

HCLSoftware

HCL MyXalytics

User Guide

Version 6.6



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Document Revision History

This guide is updated with each release of the product or when necessary.

This table provides the revision history of this MyXalytics User Guide.

Version Date	Description
October, 2023	MyXalytics_User Guide_v6.2
January, 2025	MyXalytics_User Guide_v6.5
May, 2025	MyXalytics_User Guide_v6.6

1 Preface

This section provides information about the MyXalytics Guide which includes the following topics.

- [Intended Audience](#)
- [About This Guide](#)
- [Related Documents](#)
- [Conventions](#)

1.1 Intended Audience

This information is intended for administrators responsible for configuring MyXalytics.

1.2 About this Guide

This guide provides information regarding KRS in which users can change root user password for different authentication types and rotate encryption key after KRS login.

1.3 Related Documents

The following documents can be referenced in addition to this guide for further information on the MyXalytics platform.

- Introduction to MyXalytics Guide
- MyXalytics Installation & Configuration guide
- MyXalytics Add-Ons Installation & Configuration guide
- MyXalytics Troubleshooting Guide

1.4 Conventions

Table 1 - Conventions

Convention	Element
Boldface	Indicates graphical user interface elements associated with an action, or terms defined in text or the glossary
<u>Underlined blue</u>	Indicates cross-reference and links
<i>Italic</i>	Indicates document titles, occasional emphasis, or glossary terms
Courier New (Font)	Indicates commands within a paragraph, URLs, code in examples, and paths including onscreen text and text input from users
Numbered lists	Indicates steps in a procedure to be followed in a sequence
Bulleted lists	Indicates a list of items that is not necessarily meant to be followed in a sequence

2 FinOps Overview

In a rapidly digitizing business paradigm, cloud platforms have emerged as an essential element for future-facing enterprises. This is also seeing enterprises move beyond private and public cloud platforms and opt for a hybrid cloud model for their business. Hybrid cloud offers you a range of benefits, including improved choice of services, increased speed of implementation and execution, and greater scalability. However, it also poses challenges around cloud cost visibility, optimization, and governance. Poor financial management, inadequate reporting capabilities and inability to predict the OPEX costs accurately are the realities of today's multi-cloud environments.

MyXalytics – FinOps our AI-driven Cloud FinOps Visibility and Insights product — helps you effectively visualize, manage, and optimize your multi-cloud spends.

Advantages of FinOps:

1. Unified Cloud Cost Visibility | With granular visibility into all your cloud environments, capture, track the usage patterns over time, and leverage AI and Machine Learning to accurately forecast budgets and minimize deviations.
2. Cost Anomaly Detection | Leverage AI-driven outlier analysis to identify anomalous cloud costs and get alerted via automated notifications using various channels like ITSM, Slack, ChatOps and others.
3. Cost Optimization | Reduce the amount of time spent on analyzing and optimizing your cloud spends by leveraging various techniques like rightsizing, scheduled instances, reserved / committed usage instances, waste elimination, and others.
4. Cloud Governance | Ensure continuous security, compliance, and governance across your cloud environments through native advisory and security visibility and insights.
5. Task Allocation and Tracking | Analyze and Identify problem areas, and assign them to concerned teams for resolution, with continuous tracking and updates. following typographic conventions are used in this document.

3 Features of MyXalytics

Below are the basic key features of MyXalytics KRS service Login:



Figure 1 – MyXalytics Key Features

4 MyXalytics Login

To begin using MyXalytics, follow the steps below:

1. Open a browser and enter [MyXalytics URL](#) in the address bar.

`https://myxalytics.xxxxxxx.com`

2. You will find the MyXalytics **Sign In** window appears.
3. On the login page, enter the User ID and Password.

MyXalytics supports the following authentication types for secure login into the environment:

- **LDAP:** It provides a mechanism to authenticate you to log in through LDAP/Active Directory (AD) credentials.
- **SAML:** Using third-party services for granting access to the environment.

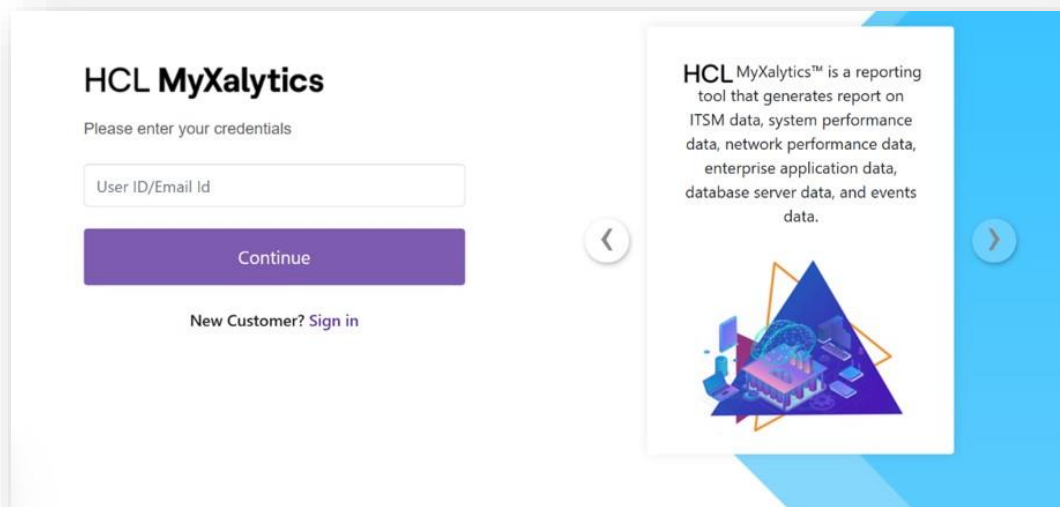


Figure 2 – MyXalytics Login

4. Click **Sign In**. The MyXalytics Home Page appears.

5 MyXalytics Homepage Intro

After successfully logging in, a dashboard will appear. A user's role determines the tasks they can perform where each role is associated with the permissions or rules that define access to a given feature.

There are two fundamental built-in roles available in MyXalytics:

- a. **Global Admin** - It is the default account that creates on installing MyXalytics, with the capability to manage MyXalytics core and other users. It has full access to all MyXalytics components, including the dashboards/views/reports and the right to create and manage the global dashboard.
- b. **User** - It has access to reporting but is not allowed to manage the user interface. They can only view the reports in MyXalytics dashboard, including the global dashboard. They can create reports as per their specified access or role.

5.1 Dashboards

MyXalytics collects the configuration data and stores it in a database that can be viewed through a dashboard in the form of reports.

5.1.1 Home Dashboard

This dashboard displays the below widgets/reports-

1. Last month's expenses: This report displays the sum of expenses for the last month of all
2. Current month's expenses: This report displays the sum of expenses for the current month of all the cloud providers for FinOps.
3. Potential Savings: This report displays savings which can be made by subscribing to the recommended plan instead of using the actual plan.

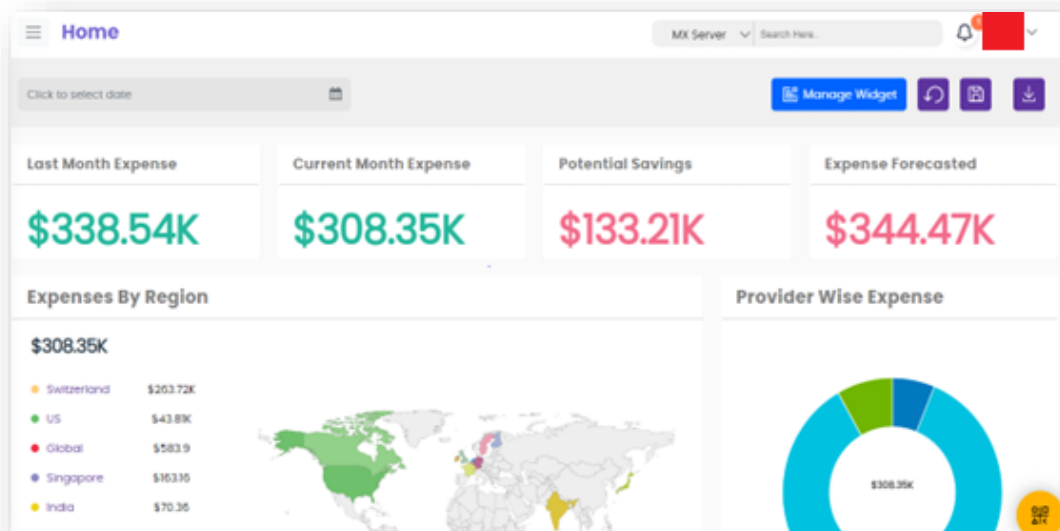


Figure 3 – MyXalytics Dashboard

4. Expenses Forecasted: This report displays the forecasted expenses for the current month.
5. Expenses by Region: This report displays the expenses based on region.
6. Provider Wise Expense: This report displays the expenses based on cloud provider.

5.1.2 Executive Dashboard

This dashboard displays the below widgets/reports:

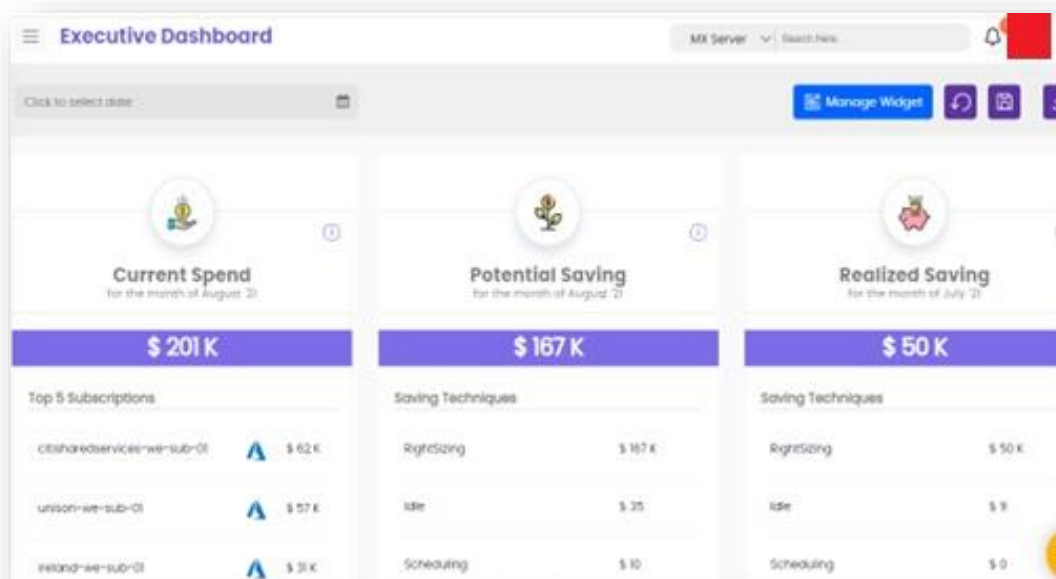


Figure 4 – Executive Dashboard

1. Current Spend - This report/widget displays the current expenditure based on the top 5 subscriptions.
2. Potential saving - This report displays the potential saving which can be done using various saving techniques.

5.1.3 Cost Analysis Dashboard

This dashboard contains the following views:

5.1.3.1 Summary

This view contains the following widgets/reports:

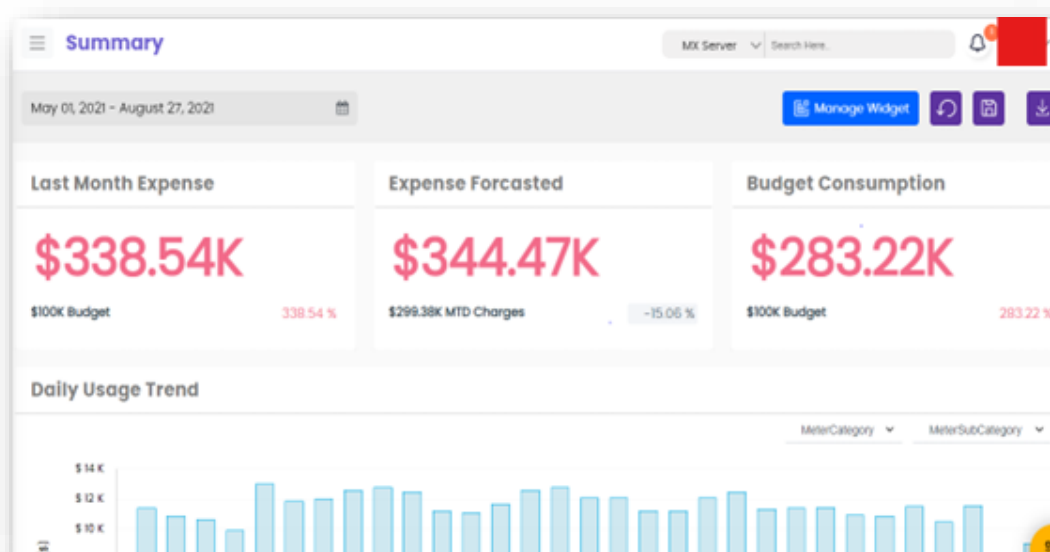


Figure 5 – MyXalytics Dashboard

1. **Last Month Expenses**- This report displays the sum of expenses for the last month of all the cloud providers for FinOps.
2. **Expenses Forecast**- This report displays the forecasted expenses for the current month.
3. Budget Consumption
4. **Cost Analysis** - This report gives an analysis of costs based on cloud providers.

5.1.3.2 Budget Forecast

This view contains the following widgets/reports-

1. **MTD Spend** - This report displays the month to date spent on providers in FinOps.
2. **Projected Spend** - This report displays the projected spend for providers in FinOps.
3. **Budget vs Projected** - This report displays the actual budget with the projected budget.

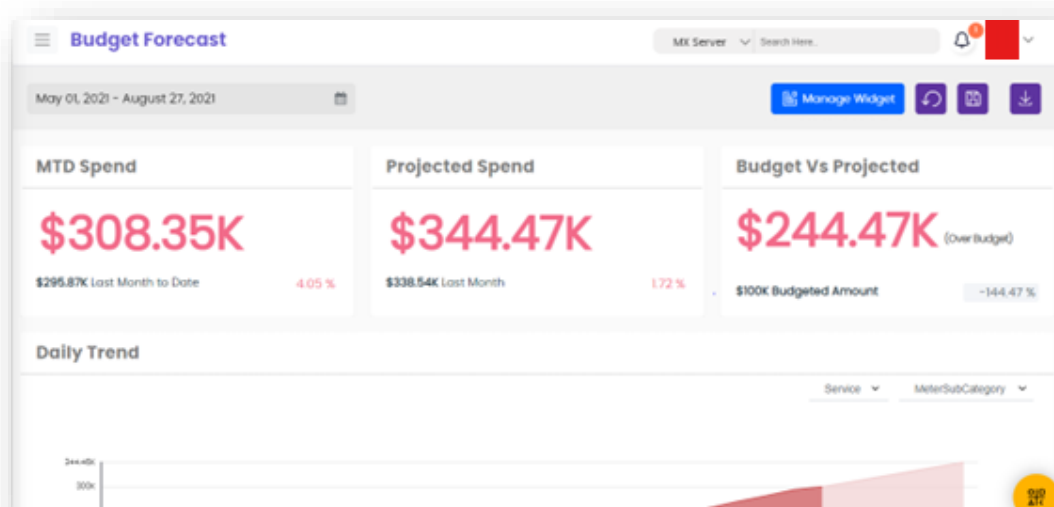


Figure 6 – Budget Forecast

For the budget reports we also need to configure the budget which is described in section_Budget Creation

5.1.3.3 Spend Analysis- This view has the following widgets-

1. **YTD spend** - This report displays year-to-date spending for providers in FinOps.

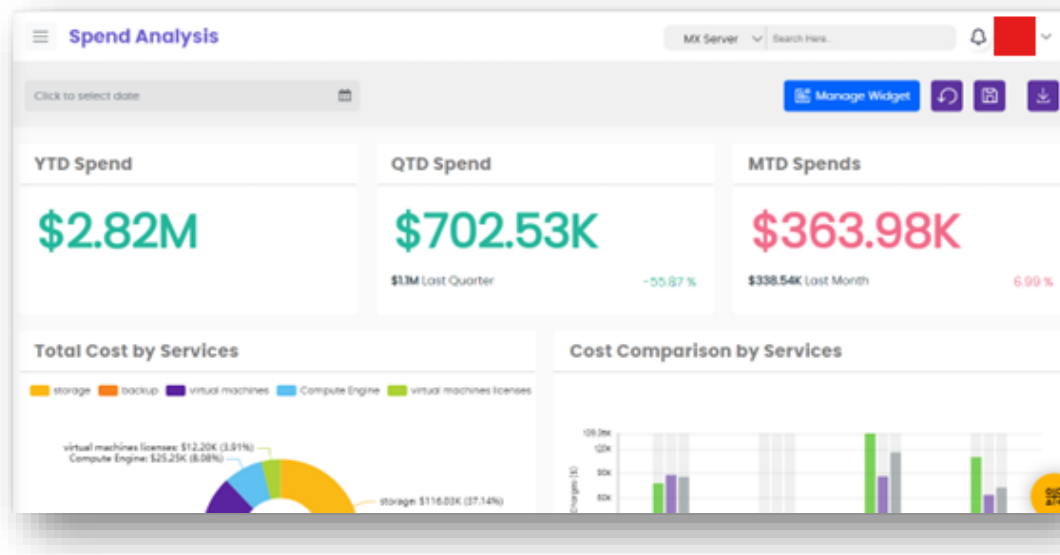


Figure 7 – Spend Analysis

2. QTD spend- This report displays quarter-to-date spend for providers in FinOps.
3. MTD spend- This report displays month-to-date spending for providers in FinOps.

Tag Analytics

This view has following widgets-

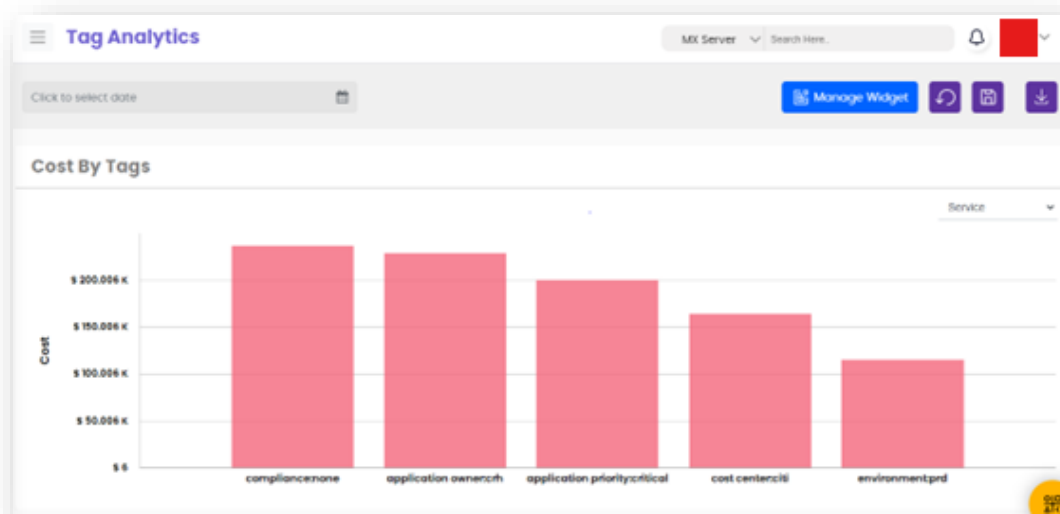


Figure 8 – Tag Analysis

1. **Cost By Tags** - This report/widget gives the cost of FinOps resources based on different tags.
2. **Resource Count by Tags** - This report/widget gives the count of FinOps resources based on different tags.

5.1.4 Cost Optimization Dashboard

This dashboard contains the following views:

5.1.4.1 Utilization

This view contains the following reports/widgets:

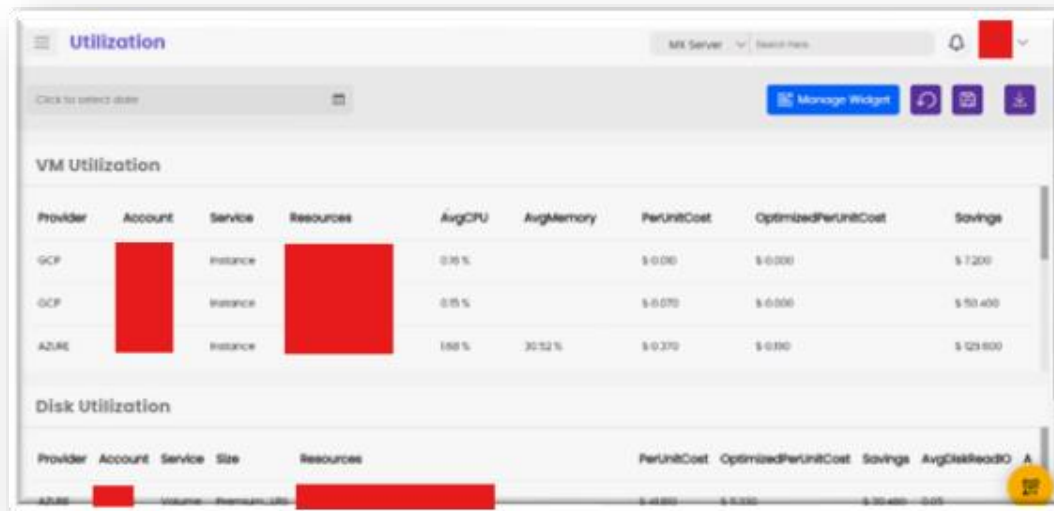


Figure 9 - Utilization

5.1.4.2 Waste Elimination

This view contains the following reports/widgets-

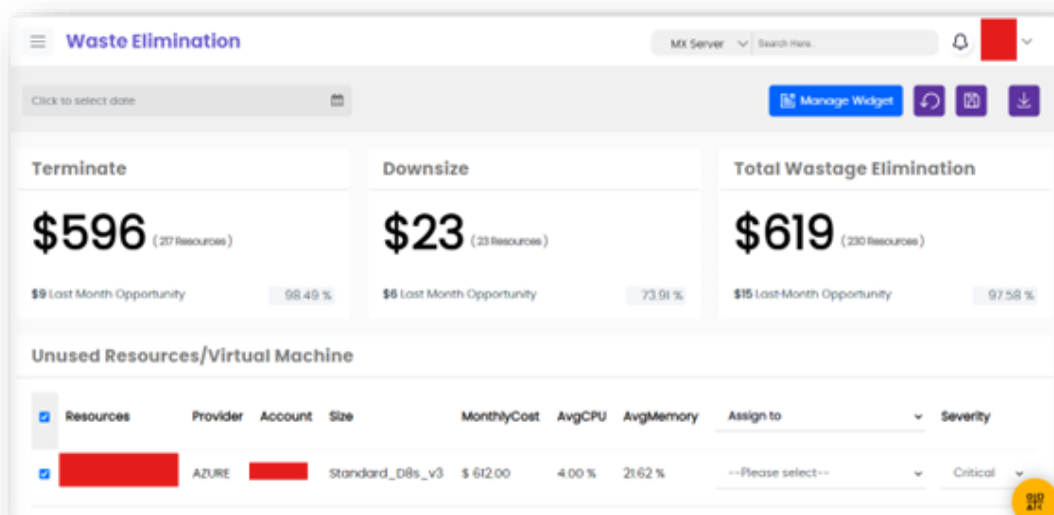


Figure 10 – Waste Elimination

5.1.4.3 AWS Saving Plan Recommendation

This view contains the following reports:

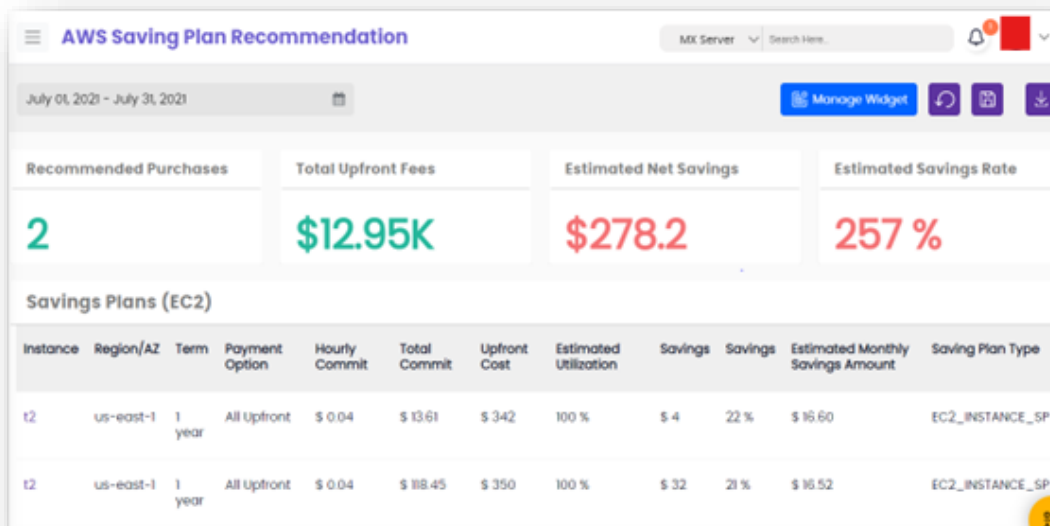


Figure 11 – Saving Plan Recommendation

5.1.4.4 RI Purchase

This view contains the following report:

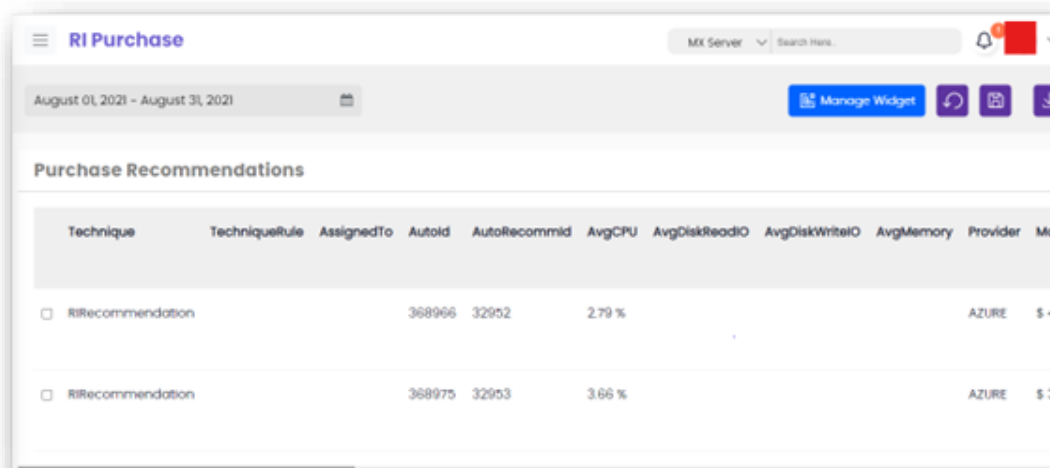


Figure 12 – RI Purchase

- This report is configured using the **Cost Optimization** setting which is described in section Cost optimization settings.

5.1.4.5 Cost Optimization driver view

This view contains the following reports:

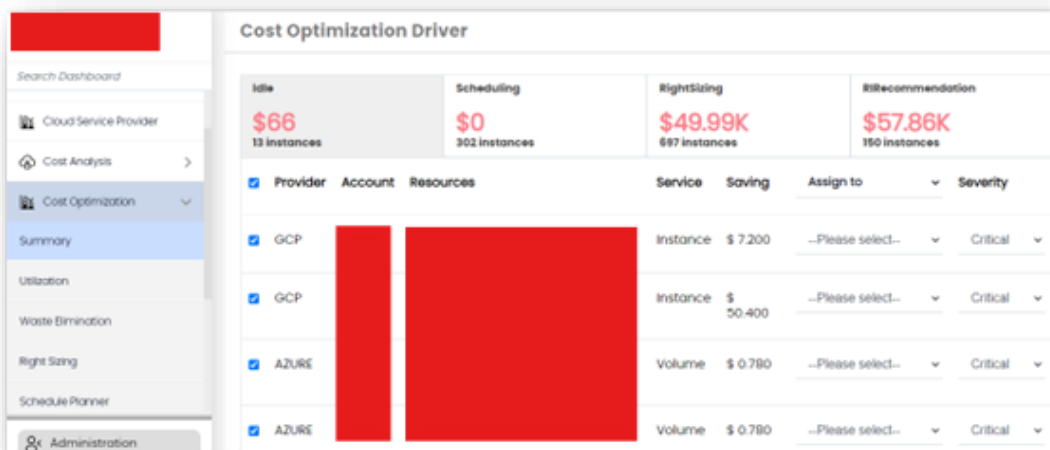


Figure 13 – Cost Optimization Driver

For configuring this dashboard, please refer to sections 6.4 and 6.5

5.1.5 Kubernetes Cost optimization

In this dashboard we display the Kubernetes recommendation data. Where we can show the data of idle, right sizing and scheduling technique. This report comes under the cost optimization menu. This view contains the following widgets/reports:

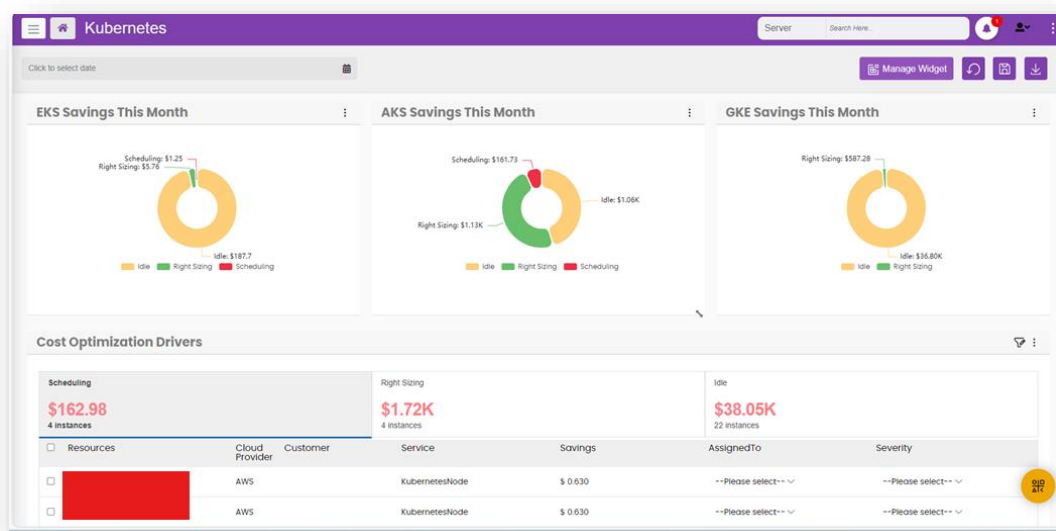


Figure 14 – Kubernetes cost optimization

5.1.6 Cloud Governance Dashboard

This dashboard has the following views/tabs:

5.1.6.1 Azure Inventory

This view contains the following widgets/reports:

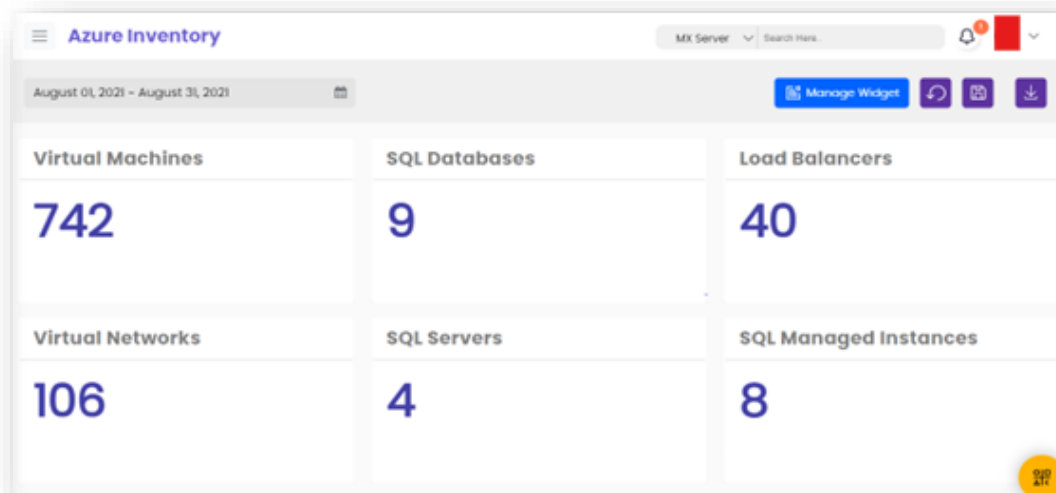


Figure 15 – Azure Inventory

5.1.6.2 AWS Trusted Inventory

This view contains the following widgets/reports-

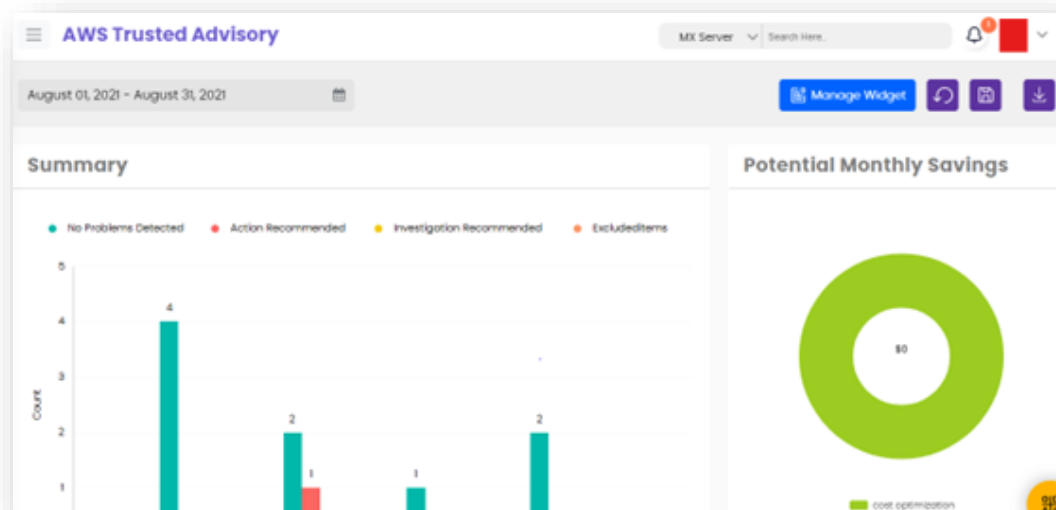


Figure 16 – AWS Trusted Advisory

5.1.6.3 GCP Inventory

This view contains the following widgets/reports-

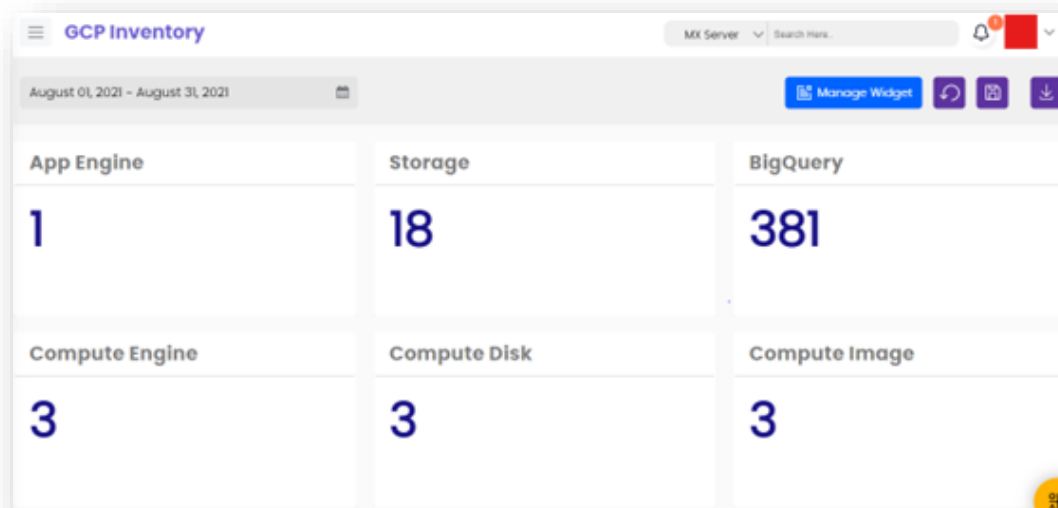


Figure 17 – GCP Inventory

5.1.7 Tag Governance

In FinOps, resources are provided with different tags at Global, Service and Resource Group levels. This dashboard has three reports which demonstrate Global Tag Compliance, Service Tag Compliance, and overall detailed view of Tag compliance respectively.

