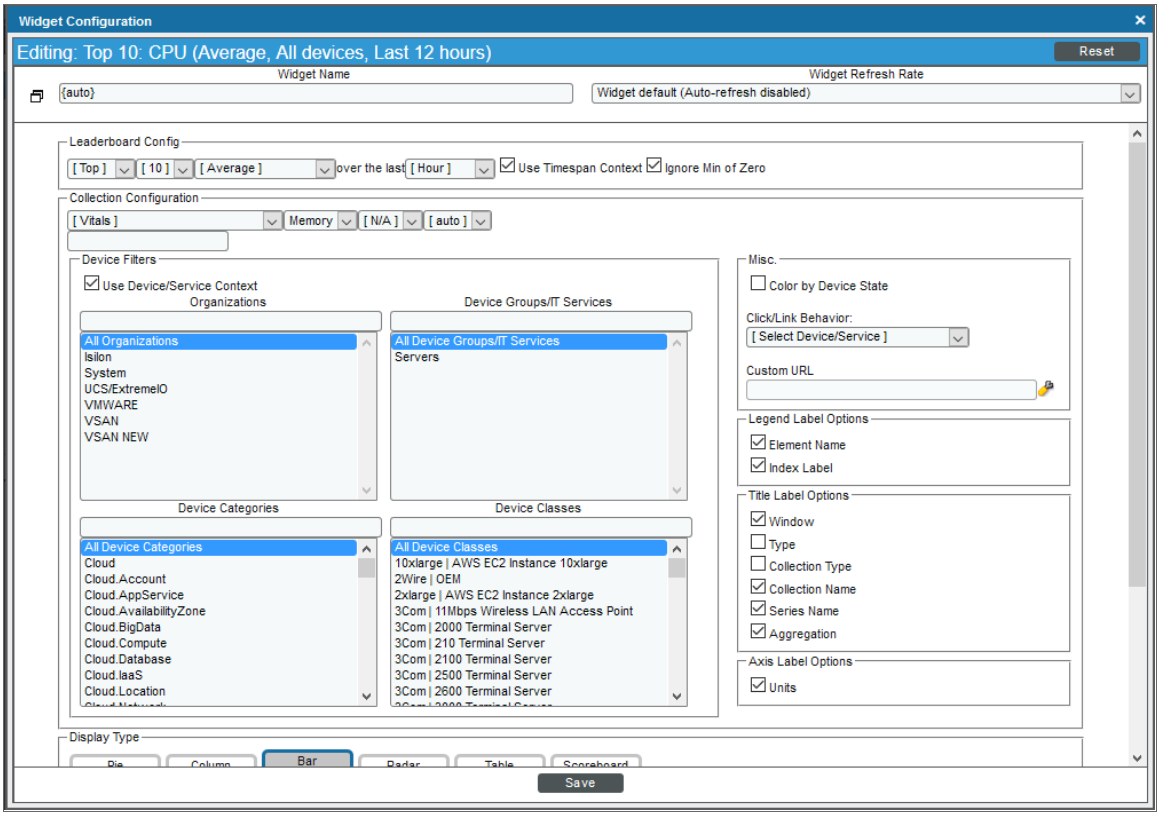
5. Instead of creating completely new widgets for the second and third Top 10 widgets, you can duplicate the first widget and then edit the appropriate settings. To duplicate the widget, click the **[Options]** menu in the top-right corner of the new widget and select *Duplicate*. Repeat this step to create a third instance of the widget. The dashboard now looks like this:



6. Click and hold the header bar of one of the two duplicate widgets, then drag the widget to the upper-right corner of the dashboard.
7. Click and hold the header bar of the other duplicated widget, then drag the widget to the top-middle of the dashboard, between the two other widgets.
8. If necessary, resize the widgets by clicking, holding, and dragging the edges of each widget. The dashboard should now look like this:

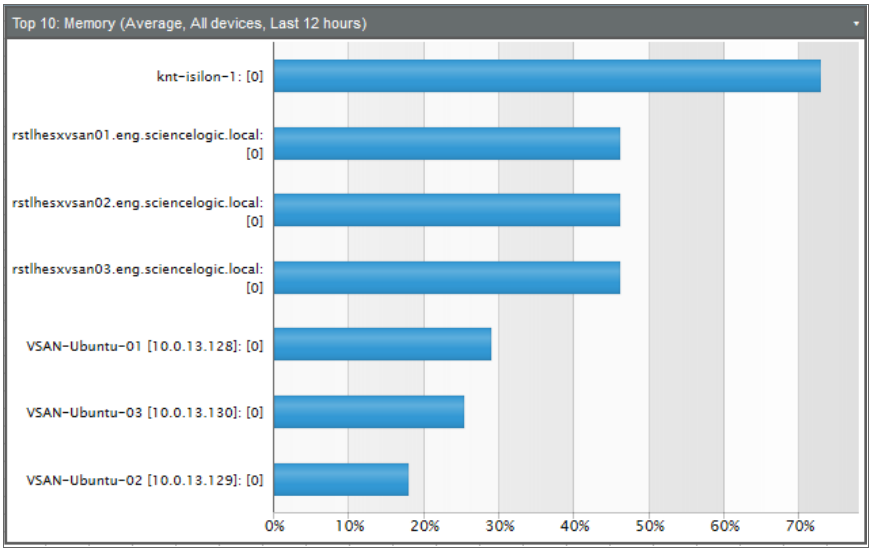


9. To reconfigure the middle widget, click the **[Options]** menu in the top-right corner of the widget and select *Configure*. The **Widget Configuration** page appears:

