LICENSE DASHBOARD™
Designed and built by SAM professionals for SAM professionals

Cloud Console

Getting Started Guide

OVERVIEW

License Dashboard Cloud Console is an online tool which integrates with License Manager.

Cloud Console brings the extensive reporting capabilities from a License Manager database and makes it available to view at any time and place through the web.

Purpose and Scope

This help documentation is designed to get you up and running with Cloud Console as quickly as possible.

More detailed help and support is available in the Cloud Console user guide.

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Preparation

Installation

When you purchase Cloud Console, you are provided with the install files and an installation guide. The installation guide is in a PDF format and gives details of the system requirements and how to install the software. Please refer to this document when installing Cloud Console.

Login

A standard administrator account is enabled when you install Cloud Console. Use this account to log into the system.

Username: Administrator

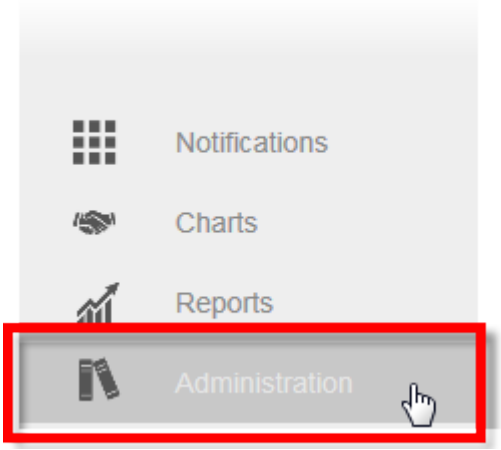
Password: Administrator

> **Note:** Please note: After login, you may want to change the password. Click **Change Password** at the top of the page to do this.

How to Configure Cloud Console

Use the administration workspace in Cloud Console to configure the system for your organization.

Click the administration link in the navigation menu to access the administration workspace:



Introduction to the administration workspace

The administration workspace is used to configure Cloud Console. There are up to four page which are configurable. These are accessed from the navigation menu:

- The users page is used to manage all the user accounts for your organization
- The security roles page is used to define the security roles for user accounts. Security roles allow you to restrict access to data by business unit. For example; you may have a business unit for each country you operate in. You could create security roles for each country so when a user views the data, they are only shown the data for the country they operate in. *Please note: this page is only available if business unit security is activated in the system page*
- The service roles page is used to define the service roles for user accounts. Service roles allow you to create custom filters for users to apply when viewing reports. For example; you may have a group of users who are responsible for managing database licensing. You can create a service role which will provide a series of filters to facilitate this role. *Please note: this page is only available if service management is activated in the system page*
- The system page is used to configure the operational features of Cloud Console

Configuring Cloud Console

Cloud Console should be configured to meet the needs of your organization. It is important that you understand how your License Manager database has been configured, and how the responsibilities for license management is organized within your organization. This will help to determine how you configure Cloud Console.

You can take the following steps to configure Cloud Console.