- Below are the reports:

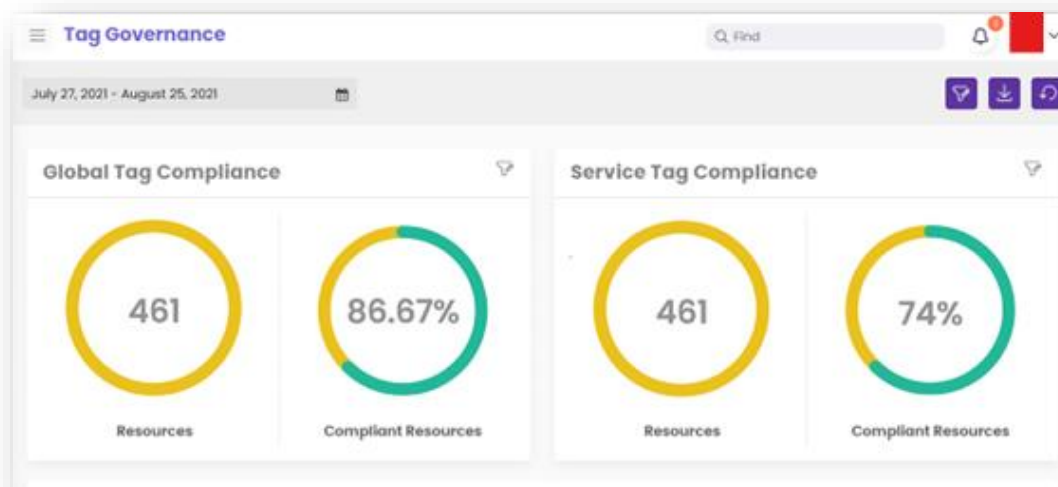


Figure 18 – Tag Governance

Provider	Account	Service	Resource Count	Global Tags	Service Tags
Azure		Virtual Machines	451	Cost Center Owner	Environment Location
AWS		EC2	600	Cost Center Owner	Environment Schedule
Azure		Storage	1239	Cost Center Owner	Environment BackupWindow Tier
AWS		S3	900	Cost Center Owner	Environment Archival Tier
Azure		Load Balancer	1200	Cost Center Owner	Application Environment Type

Figure 19 – Tag Compliance

- For collecting the data used in these reports, we first need to configure the tag policy for Global, Service, and Resource Group levels. For configuring tag policy refer section 6.2.
- Steps to configure report on Global compliance OR Service Compliance percentage:

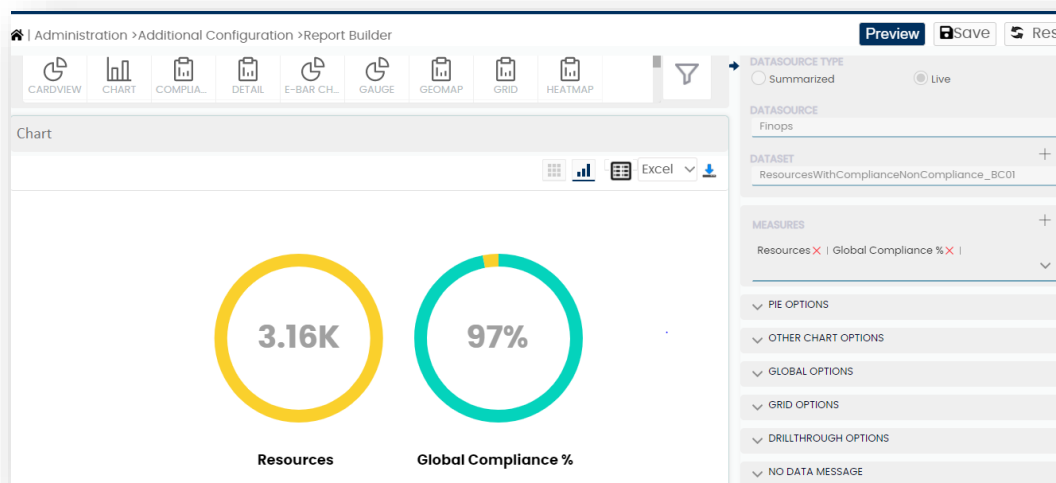


Figure 20 – Report Builder

1. Go to the report builder screen.
2. Select template 'TagComp'.
3. Select the object 'ResouresWithComplianceNonCompliance_' + EngagementName.
4. Select Measures 'Resources' and 'Global Compliance%' /Service Compliance%
5. Steps to configure overall Tag Compliance report-
6. Go to the report builder screen.
7. Select the template 'Compliance'.
8. Select the object 'ResouresWithComplianceNonCompliance_' + EngagementName.
9. Select the fields Provider,SubscriptionName, Service/ResourceGroup,Global_tags, Service_Tags/ResourceGroup_Tags.

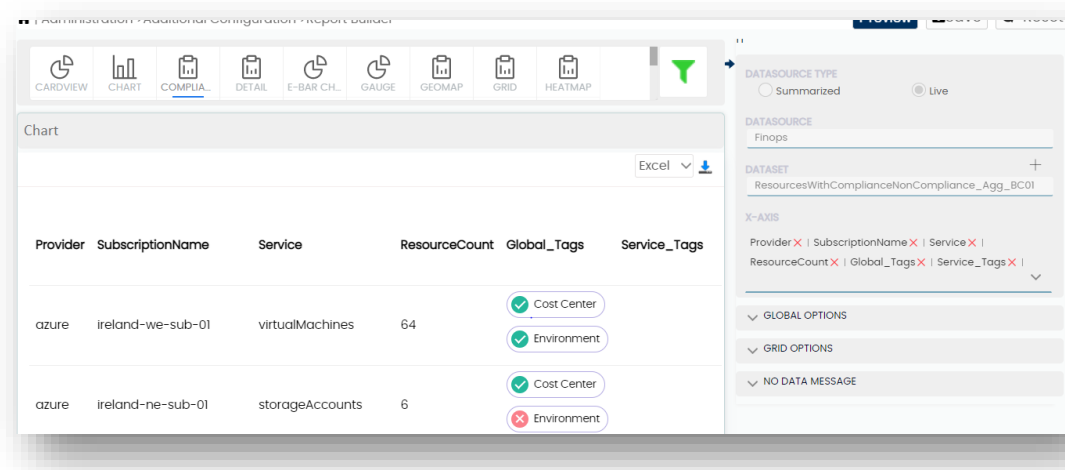


Figure 21 – Report Builder

5.2 Kubernetes Dashboard

In FinOps we have provided the multi-provider Kubernetes dashboard. In this dashboard we display the cluster, node, namespace and pod inventory count with its related billing and performance stats.

Prerequisite: -

- Cluster list inventory
- Namespace list Inventory
- Node list inventory
- Pod list inventory
- Performance data of above listed inventory of CPU, memory etc.
- Run the required recommendation of above-mentioned inventory (idle, right sizing etc.)
- Configure the universe for all the above inventory
- Define a relationship between multi cloud billing and Cloud Kubernetes Inventory.
- Configure the required measure.

5.2.1 Configure Kubernetes details report

Configure the Kubernetes details report that has the multi provider cluster details and its related node, pod, and namespace count. The report will look like below.

Kubernetes Details.

Cloud Provider	Cluster Name	Region	Version	Status	Namespace	Nodes	Pods
AWS		us-east-1	(GLOBAL)	Active	0	0	0
		eastus2	1.18.14	Running	0	0	0
		westeurope	1.27.3	Running	0	0	0
eastus		1.28.5	Stopped	0	0	0	
southcentralus		1.21.7	Running	0	0	0	
AZURE		eastus2	1.29.9	Running	0	0	0
		eastus2	1.27.9	Running	0	0	0
		eastus2	1.28.10	Running	0	0	0
GCP		eastus2	1.25.11	Running	0	0	0
		us-east4-a	1.10.5-gke.0	RUNNING	0	0	0
	us-central1-c	1.21.9-gke.1002	RUNNING	0	0	0	
	us-central1-c	1.21.9-gke.1002	RUNNING	0	0	0	
	us-central1-c	1.21.9-gke.1002	RUNNING	0	0	0	
	europa-north1-b	1.19.16-gke.9400	RUNNING	0	0	30	
	us-east1-b	1.21.11-gke.1100	RUNNING	0	0	0	
	us-central1-c	1.22.12-gke.2300	RUNNING	0	0	34	
us-central1-c	1.24.7-gke.900	RUNNING	0	0	36		
us-central1-c	1.27.3-gke.100	RUNNING	0	0			

Old Alert

</

Figure 22 – Configure Kubernetes (Details Report)

5.2.2 Configure Kubernetes cost details report

Configure the Kubernetes cost details report that has the multi provider cluster details and its related node, pod, namespace count and charges from billing data. The report will look like below.

Cloud Provider	Cluster Name	Region	Status	Namespace	Node	Pod	Charges
GCP		us-east4-a	RUNNING	0	5	1,079K	-
GCP		us-central1-c	RUNNING	0	15	295	-
GCP		europa-west2-a	RUNNING	0	12	213	-
GCP		us-central1-c	RUNNING	0	9	174	-
GCP		us-east4-a	RUNNING	0	4	150	-
GCP		us-east4-b	RUNNING	0	3	127	-
GCP		australia-southeast1-c	RUNNING	0	10	126	-
GCP		us-east4-a	RUNNING	0	3	97	-
GCP		us-east1-b	RUNNING	0	9	87	-
GCP		us-east1-b	RUNNING	0	11	84	-
GCP		us-central1-c	RUNNING	0	12	83	-
GCP		us-east4-b	RUNNING	0	4	82	-
GCP		us-east4-a	RUNNING	0	3	81	-
GCP		us-central1-c	RUNNING	0	4	80	-
GCP		us-east4-c	RUNNING	0	6	80	-
GCP		us-east4-a	RUNNING	0	3	72	-

Figure 23 - Configure Kubernetes (Cost Details Report)

When we have the above two reports configures separately then open the merge report configuration by following steps.

1. Click on the Administration menu.
2. Click on core configuration.

3. Click on Derived Report Admin option. It will open the merge query admin
4. Click on Add New Object option from top right corner. It will open the Edit query windows.
5. Select the Kubernetes details and Kubernetes cost details report and make join on cluster name.
6. Configure the required metric. Below is the reference screen shot.

Figure 24 – Edit Query

Figure 25 – Edit query (Continue)

Once the merge report configuration is done now, we are ready to create our Kubernetes overview dashboard. Now using the above merge report we have consolidated reports which have node, pod, and namespace count along with charges for each provider cluster details. We configure the Kubernetes dashboard, and it looks like the below one.

1. Kubernetes Overview:

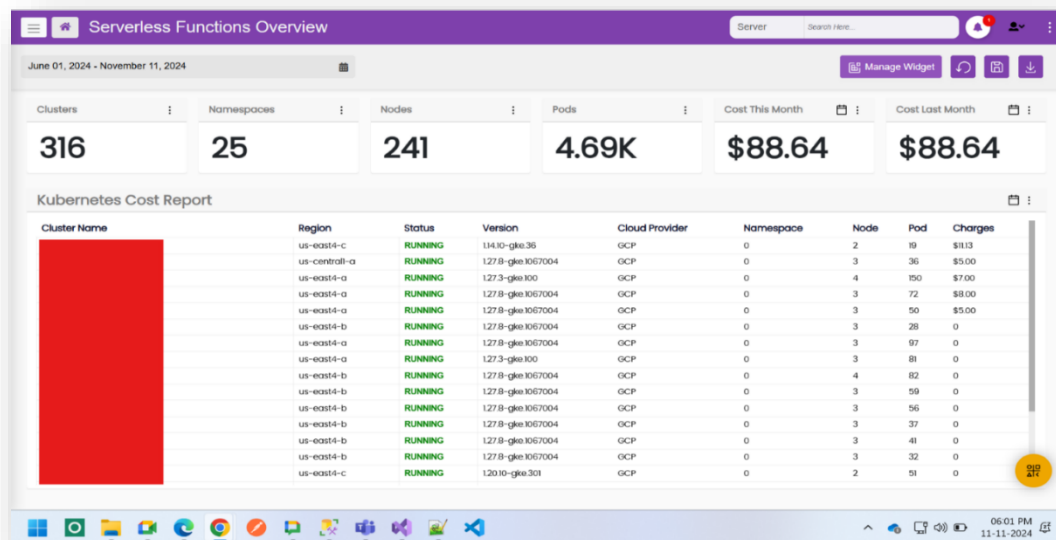


Figure 26 – Kubernetes Overview

2. Cluster Details: This dashboard will open on click of above dashboard cluster name.

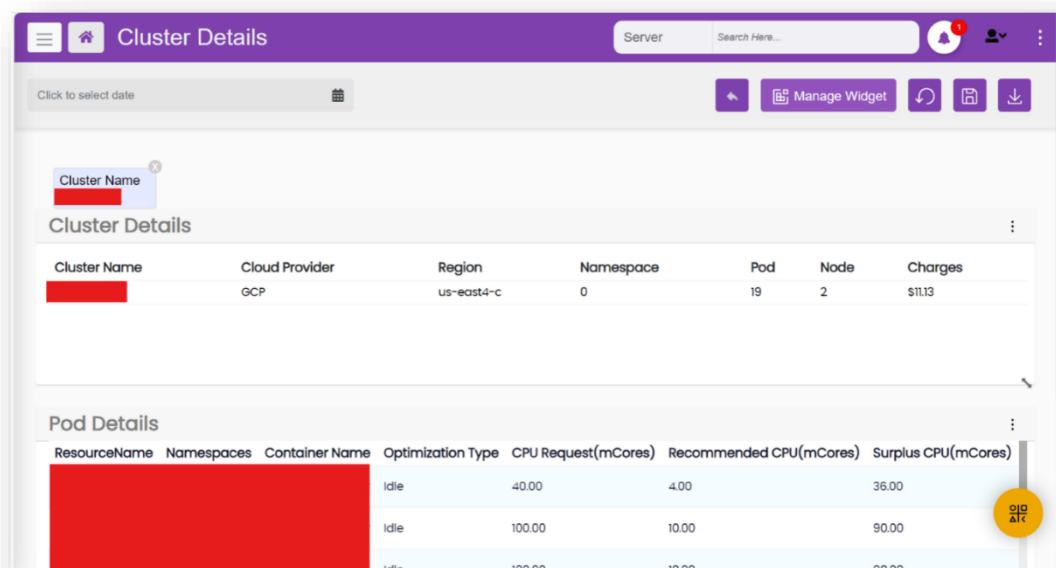


Figure 27 – Cluster Details

5.2.3 Lambda dashboard

This dashboard has the following views/tabs:

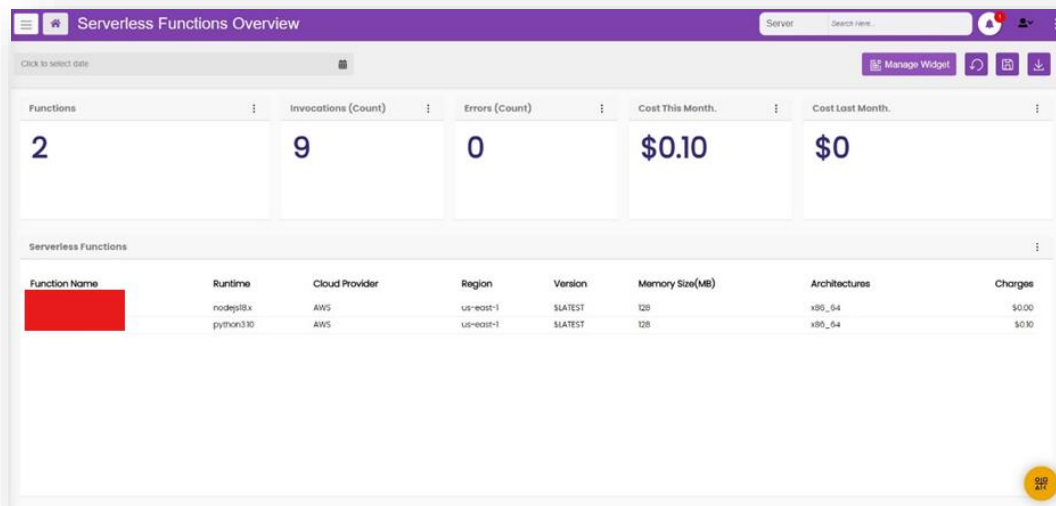


Figure 28 – Lambda Dashboard

5.3 Homepage Menus

MyXalytics homepage comprises a few tabs on the main menu to manage the user account, report scheduling, help, and exit application.

Follow the steps below to use the functions:

1. On the top right corner of the homepage, click the Username. The following items will appear:
 - Account Settings
 - Schedule Report
 - Help
 - Logout

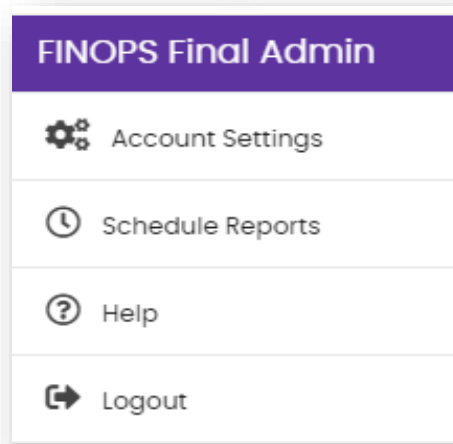


Figure 29 – Homepage Menus

5.3.1 Schedule Report

Users can schedule a report or a report view, to run at a convenient time or at a recurring date and time such as daily, weekly, or monthly interval.

To use scheduling, you must have permission for scheduling capability and need to perform the following steps:

1. On the home page, select the Profile Details and select the Schedule Reports.

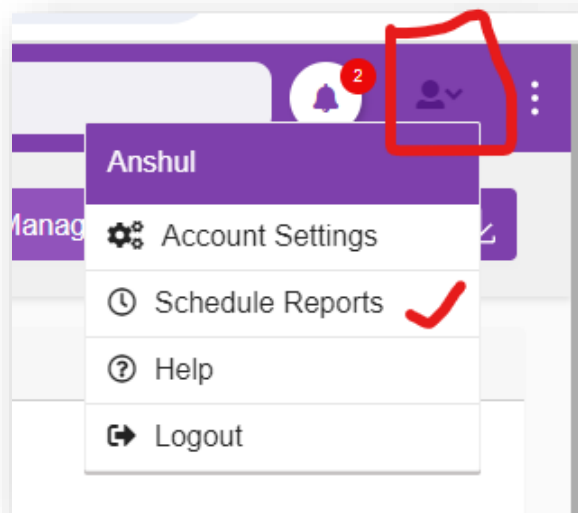


Figure 30 – Schedule Report Preview

2. To schedule a report, click **Schedule**. This re-directs you to Schedule a Report page.

Users can also run a report on a scheduled interval and how to trigger an action each time a scheduled report runs.

3. Click the Username and then select the Schedule Report.
4. The Schedule Reports screen appears which list down the existing scheduled reports in a tabular view.

Schedule Name	Start Date	End Date	Scheduled Reports	Schedule Timezone	Frequency	
RT1	12-12-2023 18:28:00	01-01-9999 00:00:00	2002_2_Navven 3 Year Up Front Reservation Account wise Budgets Azure SQL Databases	IST	Hourly	24
RT2	12-12-2023 18:32:00	01-01-9999 00:00:00	Cost Analysis Cost Anomalies - Trend Cost Anomaly Cost Optimization Driver Disk Utilization	IST	Once at 12-12-2023 18:32:00	06
RT3	12-12-2023 18:38:00	01-01-9999 00:00:00	Expenses By Region Global Tag Compliance Multi n test Savings Plans	IST	Hourly	24
ST1 - CHART- EBAR- PIE- GRID- DETAIL	29-02-2024 16:55:00	01-01-9999 00:00:00	Chart ST DETAIL ST Ebar-chart ST GRID ST PIE ST CARD MEM ST	IST	Daily at 15:00	24

Figure 31 – Schedule Reports

5. Click **Add Schedule** and it prompts you to fill in the following details:

5.3.1.1 Select Report

The screenshot shows the 'Schedule Reports' window. At the top, there's a progress bar with four steps: 'Select Report' (highlighted), 'Mail Filter Conditions', 'Report Information', and 'Mail Information'. Below this, the 'Schedule Name' is 'RT1' and the 'Enabled' checkbox is checked. Under 'Scheduler Type', 'Saved Reports' is selected. The 'Query List' on the left contains a search bar and a list of reports: '2502_3_Naveen_C', '2502', 'Anomaly Impact - MTD', 'App Engine', 'Application Wise Savings Recommendations', 'Archive Size', 'Error', 'Assessment Control Details', and 'Assessment Control Summary'. The 'Selected Reports' box on the right contains: '2502_2_Naveen', '3 Year Up Front Reservation', 'Account wise Budgets', and 'Rohit - Azure SQL Databases'. Between the lists are arrows for moving reports. At the bottom right are 'Cancel' and 'Continue' buttons.

Figure 32– Schedule Reports

- **Name:** It is the name of a schedule for identification.
- **Enable:** Enable if you want to start a report scheduling.
- **Schedule Type:** Two types of reports provided.
 - Saved Report
 - View
- **Query List:** select the reports from left side to Right side list box. Max 5 Reports can select.
- **Report List:** It lists the reports based on the above selection. Select a report and then click ➡ to move a report to the Selected Reports box.
- **Selected Report:** It lists the selected report from the report list. To unselect a report, select a report in a selected report box and click ⬅ to move it back to the Reports List.
- Click to Continue.

5.3.1.2 Mail Filter Condition

Schedule Reports

Select Report **Mail Filter Conditions** Report Information Mail Information

Do you want to configure rules for sending emails ?

☒ Yes ☐ No

Conditions/Settings for Multiple Reports

☒ Send email when atleast one of the reports have data

☐ Do not send email when there is no data in any of the reports

☐ Send email if data is not present in any of the report

Select Report: Current Month Expense

Condition for Sending the Email

& AND

Current Charges Is Equal To 10 X

AND

Current Charges Is Greater Than 20 X

Back Cancel Continue

Figure 33 – Schedule Reports (Mail Filter)

- In Mail Filter Condition tab there is an option like Do you want to configure rules for sending emails?
- If the user selects the Yes, there are some more options provided select those options based on the required condition then click the Continue.

Schedule Reports

Select Report **Mail Filter Conditions** Report Information Mail Information

Do you want to configure rules for sending emails ?

☐ Yes ☒ No

Back Cancel Continue

Figure 34 – Schedule Reports

- If the user doesn't want to add any condition, then select option NO, click Continue.

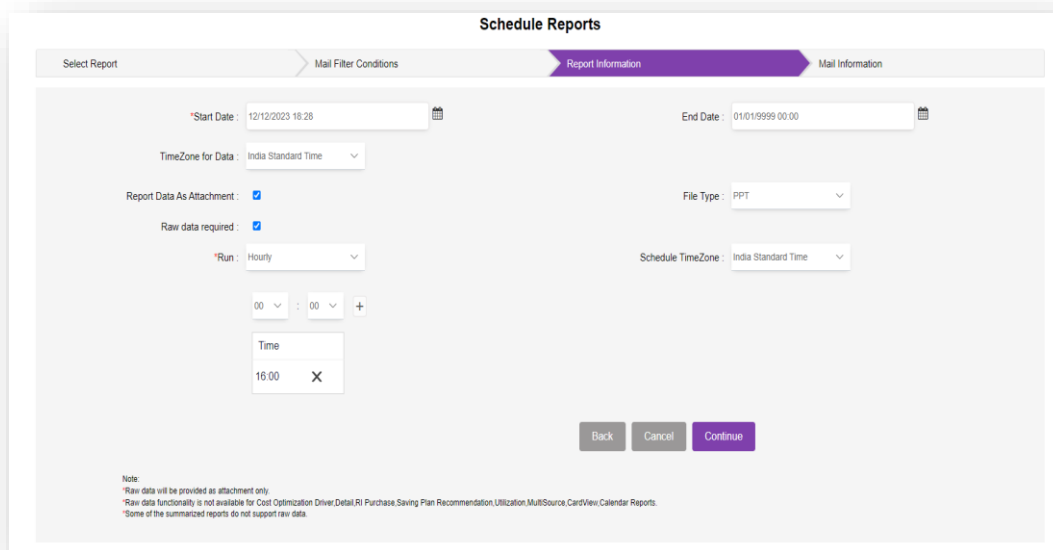


Figure 35 – Report Information

- **Start Date:** Select the date and time to start a report scheduling.
- **End Date:** Select the end date to end the report scheduling at a particular day and time.
- **Time Zone for Data:** select the time zone.
- **Report Data as Attachment:** User selects the schedule type a Saved Reports then user will decide whether to need the attachment or not, but user select the schedule type View this attachment by default it's take the Report Data as Attachment.
- **Raw Data Required:** If the User needs to do the Raw Data, it needs to select the Option.
- **File Type:** Four types of files are there (EXCEL, PDF, PPT, CSV).
- **Time Zone for Data:** It is the time zone for report scheduling.
- **Run:** Select the frequency of a report in terms of Once, Hourly, Daily, Monthly, or On-Demand (It is mandatory)

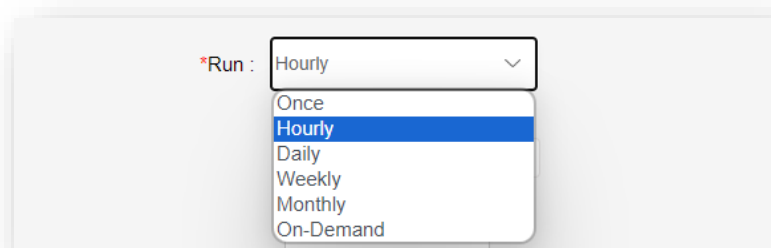


Figure 36 – Report Information (Run Section)

- Select the required options and click Continue.

5.3.1.4 Mail Information:

The screenshot shows the 'Schedule Reports' dialog box with the 'Mail Information' tab selected. The dialog contains the following fields and controls:

- Select Report** (tab)
- Mail Filter Conditions** (tab)
- Report Information** (tab)
- Mail Information** (active tab)
- Mail To:** example@hcl.com
- Mail Cc:**
- Mail Bcc:**
- Subject:** Excel selected
- Message:** Testing
- Note:** *Enter multiple email address separated by semi-colon *
- Buttons:** Back, Cancel, Update

Figure 37 – Mail Information

- **Email Details:** It is the mailing details which are required to send the scheduling details.
- **Mail To:** It is the email address of an individual to whom the report scheduling details will be sent
- **Mail Cc:** It is the email address of an individual to whom the report scheduling details will be sent, if required
- **Mail Bcc:** It is the email address of an individual to whom the report scheduling details will be sent, if required
- **Subject:** It is the subject of the report Schedule for identification
- **Message:** Enter the message for the Report, if required Click **Save**.

5.3.2 Account settings

This section details how to manage a user account, choose from a variety of themes, and even set the default time and zone, and default homepage from a list of pages. This link is available once you have logged in into the account and is visible under the username menu.

To manage an account, perform the following steps:

1. Click the **Username** and then select the **Account Settings**. The User Preference Setting page opens.

The screenshot shows the 'My Account Settings' dialog box with the following settings:

- MX:** [Field with 'MX' and a 'Browse' button]
- Time Zone:** India Standard Time
- Time Format:** Default
- Theme:** Default
- Default Page:** Home
- Currency:** USD
- Profile:** HCLSoft Profile
- Export Format:** Formatted Data
- Buttons:** Save, Close

Figure 38 – My Account Settings

2. Select the preferred **Time Zone** and then **select** the suitable **Time Format**.
3. Select a Theme from the drop-down menu and then select the default page from the available options using the drop-down in the **Default Page** field.
4. If desired, the user can reset the login password by selecting the Reset Password check box.
5. It prompts the New Password and Confirm Password text box.
6. Click the **Save** button.