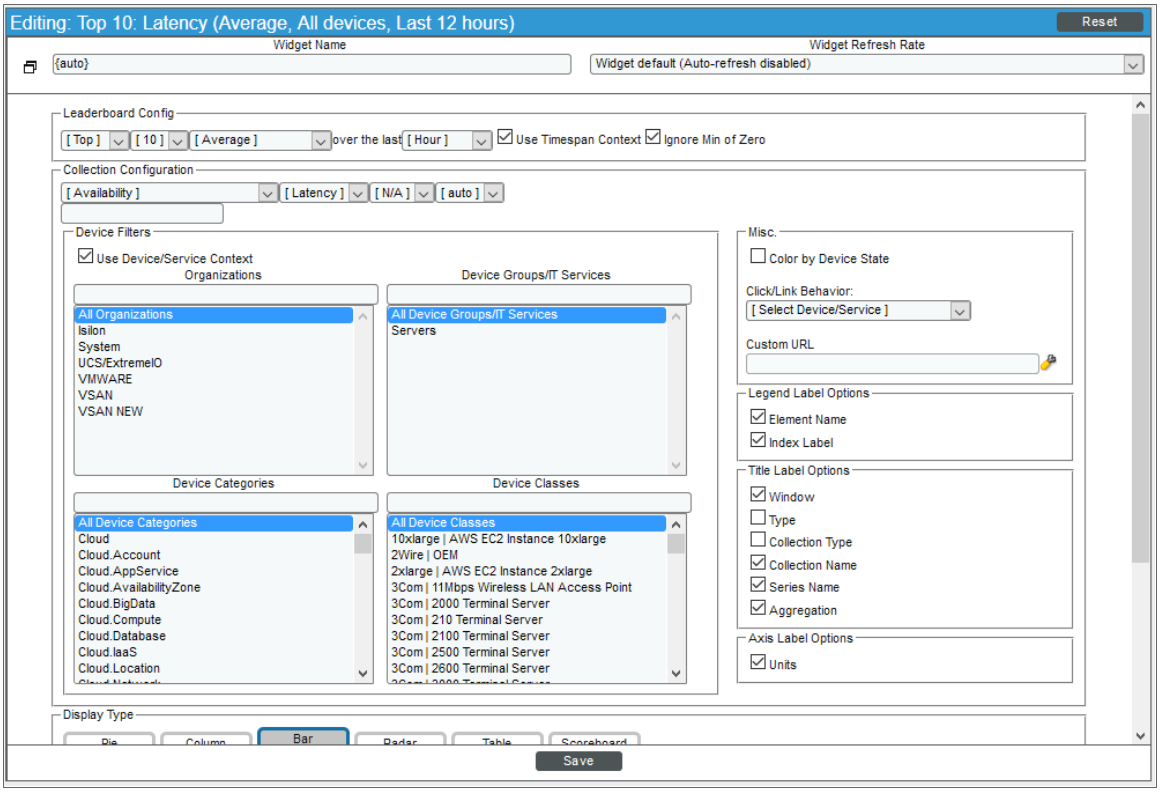


10. In the first field under **Collection Configuration**, select *Vitals*.
11. In the second field under **Collection Configuration**, select *Memory*. The dashboard displays the devices with the highest Memory Utilization.

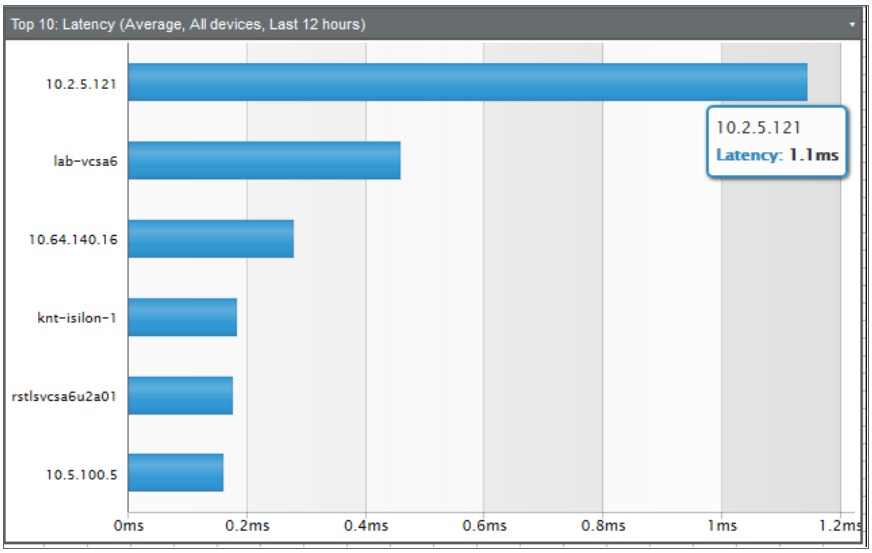
12. Click the **[Save]** button to save the widget and close the **Widget Configuration** page. The widget displays a bar graph that includes the 10 devices in the system with the highest memory utilization:



13. To reconfigure the last widget on the right of the dashboard, click the **[Options]** menu in the top-right corner of the widget and select *Configure*. The **Widget Configuration** page appears:



14. In the first field under **Collection Configuration**, select *Availability*.
15. In the second field under **Collection Configuration**, select *Latency*. The dashboard displays the devices with the highest Memory Utilization.
16. Click the **[Save]** button to save the widget and close the **Widget Configuration** page. The widget displays a bar graph that includes the 10 devices in the system with the highest latency:



Adding and Configuring the Custom Table Widget

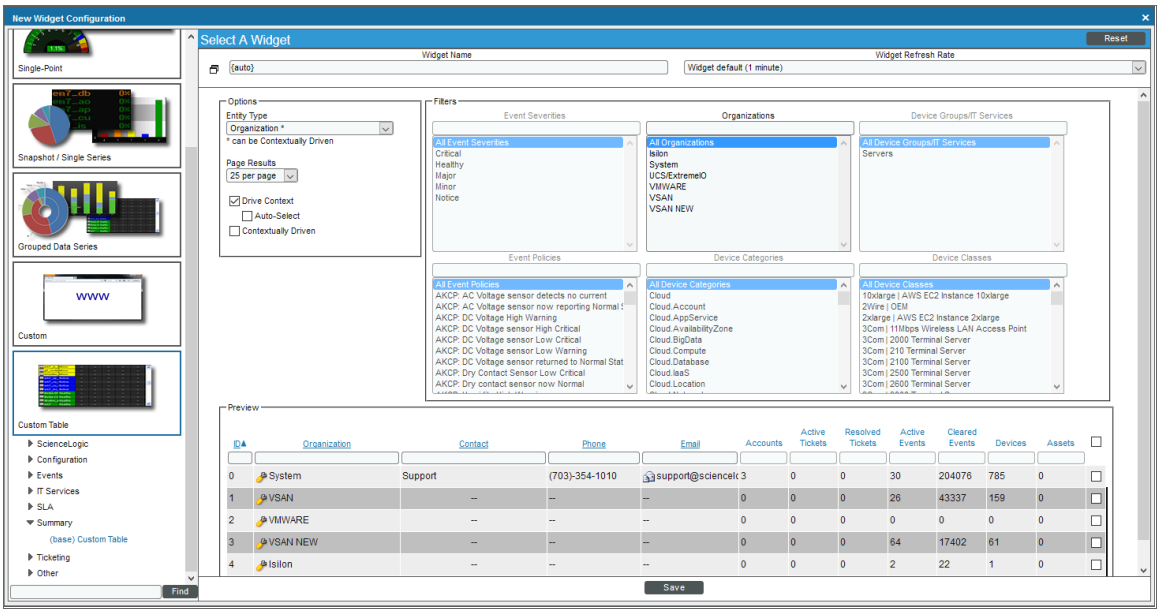
To add the Custom Table Widget to the dashboard:

1. Click and hold at the left of the dashboard, under the Top 10: CPU widget, then drag the widget that appears so that it is the same width as the Top 10: CPU widget. When you release the mouse button, the **New Widget Configuration** page appears.

2. In the left NavBar, click the **[Custom Table]** button. Expand the ***Summary*** category and select ***(base) Custom Table***.

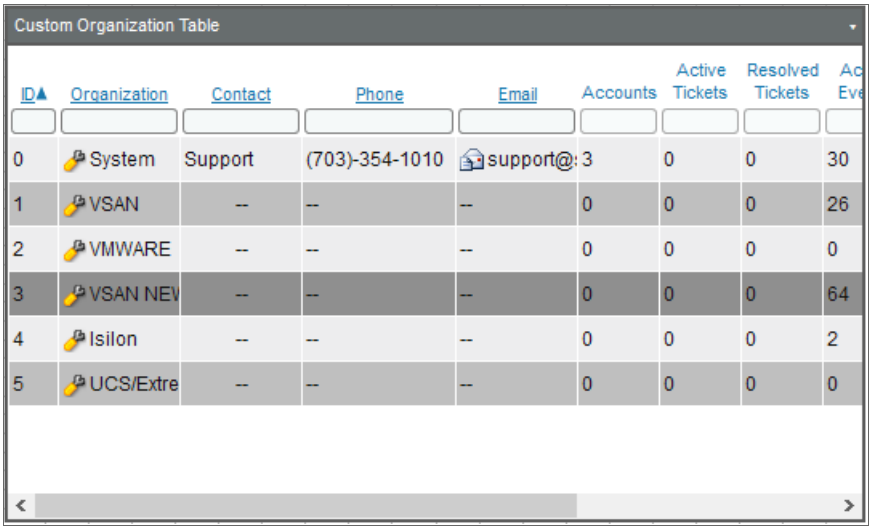
TIP: If your SL1 system contains a large number of widgets and you need to filter the results in the left NavBar, type "Custom Table" in the field at the bottom of the NavBar and click the **[Find]** button.

The Widget Configuration pane for the widget appears:

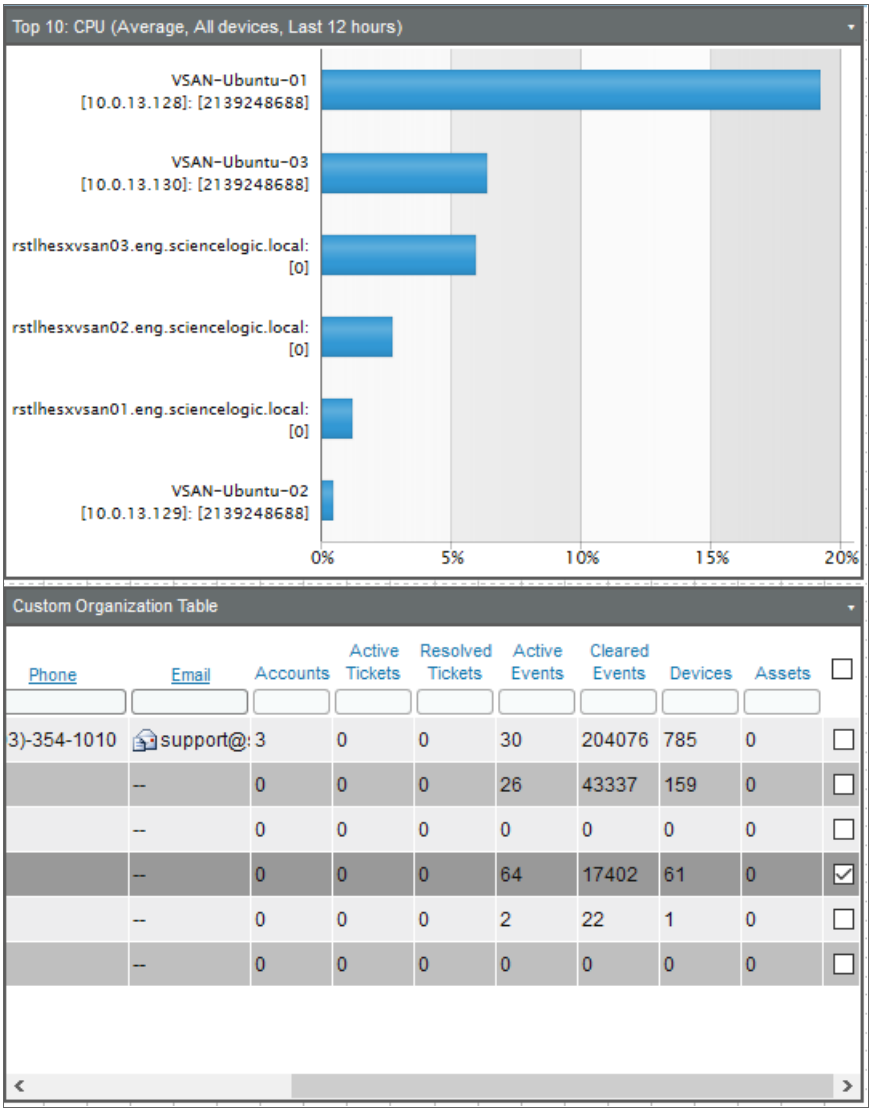


3. Supply values in the following fields:
   - ***Entity Type***. Select *Organization*. This widget displays a list of all organizations for which the user is a member.
   - ***Drive Context***. Select this checkbox. This widget controls what is displayed in other widgets in the dashboard (the Leaderboard/Top-N widgets).
   - For this example, you can leave the remaining fields set to their default value.

4. Click the **[Save]** button to save the widget and close the **New Widget Configuration** page. The widget displays a table that contains the organizations for which you are a member:



5. To make the three Leaderboard/Top-N widgets display the Top 10 devices in a specific organization, select the name of that organization:



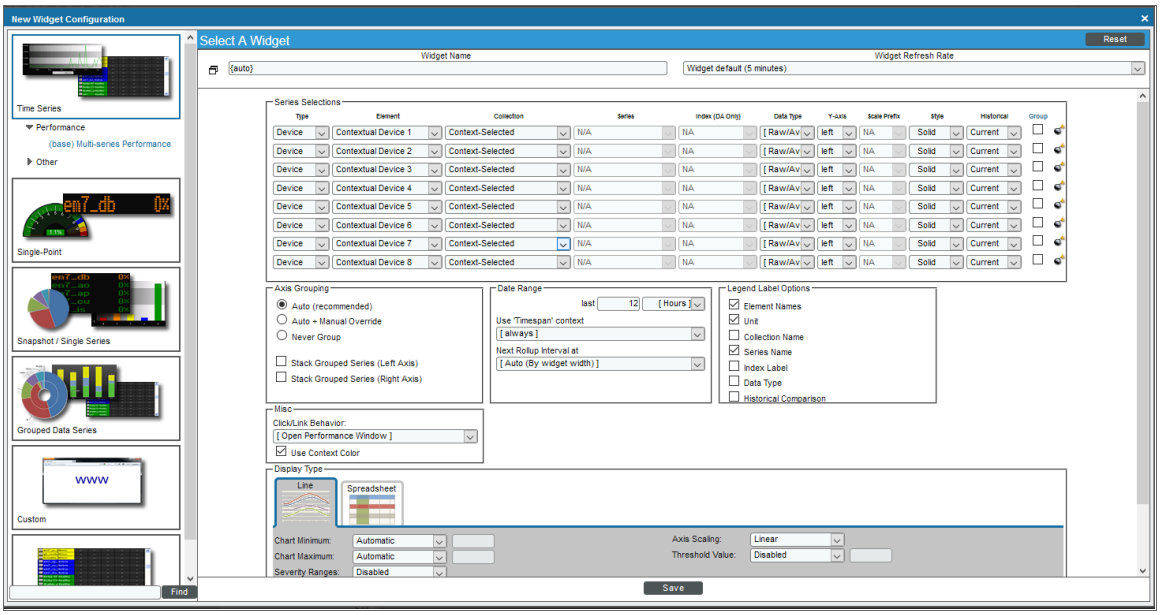
Adding and Configuring the Multi-series Performance Widget

To add the Multi-series Performance Widget to the dashboard:

1. Click and hold at the top-left corner of the empty space in the dashboard, then drag the widget that appears so that it fills the remaining space in the dashboard. When you release the mouse button, the **New Widget Configuration** page appears.
2. In the left NavBar, click the **[Time Series]** button. Expand the ***Performance*** category and select ***(base) Multi-series Performance***.

TIP: If your SL1 system contains a large number of widgets and you need to filter the results in the left NavBar, type "Multi-series" in the field at the bottom of the NavBar and click the **[Find]** button.

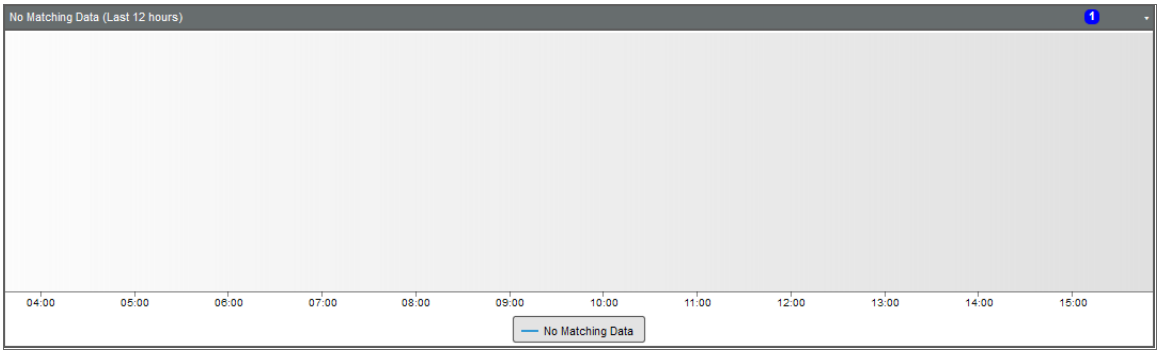
The Widget Configuration pane for the widget appears:



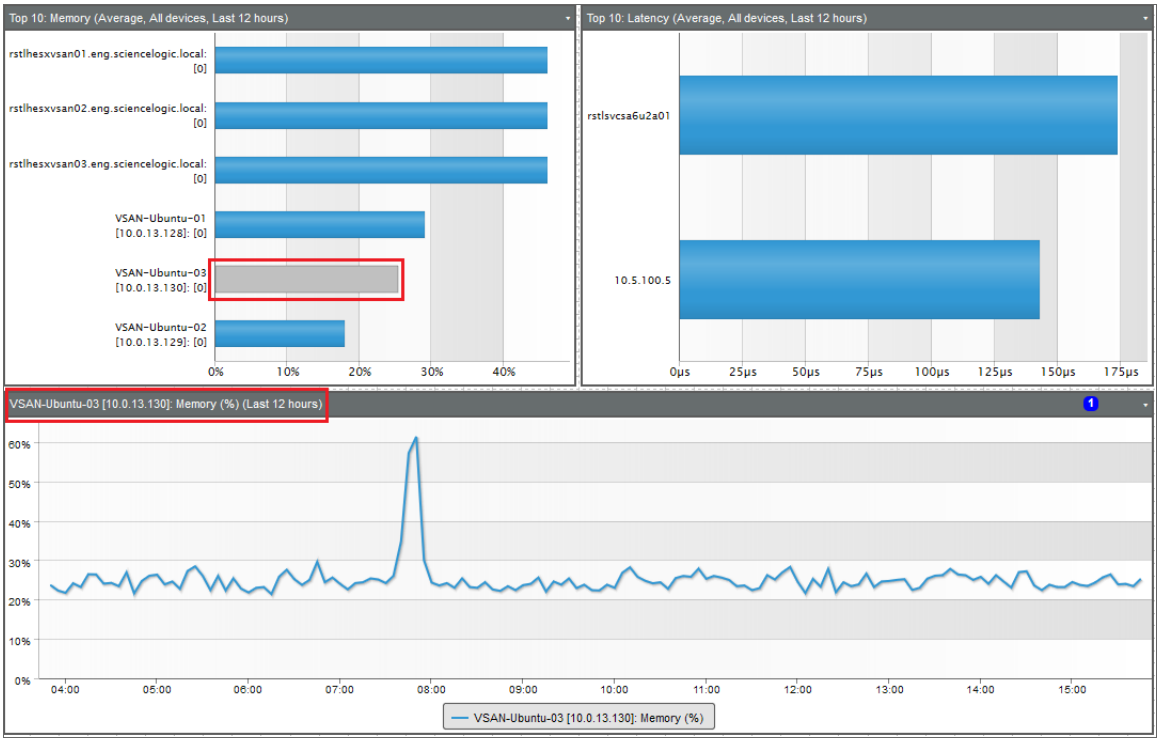
3. Supply values in the following fields:

   - ***Widget Name***. Leave "{auto}" in this field. SL1 automatically generates a title for the widget based on what is currently being displayed in the widget.
   - ***Type***. Select *Device*.
   - ***Series Selections***. In the ***Element*** field, select *Contextual Device 1*. Selecting this option tells the widget to display the performance metric that is selected in another widget in the dashboard. This widget can display up to eight performance metrics selected in other widgets at the same time. To configure the widget to display the maximum number of selected performance metrics, click ***Add another series***, then select *Contextual Device 2* in the ***Element*** column. Repeat this step for *Contextual Device 3* through *Contextual Device 8*.
   - ***Display Type***. Select *Line*. The widget displays a line graph.
   - For this example, you can leave the remaining fields set to their default value.

4. Click the **[Save]** button to save the widget and close the **New Widget Configuration** page. The widget displays no time-series by default:



5. To display a time-series in the Multi-series Performance widget, select one of the bars in one of the Leaderboard/Top-N widgets. After you select a bar, the bar turns gray, and the corresponding time series graph for that metric appears:



6. To display multiple time-series, press the **Shift** key when you select the bars. To deselect all bars, select one of the currently selected bars again.

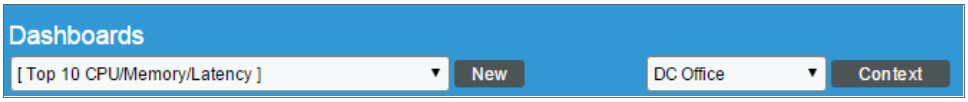
Saving Context Selections in the Dashboard

In a dashboard that allows a user to select the elements that will be displayed in one or more widgets, you can save one or more sets of selections (the *context*). You can then load a set of selections using the ***Context Selector*** field to the left of the **[Context]** button.

For example, suppose that your system includes two organizations that include devices located at your DC office: "DC - Switches" and "DC - Servers". Suppose that you frequently select those two organizations in this example dashboard. Instead of selecting the two organizations in the custom table each time you open the dashboard, you can save your selections.

To save a set of context selections in the example dashboard:

1. Click the **[Context]** button and then select *Create*.
2. In the pop-up window that appears, type a name for the context and then click the **[Create]** button. This name immediately appears in the ***Context Selector*** field. In this example, the context is called "DC Office".
3. Select one or more organizations in the custom table widget. The selections you make will be re-loaded when you select this set of context selections. In this example, the "DC - Switches" and "DC - Servers" organizations are selected in the custom table.
4. To save your set of context selections, click the **[Context]** button and then select *Save*. Your selections are saved in the context that is displayed in the ***Context Selector*** field.
5. When you open this dashboard again, you can re-load the selections by choosing "DC Office" in the ***Context Selector*** field:



Sets of context selections are saved on a per-user basis. When you create a set of context selections, that set is viewable only to you. If you share your dashboard, other users can save their own sets of context selections, and you will not be able to view those saved contexts.