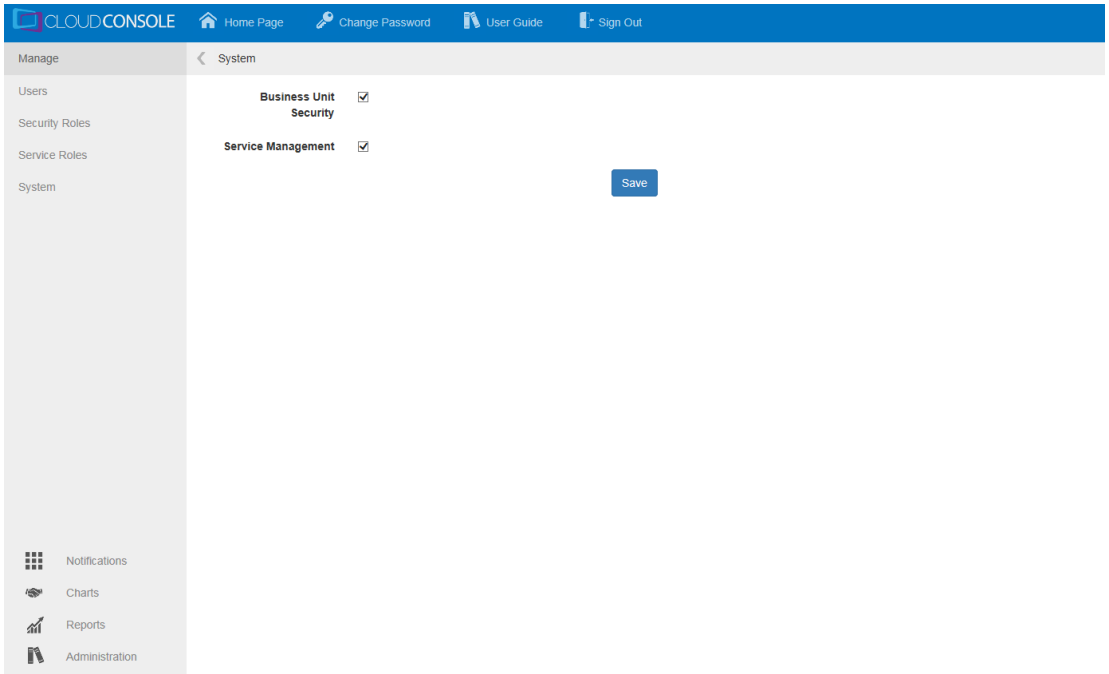
1. Configure the system page
2. Create security roles
3. Create service roles
4. Add user accounts

THE ADMINISTRATION WORKSPACE

Configuring the System Page

In Cloud Console, you can configure the system settings for your organization.

1. Click **Administration** to view the administration workspace
2. Click **System** in the navigation menu. The system page is displayed:



3. Select the system settings. There are two options:

   - Tick **Business Unit Security** to enable the security roles page. Business unit security is used to restrict user access to data by business unit. Security roles are added to user accounts. This restricts the data the user can view in Cloud Console. For example; a user may be responsible for managing the licensing for their office only. A security role can be created to only show licensing data related to their office. Disable this option if all users should be shown the data for the entire organization
   - Tick **Service Management** to enable the service roles page. Service management is used to create specific filters for users to use. These filters are only made available in the reports workspace.

4. Click **Update** to save the new settings.

Creating Security Roles

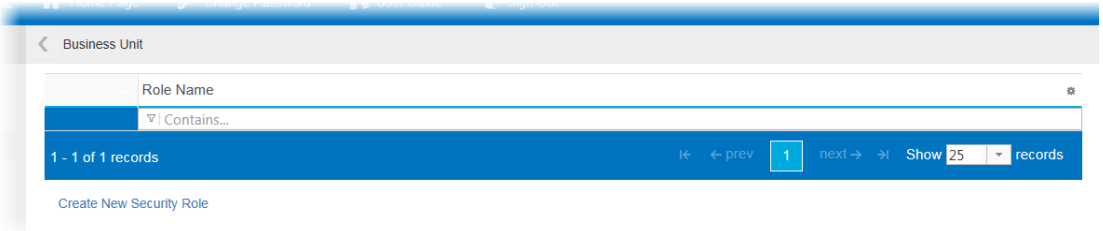
If you have chosen to enable business unit security in the system settings, you should create security roles to assign to users.

Security roles allow you to restrict the information users can view. The information can be restricted by business unit.

How to create a security role

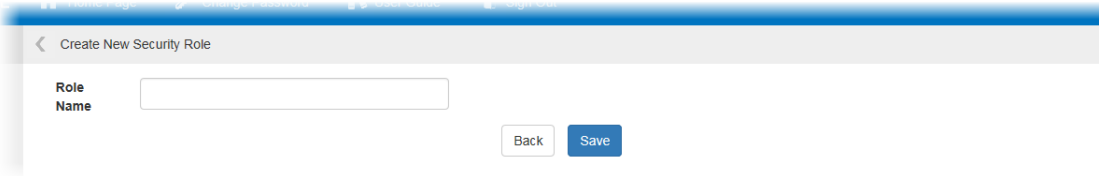
Security roles are created in the security roles page.