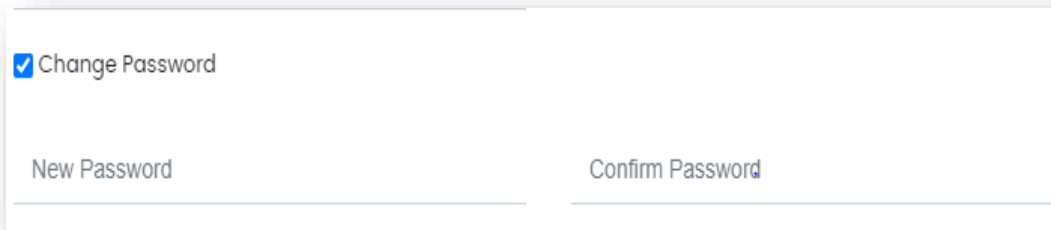


Figure 39 – Password Settings

5.3.2.1 Currency Symbol Export Options in Account Settings

Description:

1. In the Account Settings, users are provided with two export options for reports:
 - Formatted Data
 - Unformatted Data.

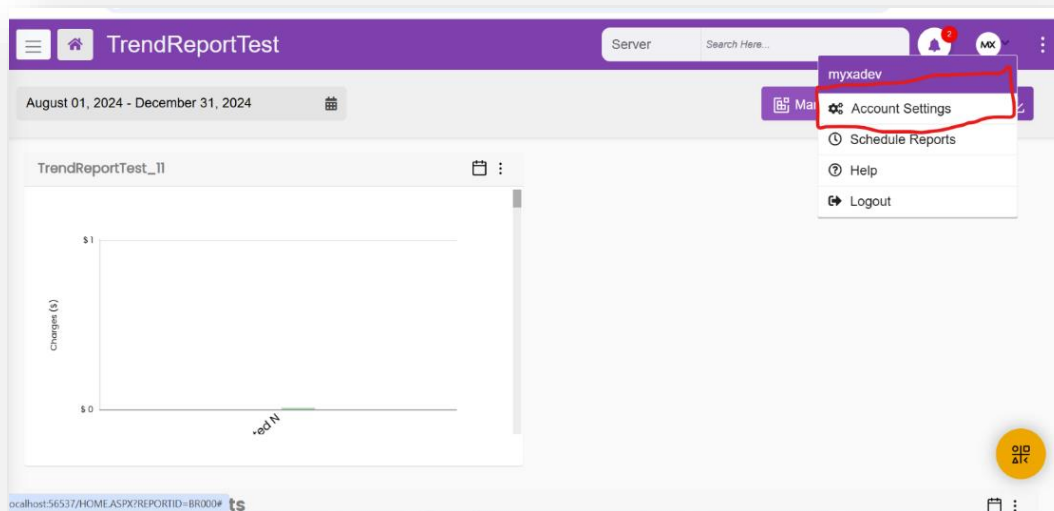


Figure 40 – Trend report test

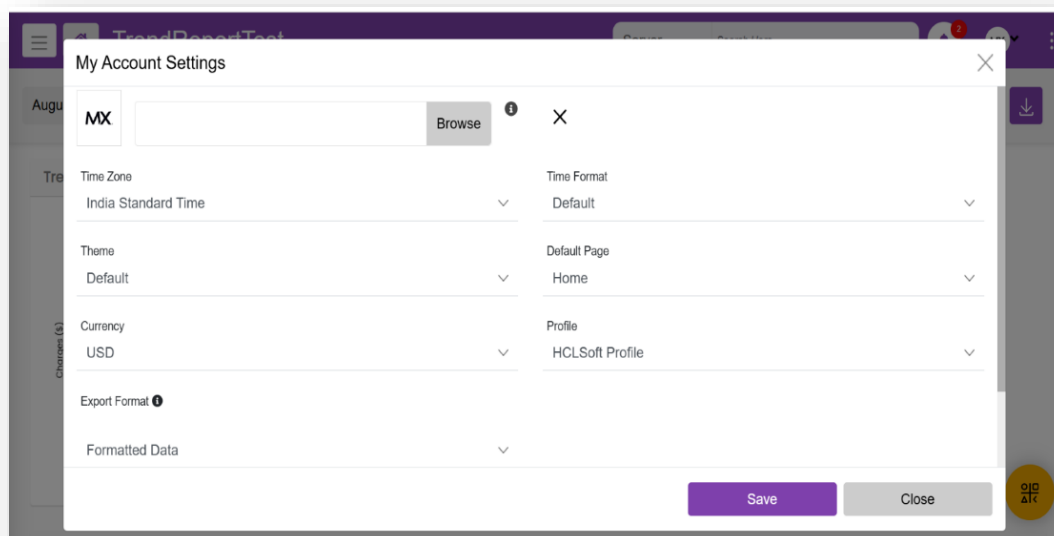


Figure 41 – Account settings

- When the **Formatted Data** option is selected, the exported report includes the currency symbol, ensuring that financial values are displayed with the appropriate currency formatting. This applies to reports generated through **Report Builder**, **Homepage**, **Homepage Widget**, and **Scheduler Reports**.
- When the **Unformatted Data** option is selected, the exported report excludes the currency symbol, displaying raw numeric values without any currency formatting. This option is useful for users who prefer working with unformatted data for further processing or analysis.

5.3.2.2 Home Page Export

- From the selected dashboard, click **Home Page Download icon**.

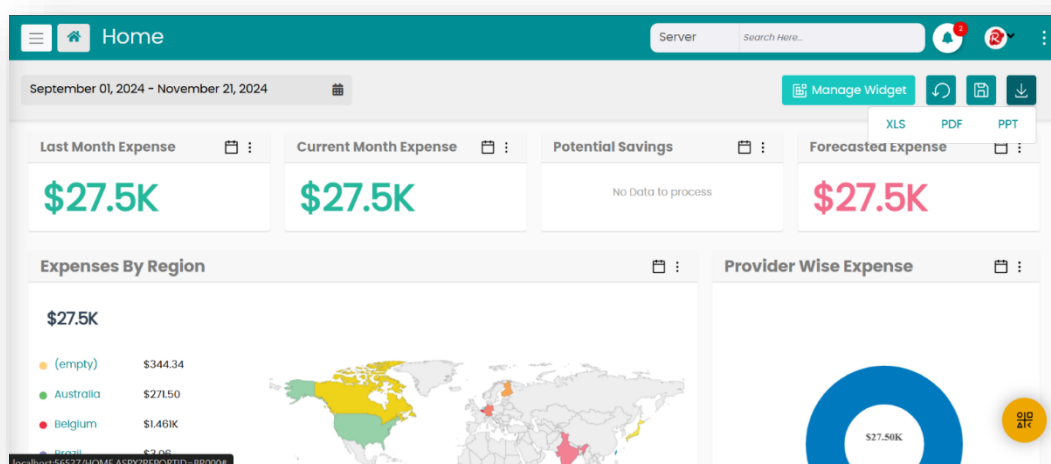


Figure 42 – Hope Page Export

- Click the Export Format type.

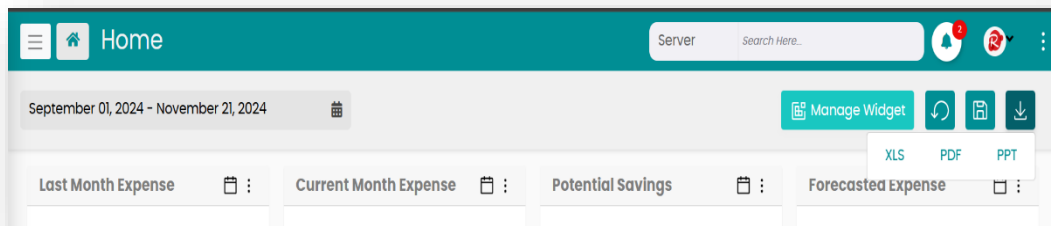


Figure 43 - Hope Page Export

5.3.3 Help

This section provides all the answers related to Frequently Asked Questions (FAQs).

1. Click the **Username** and then select **Help**.
2. It opens a screen which displays all the FAQs.

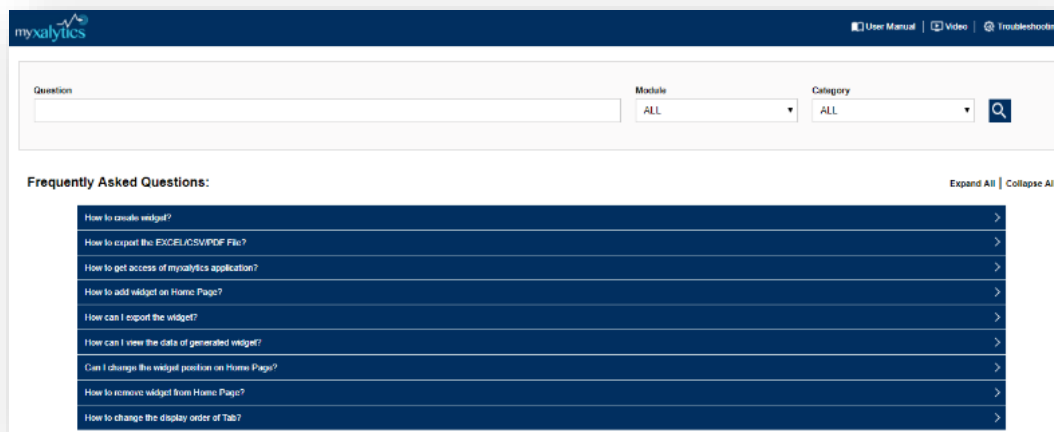
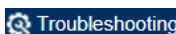


Figure 44 - Help

Search for a question:

1. Enter a question or keyword in the Question search box to scale down the search.
2. Select a Module and Category from the drop-box.
3. Click  icon to search.
4. Apart from the FAQs, you may refer to the following available help tool-
 - a. Users can download the user manual for help by clicking the  on the top right side of the screen.
 - b. Users can refer to the video for help by clicking  on the top right side of the screen.
 - c. Users can also find troubleshooting steps for help by clicking  on the top right side of the screen.

5.4 Types of dashboards in MyXalytics

The following are the dashboards available in MyXalytics:

- [Global Dashboard](#)
- [User Dashboard](#)

5.4.1 Understanding Global Dashboard

Global Dashboard is a user interface that provides single network-based console from which you can monitor and generate reports for multiple MyXalytics domains across multiple environments.

Reports configured in Global Dashboard can only be modified by respective users who have created the global view for end users e.g., Admin. All reports display the data as per requirements.

Following dashboards can be viewed by all dashboard users.

5.4.2 Understanding User Dashboard

This pane specifies the dashboards created by the logged-in user and enables the user to create a new dashboard and edit or delete the existing dashboards. For the first time logged in user, no dashboards appear in the User Dashboard pane. User dashboards are only visible to logged-in users for which their personal dashboard is created.

5.4.3 Managing User Dashboard

This section describes how to explore your data easily and share the analysis and insights found in the User Dashboard pane.

To create My Dashboard:

1. Click the Add **New Dashboard** button from the **Dashboards** window.

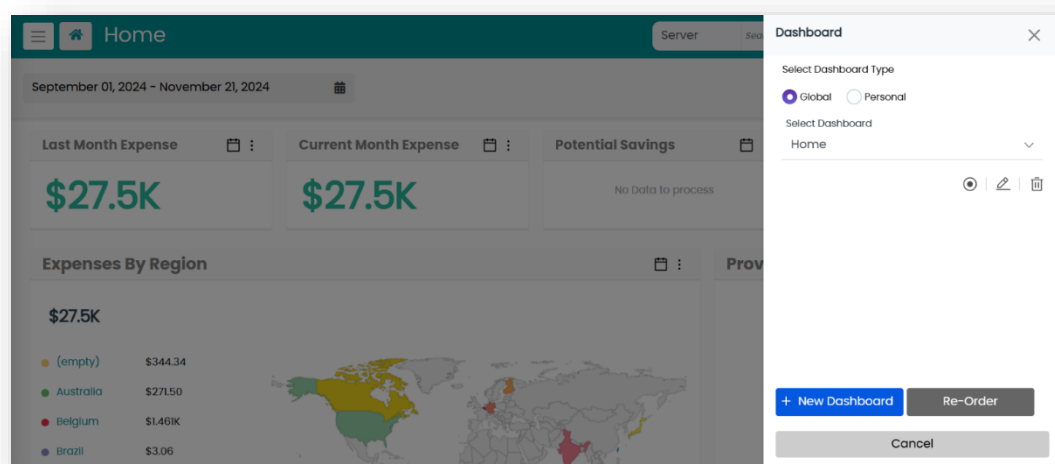


Figure 45 – Managing User Dashboard

2. Select the dashboard type and choose a dashboard from the drop-down options.
3. Select an icon that you want to display as an icon for the dashboard to be created.
4. Type a dashboard name and provide description in their respective fields.
5. Finally, click the **Save** button.

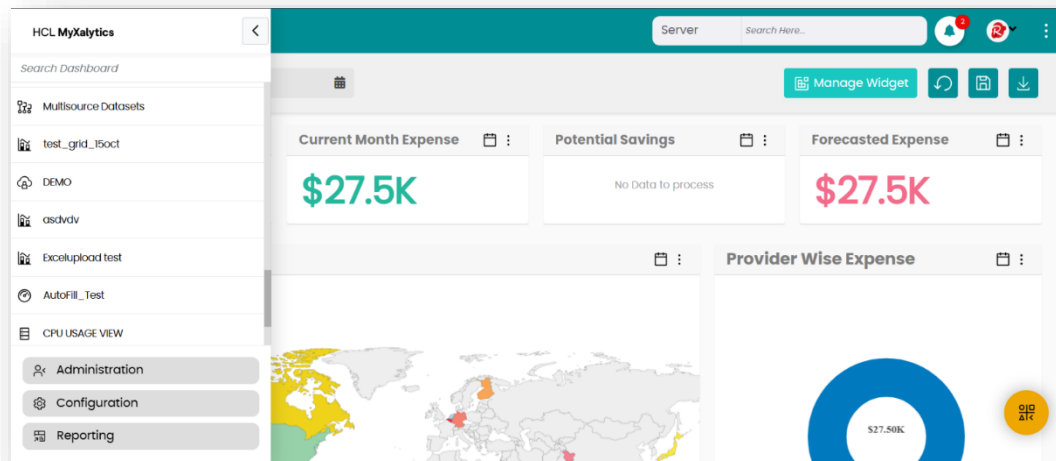


Figure 46 – Search Dashboard

The new dashboard has been added and appears in the **My Dashboard** pane.

MyXalytics comes with a variety of pre-built dashboard widgets (components) that you can use to build a specific dashboard view that meets your requirements.

5.4.4 Edit Dashboard

To edit a dashboard, perform the following steps:

1. On the **My Dashboard** pane, select a dashboard, and then move the pointer to the right corner of the selected dashboard.

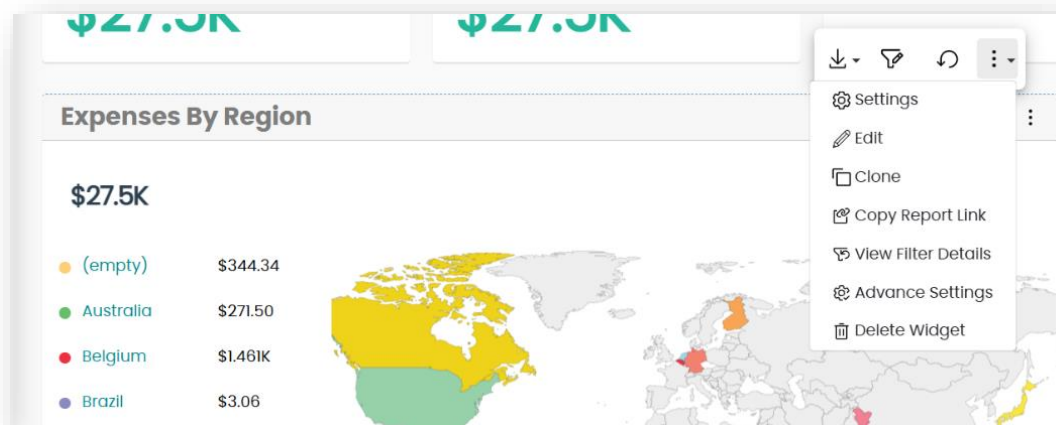


Figure 47 – Edit Dashboard

2. Click  icon to open the Dashboard Settings.

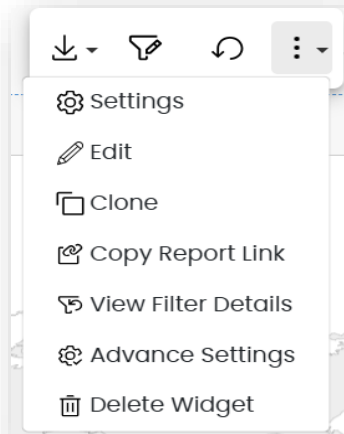


Figure 48 – Edit Dashboard

3. Modify the details as desired and click the **Save** button.

5.4.5 Delete Dashboard

To delete a dashboard, perform the following steps:

1. On the **My Dashboard** pane, select a dashboard you want to delete.
2. Then move a pointer to the right corner of selected dashboard and click .

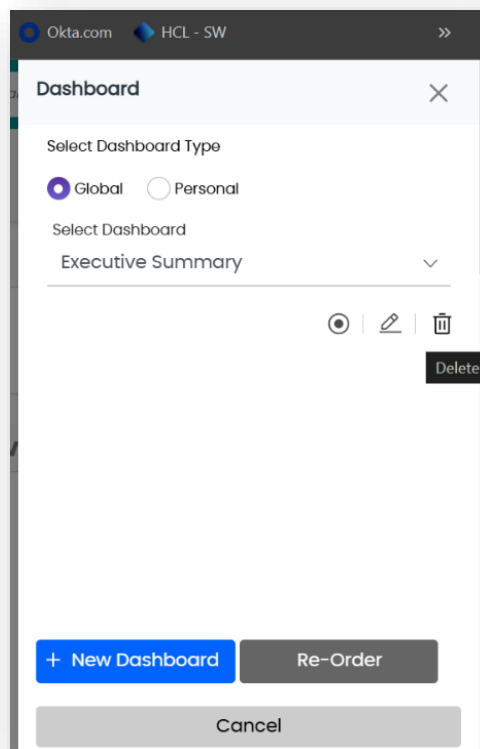


Figure 49 – Delete Dashboard

3. When prompted for confirmation, click YES to delete, or click Cancel to cancel the delete action.

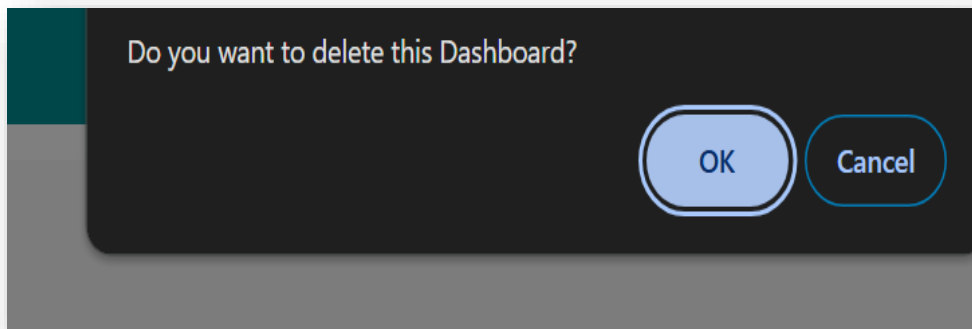


Figure 50 – Delete Dashboard Popup

5.4.6 Home Page Filter

You can filter the output of the widgets present on the view of the dashboard. MyXalytics also provides a feature to add a home filter in views on any reports of their choice.

To use a view - level filter, perform the following steps:

1. On the filter bar, click  icon to add the filter as shown below.

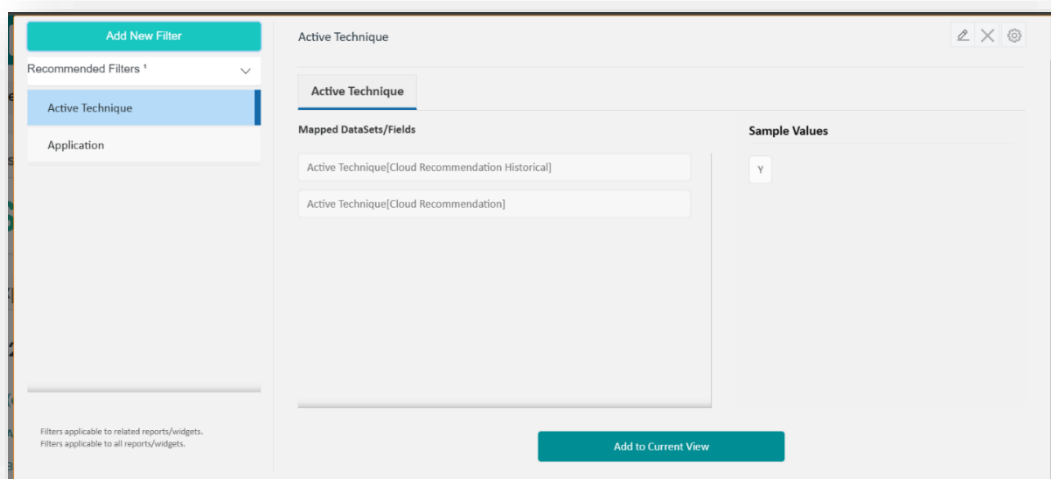


Figure 51 – Homepage Filter

2. On Click, Add New Filter screen appears as shown below.

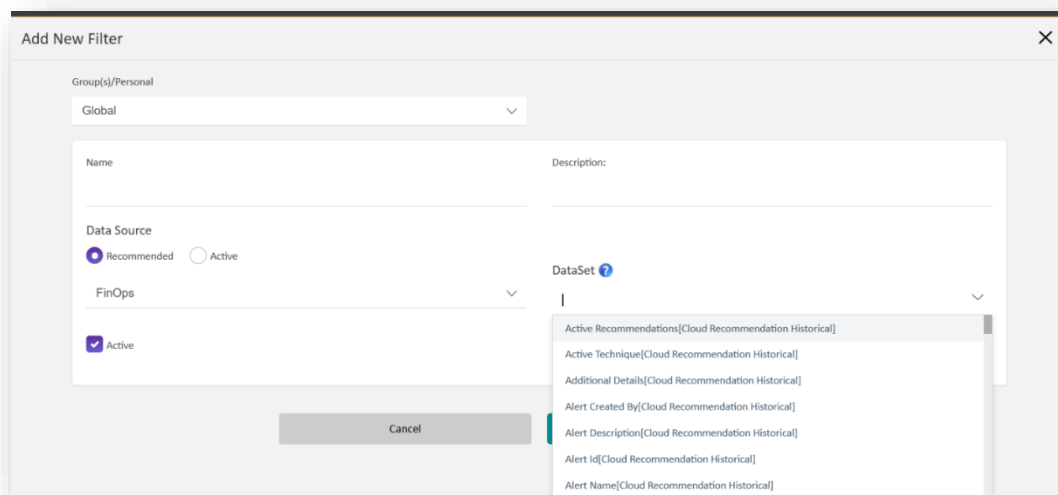


Figure 52 – Add New Filter

3. You have an option to make the desired filter Global or Personal by clicking the Select option.
4. There are two types of categorizations, namely Recommended and All.

Recommendation:

- In recommended, all the home filters applicable to related reports are shown under recommended filter. There is a data source option for users. Also, if a new report has already been created, then also you can choose for recommended filters.
- By clicking on the Dataset option, you can see various fields associated with recommended options.
- To save the recommended filter, click **SAVE FILTER** button or click **CLEAR FILTER** to clear out the applied filter.

All:

- In this, we can apply filters on the filters configured on all the reports of a view.
- By clicking on the Dataset option, users can see various fields associated with All options.

5.5 Dashboard Tabs

Views/tabs are the sub-division of MyXalytics dashboard that contains the reports and widgets. Logged-in users can configure multiple views in a dashboard under the My Dashboard pane.

To create a view/tab, perform the following steps:

1. On the Dashboard screen, select My Dashboard pane, and then select a Dashboard.
2. Click the View Setting () icon. You can access View Setting () either by clicking at the center of the main screen or at the top right corner of the main menu bar. The **View Setting** screen appears.

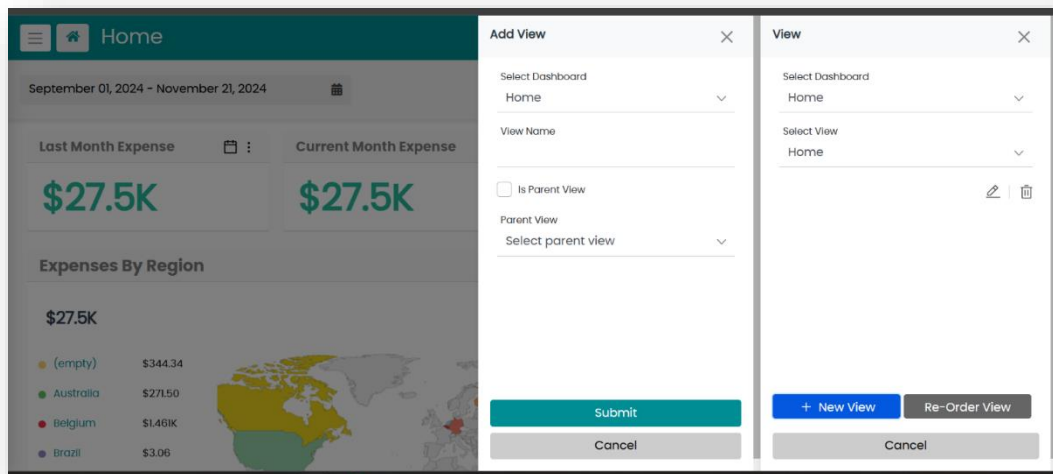


Figure 53 – Dashboard Tabs

3. Available views in the selected dashboard appear in the **Select View** box.
4. Enter a **View Name** for the view to be created and then click **Create** button. The created view is added in the **Select View** box.
5. User can re-order the views by clicking , , or  icons next to the Select View box and then click Save Order.
6. To delete an existing view, select the View from the Select View box, and then click the **Delete** button.
7. You can create multiple **Views** for a selected dashboard.
8. All the available views in a dashboard appear on a tab located on the main screen.

5.6 Widget Configuration in Dashboard

You can run and create custom reports using the Report Builder function to configure widgets.

5.6.1 Create New Widget

Users can perform the following steps:

1. From the left menu, go to **Reporting → Build Your Reports → Report Builder** or on the main homepage.
2. Click **manage widget → Add Widget**.

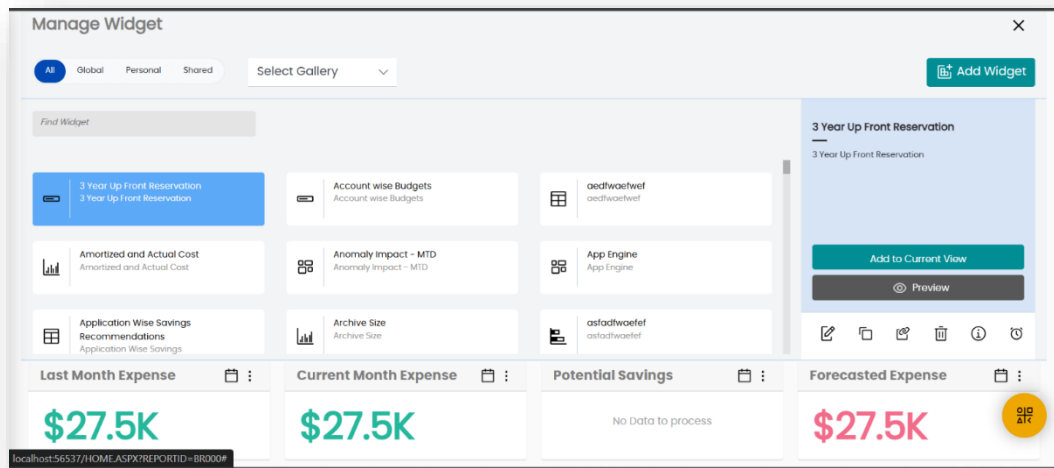


Figure 54 – Test View

- On clicking the icon below the screen appears where the user has a data source type option to configure the report i.e., Summarized and Live data reporting.

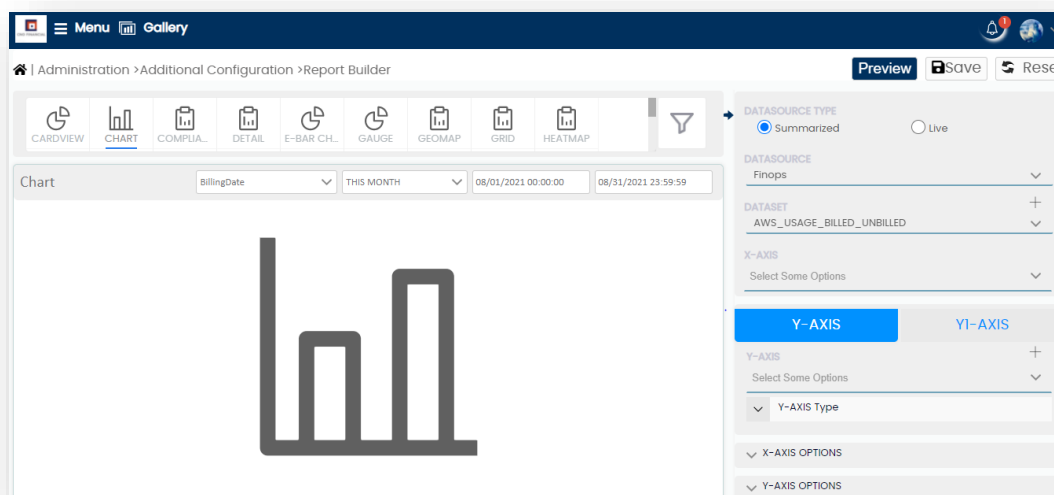


Figure 55 – Menu Gallery

- Select the required Output type/ Data view for the report as shown on the screen below:

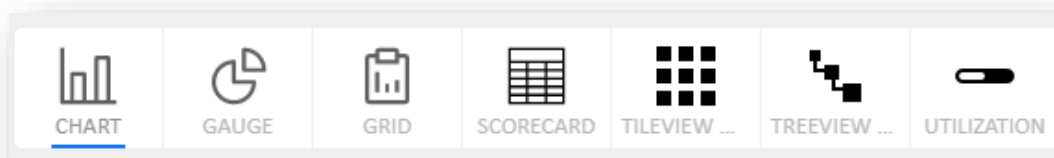


Figure 56 - Menu

- Click the **Summarized/LIVE** data source type option as per the requirement.
- Select the Data set i.e., Metric Collection, SNOW, Performance etc., data used for Metric Collection consists of jobs which are configured via metric collection.
- Column selected to show data group by based are shown in X-axis.

8. Measure which are to be shown in the report are shown in Y-Axis or Y1-Axis, chart type can be selected for Y-Axis and Y1-Axis.
9. Selection to be made for X-Axis option and Y-Axis option based on below options.

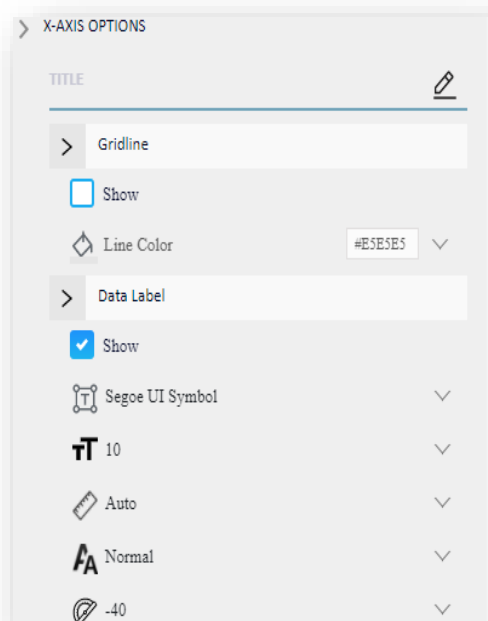


Figure 57 – X-Axis Options

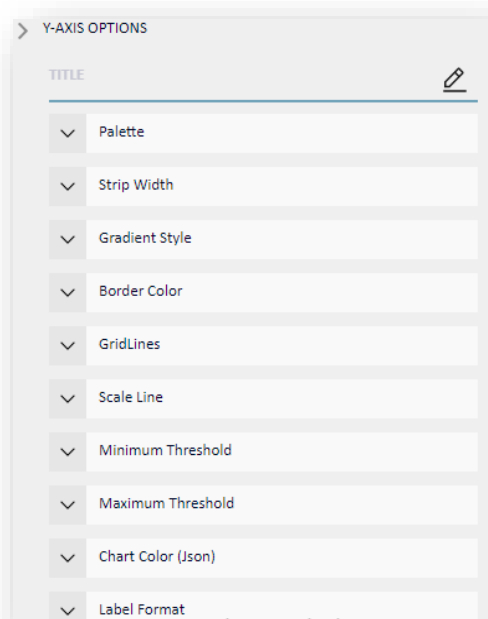


Figure 58 – Y-Axis Options

10. Once the selection for X and Y-Axis is made, click on Other Chart Options as shown below to make the report look more attractive.