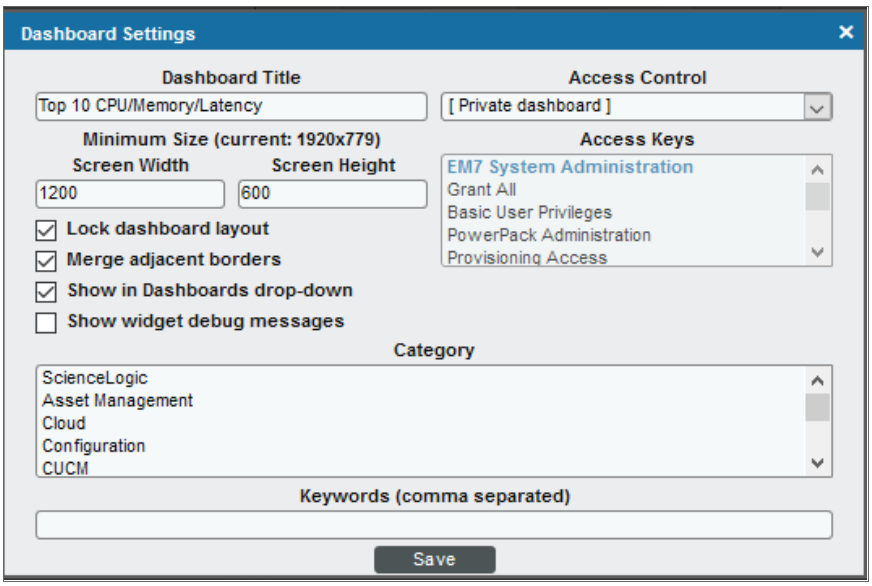
Locking and Sharing the Dashboard

On the **Dashboard Settings** page, you can lock the layout of your dashboard, which will prevent users from moving or accidentally editing the widgets. You can also use the **Dashboard Settings** page to configure your dashboard to be shared between organizations.

Locking the Dashboard

To lock the dashboard:

1. Select the dashboard you want to lock from the drop-down list in the top left of the **Dashboards tab** page.
2. In the **[Actions]** menu, select *Configure Dashboard…*. The **Dashboard Settings** page appears.



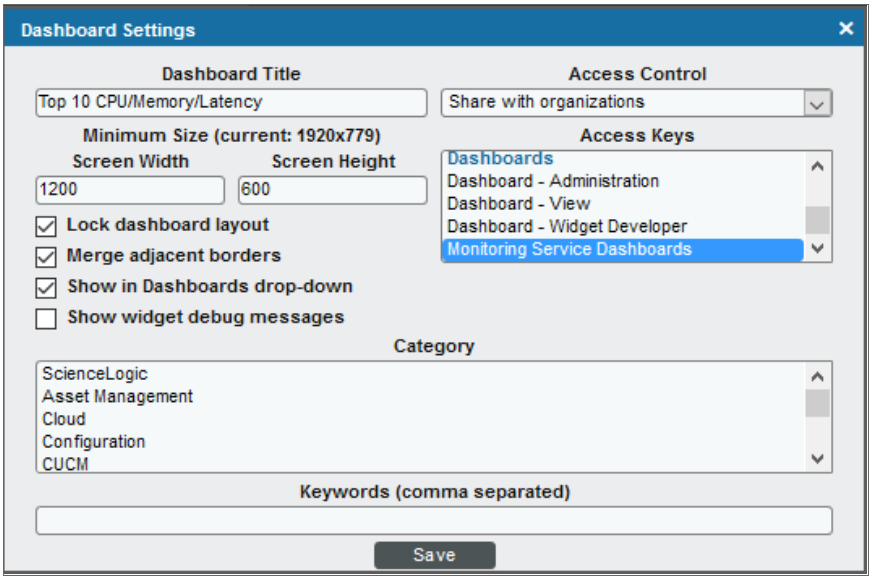
3. Select the ***Lock dashboard layout*** checkbox. Selecting this checkbox makes the ***Merge adjacent borders*** checkbox available. As a best practice, leave the ***Merge adjacent borders*** checkbox selected to make the dashboard look more unified.
4. Click the **[Save]** button to lock the dashboard.

Sharing the Dashboard

To share the dashboard:

1. Select the dashboard you want to share from the drop-down list in the top left of the **Dashboards tab** page.

2. In the **[Actions]** menu, select *Configure Dashboard*. The **Dashboard Settings** page appears.

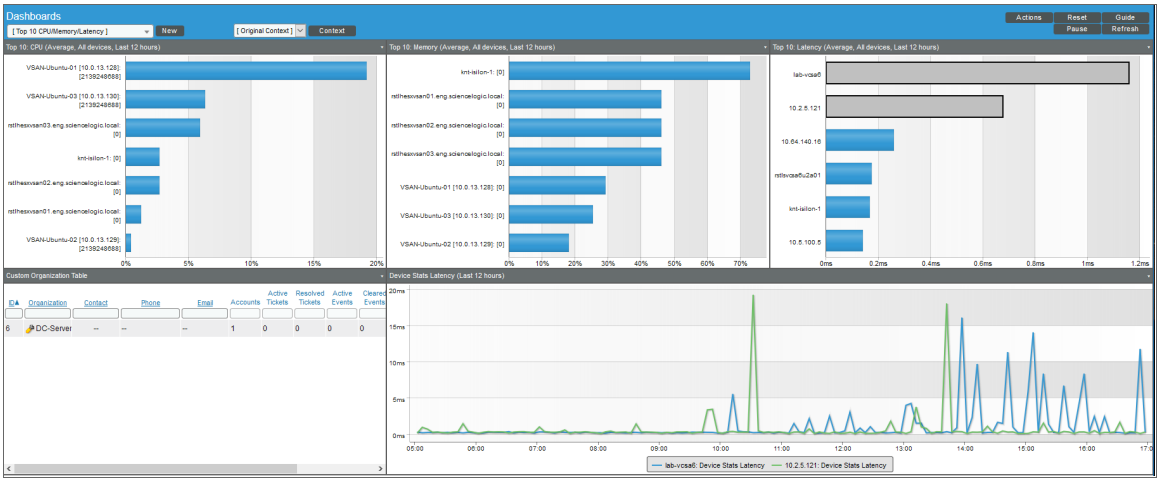


3. In the ***Access Control*** field, select *Share with organizations*.
4. In the ***Access Keys*** field, select the *Monitoring Service Dashboards* key that you created in the *Creating an Access Key to Control Dashboard Access* section.
5. Click the **[Save]** button. This dashboard can now be viewed by all organizations to which you have granted your access key.

Example Dashboard View

To illustrate how a user views this dashboard, we created a user account that is part of the organization "DC - Servers". The user, "Samuel Johnson", was created with the default *End User* user policy. We added the *Monitoring Service Dashboards* access key to this policy to allow the user to view the example dashboard.

When user Samuel Johnson logs in to the system and selects the ***Top 10 CPU/Memory/Latency*** dashboard, this is what he sees:



Chapter 2

Creating Reports for Users

Overview

This chapter describes how an administrative user can create a report job for a specific customer and schedule that report job.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ( ).
- To view a page containing all of the menu options, click the Advanced menu icon ( ).

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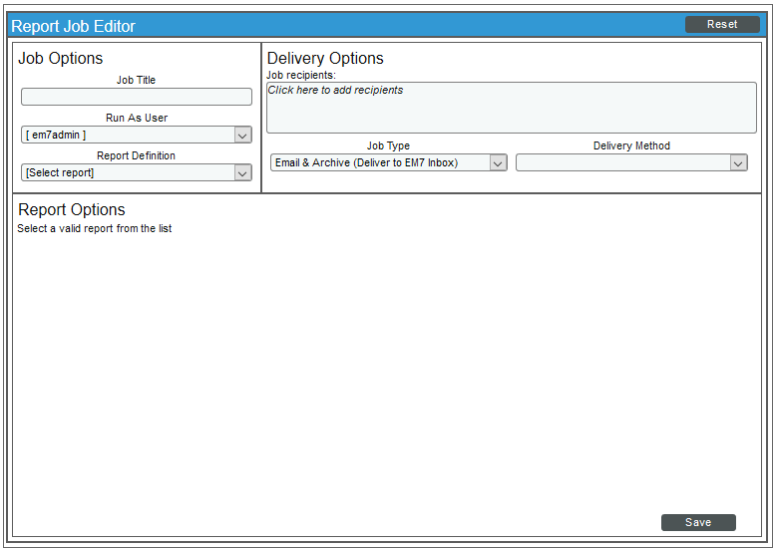
Creating a Report Job

To create a report job for a customer:

1. Go to the **Report Jobs** page (Reports > Create Report > Report Jobs).
2. Click the **[Create]** button in the upper right of the page. The **Report Job Editor** page appears:



3. On the **Report Job Editor** page, complete the following fields as needed:
   - ***Job Title***. Type the name of the report job, up to 220 characters in length.
   - ***Run As User***. Specify a user for which the report will run. When SL1 generates the report, SL1 uses this user's organization restrictions. This is helpful when a system administrator sets up a scheduled report for a user who does not have access to the Report Scheduler and who may have access only to the entities in his or her organization. As a result, select the user account for the customer for which you are generating the report.
   - ***Report Definition***. Select a report from the list of all reports defined on the **Report Management** page. Depending on the report you selected, SL1 populates the various fields in the **Delivery Options** and **Report Options** sections.
   - ***Job Recipients***. Specifies the recipients for the report. Clicking in this field opens the **Add Recipients** page, where you can select users, external contacts, and vendor contacts to include in the ***Job Recipients*** field.
   - ***Job Type***. Select how to deliver the generated report . Your options include:
     - *Email & Archive*. SL1 emails the report to the people listed in the ***Job recipients*** field, and the email is also archived in SL1.

- *Archive*. The report is archived in SL1. You can view archived reports on the **Scheduled Report Archive** page (Reports > Create Report > Scheduled Job / Report Archive).

- ***Delivery Method***. Select a method of delivery and the output format (if applicable) for the report. Your options include:

  - *Inline (HTML)*. SL1 sends the generated report to the selected users in the body of an email.
  - *Attachment*. SL1 sends the generated report to the selected users as an attachment to an email.
  - *Link to EM7*. SL1 makes the generated report available with a direct URL. The link can be sent to the selected users in an email.

- ***Report Options***. The interface for the selected report appears in this pane. Select the options you want included in the automatically generated report.