1. Click **Administration** to view the administration workspace
2. Click **Security Roles** in the navigation menu to view the security roles page

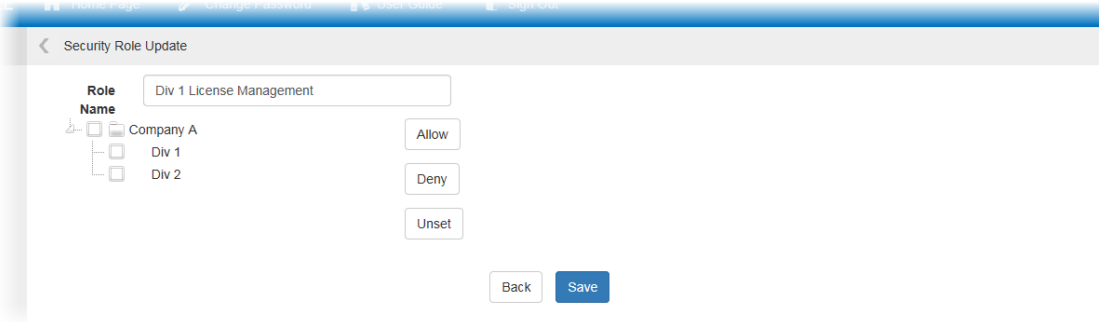


Use the roles table to create security roles for your user accounts

3. Click **Create New Security Role**. The create new security role page is displayed:



4. Type the **Role Name**
5. Click **Save**. The role is added and the business unit rules tree is displayed:



6. Set the business unit security rules for the role:

   - Tick a business unit and click **Allow** to allow access to data related to the selected business units. Click **Save** to save the changes
   - Tick a business unit and click **Deny** to deny access to data related to the selected business units. Click **Save** to save the changes
   - Click **Unset** to remove the current rules

7. Click **Back** to return to the security roles page

> **Note:** Repeat this process to create all of the security roles you require

Creating Service Roles

If you have chosen to enable service management in the systems settings, you should create service roles to assign to users.

Service roles are groups of custom filters for users to use in the reports workspace. The filters can be designed to meet specific needs. For example; you may have a group of users who are responsible for managing database licensing. You could create a service role for database licensing. This could include filters which will only show data related to the licenses for database products.

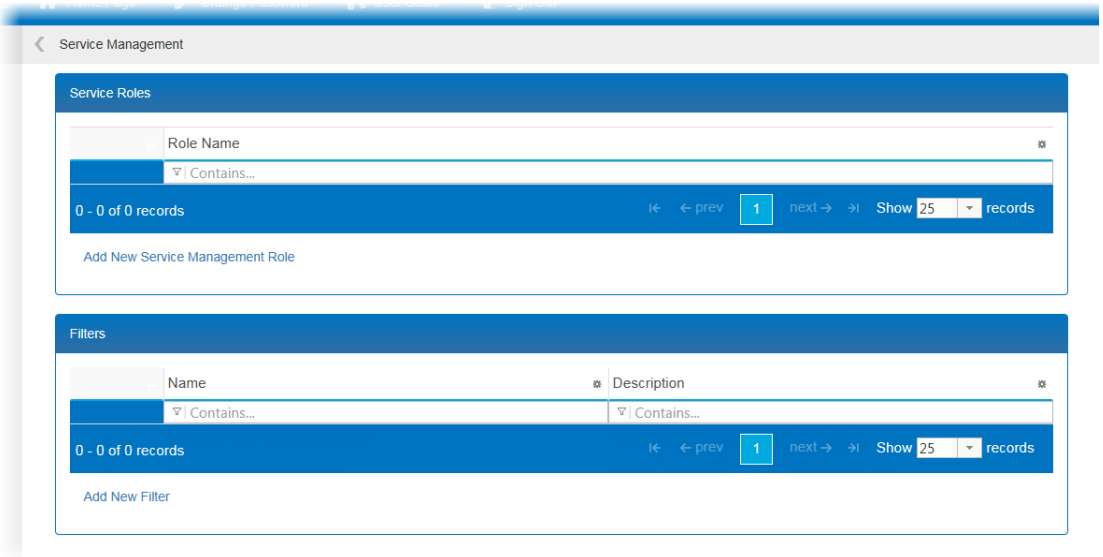
There are two processes for creating a service role:

- Create the filter sets for the role
- Create the service role. This includes assigning the filters to the role

How to create a filter set

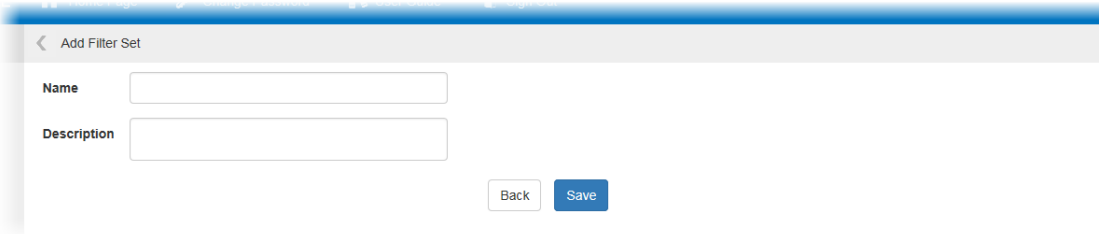
Filter sets are created in the service roles page.

1. Click **Administration** to view the administration workspace.
2. Click **Service Roles** in the navigation menu. The service management page is displayed:

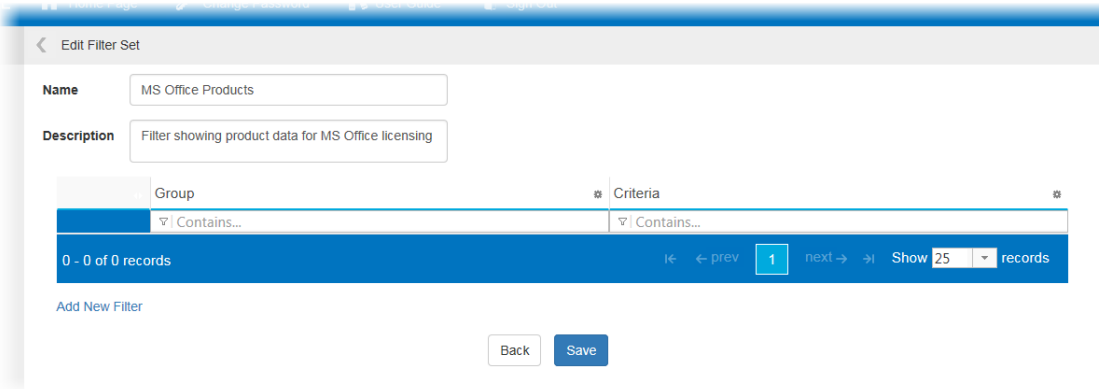


The service management page is split into two tables. Use the filters table to add the filter sets for your service roles. Filter sets are groups of filters which create a single query for the data in your License Manager database.

3. Click **Add New Filter**. The add filter set page is displayed:

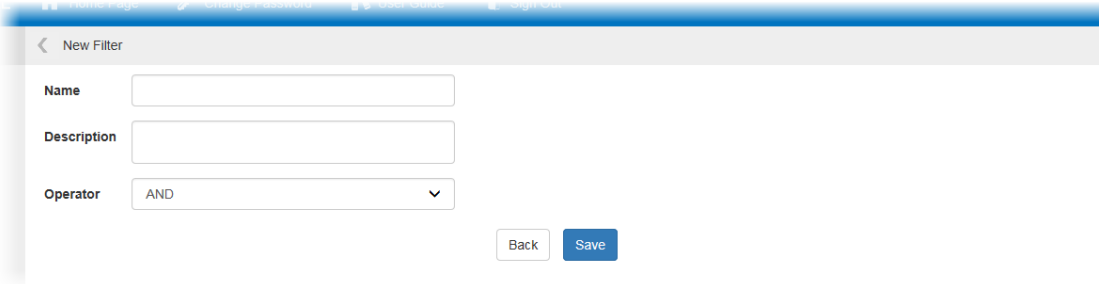


4. Type the **Name** of the filter set
5. Type a **Description** of the filter set
6. Click **Save**. The filter is added and the filter table is displayed:



Use the filter table to create every filter required for the filter set

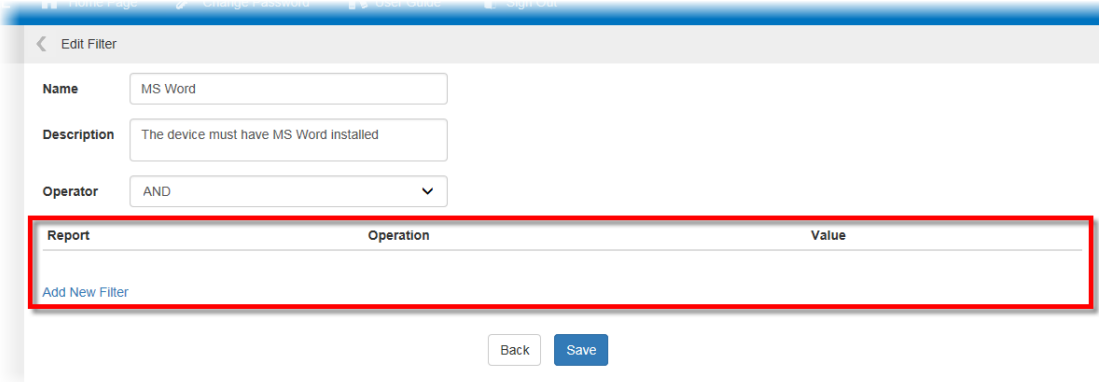
7. Click **Add New Filter**. The new filter page is displayed:



8. Type the **Name** for the filter
9. Type a **Description** for the filter
10. Select an **Operator** for the filter. This defines how the criteria lines operate in relation to each other. There are two options:

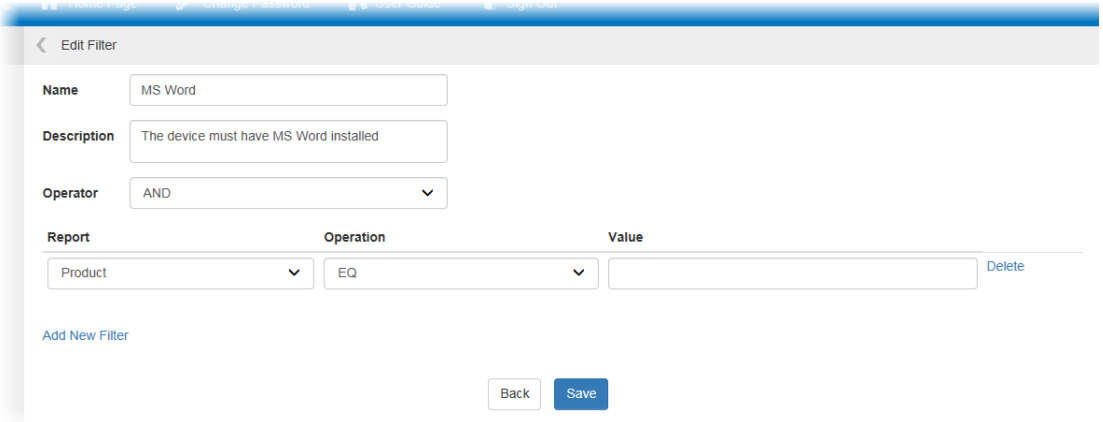
    - Select **AND** to require that all the criteria must be met by the data to be included
    - Select **OR** to allow data to be included if any of the criteria is be met

11. Click **Save**. The filter criteria table is displayed:



Use the filter criteria table to define what criteria must be met to allow data to be displayed when the filter set is run.