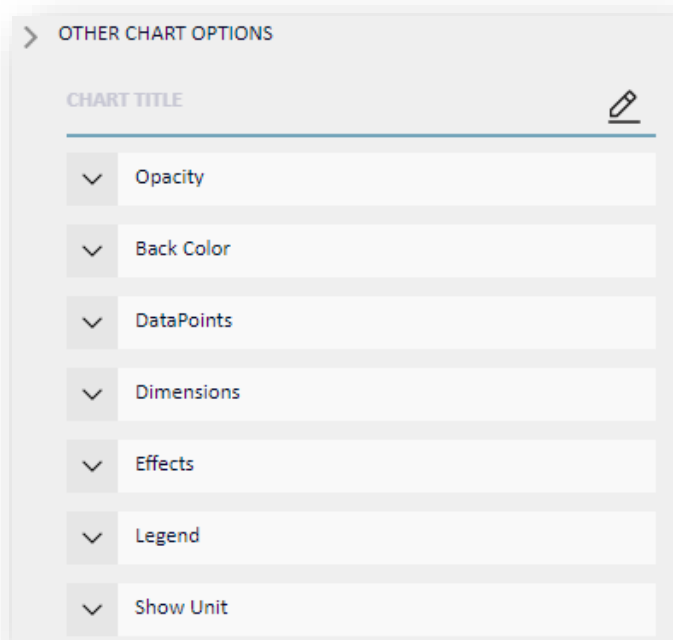


Figure 59 – Other chart options

11. Select **Global Options** from the options as shown below.

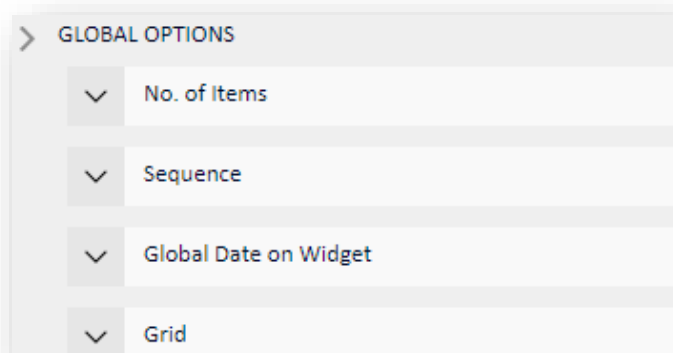


Figure 60 – Global Options

- **No. Of Items**- This option is for the number of items that need to be displayed in the report/widget.
- **Sequence** – This option is used to sort the data based on difference options available.
- **Global Date on Widget**- This option is used to choose whether you want to apply global date filter on widget or not.

12. Select **Grid Options** once the selection for global options is completed as shown below.

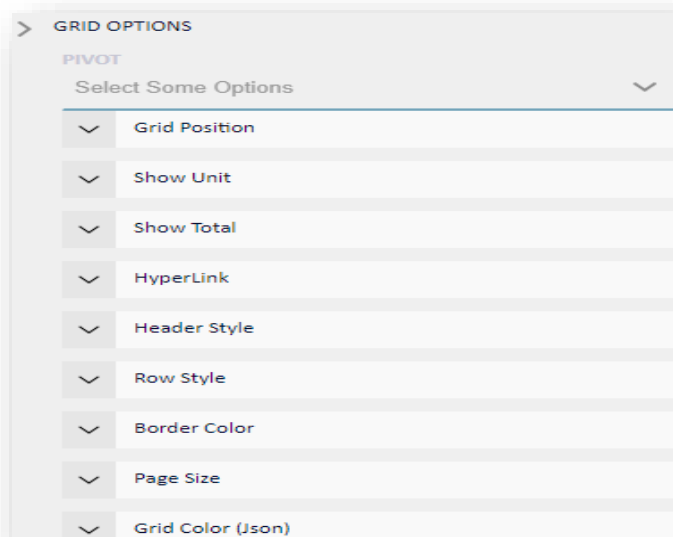


Figure 61 – Grid Options

13. Select the **Drill Through Options** for the report to see raw data, select the level data should be shown before showing raw data. Also, select the chart for each level.

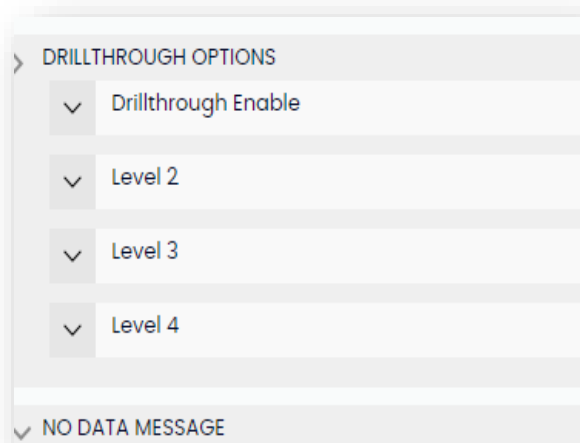


Figure 62 – Drill through Options

14. Make selection for Drilldown Columns which are to be shown in the raw data as shown below.

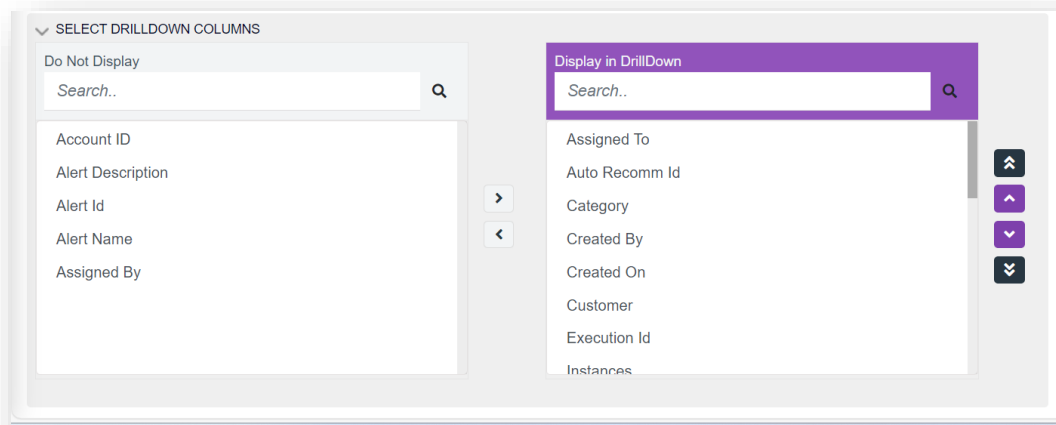


Figure 63 – Drill down columns

15. Select the DATE filter for the screen.
16. The **Select Date** window appears which enables you to filter the results with respect to the desired dates.
17. Apply filters on the report by clicking  icon shown on the screen, clicking the icon below screen appears. Select the field and apply the filter.

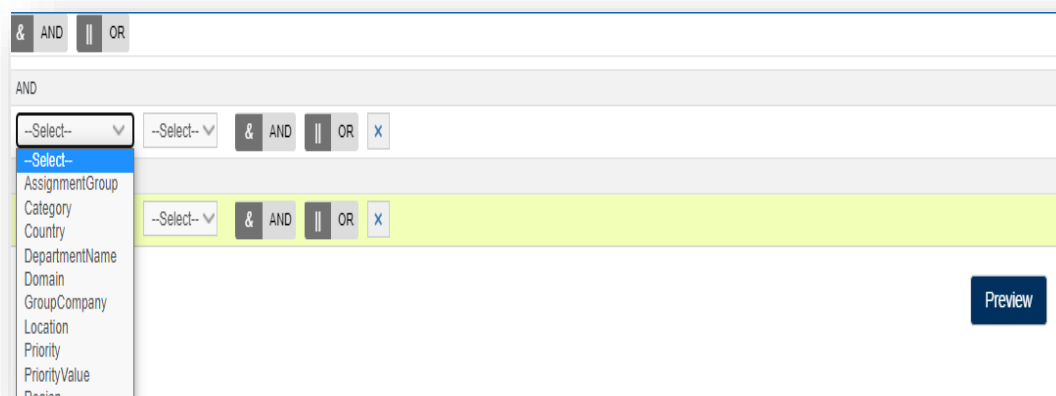


Figure 64 – Select Options

18. Click on preview to view the desired result.
19. Once all the changes are applied, click the SAVE icon as shown below to save the report.
20. On clicking the **SAVE** icon, below screen appears.

*Report Name: Service Quality

*Report Description: Service Quality (% of reopen tickets Vs closed tickets)

*Profile(s)/Custom: Global

*Report Gallery: Global

Dashboard: 1. Executive Dashboard

View: Home

Specified dates from the Time Period filters will be used to Run/Export Saved Reports.

Save Cancel

Figure 65- Save

21. Provide a name for the report along with a report description. Select a report gallery for the report. (Detailed description about report gallery visit section), provide a dashboard and view name to your report.

5.6.2 Viewing data in a Widgets

You can present the data on a widget in various views such as a bar chart, pie chart, line charts, or tabular view. On selecting a widget, the following icons appear at the top of the widget:

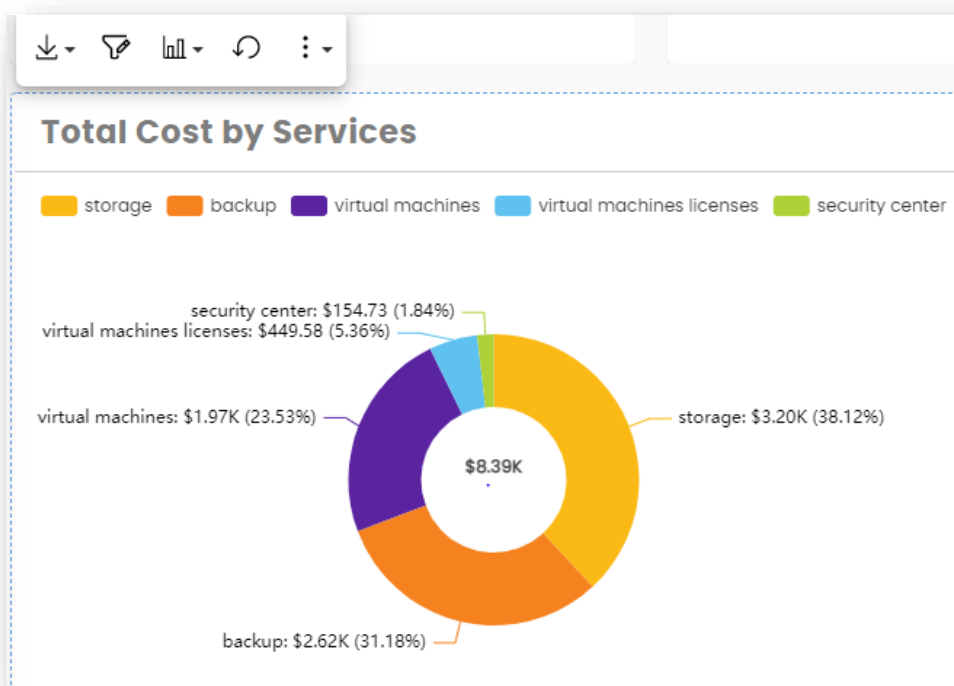


Figure 66 – Total Cost by Service Chart

The functions of the icons appeared on the top of the widget:

- **Export** - Exports the files to the pre-defined source (excel/pdf/csv) in a pre-defined format (bar/line) which is already defined in the filter parameter.

-  **Refresh** - Refreshes the data visualized by the widget in accordance with the parameters/filters set by the user.
-  **Filters** - Allows to set the filter on the data to be presented by the widget.
-  - Allows the view of the widget to either graph or table.
-  **Settings** - Allows you to change the settings of the current widget.
-  **Edit** - Allows you to edit the widget and redirects you to the report builder screen.
-  **Clone** - Allows you to make a copy of the widget by customizing the settings of the widget.
-  **View Raw Data** - Allows you to view the raw data of the widget.
-  **View Filter Details** - Allow you to view filters already applied on the widget.
-  **Advance Settings** - Allows you to apply advanced settings like filters, group by feature, chart type feature etc.
-  **Delete Widget** - Allows you to delete the widget from the dashboard

5.6.3 Widgets Filters

Widget filters make it easy to provide different combinations of data from a single dashboard. You do not need separate dashboards for different sets of users - give each group a filter that makes sense for them. When you use a filter on a dashboard, the filtered view is shown again the next time you visit the dashboard. You can set multiple filters on a widget you selected. From a **Filter** tab, you can set filters for the data which you want to display in a selected widget.

To apply a filter, perform the following steps:

1. On a **Widget**, select 
2. A **Report Filters** dialog-box appears on the right side of the screen which includes various parameters for the filter to be applied on a report.

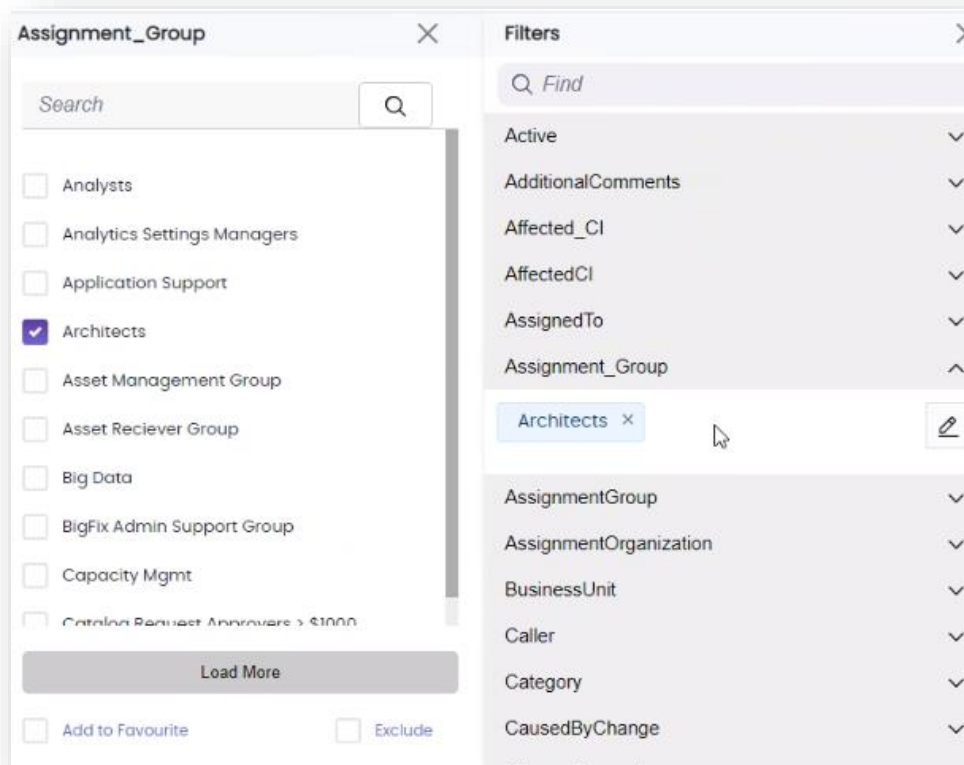


Figure 67 – Assignment Group Filter

3. Select a report filter parameter on the right navigation bar and then click the **Apply** button.

5.6.4 Clone Widgets

This section details how to clone a widget to create similar looking widgets in a dashboard. It duplicates the entire setup of the widget, filters, alerts, annotations, and so on.

- To clone a widget, click on the Clone icon from the top of the widget.

5.6.5 View Raw Data

You can view raw data using the drill down reports capable of analyzing a dataset according to all characteristics included in the data description. This allows users to view the aggregated and summary data, and then hierarchically explore the deeper levels of the data for a more specific analysis.

To view the raw data, perform the following steps:

1. Click on **view raw data** icon from the top of the widget.
2. The **Report Drill Down** screen displays the detailed report:

Data Source

MetricCollection

DataSet

Azure_RITransactions

Group By

Details

Export to

Excel

Record Count: 195

ReservationOrderName	Amount	ArmSkuName	BillingFrequency	BillingProfileName	Currency	
Disk_RI_06-17-2021_15-36		premium_ssd_managed_disks_p50	Recurring	HCL Technologies Ltd.- Swiss Branch	EUR	f
Disk_RI_18-03-2021_16-01		Premium_SSD_Managed_Disks_P60	Recurring	HCL Technologies Ltd.- Swiss Branch	EUR	f
Disk_RI_18-03-2021_16-01		Premium_SSD_Managed_Disks_P50	Recurring	HCL Technologies Ltd.- Swiss Branch	EUR	f
Disk_RI_18-03-2021_16-02		Premium_SSD_Managed_Disks_P70	Recurring	HCL Technologies Ltd.- Swiss Branch	EUR	f
Disk_RI_18-03-2021_16-02		Premium_SSD_Managed_Disks_P30	Recurring	HCL Technologies Ltd.- Swiss Branch	EUR	f
Disk_RI_18-03-2021_16-02		Premium_SSD_Managed_Disks_P40	Recurring	HCL Technologies Ltd.- Swiss Branch	EUR	f

Figure 68 – Data source record

5.6.6 View Filter Query Details

This section details how to view the filter queries applied to a widget.

1. To view the filter query details, click on view filter query details icon on the top of the widget.

Filter Details	
Data Source	Finops
Dataset	Cloud Recommendation
Saved Report Name	Missed Savings
Saved Report Description	Missed Savings
Created By	FinopsFinalAdmin1
Modified By	finops
Created On	15-Jul-21 11:07:34
Modified On	19-Aug-21 13:12:12
Report filters applied	AND ToBeConsideredInFinalS aving Is Any Of Y

Figure 69 – Filter Details

5.6.7 Advance Settings:

1. To apply advanced settings like filter, group by feature, chart type feature for live time in a dashboard as shown below:

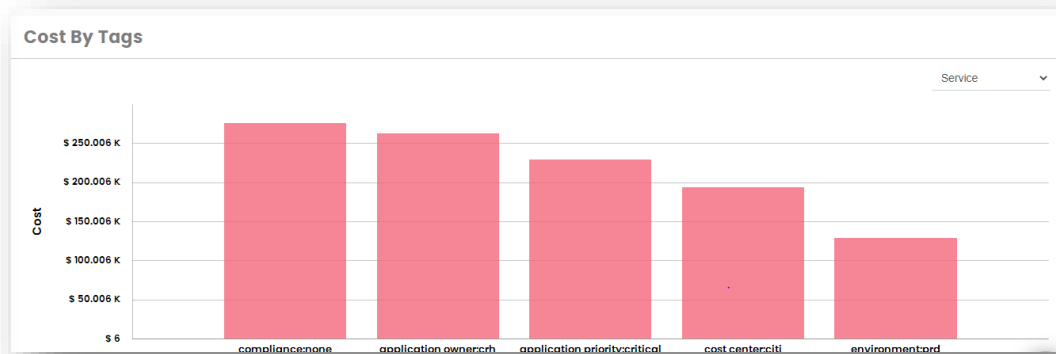


Figure 70 – Cost by Tags

2. To apply this feature, Click on the advanced settings icon on the top of widget.
3. The following screen appears:

Advance Setting

☐ Enable Group By Feature

☐ Enable Chart Type Feature

Select Control Type

☒ Dropdown ☐ Multi-Select ☐ Radio

Select Filter

ChargeType

Add

Filter Name	Control	Action
Service	Dropdown	X

Apply Setting Reset Setting

Figure 71 – Advanced Settings

To configure it, follow the below-mentioned steps:

1. Select Control Type.
2. Select the field on which data needs to be filtered.
3. Click on add and then click on Apply setting and data of the widget will be filtered.

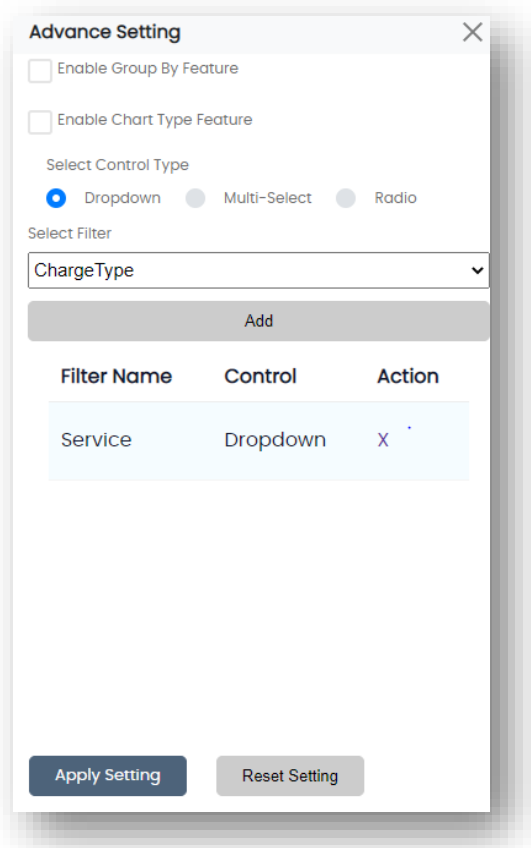


Figure 72 – Advanced Settings

4. You can rearrange a widget on the home screen by using the following steps. Navigate the cursor to the widget that you want to rearrange and then click the left mouse button.
5. Click on the widget and then drag the mouse pointer to a place on the screen where you want the tab. After you move the mouse pointer to a position on your screen where you want the taskbar, then release the mouse button.
6. Click **Save Page Settings** icon on the main menu bar to save the widget.

5.6.8 Re-Size a Widget

1. Click on the widget and then drag the mouse pointer to a place on the screen where you want the tab. After you move the mouse pointer to a position on your screen where you want the taskbar, then release the mouse button.
2. Click **Save Page Settings** icon on the main menu bar to save the widget.

5.6.9 Delete a Widget

You can delete a widget from the home screen by using the following steps.

1. On a selected View, click on Delete widget icon from the top of the widget.

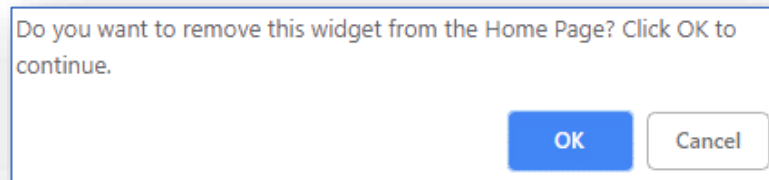


Figure 73 – Pop-up

2. When prompted to confirm that you want to delete the selected widget from home screen, click OK.
3. This section reflects the report's structure in a tree-like form and provides access to various components assigned to a report.

5.6.10 Manage a Widget

This section explains the type of reports available on the dashboard.

To assess reports, perform the following steps:

1. On the home page, click **Manage Widget**.

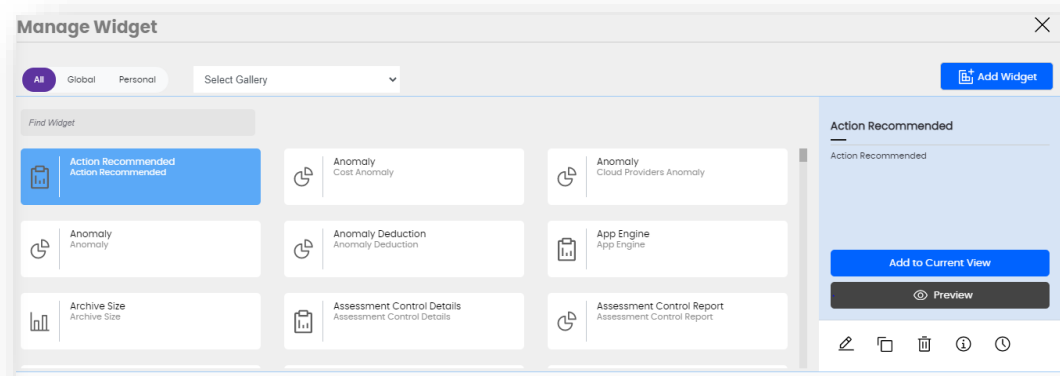


Figure 74 – Manage Widget

2. The screen comprises the following report's tabs:
 - **All:** It includes all the logged-in user configured reports
 - **Global Reports:** It includes global reports across projects.
 - **Personal Reports:** It includes all the reports that have been created by the user for his use only.
3. Select Gallery option let you select the gallery in which the widget has been saved. Functions to be performed in the Manage Widget Section:

This step details multiple functions which can be performed in a report gallery. You can visit each report to see what data it contains and can perform the following actions on a report:

- **Add a report to Current View:** To add the selected report to the current view.
- **Add Report to Dashboard:** To add a report to a dashboard.
- **Preview:** To run the report on a new window.
- **Clone:** To duplicate a report.
- **Schedule:** To schedule a report update.
- **Details:** To view the details of the report.

We can restrict cross-project reports to an initiative or could be across initiatives.

5.7 Metric Collection Module

Users can create their own metric using this page.

This page is visible to the user that has admin rights.

1. Search for the Metric Collection in the Menu as shown below.

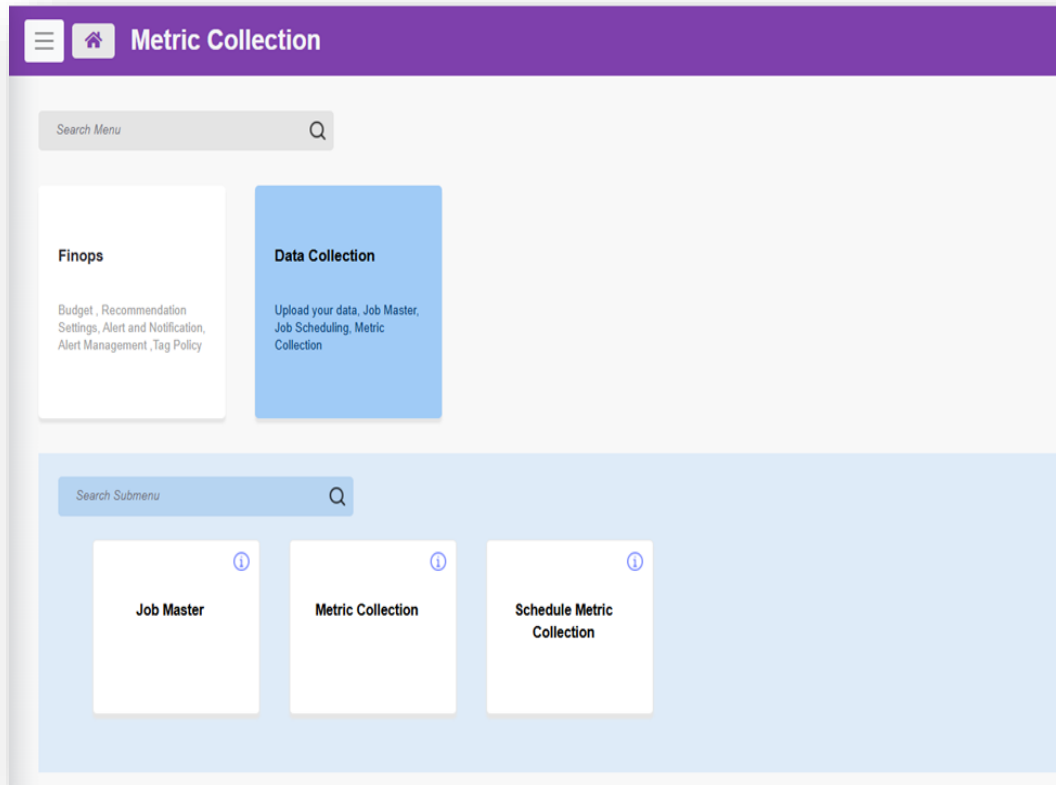


Figure 75 – Configuration

2. Click **Add Item** to create the KPI metric.

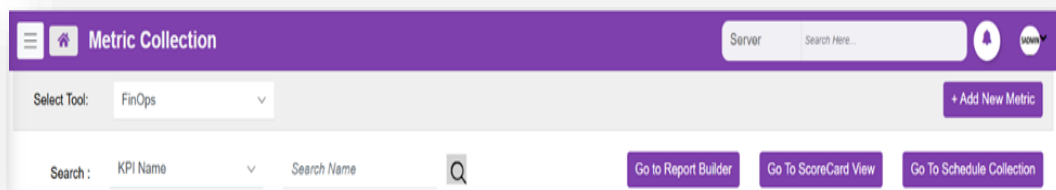


Figure 76 – Menu Gallery

3. The Metric Collection dialog box appears.

Figure 77 – Metrics Collection Table

4. The KPI creation consists of the following steps:

Define KPI:

This section details how a user defines KPI by using the following steps.

5. On the Metric Collection screen, select the KPI Master. The KPI master fields appear on the right side of the screen.
 - a. Enter the name of the KPI for which the KPI is being made in the KPI Name field.
 - b. Describe the KPI for which the KPI is being made in the KPI Description field.
 - c. Select the Customer for which KPI is made from the pull-down menu.
 - d. Select the Source Tool from the pull-down menu such as SNOW, Remedy, and so on.
 - e. Select the Destination Tool from the pull-down menu such as SNOW, Remedy, and so on.
 - f. Select the Module of the tool (like SNOWIM, SNOWPM etc.) from the pull-down menu.
 - g. Select the Collection Time Zone in which the KPI must be executed like India time zone, Europe time zone, China time zone etc.
 - h. Select Orientation using the radio button. Select Positive, if going positive is good for the KPI or else select Negative.
 - i. If any exception needs to be made for the KPI, then mark **Is Exception Needed** field as **Yes** using the toggle button. Click **Save**.

It enables the **Continue** button. Click **Continue** and it navigates you to the **Data Collection** screen.

Figure 78 – Metrics Collection Test KPI

Figure 79 – Metrics Collection Test KPI (Cont.)

Data Collection:

This section details how a user can define the source of collection using the following steps.

1. On the Data Collection screen, select the dropdown:
2. KPI Procedures

Figure 80 – Test KPI Doc

3. On the Data Collection screen, we have a dropdown labeled KPI Procedures that displays a list of registered stored procedures. Once a stored procedure is selected, all its input parameters are dynamically populated as labels alongside corresponding dropdowns.
4. The dropdowns contain options based on the data types of the input parameters:
5. **Date Parameters:** For date parameters, the dropdowns populate options like @StartTime and @EndTime. If you want to enter a custom date value, select Custom in the dropdown. This will enable a text box beside the dropdown, where you can enter a valid datetime.
6. **String Parameters:** For string parameters, the dropdowns populate options such as:
 - @EngagementID
 - @EngagementName

- @SharedEngagementID
 - @PrimarySecurityValue
 - @SecondarySecurityValue
 - @ServiceSubType
7. Custom Parameters: If you select Custom, a text box will be enabled next to the dropdown, where you can enter a valid string. For both date and string inputs, ensure that you provide values in the correct format.
 8. DoNotPass Parameters: If you do not need to pass the parameter, select DoNotPass from the dropdown. Added Information icon and required filed * for each label.

Metrics Collection: Test KPI for Doc

KPI Master
Data Collection
Formula Configuration
Scheduling

Dimensions to be used in formula

Customer

Measure Type: Hours

Measure Name:

Formula: (SUM / SUM)

Add Measure

Measure Unit	Measure Name	Measure Formula	Action
#	Total	COUNT(Customer)	

<< Previous Note: Data will be saved only when you click on save button. Save Continue >>

Display Format: NUMERIC(18,2)

Filters:

Validate Filter

<< Previous Note: Data will be saved only when you click on save button. Save Continue >>

Figure 81 – Formula Configuration

Formula Configuration:

1. This section details how to create any formula or measure and how to apply any filter.
2. The selected drilldown columns will remain available for use in measure. By default, a measure will be added which has the formula of Sum of Unique Id field. If a new measure is added, it is first validated and then added.
 - a. **Measure Name:** The name of a measure to be calculated using the KPI. This is usually present in the formula present in Formula Builder Configuration screen.
 - b. **Formula:** The query which is used to calculate a particular measure.
 - c. **Filters:** This refers to the query to filter if some formula has a filter attached with the query. For example: While creating a KPI for TTR, a filter is used as “INC.Resolved_At IS NOT NULL” and this can be verified by clicking “Validate Filter”
3. After adding the measures and filters, click **Save** and then click **Continue**.
4. It will redirect to scheduling screen.