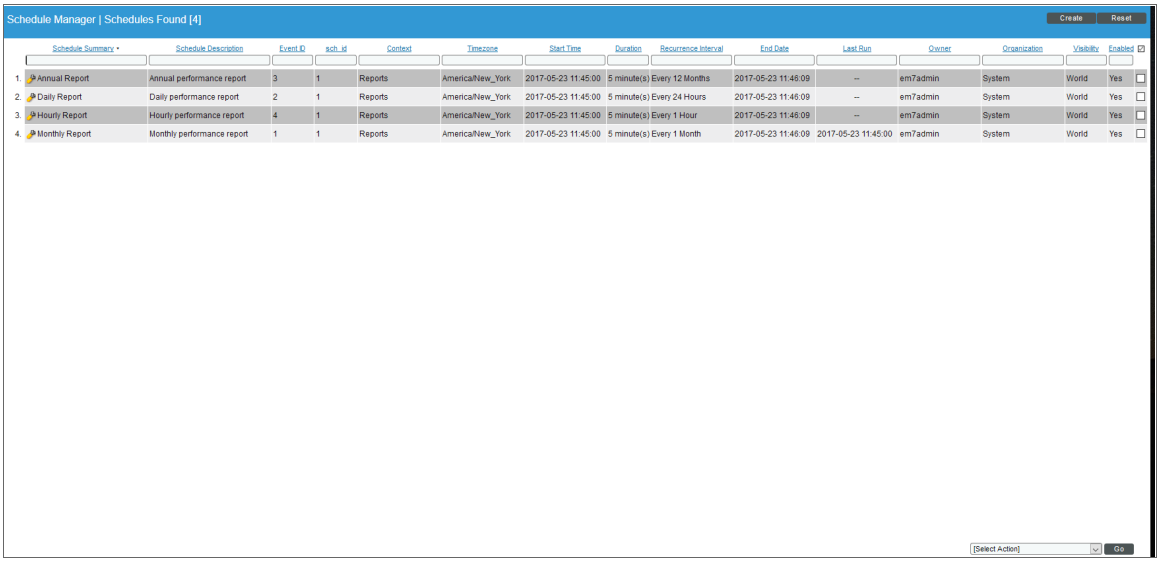
4. To save the report job you created, click the **[Save]** button in the bottom right of the page.

Scheduling a Report Job

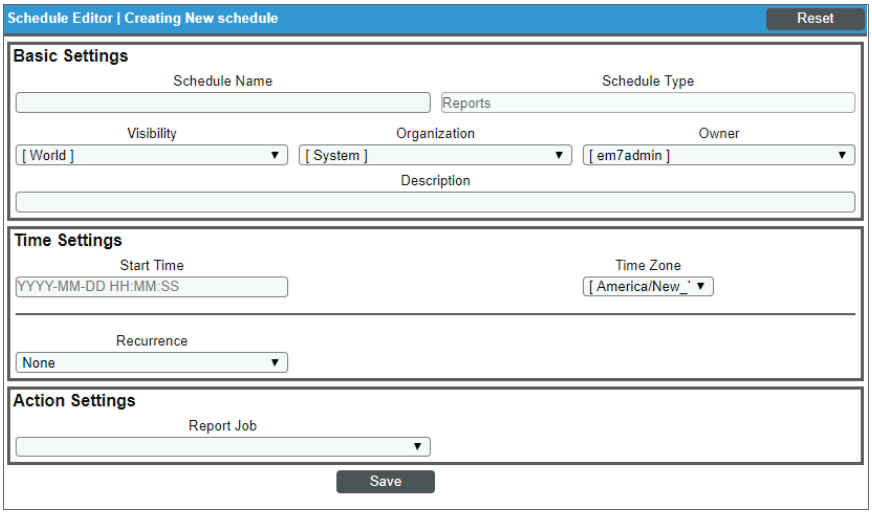
After you create a report job, you can schedule that report to run once, at a specified time, or at specified regular intervals.

To schedule a report job:

1. Go to the **Schedule Manager** page (Reports > Create Report > Scheduler).



2. Click the **[Create]** button in the upper right of the page. The **Schedule Editor** page appears:



3. On the **Schedule Editor** page, complete the following fields as needed:

Basic Settings

- ***Schedule Name***. Type a name for the scheduled process.
- ***Schedule Type***. Indicates the scheduled process type (such as Tickets, Reports, or Devices).
- ***Visibility***. Select the visibility for the scheduled process. You can select one of the following:
  - *Private*. The scheduled process is visible only to the owner selected in the ***Owner*** field.
  - *Organization*. The scheduled process is visible only to the organization selected in the ***Organization*** field.
  - *World*. The scheduled process is visible to all users.
- ***Organization***. Select the organization to which you want to assign the scheduled process.
- ***Owner***. Select the owner of the scheduled process. The default value is the username of the user who created the scheduled process.
- ***Description***. Type a description of the scheduled process.

Time Settings

- ***Start Time***. Click in the field and select the date and time you want the scheduled process to start.
- ***Time Zone***. Select the region or time zone for the scheduled start time.

NOTE: If you want SL1 to automatically adjust for daylight savings time (if applicable), then you must select a named region (such as *America/New York*) in the ***Time Zone*** field. If you select a specific time zone (such as *EST*) or a specific time offset (such as *GMT-5*), then SL1 will not automatically adjust for daylight savings time.

- ***Recurrence***. Select whether you want the scheduled process to occur once or on a recurring basis. You can select one of the following:
  - *None*. The scheduled process occurs only once.
  - *By Interval*. The scheduled process recurs at a specific interval.

If you select *By Interval*, the following additional fields appear:

- ***Interval***. In the first field, enter a number representing the frequency of the scheduled process, then select the time interval in the second field. Choices are *Minutes*, *Hours*, *Days*, *Weeks*, or *Months*. For example:
  - If you specify "6 Hours", then the scheduled process recurs every six hours from the time listed in the ***Start Date*** field.
  - If you specify "10 Days", then the scheduled process recurs every 10 days from the date listed in the ***Start Date*** field.
  - If you specify "2 Weeks", then the scheduled process recurs every two weeks, on the same day of the week as the ***Start Date***.
  - If you specify "3 Months" the ticket recurs every three months, on the same day of the month as the ***Start Date***.
- ***Recur Until***. Specifies when the scheduled process stops recurring. You can select one of the following:
  - *No Limit*. The scheduled process recurs indefinitely until it is disabled.
  - *Specified Date*. The scheduled process recurs until a specific date and time. If you select *Specified Date*, you must enter a date and time in the ***Last Recurrence*** field.
- ***Last Recurrence***. Click in the field and select the date and time you want the scheduled process to stop recurring.

Action Settings

- ***Report Job***. Select the report job to generate the report.

4. Click **[Save]**.

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