12. Click **Add New Filter**. A line is added to the table:



Input the criteria for the line:

- Select the **Report** type. There are four options:
  - Product
  - Manufacturer
  - Environment
  - Country
- Select the **Operation**. This defines how the value must relate to the report in order to meet the criteria. There are 12 options:
  - EQ. The report must equal the value. For example; Product is Excel
  - NE. The report must not equal the value. For example; Manufacturer is not Adobe
  - GT. The report must be greater than the value. For example; Product is greater than 2010
  - LT. The report must be less than the value. For example; Product is less than 2013
  - GE. The report must be greater than or equal the value. For example; Product is greater than or equal to 2010
  - LE. The report must be less than or equal to the value. For example; Product is less than or equal to 2013
  - Contains. The report must contain the value. For example; Country must contain united
  - StartsWith. The report must start with the value. For example; Environment must start with virt
  - EndsWith. The report must end with the value. For example; Manufacturer must end with inc
  - NotContains. The report must not contain the value. For example; Country must not contain united
  - NotStartsWith. The report must not start with the value. For example; Environment must not start with virt
  - NotEndsWith. The report must not end with the value. For example; Manufacturer must not end with inc
- Type the **Value**

Repeat this step to create all of the criteria for the filter

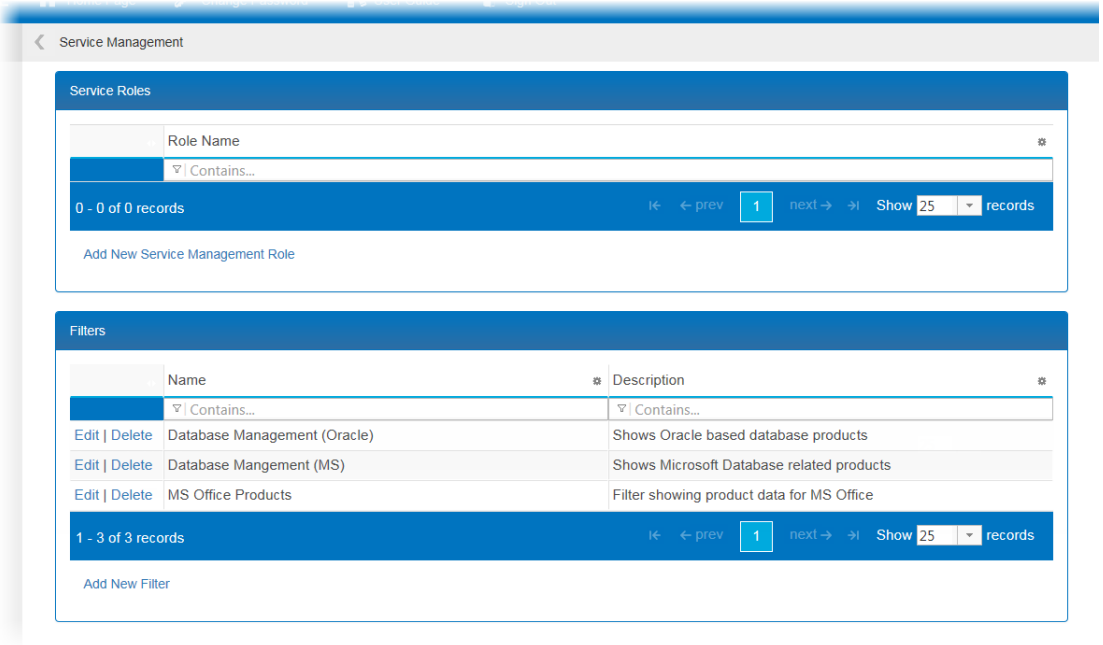
13. Click **Save**. The filter is added to the set and the edit filter set page is displayed again. Repeat steps 7 to 12 to create all of the filters for the set. *Please note; each filter will return data independently of the other filters in the set when the filter is applied to a report*
14. Click **Save**. The filter set is saved

Note: Repeat this process to create all of the filter sets you require

How to create a service role

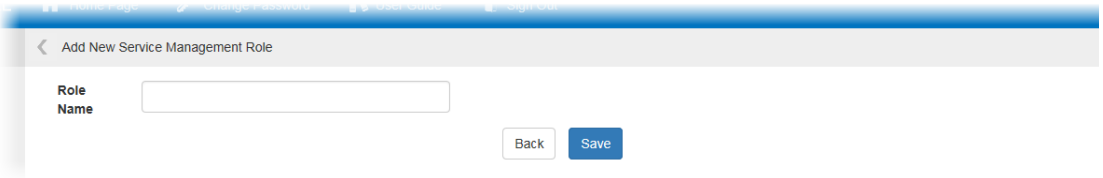
Service roles are created in the service roles page.