Scheduling:

1. This section details how a user can schedule the collection.
2. At the backend, a service runs their respective jobs at a particular time. The data will be collected in separate tables according to the selected table cutover.
3. Fill in the following details for scheduling a job:
 - a. **Job Name:** The name of the job which a user gives to a particular KPI functionality.
 - b. **Controller:** The name of the server on which the service will be running while execution.
 - c. **Update Frequency:** The frequency at which the job is to be executed.
 - d. **Data Collection Start Date:** The date to start the data collection in the KPI.
 - e. **Schedule Time Zone:** The time zone to execute a job.
 - f. **Table Cutover:** The frequency at which resultant tables will be made while the job is running/has executed. It can be monthly, quarterly, weekly, etc.
 - g. **Data Granularity Level:** The frequency at which the data will be “grouped by” in the resultant tables.

Figure 82 – Metrics Collection

To refresh cache for a particular job, configure in additionalsettings = {CacheRefresh:true}

If CacheRefresh = true, then only this will go for cache refresh.

Figure 83 – Metrics Collection (Cont.)

A new Additional Settings section has been introduced under the Scheduling tab of the *Metric Collection*.

Additional Settings – Functionality Overview

- a. **Checkbox Option for Cache Refresh**
A checkbox is provided to enable or disable the Cache Refresh feature.
When checked, the system sets CacheRefresh: true.
 - b. **Submit Button**
The **Submit** button saves the configuration defined under Additional Settings for the specific metric collection job.
 - c. **Application of Settings**
The configurations are **only applied** after clicking the **Submit** button.
 - d. **Save & Finish**
After adding or updating any Additional Settings, click **Save & Finish** to finalize the job configuration.
 - e. This action updates the selected values in the database in JSON format for that metric job in Additional settings column.
4. Run KPI as Backdated. To backdate a KPI, follow the steps below:
 - a. Open browser and enter the MyXalytics URL.
 - b. Click Menu --> Core Configuration --> Schedule Metric Collection

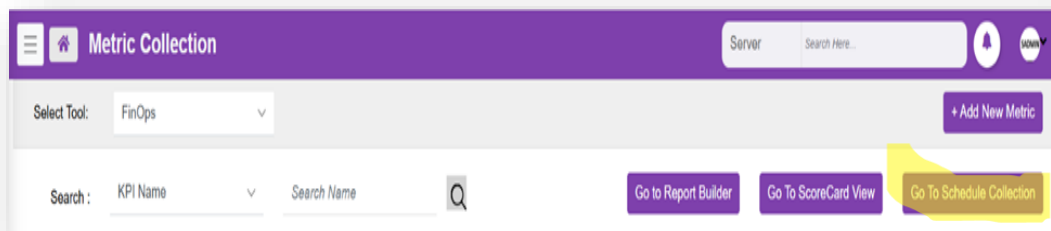


Figure 84 – Menu Gallery

5. Enable the Job to be rescheduled under the Action column using .

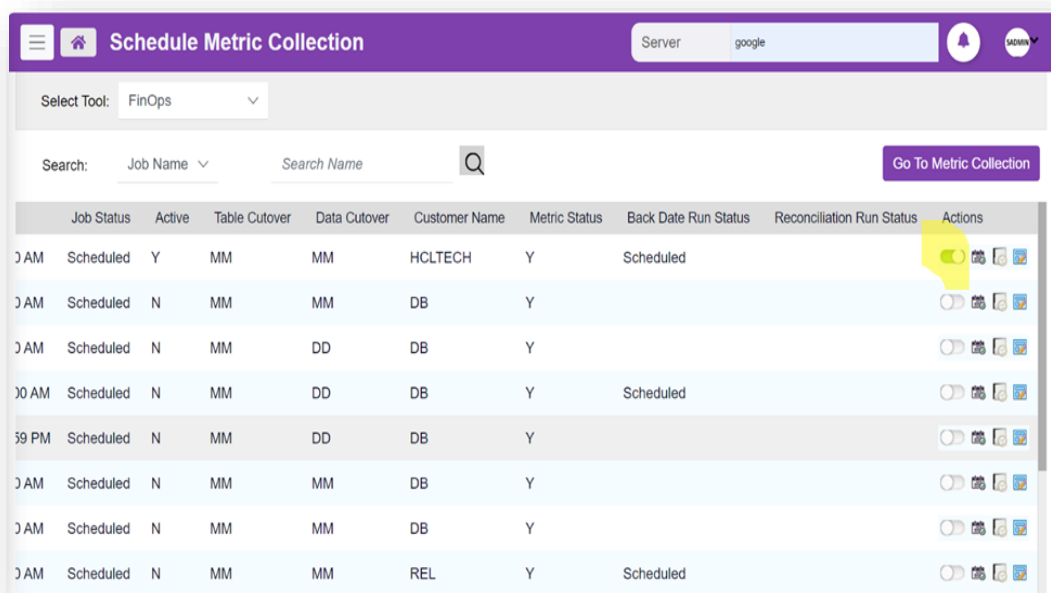


Figure 85 – Menu

6. Click  under the Action column to reschedule a Job.

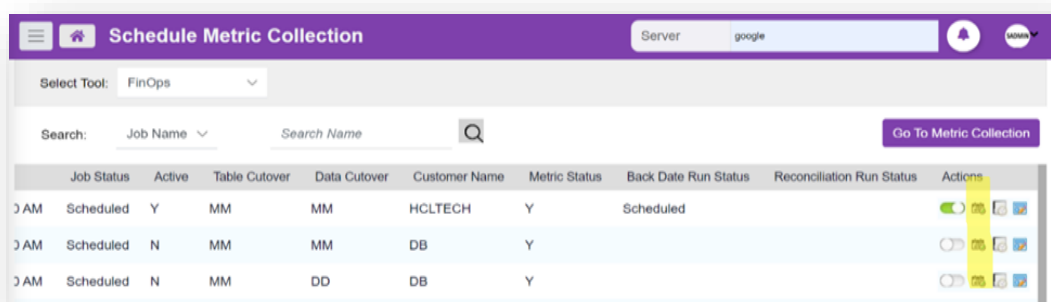


Figure 86 - Menu

7. The Backdate Collection dialog box appears.

Figure 87 – Backdate Collection

8. Verify the following details of the Backdate Collection:
 - a. **Backdate Collection Start Date:** The date to start the data collection.
 - b. **Backdate Collection End Date:** The date to stop the data collection.
 - c. **Delete Previous Data:** Select **Yes**, to delete the previous data logs or **no**, to save the previous data logs.
9. Click Schedule Now to schedule the job. The job starts when the service gets triggered next (Job triggers after every 10 minutes).

5.8 Excel Upload

1. In the menu section, go to Configuration and select Upload Excel Data and below screen will appear-

Figure 88 – Excel Upload

2. The grid on the page shows the already uploaded data files and the options to download, upload the data again, view details, delete data.
3. On clicking Upload data following screen appears in which we can upload the data again and modify the data accordingly.

Figure 89 – Upload Data

- On clicking view details icon below screen appears:

Figure 90 – Show Data

- To add new data, click on the Add new data and you will be directed to below screen

Figure 91 – Add Data

- Select the choose file option and upload the data of any form and structure and click on preview and the data will be uploaded as below:

DATE	USERMAILID	EMPID	KPI	CATEGORY	VALUE	ACTION
8/1/2020 12:00:00 AM			Final Points	L3 Score	91.60	Update
8/1/2020 12:00:00 AM			Final Points	L3 Score	81.62	Update
8/1/2020 12:00:00 AM			Final Points	L3 Score	95.36	Update
8/1/2020 12:00:00 AM			Final Points	L2 Score	88.60	Update
8/1/2020 12:00:00 AM			Final Points	L2 Score	84.40	Update
8/1/2020 12:00:00 AM			Final Points	L2 Score	84.40	Update
8/1/2020 12:00:00 AM			Final Points	L2 Score	88.60	Update

Figure 92 – Data Table

- Enter customer name, table name, access type, table type, upload mode fields and save the data.

6 FinOps Management

6.1 Budget Creation

This module helps in configuring the Budget of a customer based on selected cloud provider.

Budget can be defined on three levels:

- Overall
- Subscription
- Service
- Application
- BusinessUnit
- Environment
- Region

Steps to configure the budget:

1. Go to Configuration tab -> FinOps -> Budgets:

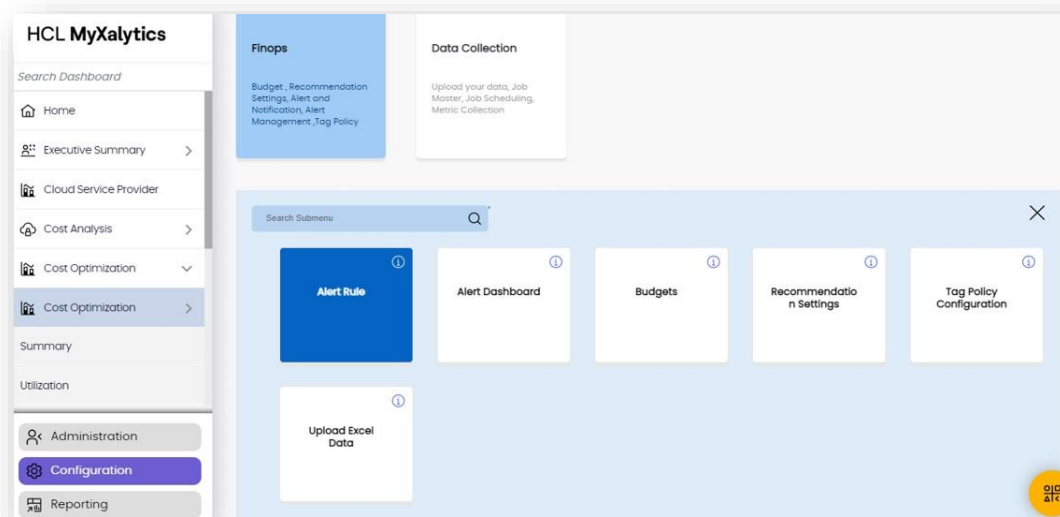
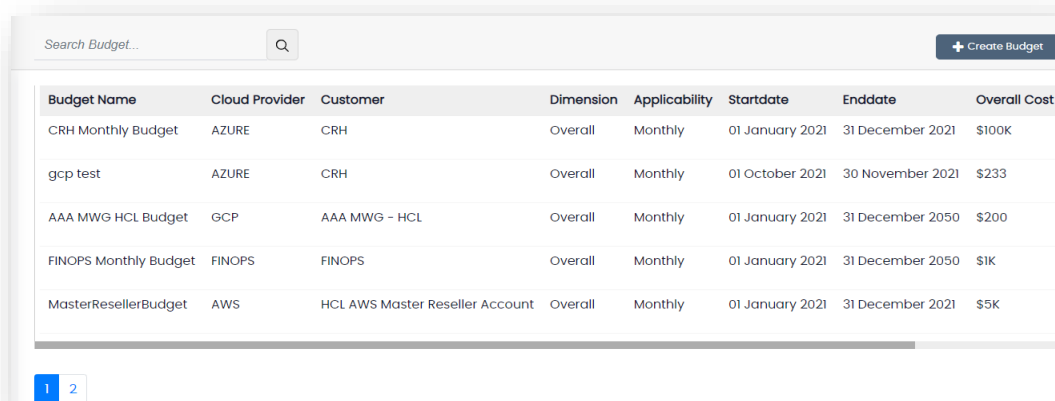


Figure 93 – Budget Configuration

2. Click on the Create budget button on top right.



Search Budget...

+ Create Budget

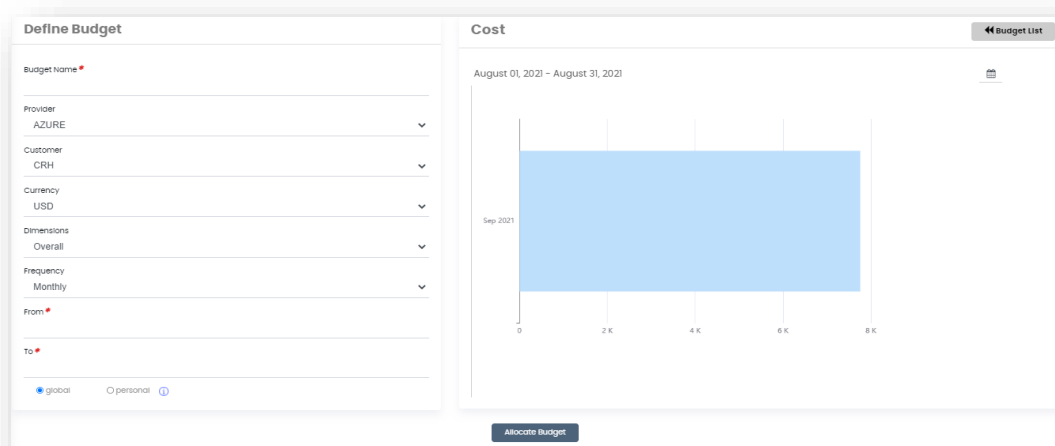
Budget Name	Cloud Provider	Customer	Dimension	Applicability	Startdate	Enddate	Overall Cost
CRH Monthly Budget	AZURE	CRH	Overall	Monthly	01 January 2021	31 December 2021	\$100K
gcp test	AZURE	CRH	Overall	Monthly	01 October 2021	30 November 2021	\$233
AAA MWG HCL Budget	GCP	AAA MWG - HCL	Overall	Monthly	01 January 2021	31 December 2050	\$200
FINOPS Monthly Budget	FINOPS	FINOPS	Overall	Monthly	01 January 2021	31 December 2050	\$1K
MasterResellerBudget	AWS	HCL AWS Master Reseller Account	Overall	Monthly	01 January 2021	31 December 2021	\$5K

1 2

Figure 94 – Search Budget

3. In the below page, following fields should be filled in:

- **Budget Name:** Enter a name for the Budget. The budget list will contain all the budgets created for the user's engagement logged in.
- **Provider:** Select cloud provider i.e.: AZURE, AWS etc.
- **Customer:** Based on the data security value provided in onboarding console to a specific engagement, Customer of specific cloud provider is shown.
- **Currency:** selected currency will be used for creating budget.
- **Dimensions:** Currently we have 12 dimensions: Overall (Customer level), Subscriptions and Services etc. based on which we allocate budget.



Define Budget

Budget Name *

Provider: AZURE

Customer: CRH

Currency: USD

Dimensions: Overall

Frequency: Monthly

From *

To *

global personal

Cost

August 01, 2021 - August 31, 2021

Sep 2021

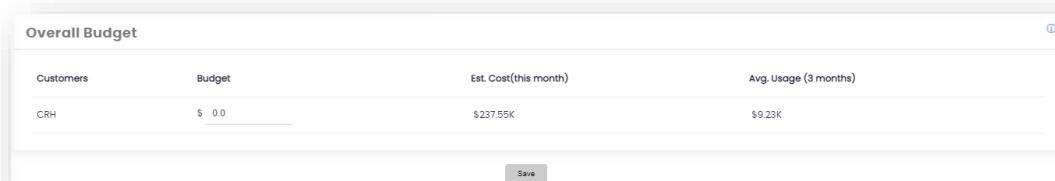
0 2K 4K 6K 8K

Allocate Budget

Budget List

Figure 95 – Define Budget

- When **overall** is selected:



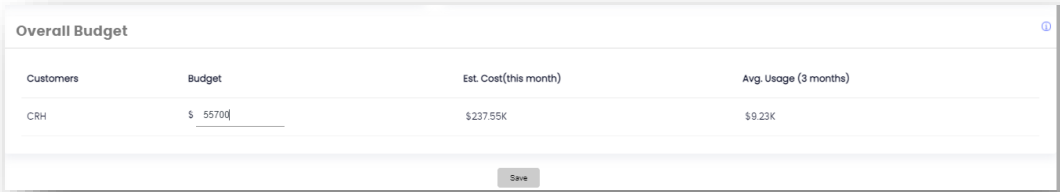
Overall Budget

Customers	Budget	Est. Cost (this month)	Avg. Usage (3 months)
CRH	\$ 0.0	\$237.55K	\$9.23K

Save

Figure 96 – Overall Budget

- It shows the estimated cost of the current month and Average Usage (3 months) to determine the value of budget. That helps in creating a budget.
- When the Overall Dimension is selected:



Customers	Budget	Est. Cost(this month)	Avg. Usage (3 months)
CRH	\$ 55700	\$237.55K	\$9.23K

Figure 97 – Overall Budget

- Also shows the current month Cost trend of the current month.

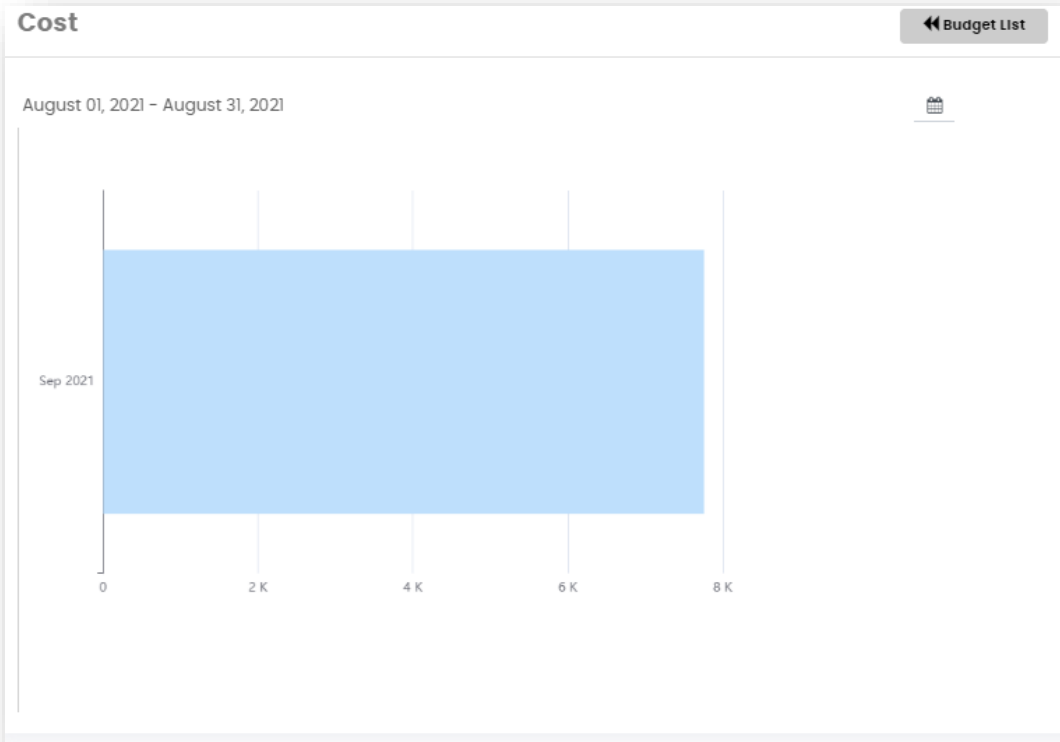


Figure 98 - Cost

- When Subscription level is selected, all subscription related to the customer are shown:

Subscriptions	Budget	Est. Cost(this month)	Avg. Usage (3 months)
Azure subscription 1	\$ 0.0	\$0	\$0
BetonCatalan_Lemona-ne-sub-01	\$ 0.0	\$0	\$0
BetonCatalan_Lemona-we-sub-01	\$ 0.0	\$198.69	\$16.59
cementbouw-ne-sub-01	\$ 0.0	\$0	\$0
cementbouw-we-sub-01	\$ 0.0	\$20.33K	\$860.88
citi-p-prototyping-hub	\$ 0.0	\$0	\$0.17
citisharedservices-ne-sub-01	\$ 0.0	\$10.46K	\$331.14
citisharedservices-we-sub-01	\$ 0.0	\$47.68K	\$1.63K
CRH NORTH DANUBE-NE-SUB-01	\$ 0.0	\$0	\$0

Figure 99 – Overall Budget

- Also shows the Cost trend subscription wise of the current month.

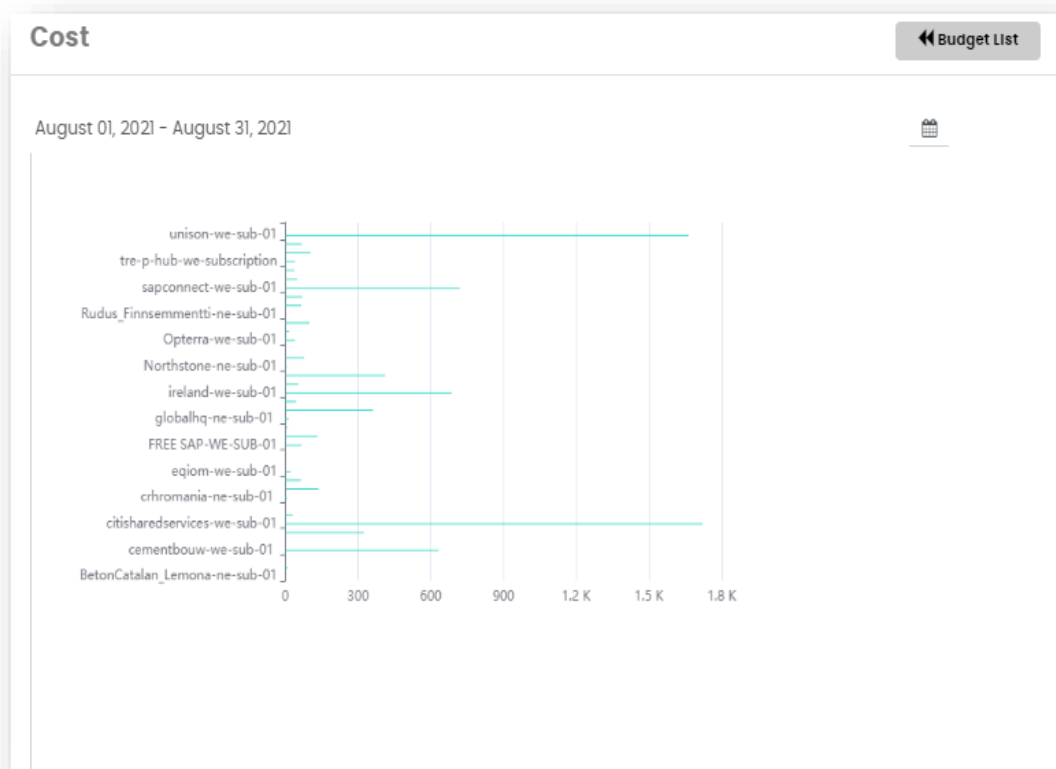


Figure 100 – Cost Graph

- When selected services wise dimension for creating budget:

Services	Budget	Est. Cost(this month)	Avg. Usage (3 months)
advanced data security	\$ 2222	\$0	\$0
advanced threat protection	\$ 333	\$657.34	\$2116
application gateway	\$ 0.0	\$16K	\$43.92
automation	\$ 0.0	\$23.55	\$0.68
azure dns	\$ 0.0	\$0	\$0
azure monitor	\$ 0.0	\$687.32	\$20.8
azure netapp files	\$ 0.0	\$163K	\$49.97

Figure 101 - Table

- Also shows the Cost trend subscription wise of the current month.

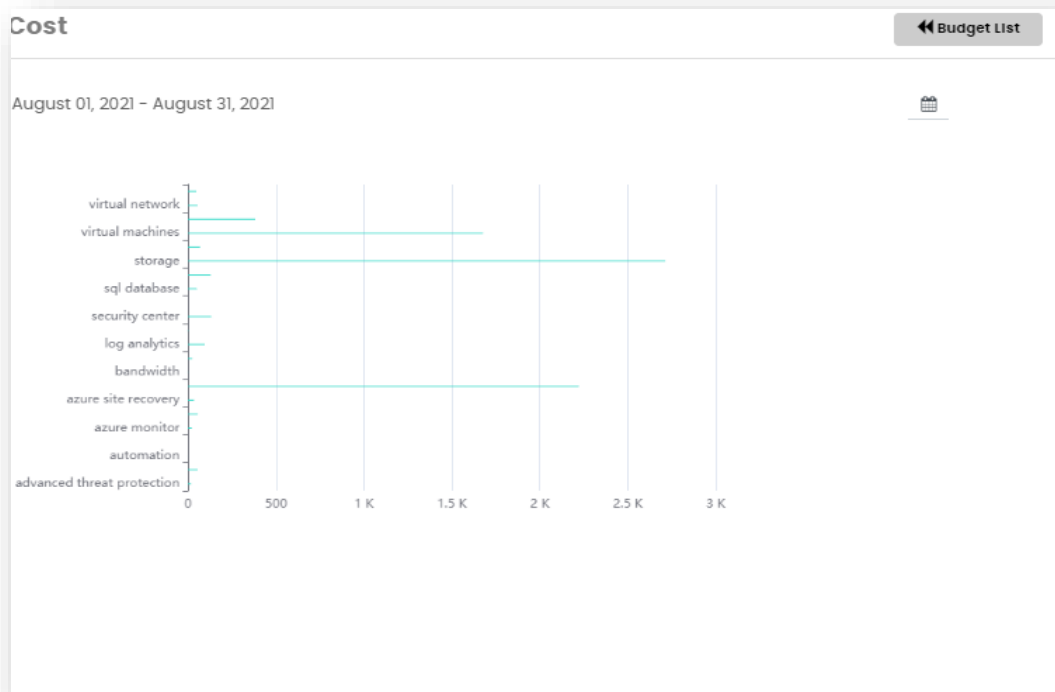


Figure 102 – Cost Table

- **Validity of budget:** Selection of from and to date
 - **Global/Personal:** Global rules can be configured when user needs to create budget visible to all inside a particular engagement, whereas Personal rules can be configured at User level.
4. Click on the **Save** button to save. and created budget is now visible for editing and deleting.

Budget Name	Cloud Provider	Customer	Dimension	Applicability	Startdate	Enddate	Overall Cost	Active	Action
CRH Monthly Budget	AZURE	CRH	Overall	Monthly	01 January 2021	31 December 2021	\$100K	Y	
gcp test	AZURE	CRH	Overall	Monthly	01 October 2021	30 November 2021	\$233	Y	
AAA MWG HCL Budget	GCP	AAA MWG - HCL	Overall	Monthly	01 January 2021	31 December 2050	\$200	Y	
FINOPS Monthly Budget	FINOPS	FINOPS	Overall	Monthly	01 January 2021	31 December 2050	\$1K	Y	
MasterResellerBudget	AWS	HCL AWS Master Reseller Account	Overall	Monthly	01 January 2021	31 December 2021	\$5K	Y	

Figure 103 – Search Budget

6.2 Tag Policy

The following are the Steps to configure tag policy:

1. From the left menu, go to Configuration -> FinOps -> Tag Policy
2. Click on Add Tag Policy button and configure the basic details of Policy like cloud provider, Customer, policy name, level (Global, Service, Resource Group) in the below screen:

TagPolicy

Server Search Here

1 Policy Master Configuration

2 Policy Details Configuration

Create Tag Policy

Cloud Provider *
AWS

Customer *
HCLSoft

Policy Name *
AWSGlobal

Level *
Global

Active
☒

Cancel Save Next

Figure 104 – Tag Policy

3. Click on save and next.
4. Configure the tag and level (Service Resource Group) details in the below-screen.

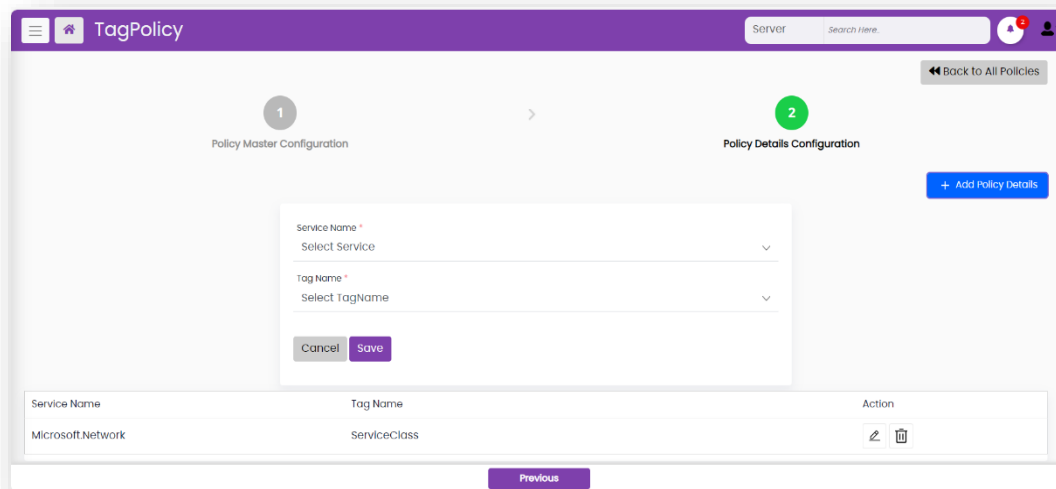


Figure 105 – Test Policy

Multiple tags can be configured for which list is displayed on the same screen

5. Click Save. Now schedule the job compliance collection from job scheduling screen and configure the reports.

6.2.1 Add Tag Values Console

1. In this console, you can assign values to the global and service tags for cloud provider that are already configured in the tag policy configuration page.
2. To access the Add Tag Values page, Configuration -> FinOps -> Tag - Define Tag values

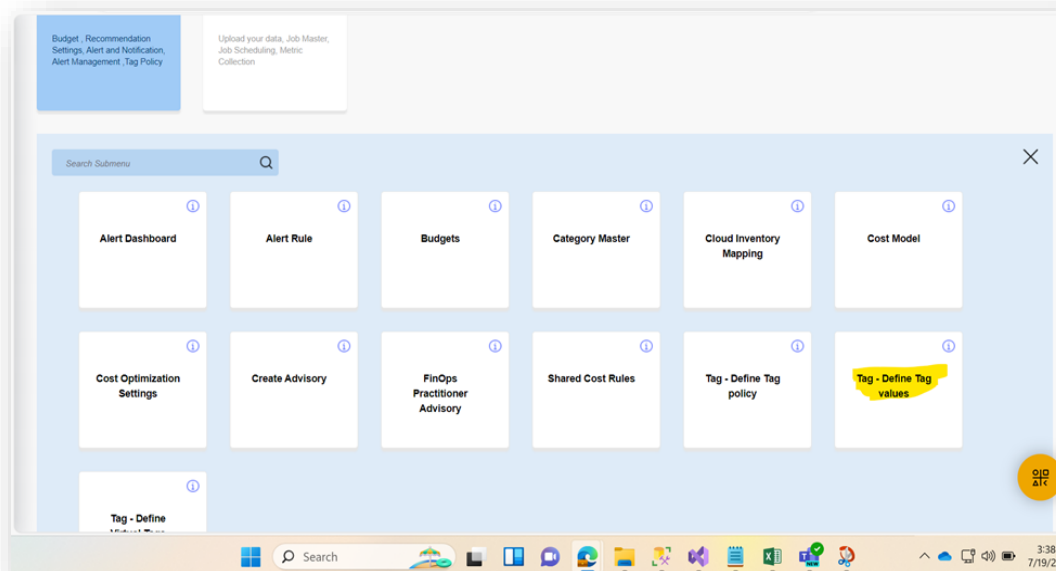


Figure 106 – FinOps Menu

3. This is the landing page of AddTagValues Console, here you could see all the tags that are created in the Tag policy configuration page. Click on add button to add the Tag values for the corresponding tagname. To Get data by using stored procedure **SpGetTagDetails**

The screenshot shows the 'AddTagValues' application interface. At the top, there is a purple header bar with a menu icon, a home icon, the title 'AddTagValues', a 'Server' dropdown, a search bar, and user profile icons. Below the header, there is a search bar labeled 'Search Tag...'. The main content area displays a table with the following columns: Provider, PolicyName, PolicyLevel, Service, TagName, and Action. The table lists several entries for AWS and AZURE providers, all with a 'Global' policy level. The 'TagName' column lists various tags like 'AWSGP', 'application owner', 'area', 'compaycode', 'createdby', 'description', 'environment', 'server role', and 'Test Owner'. Each row has a '+ ADD' button in the 'Action' column.

Provider	PolicyName	PolicyLevel	Service	TagName	Action
AWS	AWS Global Policy	Global		AWSGP	+ ADD
AZURE	Global Policy BC01	Global		application owner	+ ADD
AZURE	Global Policy BC01	Global		area	+ ADD
AZURE	Global Policy BC01	Global		compaycode	+ ADD
AZURE	Global Policy BC01	Global		createdby	+ ADD
AZURE	Global Policy BC01	Global		description	+ ADD
AZURE	Global Policy BC01	Global		environment	+ ADD
AZURE	Global Policy BC01	Global		server role	+ ADD
AZURE	Global Policy BC01	Global		Test Owner	+ ADD

Figure 107 - List of Tag Values

- In the below page you can see already existing tag values for the tags which are fetched by using stored procedure - **GetAddTagDetails**, and the last row will have empty text box to enter new tag value.
- One can update delete the existing tag values and add new tag value. For saving, editing, deleting the tag value we use stored procedure – **spSaveTagValues**.

The screenshot shows the 'AddTagValues' application interface. At the top, there is a purple header bar with a menu icon, a home icon, the title 'AddTagValues', a 'Server' dropdown, a search bar, and user profile icons. Below the header, there is a 'Back To TAGS' button. The main content area displays a table with the following columns: Provider, PolicyName, PolicyLevel, Service, TagName, TagValue, and Action. The table lists several entries for AWS provider, all with a 'Global' policy level. The 'TagName' column lists 'AWSGP' for all entries. The 'TagValue' column shows existing values: 'sample', 'mbv', 'jtkk', and an empty text box labeled 'Enter Tag Value'. The 'Action' column contains icons for edit, delete, and update, along with a 'Save' button.

Provider	PolicyName	PolicyLevel	Service	TagName	TagValue	Action
AWS	AWS Global Policy	Global		AWSGP	sample	✎ 🗑️ Update
AWS	AWS Global Policy	Global		AWSGP	mbv	✎ 🗑️ Update
AWS	AWS Global Policy	Global		AWSGP	jtkk	✎ 🗑️ Update
AWS	AWS Global Policy	Global		AWSGP	Enter Tag Value	Save

Figure 108 - Adding Tag Values to Tag Name

- Added Two buttons for navigating Virtual Tag or TagPolicy Pages.

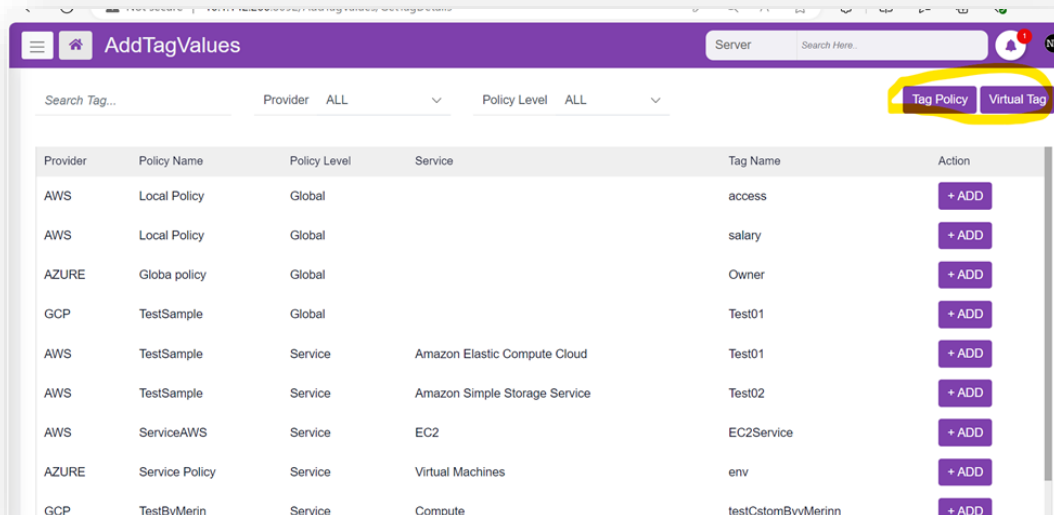


Figure 109 – Redirecting to Tag Policy and Virtual Tag Page

7. The Tables used in the console for storing and retrieving the data

- CloudTagPolicyMaster
- CloudTagPolicyDetails
- Cloud_Tags_<EngId>

6.2.2 Virtual Tag

In this console's initial page, you'll find a comprehensive overview of cloud providers, their respective services, and subscriptions, resource count, Global Tag Noncompliance percentage, Service Tag Noncompliance percentage nested within those services. In the second page, you will be able to map the tag values with resources for both global and service-level tags. Additionally, you can observe the percentage of Tag noncompliance.

Steps to access console and stored procedures used:

1. To access the Virtual Tag page, Configuration- > FinOps - > Tag - Define Virtual Tags

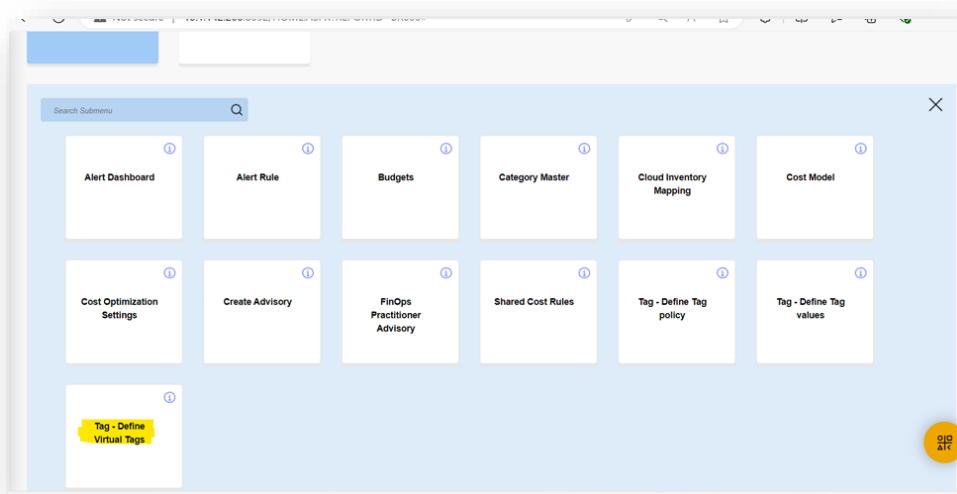


Figure 110 - FinOps Menu

2. This is the landing page, where you can see the cloud providers at the top. These cloud providers are populated by stored procedure - usp_GetApprovedIntegrations, by default the first cloud provider will be selected and the services, subscriptions under each service, resource count, Global Tag Noncompliance percentage and service Tag Noncompliance percentage will be shown.
3. The services, subscriptions, resource count and Noncompliance percentage data are getting by using stored procedure - MX_spGetServiceDetailsbyProvider_VR01 Click on action add button beside subscription to map the resource's tags with tag values.
4. In the top right corner, you will have the button Download Tagging script to download the entire Tag Script for the resources there are already cells populated with tag values are compliant. And the cells which are showing red color then the corresponding resources are non-compliant.

The screenshot shows the 'Virtual Tag' application interface. At the top, there are tabs for 'AWS', 'AZURE', and 'GCP'. Below these, there's a 'Download Tagging Script' button. The main content area displays two sections: 'Amazon Elastic Compute Cloud' and 'Amazon Simple Storage Service'. Each section contains a table with columns: Subscription, Resource Count, Global Tag Non Compliance(%), Service Tag Non Compliance(%), and Action.

Subscription	Resource Count	Global Tag Non Compliance(%)	Service Tag Non Compliance(%)	Action
HCL_AWS_COMMON	198	98.99	0.51	+
HCL_AWS_MYXLTC	3	66.67	0.00	+
HCL_AWS_DEMOPOC	35	88.57	14.29	+

Subscription	Resource Count	Global Tag Non Compliance(%)	Service Tag Non Compliance(%)	Action
HCL_AWS_COMMON	3	66.67	0.00	+

Figure 111 - Global and Service Level Tag Non-Compliance Percentage in Resource Level

5. In the following figure, the grid used is kendo, The resources list is fetched by stored procedure - **MX_spGetSubscriptionsbyservice**, tag names are populated using stored procedure - **Mx_getTagcolumns**, Tag values dropdown in each cell is populated by using stored procedure – **MX_spGetTagValuesfordropdown**.

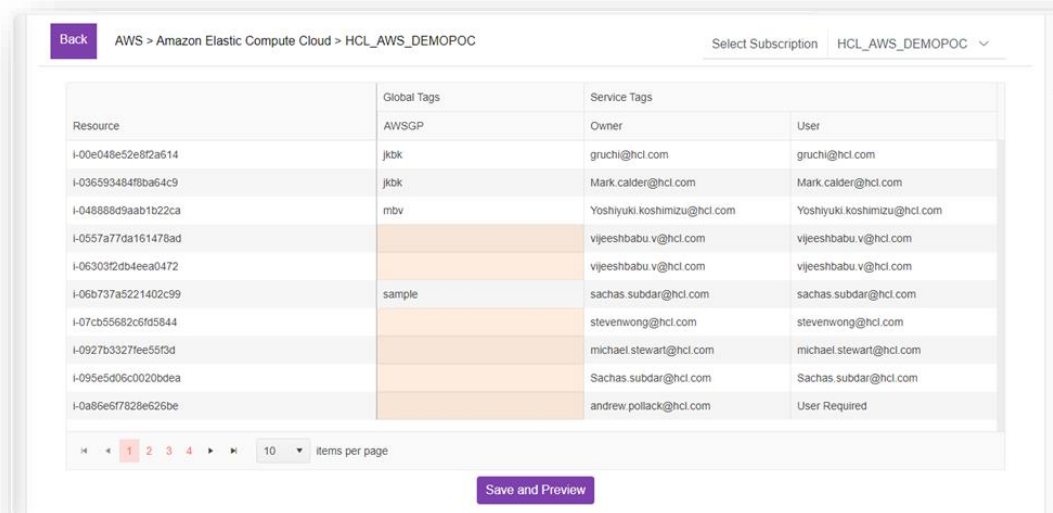


Figure 112 - Tag Value Mapping for Resources

6. In the top right there is Subscription dropdown, you will be able to change the subscription under the service. This dropdown is populated by using stored procedure- **MX_spGetSubscriptionsbyservice_VR01**
7. Clicking on each cell under the tags will show the dropdown with the tag values that are added in addtagvalue console. Select the tag values and click on save. For saving we use the store procedure - **MX_SaveTagMapping**

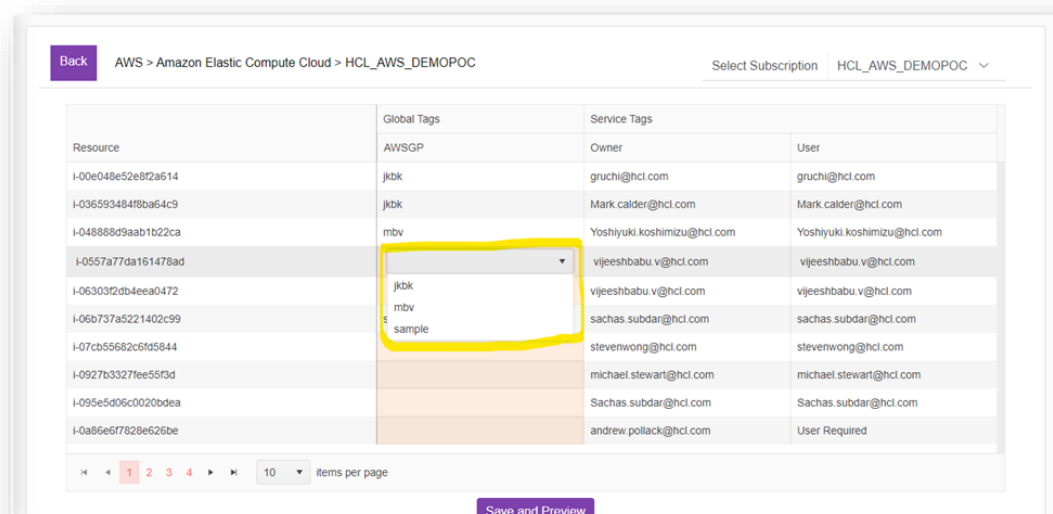


Figure 113 - Tag Value Mapping for Resources (Detail)

Before accessing the Virtual tag console, make sure for the corresponding engagement there is already Global, and tag policy created with tag names in tag policy configuration page.

8. Also make sure that you have added tag values in the AddTagValues console for the Tag names that are created in the tag policy configuration console.
9. Added Two buttons for navigate AddTagValues or TagPolicy Pages

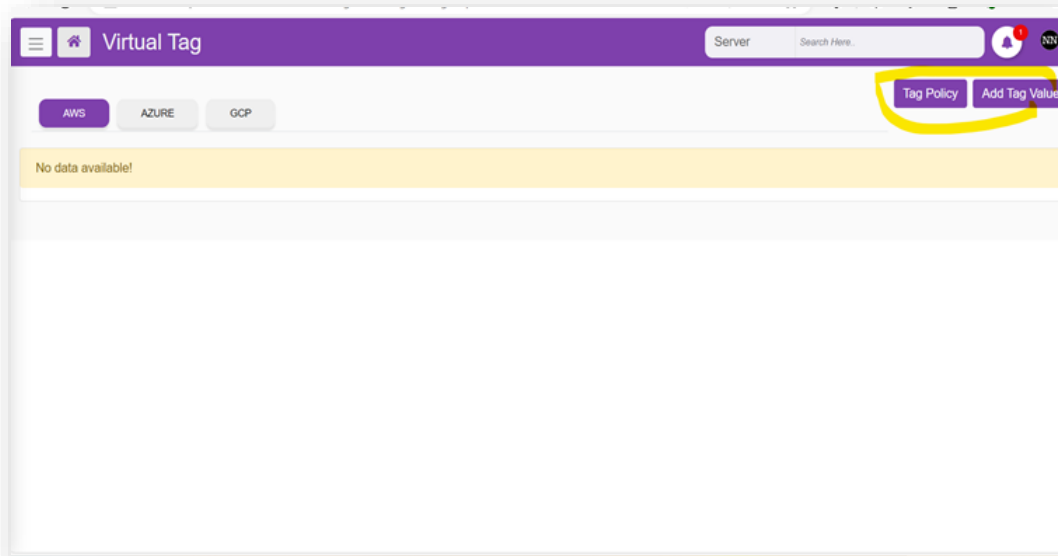


Figure 114 - Redirect to Tag Policy and Tag Value Page

10. The Tables used in the console for storing and retrieving the data:

- CloudTagPolicyMaster
- CloudTagPolicyDetails
- Cloud_Tags_EngagementID
- Cloud_ResourceTagString_EngagementID
- Cloud_ResourceTagString_custom_EngagementID

6.3 Cost optimization settings

This module helps user to optimize and save their cost for different infrastructural demand. It works on different parameters like Cloud Provider, Offered Service, Service Category, Optimization Technique Category, Technique, Technique Rule etc. Users can choose within the list of available cloud providers and optimize the cost of its infra. Please find below the detailed explanation with images.

1. Path to access the Optimization setting page:

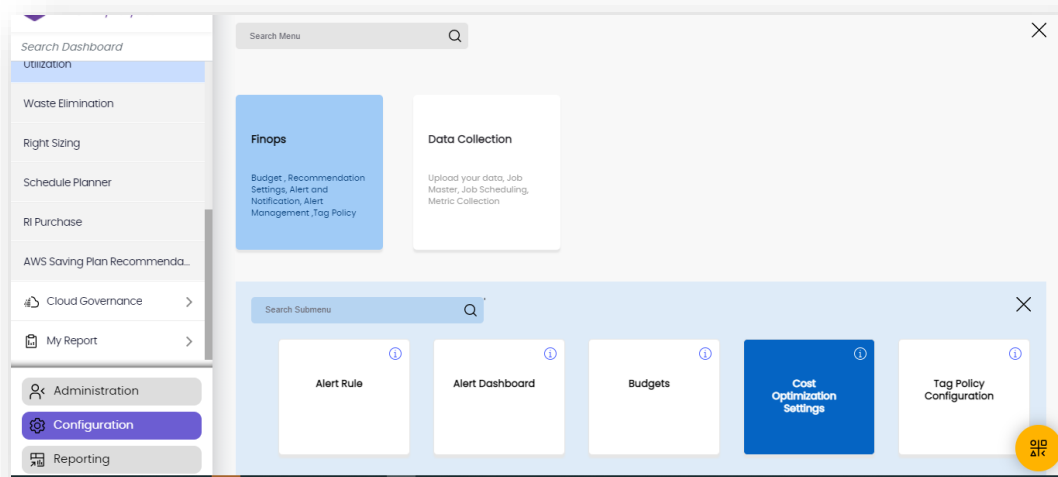


Figure 115 – Cost Optimization Settings

2. Click on the Configuration section on the left-hand side in the main menu.
3. Click on FinOps.
4. Click on the Cost Optimization Settings and the user will be navigated to Cost Optimization Setting dashboard page.

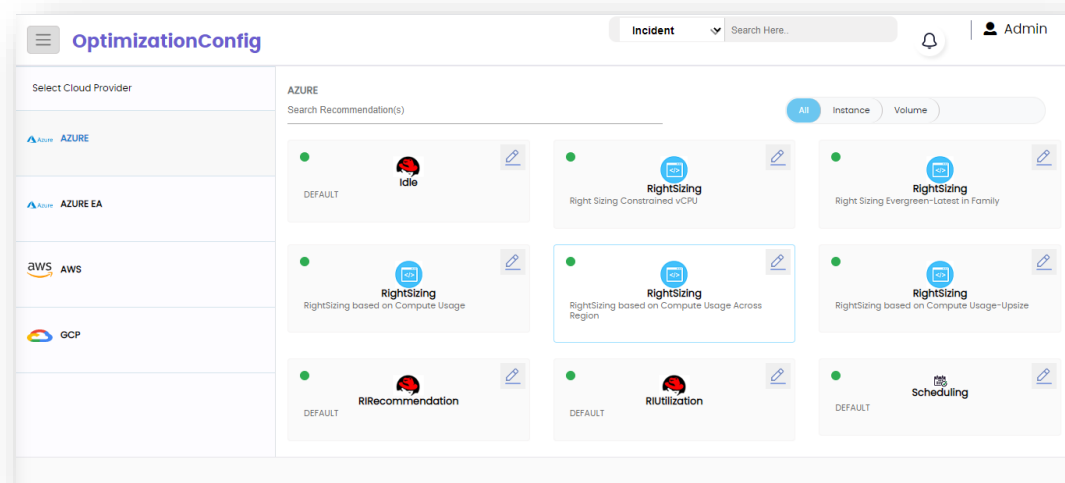


Figure 116 – Optimization Config

- The above page has two sections. One section contains the list of available cloud providers, and another section contains the list of available Technique and Technique Rule within that cloud provider.
- Users can search with the name of the technique by using the search option available, also categories the Technique with respect to the Instance or the Volume. Each technique has its own set of rules and options.
- To edit the given Technique user can click on the edit. Please find below image for Right Sizing technique after clicking on Edit button :

Figure 117 – Edit KPI Configuration

In the above image you can see the two sections named KPI Configuration and Advance Settings. KPI Configuration section varies with respect to the Technique chosen by the User.

- **KPI Configuration:** As the name suggests, it is used to configure the different KPI's. KPI Configuration completely depends upon Technique and Technique rules. In the above image, we can see different parameters like Across Service Type, Across Family Type, Across Region etc. These parameters are predefined according to the Technique and Technique rules. User can Save its recommendation by clicking the Save button at the bottom of the page shown in the below image.
- Exclusion List and Advance Filter options are introduced in cost optimization where users have options to include or exclude Instance category and instance families in cost optimization, also can add advance filter conditions in cost optimization right sizing performance data.

Figure 118 – KPI Configuration

Exclusion Type	Instances	Condition	Action
InstanceCategory	HPC Optimized Memory Optimized Storage Optimized	Is Any Of	
InstanceFamily	C5ad C5d C5n C6g C6gd C6gn C6i	Is Not Any Of	

Figure 119 - KPI Configuration (Cont.)

Dimension	Condition	Value	Action
Cloud Provider	Is Any Of	AWS	
Active	Is Not Any Of	Y	

Figure 120 - KPI Configuration (Cont.)

- Also user has option to set minimum threshold value for cost optimization deviation.

Figure 121 - KPI Configuration (Cont.)

Cloud Provider	Technique	Technique Rule	Offered Service	Service Category	Optimization Technique Category
AZURE	RightSizing	Right Sizing Constrained vCPU	Compute	Instance	COST

Across SKU Family: ☒ Yes ☐ No
 SKU Generation: ☒ Yes ☐ No
 Metrics To Consider For RightSizing: PerfCPUUsage | ☒ PerfMemoryUsage | ☒
 PerfCPUUsage Deviation (%):
 PerfMemoryUsage Deviation (%):
 Look Back Days:
 Option:

Figure 122 – KPI Configuration

- **Advance Settings:** This section is used if users want to perform some advance actions on KPI's like Average, Maximum, Minimum on the specific parameter and can save them.

Figure 123 – Advanced Settings

6.4 Alerting

Users can go to alert dashboard by following below path:

1. Menu -> Configuration -> FinOps -> Alert Dashboard

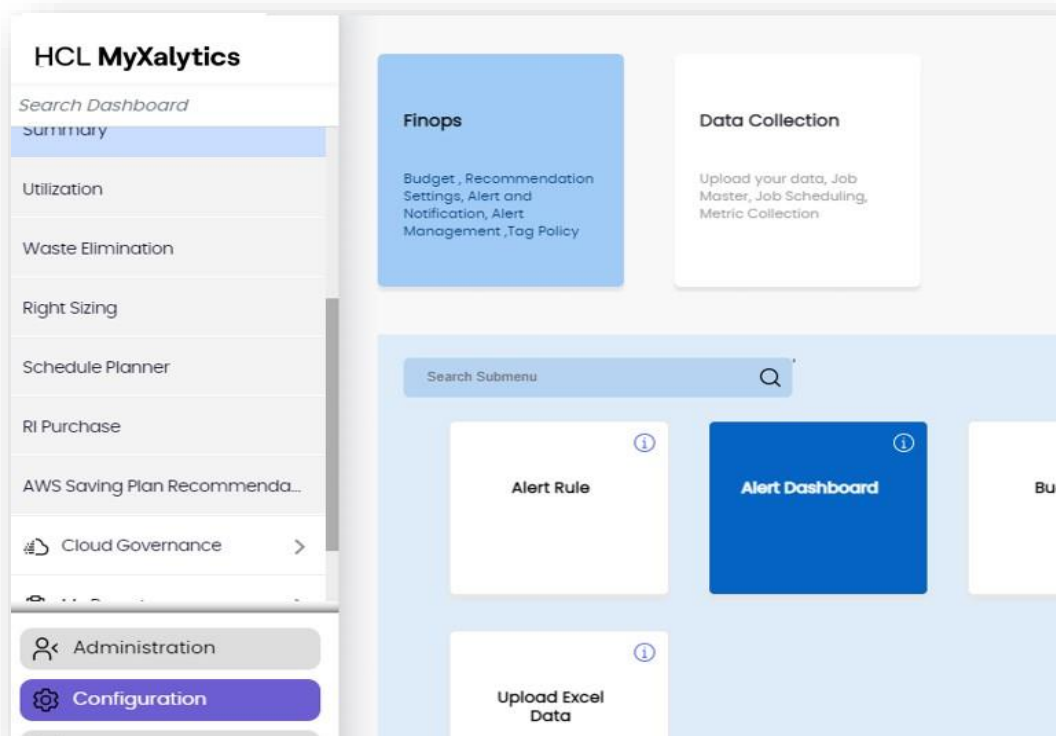


Figure 124 – Alert Dashboard

2. The Alert Dashboard lists the alerts created for
 - Recommendations from Cost Optimization view.
 - Alert rule configured for Cost Anomaly.
 - Alert rule configured for Cost.

- Alert rule configured for Budget.
3. As soon as user clicks on Alert Dashboard, user can see the below screen:

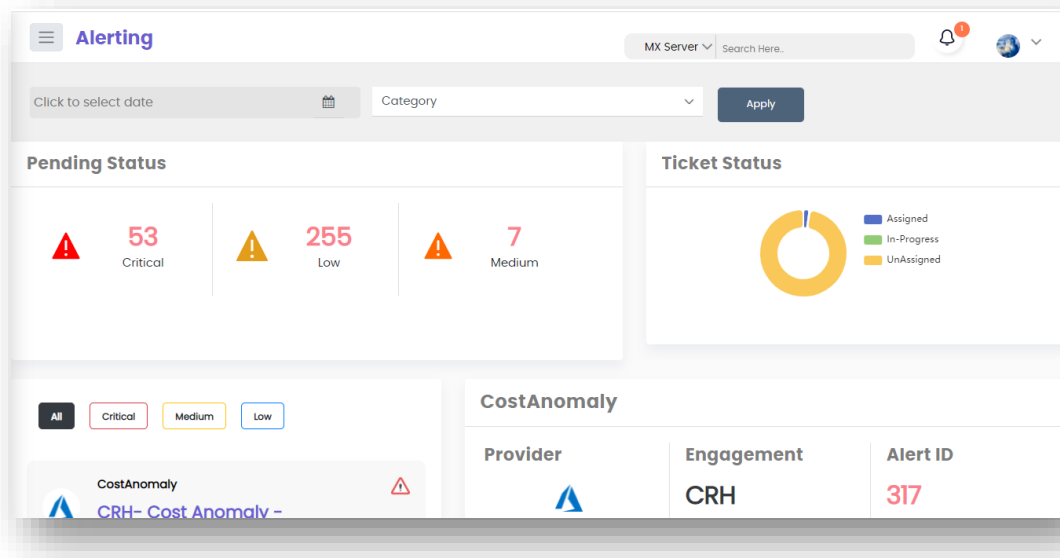


Figure 125 – Alerting

4. In this dashboard, you can have a look at the alerts which are in:
 - Pending status severity wise.
 - Count of alerts status wise.
5. Users can filter alerts based on creation date and category:

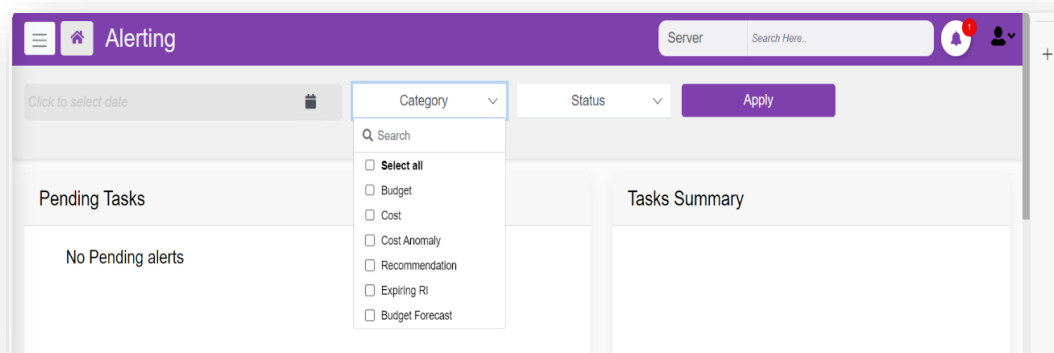


Figure 126 – Pending Status

6.5 Alert listing

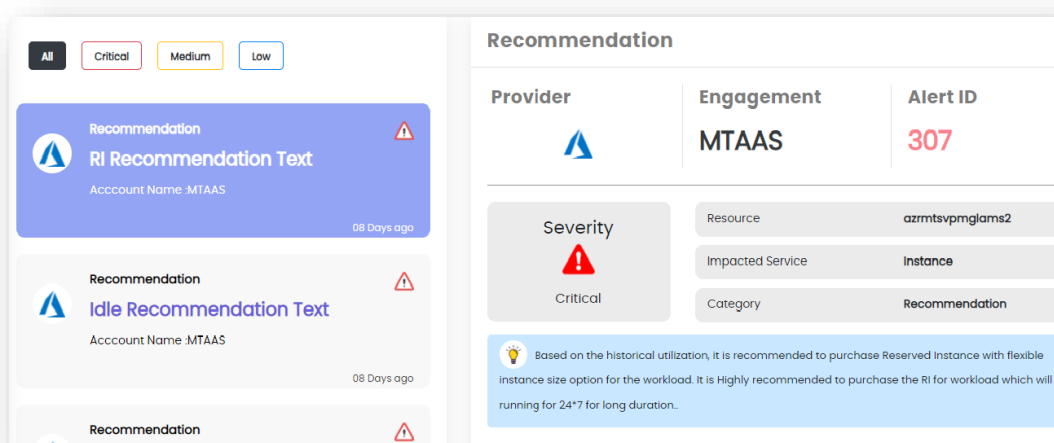
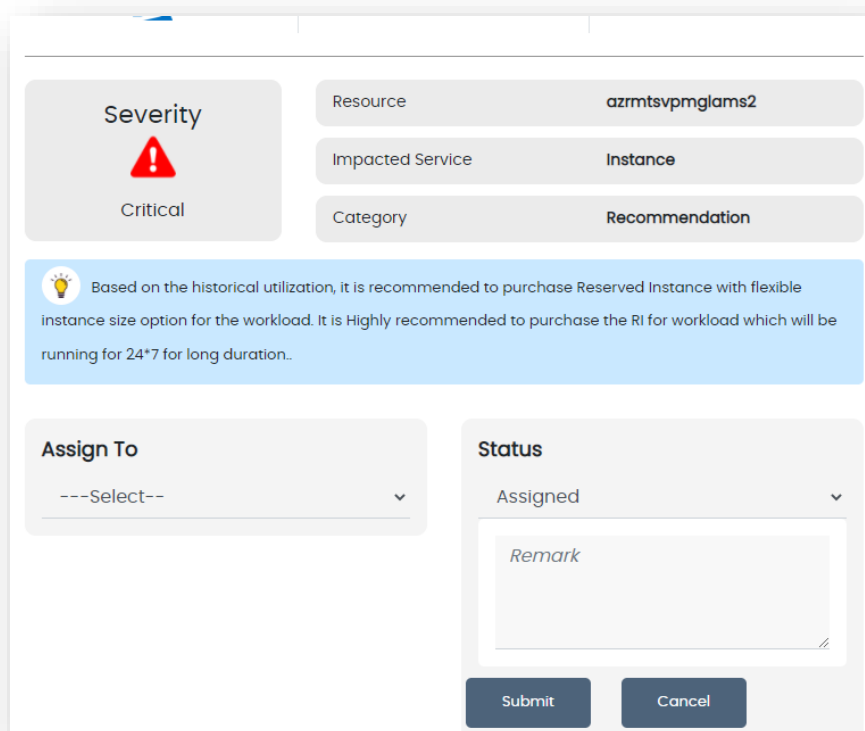


Figure 127 – Recommendation

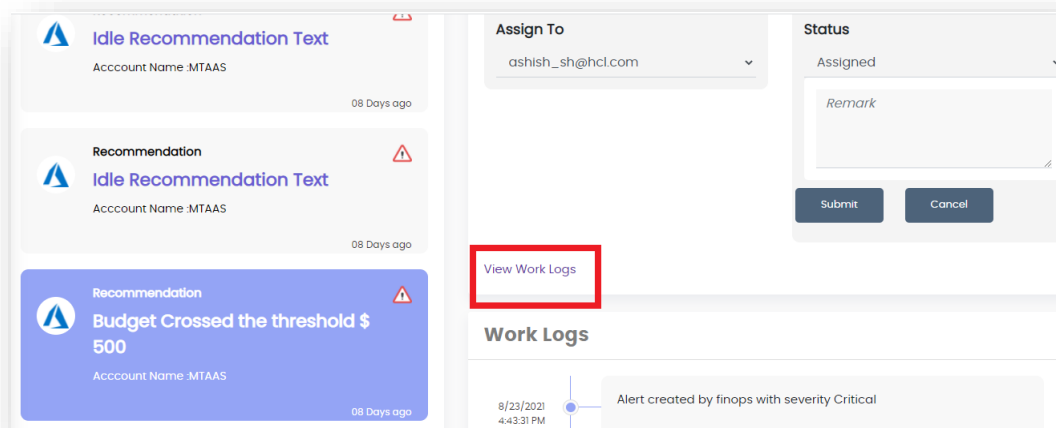
1. By clicking on any alert on the left side, the details for that alert can be seen on the right-hand side as shown in the above figure.
2. In the detailed view the alert can be assigned to any assignee putting some remarks.