1. Click **Administration** to view the administration workspace
2. Click **Service Roles** in the navigation menu. The service management page is displayed:

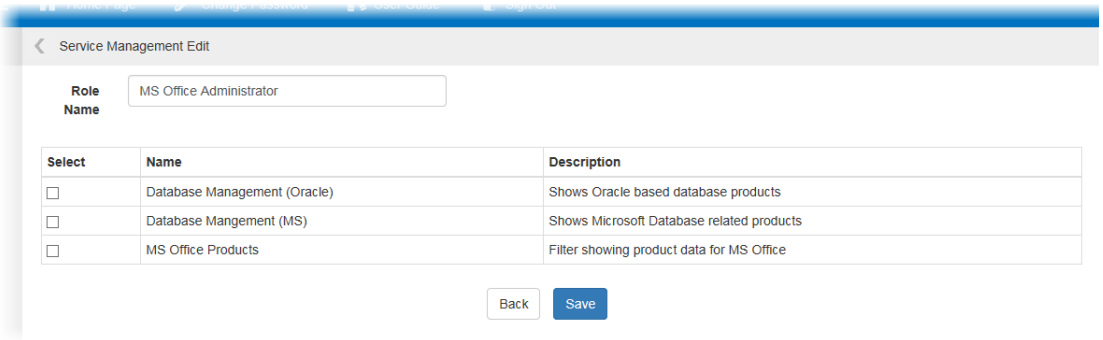


The service management page is split into two tables. Use the service roles table to add the service roles. Service roles are groups of filter sets which are assigned to users. The users with a role has access to all of the filter sets when they are viewing data in the reports workspace

3. Click **Add New Service Management Role**. The add new service management role page is displayed:



4. Type the **Role Name**
5. Click **Save**. The filter sets table is displayed:



6. Tick the filter sets you want to make available to users with the service role
7. Click **Save**. The service role is saved

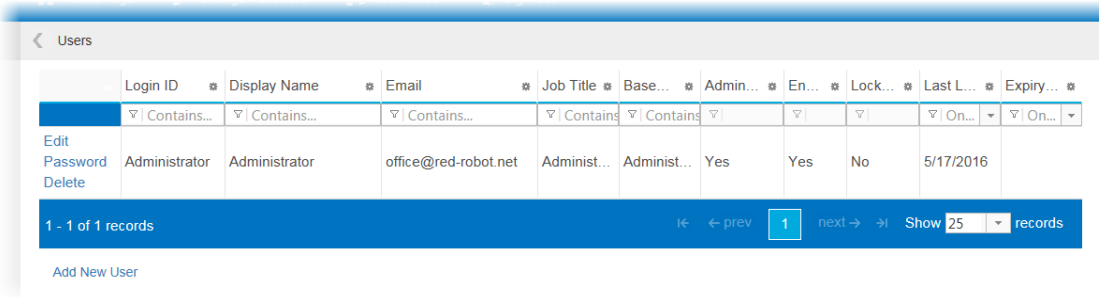
Note: Repeat this process to create all of the service roles you require

Creating Users

Users require a user account to access Cloud Console. This allows them to view licensing data appropriate to their role.