The image shows a modal window for configuring an alert. It has a 'Severity' section with a red warning icon and the text 'Critical'. To the right, there are three fields: 'Resource' with the value 'azrmtsvpmglams2', 'Impacted Service' with the value 'Instance', and 'Category' with the value 'Recommendation'. Below these is a light blue box containing a lightbulb icon and a paragraph of text: 'Based on the historical utilization, it is recommended to purchase Reserved Instance with flexible instance size option for the workload. It is Highly recommended to purchase the RI for workload which will be running for 24*7 for long duration..'. At the bottom, there are two dropdown menus: 'Assign To' (showing '---Select---') and 'Status' (showing 'Assigned'). Below the 'Status' dropdown is a text area labeled 'Remark'. At the very bottom are 'Submit' and 'Cancel' buttons.

Figure 128 - Alert

3. In the detailed view, there is a link View Work logs. This can be used to view the work logs done till date on the alert.



The image shows a detailed view of alerts. On the left, there is a list of three alerts. The first two are 'Idle Recommendation Text' for 'Account Name :MTAAS', dated '08 Days ago'. The third is 'Budget Crossed the threshold \$ 500' for 'Account Name :MTAAS', also dated '08 Days ago'. On the right, there is a configuration panel with 'Assign To' (showing 'ashish_sh@hcl.com') and 'Status' (showing 'Assigned'). Below this is a 'Remark' text area and 'Submit'/'Cancel' buttons. A red box highlights a 'View Work Logs' link. Below this link is a 'Work Logs' section showing a timeline for '8/23/2021 4:43:31 PM' with the text 'Alert created by finops with severity Critical'.

Figure 129 – View Work Logs

6.6 Alert Rule

This module helps in configuring rules for Cost Anomaly, Budget, Cost and BudgetForecast for generating alerts and sending emails based on defined ranges.

Rules can be defined for:

- Budgets Alert
- Cost
- Cost Anomaly

- Expiring RI
- BudgetForecast

Steps to configure the rule:

1. Go to Configuration tab -> FinOps -> Alert Rule:

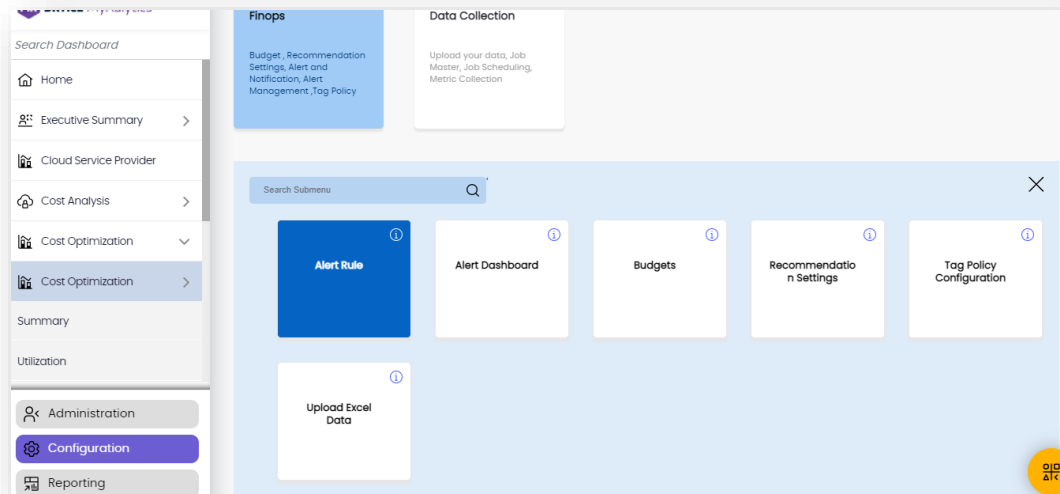


Figure 130 – Alert Rule

2. Click on the Create Alert button on top left.

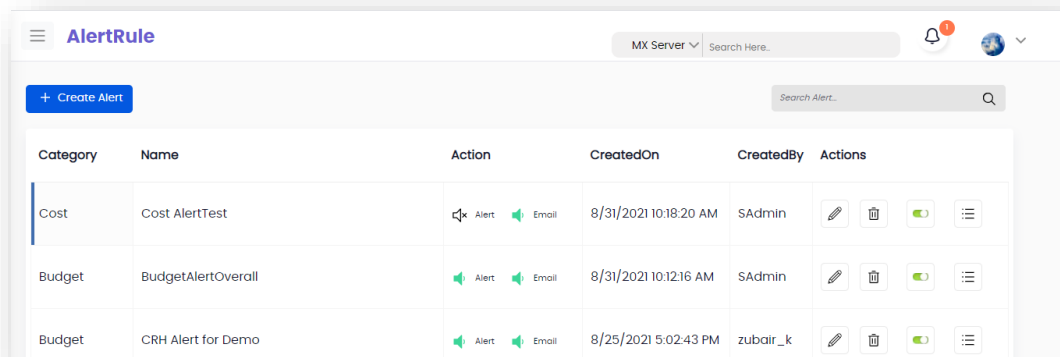


Figure 131 – Alert Rule

3. In the below page, following fields should be filled in:

- **Alert Name:** Enter a name for the alert rule.
- **Global/Personal:** Global rules can be configured when user needs to send email and generate alerts, whereas Personal rules can be configured at User level where only emails can be sent to the configured email ids.
- **Alert Category:** Configuration to be done for which category: Budget, Cost Anomaly or Cost
- **Budget Name:** If the category is selected as Budget, users need to select the name of the Budget for the rule that needs to be created. The budget list will contain all the budgets created for the user's engagement logged in.

The screenshot shows the 'AlertRule' configuration page. At the top, there's a header with a menu icon, a home icon, the title 'AlertRule', a 'Server' dropdown, a search bar, and a user profile icon. A 'Back to List' button is in the top right. The main content area has four sections: 'Alert Name' with a text input; 'Alert Category' with five buttons: 'Budget', 'Cost', 'Cost Anomaly', 'Expiring RI', and 'Budget Forecast' (which is selected); 'Budget Forecast' with a 'Budget Names' dropdown set to '--- Select ---' and a 'Go to Budget' link; and 'Alert Parameters' with a 'Look back period' dropdown set to '15 Days'.

Figure 132 – Alert Rule

The screenshot shows the 'AlertRule' configuration page with different settings. The 'Applicable on' section has a 'Dimension' dropdown set to 'Overall'. The 'Alert Parameters' section has a 'Look back period' dropdown set to '15 Days' and an 'Average Type' dropdown set to '--- Select ---'. The 'Actions' section has a 'Provide Range' with two empty input boxes, an 'Alert Severity' dropdown set to 'Critical', and a row of notification action buttons: 'Email', 'Alert', 'SMS', and 'Push Notification'.

Figure 133 – Alert Rule

Figure 134 – Alert Category

- **Applicable on:** Dimension for which the rule will be applicable. Options are Overall (for Customer), Subscription and Service. If user selects Subscription or Service, the list of Subscription/ Service will appear from which user can multi select.

Figure 135 – Alert Parameters

- If the category selected is Budget, then the dimension on which the selected budget is created will appear automatically. This dimension will not be editable.

Recommendation CostAnomaly **Budget** SecurityCenter TrustedAdvisories

Cost

Budgets

Budget Names
AAA MWG HCL Budget

Applicable on

Dimension
Overall

Figure 136 - Budget

- **Lookback Period:** If the rule category is selected as Cost Anomaly user needs to mention the Lookback Period which will be considered for calculating daily average cost against which current anomaly will be calculated.

Alert Parameters

Look back period

15 Days

- 15 Days
- 30 days
- 60 days
- Last Week
- Last Two Weeks
- Last Three Weeks
- Last Four Weeks
- Last Six Weeks
- Last Month
- This Month
- Last 2 Months
- Last 3 Months

Figure 137 – Alert Parameters

- **Average Type:** If the category is selected as Cost Anomaly or Cost, user needs to mention the period for which average cost to be considered for further calculation.

Average Type

--- Select ---

Month Till Today

This Week

Today

Figure 138 - Parameters

- **Actions:** User needs to define the ranges and severity for which he wants the email or/and alerts.

Provide Range	Alert Severity	Actions
3000 - 5000	Low	Email, Alert, SMS, Push Notification
5001 - 15000	Medium	Email, Alert, SMS, Push Notification
15001 - 9999999	Critical	Email, Alert, SMS, Push Notification

Figure 139 – Alert Actions

- The email address to which mail should be sent should be configured by clicking on Email/ Alert links under Actions.

AlertRule

☒ Alert Name

Alert Name
Cost Alert CRH

☒ Alert Category

Recommendation

Cost

Applicable on

Actions

Email, Alert, SMS, Push Notification

Email address (Please put comma separated email address)

Enter Email...

Subject
Low alert for cost

Save

Figure 140 – Alert Rule Actions

5. Click on the **Save** button to save the configuration.

Provide Range	Alert Severity	Actions
3000 - 5000	Low	☒ Email ☒ Alert ☒ SMS ☒ Push Notification
5001 - 15000	Medium	☒ Email ☒ Alert ☒ SMS ☒ Push Notification
15001 - 9999999	Critical	☒ Email ☒ Alert ☒ SMS ☒ Push Notification

Save

Figure 141 – Alert Actions

6. The listing page enables user to Edit, Delete and Enable/ Disable a rule.

Category	Name	Action	CreatedOn	CreatedBy	Actions
Cost	Cost AlertTest	☒ Alert ☒ Email	8/31/2021 10:18:20 AM	SAdmin	

Figure 142 – Edit Alerts

Here we can see different tabs technique wise. Each tab shows savings per resource. These can be assigned to assignees with severity. As soon as a line item is assigned to someone, an alert is generated. The alerts can be seen on Alert Dashboards.

6.7 Cloud Savings Plan

Cloud savings plan page is a cost saving model view screen of associated cloud providers to an end user.

1. To view cloud savings plan, click on the Savings Plan button on FinOps dashboard.

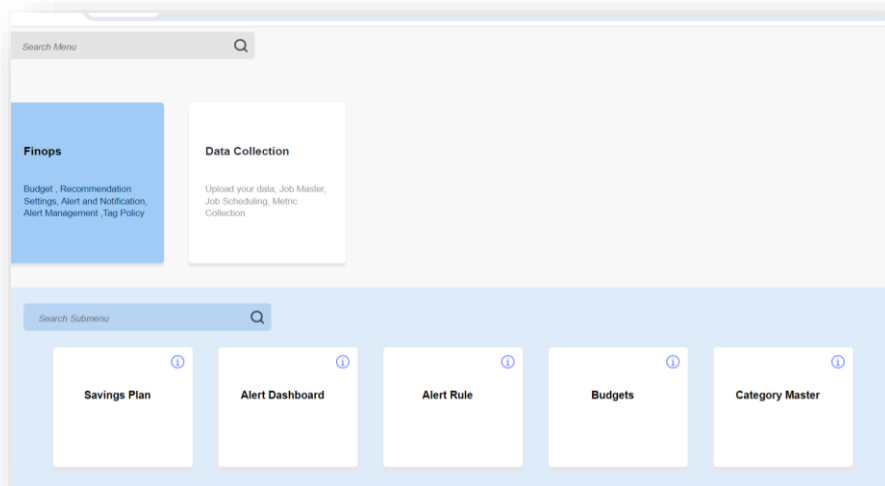


Figure 143 – FinOps Dashboard

2. On click of saving plan option a new tab will open with view cloud savings plan screen default first option of cloud provider will be selected and kendo grid binds with savings plans data.

Resource		Spend		Savings		RI					
Name	Type	On Demand (\$)	Estimated Monthly Spend (\$)	Estimated Monthly Saving (\$)	Percent Saving(%) (\$)	Standard RI (1 year)			Standard RI (3 year)		
						No Upfront (\$)	Partial (\$)	All Upfront (\$)	No Upfront (\$)	Partial (\$)	All Upfront (\$)
CohesitySaaSConnector-65...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-00...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-02...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-30...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-36...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-40...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-49...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-61...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-67...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
Total :		13,229.13	9,929.37	3,309.76	29.66						

Figure 144 – AWS Savings Plan

3. User can select Tool Name option and corresponding savings plans data can view as given below.

Cloud Savings Plan											
Tool Name		Provider Name		Service(s)		Account(s)					
FinOps		AWS									
Search											
Search Resource Name...											
Resource		Spend		Savings		RI					
Name	Type	On Demand (\$)	Estimated Monthly Spend (\$)	Estimated Monthly Saving (\$)	Percent Saving(%) (\$)	Standard RI (1 year)			Standard RI (3 year)		
						No Upfront (\$)	Partial (\$)	All Upfront (\$)	No Upfront (\$)	Partial (\$)	All Upfront (\$)
CohesitySaaSConnector-85...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-00...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-02...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-30...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-36...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-40...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-49...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-51...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
CohesitySaaSConnector-67...	EC2	165.6	104.4	61.2	36.96	104.4	49.68	0	71.28	33.12	0
Total :		13,229.13	9,808.37	3,308.76	29.56						

Figure 145 – AWS Savings Plan

- For Azure cloud provider below options will be loaded on view cloud savings plan screen.

Cloud Savings Plan											
Provider Name		Service(s)		Account(s)							
Azure											
Search											
Search Resource Name...											
Resource		Spend		Savings		Savings Plan				RI	
Name	Type	On Demand (\$)	Estimated Monthly Spend (\$)	Estimated Monthly Saving (\$)	Percent Saving(%) (\$)	1 year		3 year		1 year	
						Monthly (\$)	Upfront (\$)	Monthly (\$)	Upfront (\$)	Monthly (\$)	Upfront (\$)
ESBARAPT1M02	Virtual Machines	139.68	103.46	36.22	25.93	103.464	1241.568	72.2952	2602.6272	82.764	82.764
ESBARJRT1TC0B	Virtual Machines	279.36	206.92	72.44	25.93	206.9208	2483.0496	144.5976	5205.5136	165.4488	165.4488
ESBARWADT01	Virtual Machines	82.8	62.93	19.87	24	62.928	755.136	45.54	1639.44	55.0656	55.0656
ESBARWADT03	Virtual Machines	82.8	62.93	19.87	24	62.928	755.136	45.54	1639.44	55.0656	55.0656
ESBARWADT05	Virtual Machines	82.8	62.93	19.87	24	62.928	755.136	45.54	1639.44	55.0656	55.0656
ESBARWBAM02	Virtual Machines	139.68	103.46	36.22	25.93	103.464	1241.568	72.2952	2602.6272	82.764	82.764
ESBARWDEPO01	Virtual Machines	139.68	103.46	36.22	25.93	103.464	1241.568	72.2952	2602.6272	82.764	82.764
ESBARWDIC01	Virtual Machines	82.8	62.93	19.87	24	62.928	755.136	45.54	1639.44	55.0656	55.0656
ESBARWVAT01	Virtual Machines	69.84	51.73	18.11	25.93	51.732	620.784	36.1512	1301.4432	41.3424	41.3424
Total :		17,340.41	13,107.57	4,232.84	24.94						

Figure 146 – Azure Savings Plan

- AWS cloud provider has RI savings plan of tenure option 1 year and 3 years.
- The AWS savings plan provides two cost saving options for RI like standard RI and convertible RI of tenure options for 1 year and 3 years.
- AWS provides three options of RI cost saving model for billing like no upfront, partial upfront and all upfront.

The screenshot shows the AWS Cloud Savings Plan interface. At the top, there are filters for Provider Name (AWS), Service(s), and Account(s). Below these is a search bar and a table of savings plans. The table has columns for Savings (Estimated Monthly Saving, Percent Savings) and RI (Standard and Convertible for 1 and 3 years). The table is paginated, showing 1-50 of 120 items.

Figure 147 – AWS Savings Plan

8. Azure cloud provider has two cost savings model options like saving plan and RI of tenure option 1 year and 3 years.
9. Azure provides two options of each cost saving model for billing like monthly, upfront of tenure 1 year and 3 years.

The screenshot shows the Azure Cloud Savings Plan interface. At the top, there are filters for Provider Name (Azure), Service(s), and Account(s). Below these is a search bar and a table of savings plans. The table has columns for Spend (On Demand, Estimated Monthly Spend) and Savings (Estimated Monthly Saving, Percent Savings). It also includes columns for Savings Plan (Monthly, Upfront) and RI (Reserved Instance) options for 1 and 3 years. The table is paginated, showing 1-50 of 157 items.

Figure 148 – Azure Savings Plan

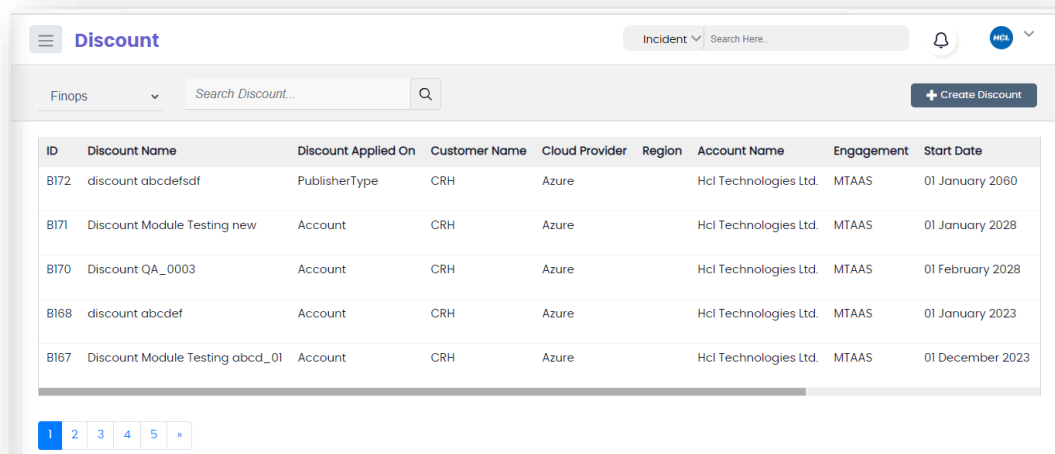
Features Provided in Cloud Savings Plan Page:

- Cloud Savings plan page has filtering features of data based on services and subscriptions type.
- The Cloud Savings plan page has ordering features of columns either in ascending or descending order on resource name and resource type column.
- Cloud Savings plan page has a pagination feature.
- Cloud Savings plan page has search data features based on resource name field.
- Cloud Savings plan page has features of export data into excel.
- Cloud Savings plan page has feature of total saving display of 4 fields named as on demands /Estimated Monthly spend / Estimated Monthly savings and average of % savings.
- Cloud Savings plan page has currency conversion features.

7 Discount

7.1 List of Discounts

1. Path: Configuration -> FinOps -> Discount

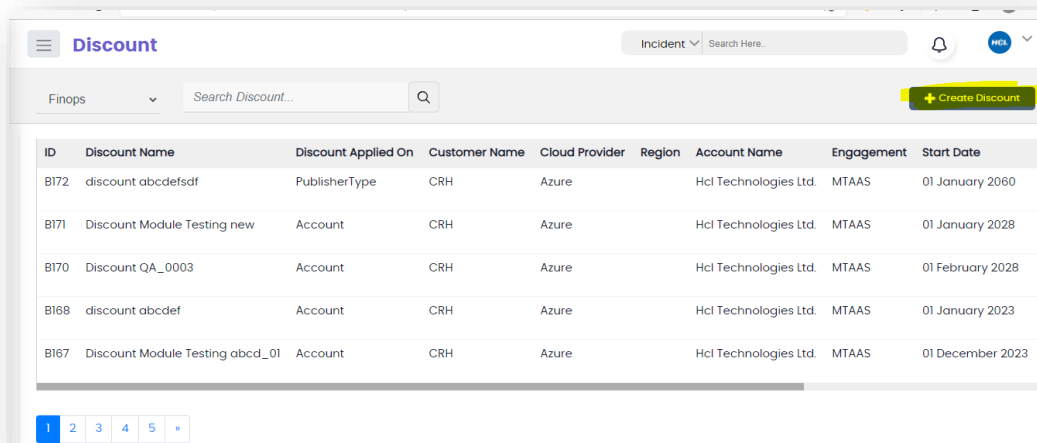


ID	Discount Name	Discount Applied On	Customer Name	Cloud Provider	Region	Account Name	Engagement	Start Date
B172	discount abcdefsd	PublisherType	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2060
B171	Discount Module Testing new	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2028
B170	Discount QA_0003	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 February 2028
B168	discount abcdef	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2023
B167	Discount Module Testing abcd_01	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 December 2023

Figure 149 – List of Discounts

7.2 Create Discount

1. Path: Configuration -> FinOps -> Discount -> click on Create Discount as shown below



ID	Discount Name	Discount Applied On	Customer Name	Cloud Provider	Region	Account Name	Engagement	Start Date
B172	discount abcdefsd	PublisherType	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2060
B171	Discount Module Testing new	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2028
B170	Discount QA_0003	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 February 2028
B168	discount abcdef	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2023
B167	Discount Module Testing abcd_01	Account	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 December 2023

Figure 150 – Create Discount

2. It will take you to the page below with URL: <http://10.1.142.23/Discount/CreateBillingDiscount>

Figure 151 – Define Discount

3. Enter the Discount Name, select the customer from Customer dropdown, select the Dimension from Dimension dropdown, select the provider from Provider dropdown, select the Region from Region dropdown, select From and To Dates.
4. Then Press on Allocate Discount. It will show the Overall Discount details below.

Figure 152 - Create Discount

5. Enter the Discount percentage for the Customers and select the checkbox.
6. Then click on Save button to Save the Discount

7.3 Edit Discount

Applied On	Customer Name	Cloud Provider	Region	Account Name	Engagement	Start Date	End Date	Created Date	Actions
rType	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2060	31 January 2060	28 October 2022	 
	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2028	30 November 2029	18 October 2022	 
	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 February 2028	28 February 2029	06 October 2022	 
	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 January 2023	31 December 2023	04 October 2022	 
	CRH	Azure		Hcl Technologies Ltd.	MTAAS	01 December 2023	31 December 2023	04 October 2022	 

Figure 153 – Edit Discount

1. In the Discount List Page for every discount there is an Action Column as shown above
2. Click on Edit button, it will take you to Edit Discount page.

Define Discount

Discount Name: *discount abcdefsd

Customer: *CRH

Dimensions: *PublisherType

Provider: *Azure

Region: Select Region

From: *01 January 2060

To: *31 January 2060

☐ Active

Allocate Discount

Figure 154 – Allocation Discount

3. Make changes which ever required and click on Allocate Discount. Then update the Discount percentage for the customers and click on Update button as shown below:

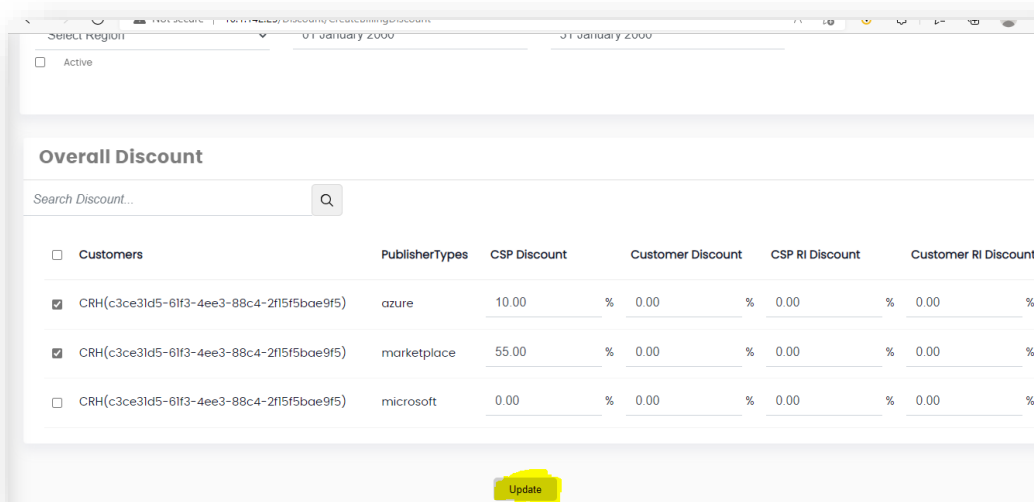


Figure 155 – Update Discount

7.4 Delete Discount

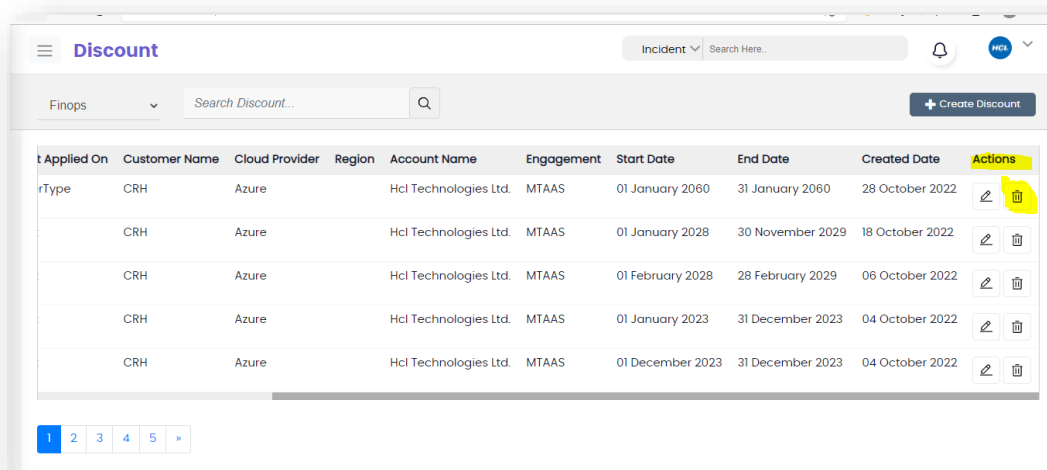


Figure 156 – Delete Discount

1. In the Discount List Page for every discount under the Action Column there is Delete button as shown above
2. Click on **Delete** button, to delete the Discount.

8 Creating CSP Customer Mappings

1. CSP Customer Mapping page can be accessed only by S-admin.
2. Path to open CSP Customer Mapping page: Configuration -> FinOps -> CSP Customer Mapping

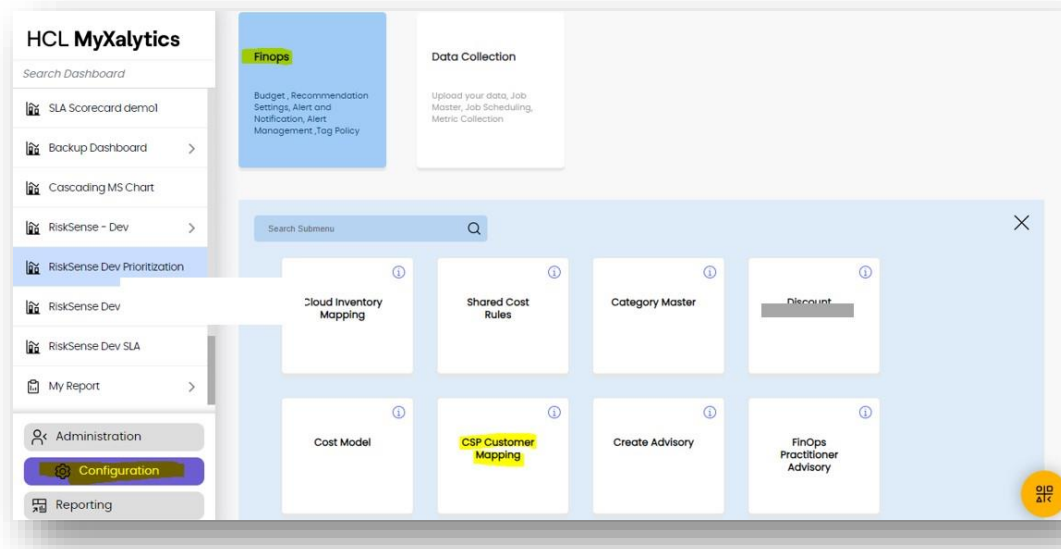
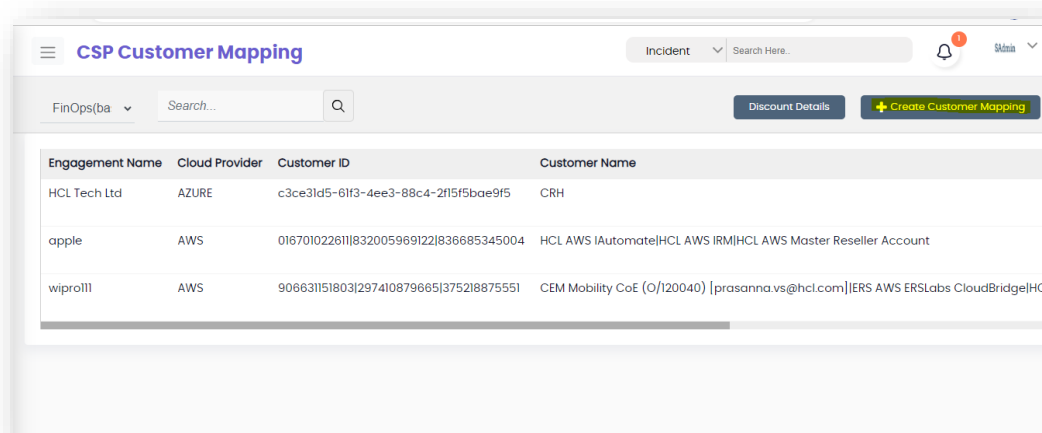


Figure 157 – Customer Mapping

3. CSP Customer Mapping list page will open, then click on Create Customer Mapping as shown below



- 4.

Figure 158 - Create Customer Mapping

5. Here the Customer and Provider data will be populated from the following steps:
 - Select Engagement, Provider and Customers (multi select) in the corresponding dropdown.
 - Click Save button.

The screenshot shows a web application interface for 'CSP Customer Mapping'. At the top, there is a navigation bar with a hamburger menu icon, the title 'CSP Customer Mapping', and a search bar with the placeholder 'Search Here...'. To the right of the search bar are icons for 'Incident', a notification bell with a red '1', and a 'Signin' dropdown. Below the navigation bar, the main heading is 'Define CSP Customer Mapping'. To the right of this heading are two buttons: 'Discount Details' and 'CSP Custom Mapping Details'. The form contains three dropdown menus: 'Engagement' with the value 'apple', 'Provider' with the value 'AWS', and 'Customer' with the value 'HCL AWS Avago, HCL AWS ERS'. At the bottom center of the form is a 'Save' button.

Figure 159 – Customer Mapping

- After saving You will be redirected to List page.
- By default, the created Mapping will be Active.

Use Cases:

If customers are already mapped to a particular Engagement, then you cannot map them to another Engagement.

9 Export Report

9.1 Exporting option on widgets

1. Users can find export options on each widget in the view. So, the screenshot below refers to the - Right Sizing view from **Cost optimization** dashboard.

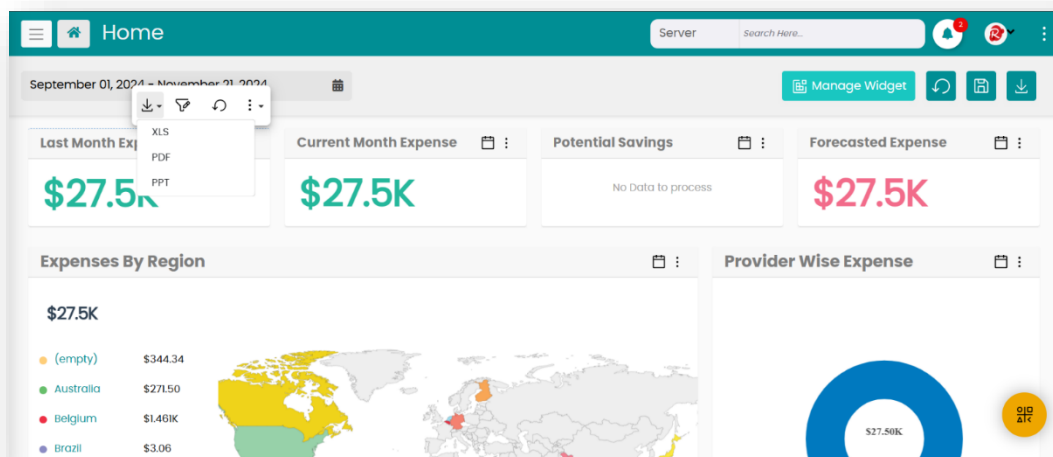


Figure 160 – Export Report

9.2 Exporting option on Homepage

1. We can export the entire widget on the home page along with the screen shot in the name of final Image.

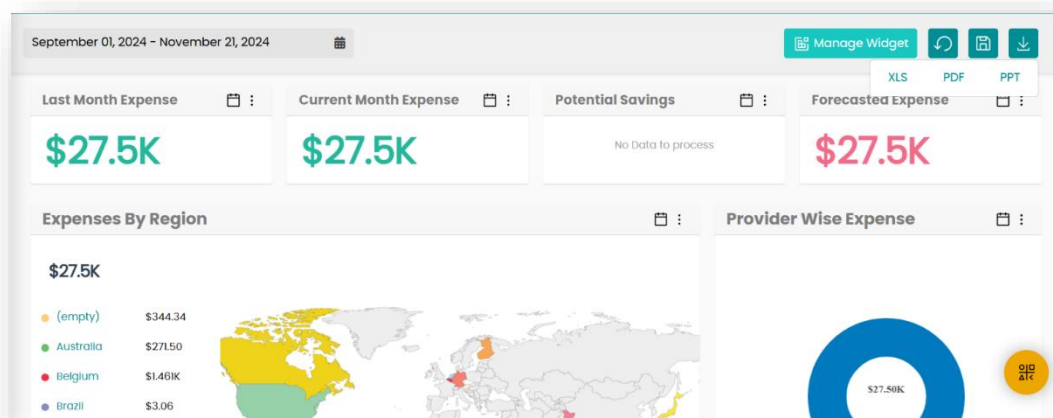


Figure 161 – Home page

9.3 Exporting options on Raw data

1. When a user needs to see the raw data of the report, they can be able to see it by clicking the three dots option on the header of the widgets.