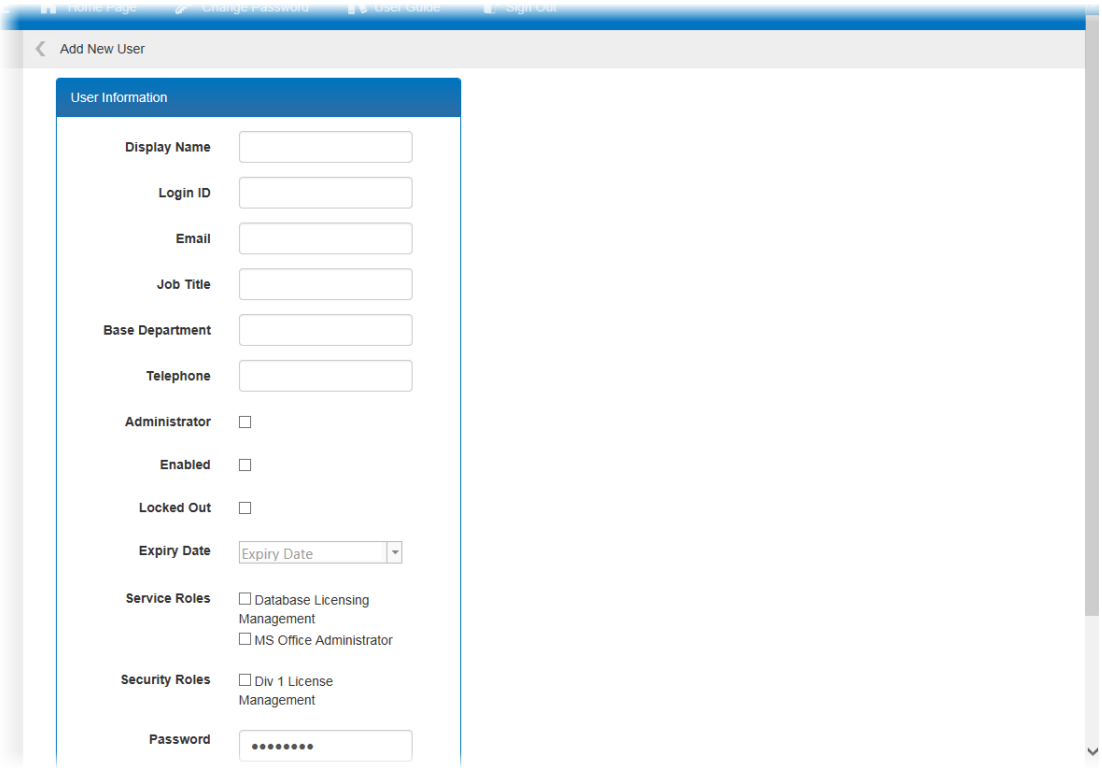
In , users are permitted access to the notifications, charts and reports workspaces. Users can also be given administrator rights to allow them to access the administration workspace.

1. Click **Administration** to view the administration workspace
2. Click **Users** in the navigation menu to view the users page:



Please note; an administrator account is automatically created when the system is installed. Do not delete this account

3. Click **Add New User**. The add new user page is displayed:



4. Type the **Display Name**
5. Type the **Login ID**
6. Type the **Email** address
7. Type the **Job Title**
8. Type the **Base Department**. This is used to identify the department where the user works
9. Type the **Telephone** number
10. Tick **Administrator** to give the user administrator permissions
11. Tick **Enabled** to enable the account
12. Select an **Expiry Date** to disable the account after a specific date
13. Select a **Security Role** to restrict the data a user can access
14. Select a **Service Role** to give the user additional filters to use in the reports workspace
15. Type a **Password** for the user account

16. Type the same password in the **Confirm Password** field

17. Click **Save**. The user is added

Note: Repeat this process to create all of the users you require

Support

Support website: www.licensedashboard.com

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Telephone US/Canada: 1-855-773-3404

Email: support@licensedashboard.com

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Online resources

- Share your thoughts and views in the License Dashboard Forum. Get the latest news, development schedules and technical details. Share your wish lists and questions, and communicate with other users.

  http://www.licensedashboard.com/forums/

- Download the latest patch versions of the software, including the latest dictionary definition updates. You can log in using your forum username and password.

  http://www.licensedashboard.com/LatestDownloads/Login.aspx