Data Source

DataSet

Report Name

Group By

Export to

Finops

Cloud Recommendation Historical

Potential Savings RightSizing

Details

Excel





Record Count: 488

Resource	Cloud Provider	Account	Service	Current Size	Recommended Size	Current f
cibip-datadisk1	AZURE	sapconnect-we-sub-01	Volume	Premium_LRS-P6	StandardSSD_LRS - E1	\$ 11.227
cibiq	AZURE	sapconnect-we-sub-01	Instance	Standard_E8s_v3	Standard_E8-2as_v4	\$ 0.640
CIECP-DataDisk	AZURE	sapconnect-we-sub-01	Volume	Premium_LRS-P20	StandardSSD_LRS - E1	\$ 80.540
clecr	AZURE	sapconnect-we-sub-01	Instance	Standard_E4s_v3	Standard_E4as_v4	\$ 0.320
cigr	AZURE	sapconnect-we-sub-01	Instance	Standard_E4s_v3	Standard_E4a_v4	\$ 0.320
crh008_DataDisk_2	AZURE	unison-we-sub-01	Volume	Premium_LRS-P10	StandardSSD_LRS - E1	\$ 21.680
crh016_datadisk01	AZURE	unison-we-sub-01	Volume	Premium_LRS-P10	StandardSSD_LRS - E1	\$ 21.680

Figure 162 – Raw Data Export

2. This raw data report has a Group By function where the user can filter accordingly.

MyKalytics - Home Page

localhost:8693/HOME.ASPX?REPORTID=BR000

Data Source

Finops

DataSet

Cloud Recommendation Historical

Report Name

Potential Savings RightSizing

Group By

Details

Resource

Account

Alert Severity

Assigned To

Category

Cloud Provider

Current Size

Customer

Offered Service

Optimized Service Type

Parent Resource

Recommend Type

Recommended Family Size

Recommended Region

Recommended Size

Region

Resource Application

Resource Business Unit

Resource Cost Center

Export to

Excel

Record Count: 488

Resource	Cloud Provider	Account	Service	Current Size	Recommended Size	Current Cost
cibip-datadisk1	AZURE	sapconnect	Volume	Premium_LRS-P6	StandardSSD_LRS - E1	\$ 11.227
cibiq	AZURE	sapconnect	Instance	Standard_E8s_v3	Standard_E8-2as_v4	\$ 0.640
CIECP-DataDisk	AZURE	sapconnect	Volume	Premium_LRS-P20	StandardSSD_LRS - E1	\$ 80.540
clecr	AZURE	sapconnect	Instance	Standard_E4s_v3	Standard_E4as_v4	\$ 0.320
cigr	AZURE	sapconnect-we-sub-01	Instance	Standard_E4s_v3	Standard_E4a_v4	\$ 0.320
crh008_DataDisk_2	AZURE	unison-we-sub-01	Volume	Premium_LRS-P10	StandardSSD_LRS - E1	\$ 21.680
crh016_datadisk01	AZURE	unison-we-sub-01	Volume	Premium_LRS-P10	StandardSSD_LRS - E1	\$ 21.680

Figure 163– Data Export Group

9.4 Exporting option on Report Builder

1. When the user needs to create a new report on the report builder page, they need to select measures and preview that report. While previewing the report there is the option to export.

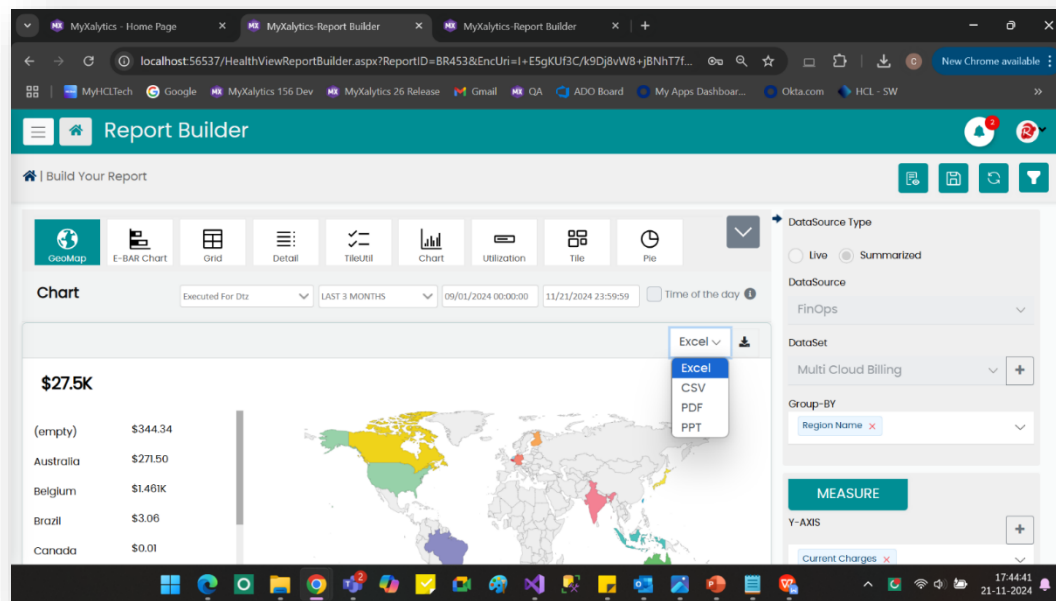


Figure 164 – Report Builder

2. Export Types:
 - a. Excel
 - b. PDF
 - c. PPT
3. Steps to Export Report to Excel:
 - a. Click the XLS icon in the dropdown list.
 - b. Excel will download to your local.
4. Matters in Excel:
5. This can contain three tabs and follows this same order as
 - a. Report Description
 - b. Data part
 - c. Final Image

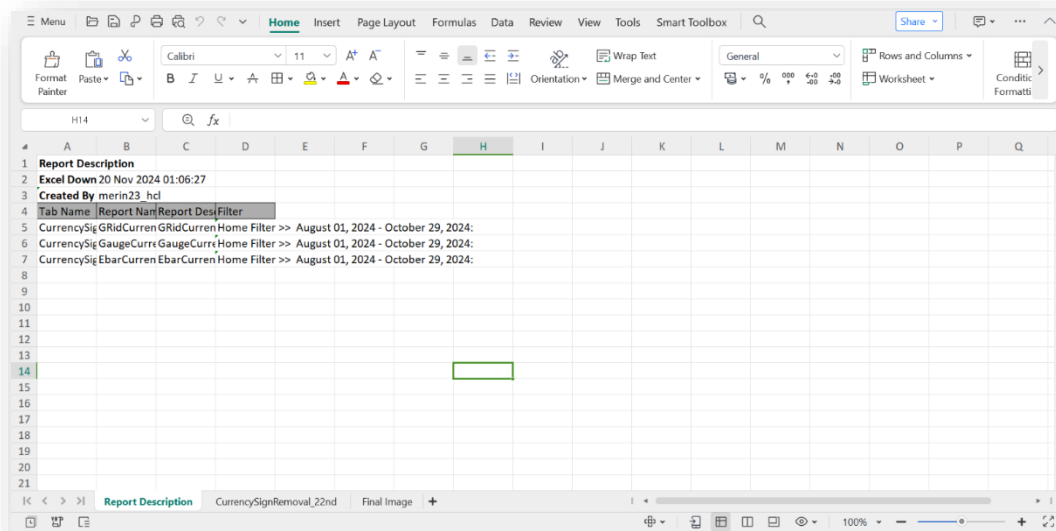


Figure 165 – Matters in Excel

6. The report description has all the details related to that report.
 - a. Name of the report
 - b. Excel downloaded date.
 - c. Chart type etc.
 - d. The Data tab has all the data contained in the report.
 - e. Final Image has the screenshot of widgets.
7. Steps to Export Report To PPT:
 - a. Click the PPT icon in the dropdown list.
 - b. PPT will be downloaded to your local.
8. Matters in PPT:
 - a. Every ppt header has a Report Name and downloaded date and time.
 - b. The data description will be presented on the first page.

Attribute	Attribute Value
Report Name	Report Builder - Geo Health Master
Downloaded Date	15 Nov 2024 14:21:02 (Coordinated Universal Time)
Created By	pushkar Singh_goyal_hcl
Output Type	GeoHealthStatus
DataSource Type	Live
DataSource	MIIMong
DataSet	Geo Health Master
Dimension	Country
Measure	Status
Time Period	DateRange: 01 Nov 2024 00:00:00 and 30 Nov 2024 23:59:59
Time Interval	NONE

Figure 166 - Table

9. The second page of the ppt has data in the table format.

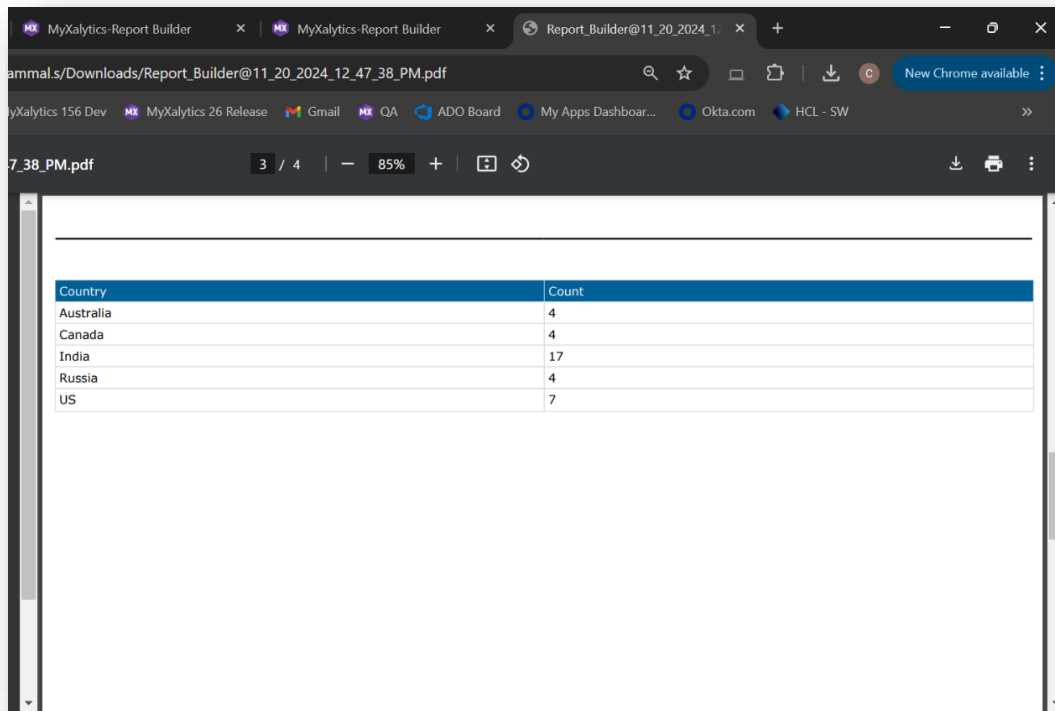


Figure 167 - Sizing

10. If the report has huge number of data, then each page will contain 12 rows and 6 columns of data instead of showing every data in one page.
11. If the cell contains a large text, then we squeeze the character by showing only 20 characters and remaining in dotted format.

Current Size	Recommended Size	
Standard_E2s_v3...	Standard_E2s_v4...	E
Standard_E2s_v3...	Standard_E2as_v...	E
Standard_E2s_v3...	Standard_E2a_v4...	E
Standard_E2s_v3...	Standard_E2as_v...	E
Premium_LRS-P1	StandardSSD_LRS...	E
Premium_LRS-P1	StandardSSD_LRS...	E
Premium_LRS-P1	StandardSSD_LRS...	E
Premium_LRS-P20...	StandardSSD_LRS...	E
Premium_LRS-P50...	StandardSSD_LRS...	E
Premium_LRS-P50...	StandardSSD_LRS...	E
Premium_LRS-P40...	StandardSSD_LRS...	E
Premium_LRS-P40...	StandardSSD_LRS...	E

Figure 168 - Table

12. Steps to Export Report To PDF:
 - a. Click the Pdf icon in the dropdown list.
 - b. Pdf will be downloaded to your local.

13. Matters in PDF:

- a. Every pdf header has a Report Name and downloaded date time.

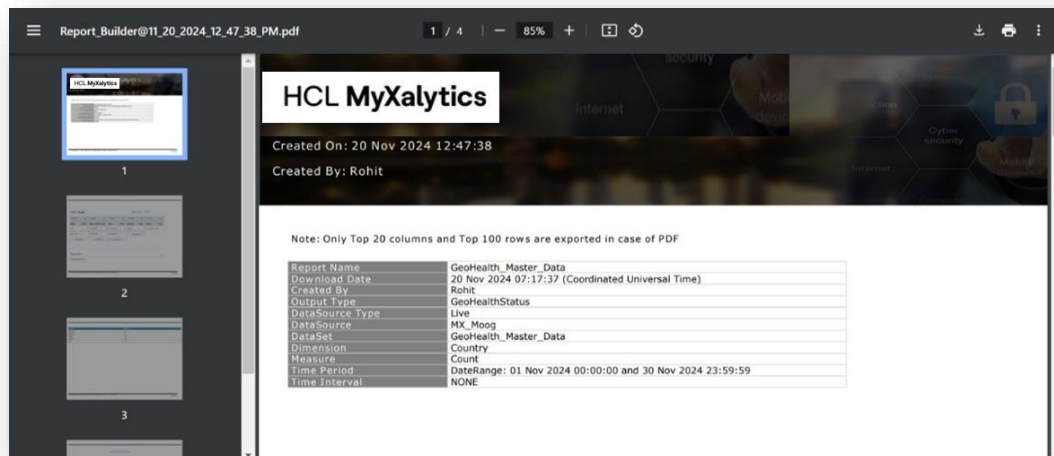


Figure 169 – Report Information

14. The data description will be presented on the first page.

15. The second page of the ppt has data in the table format.

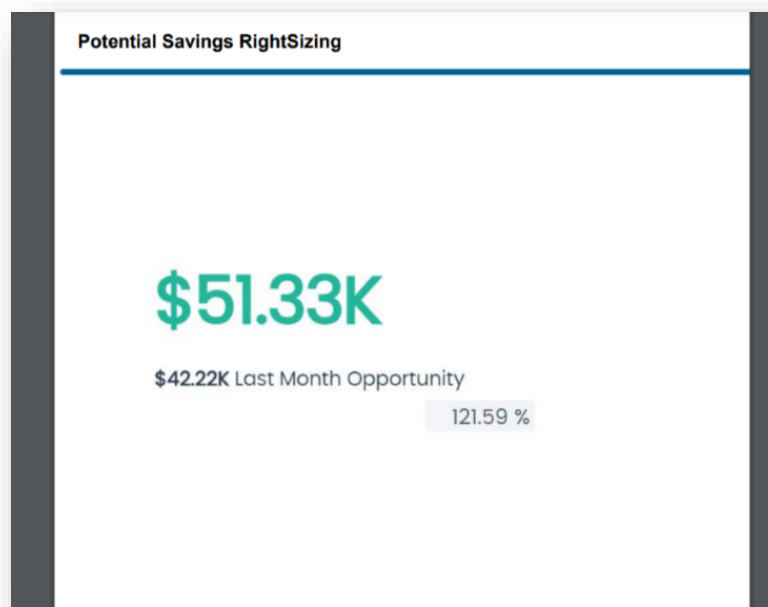


Figure 170 – Potential Savings Rightsizing

16. This is similar structure to the ppt.

17. If we are exporting pdf from homepage or widget or raw.

18. The table formatting and header, rows and column formatting are done in **CreatePDFDocument** method.

If your download excel file is corrupt, then please try the link below for guidance

19. <https://stackoverflow.com/questions/15675710/opening-excel-file-prompts-a-message-box-content-recovery-of-the-workbooksss>

10 Conditional formatting rules

Conditional formatting rules framework:

- This section describes how to add conditions on widget(report) in MyXalytics and based on applied conditions formatting needs to be changed on the widget.
- For example, if someone added condition to change background color as green, if data is greater than 100. In this scenario conditional formatting rule framework will change the background color of all the rows/columns where data will be greater than 100.
- Through this framework, users can add multiple conditions, and, in each condition, they can provide specific formatting options. Such as background color, fore color, font size, font name, image etc.
- In each condition, the user can choose whether he wants to apply formatting on an entire row or specific column. If he wants to apply formatting on entire row, then he should choose 'row' option from dropdown and for specific column he needs to choose 'column' from the dropdown.
- If in case user choose 'column' means he wants to apply formatting options on specific column then he needs to choose 'target' as well from the target dropdown with formatting options.

Step 1: How to enable conditional formatting

1. MyXalytics support multiple templates, and conditional formatting framework is applicable for most of the templates.
2. Where conditional formatting is enabled below section i.e. 'Conditional Formatting Rules' section will come up.

When you click on 'Conditional Formatting Rules' section header, you can see the other options as well, which is related with this feature.

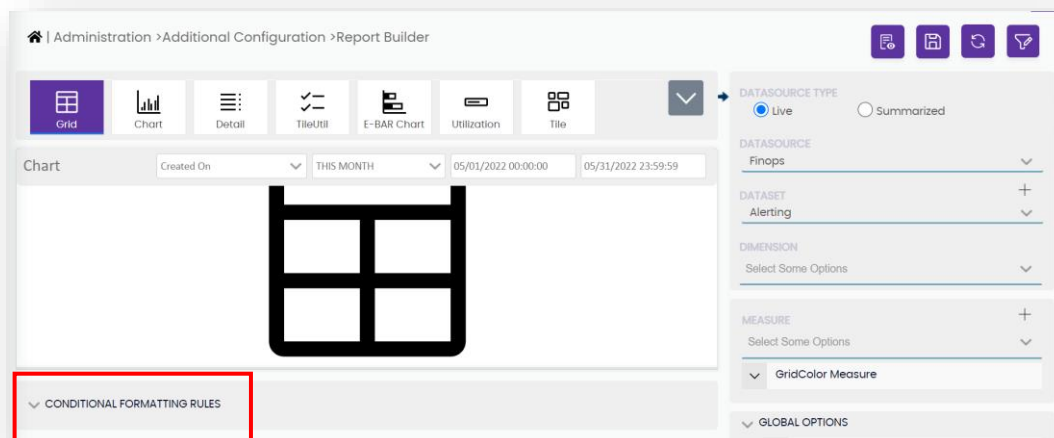


Figure 171 – Conditional Formatting Rules

Step 2: Different Types of Conditional Formatting options



Figure 172 - Rules

1. 'Chart' and 'Table' two types of formatting options are available as of now in MyXalytics, but 'Chart' is only applicable for Heatmap template.
2. Different kinds of formatting options:
 - **Table:** If the user creates any condition and selects any formatting option under this section then it will change the formatting of table section i.e., '**Data View**' of the widget.
 - **Chart:** If a user creates any condition and selects any formatting option under this section then it will change the formatting of chart section i.e., '**Chart View**' of the widget.

Step 3: Table

1. Users can add an array of conditions by choosing field name and then operator and specific filter/value.
2. Below are the UI representations of 'conditional formatting rule' where a list of measures (Y-axis) and dimensions (X-axis) is given which you can use to create conditions.
3. All the measures and dimensions will automatically be populated inside the dropdown.

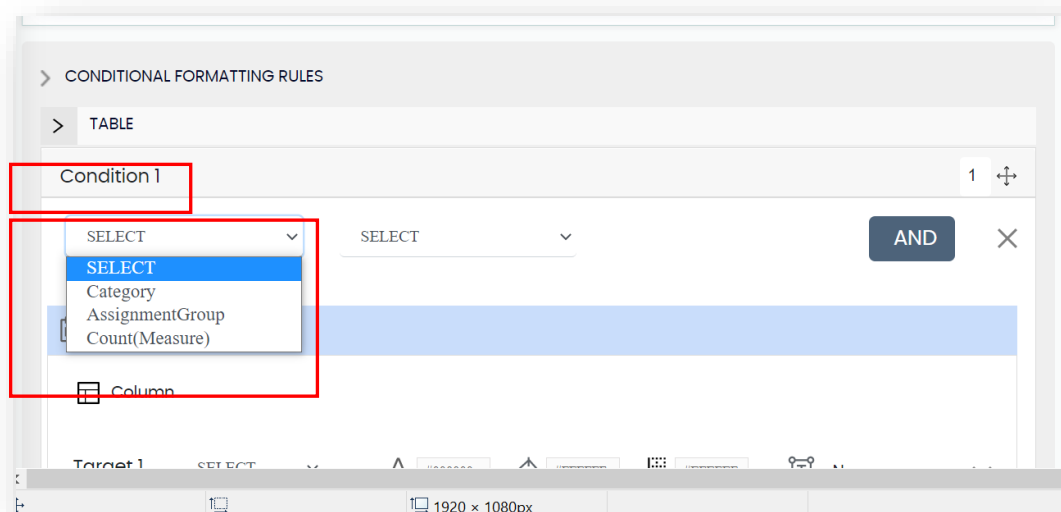


Figure 173 – Formatting Rules

4. As per the selected measures/dimensions list of below operators will be coming up.

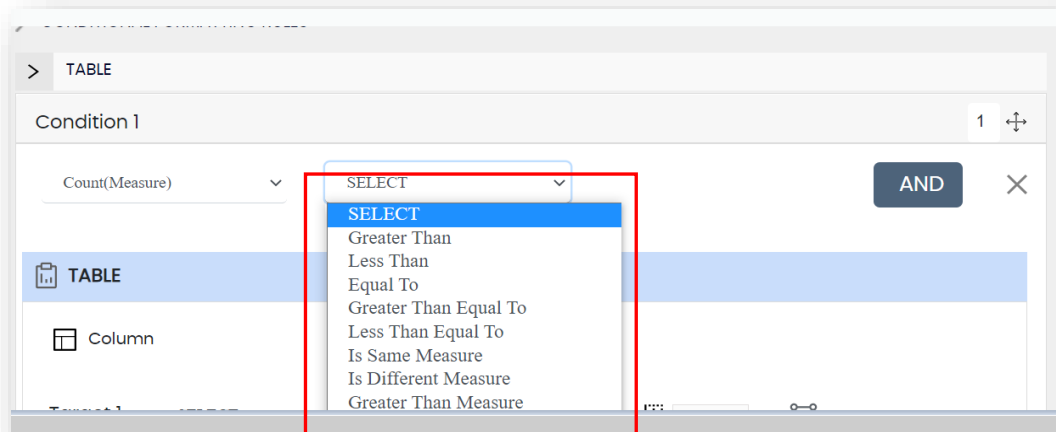


Figure 174 – Formatting Rules

5. After selecting operator user can enter the actual filter condition or value.
6. In the table section, users can choose column and rows option. In screen shot below, rows have been selected.
7. Once the condition is satisfied, below highlighted formatting option will be applied on the rows of the table.

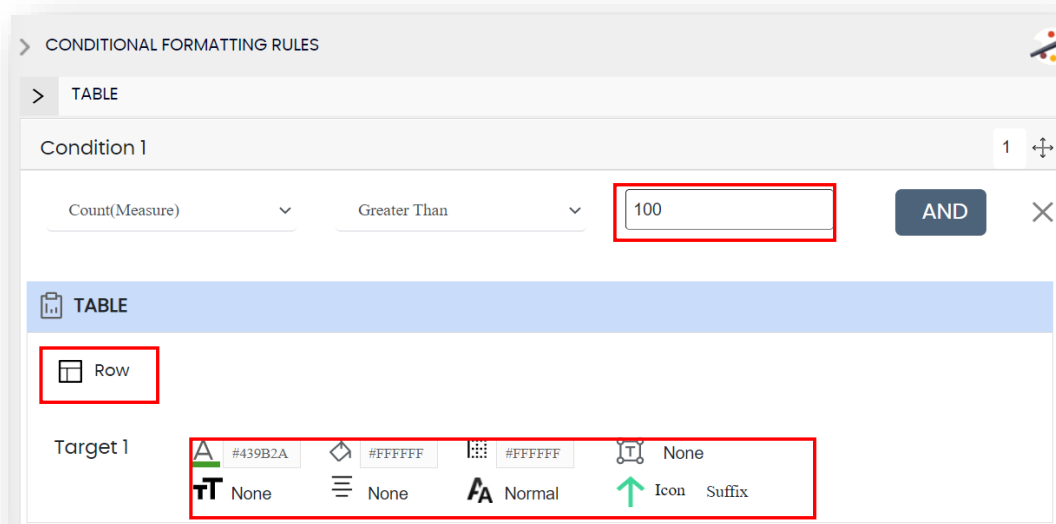


Figure 175 – Formatting Rules

8. Two conditions have been added to this example. For example, if the count is greater than 100 then the color is green else red. Refer below screen shot for the second condition.
9. You can add more conditions by clicking on '**Add More Conditions**' button.

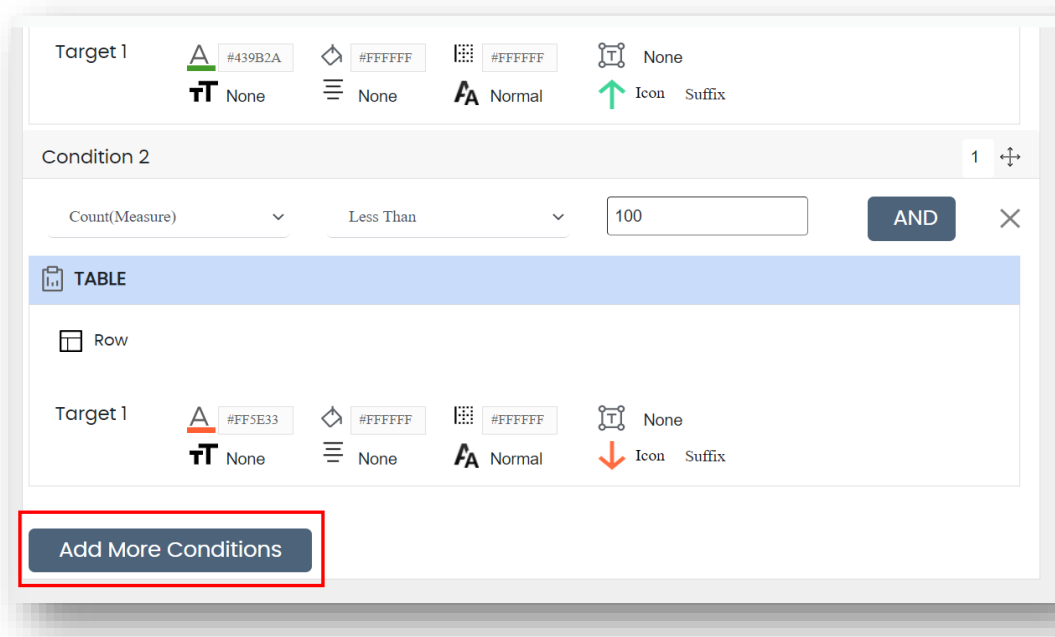


Figure 176 – Add Conditions

10. When condition will be satisfied then color coding will be applied on entire row. Below is the screen shot where color code is applied as per the selected conditions.

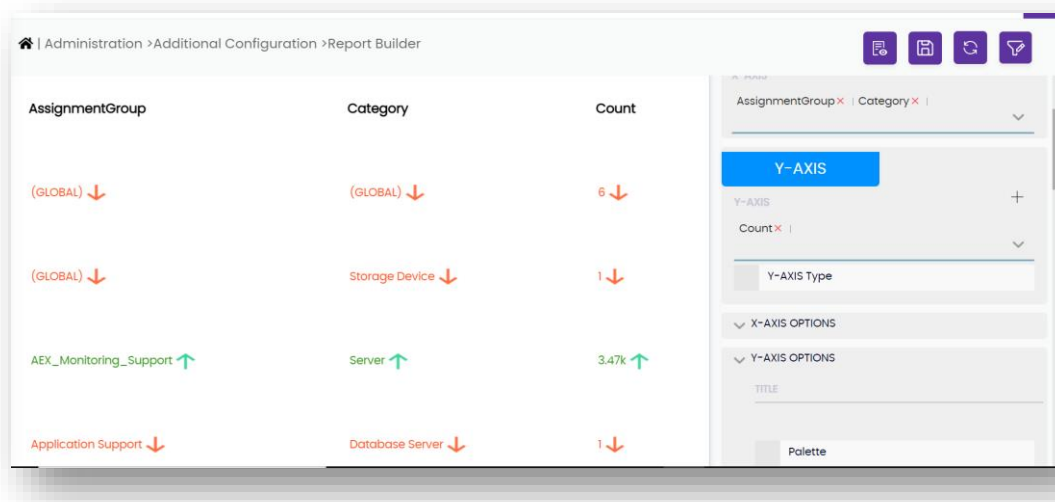


Figure 177 – Report Builder

11. You can also apply formatting on specific column rather than entire row, by selecting 'column' from the dropdown.
12. Then you must choose specific target where formatting will be applied.
13. In below case 'Count' column has been selected as a target.
14. User can add more target by clicking on 'Add Target' button.

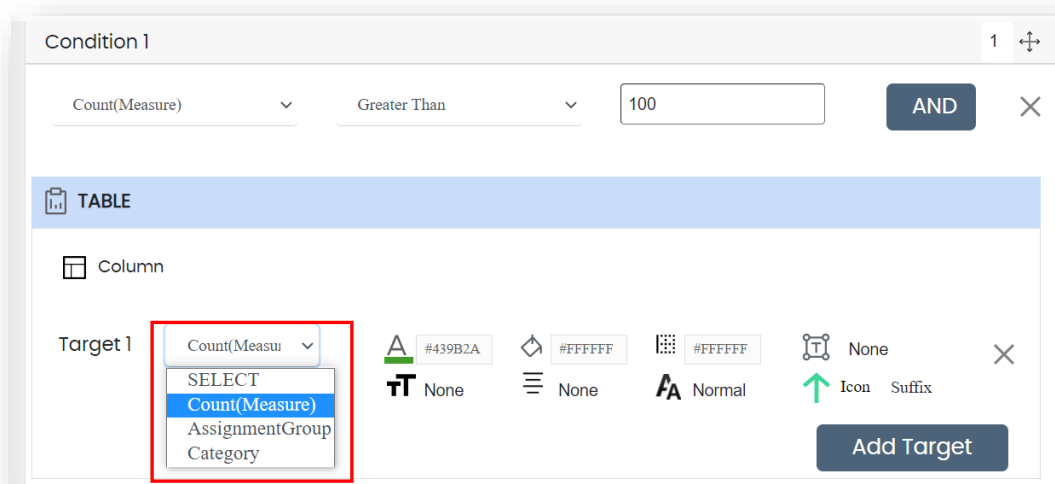


Figure 178 – Add target

15. As per the selected target, color code will be applied on the table

AssignmentGroup	Category	Count
(GLOBAL)	(GLOBAL)	6 ↓
(GLOBAL)	Storage Device	1 ↓
AEX_Monitoring_Support	Server	3.47k ↑
Application Support	Database Server	1 ↓

Figure 179 - Table

11 Cost Optimization Report Builder

11.1 Overview

What is Cost Optimization?

- Cost optimization is a combination of strategies, techniques, best practices, and tools that not only help reduce cloud costs but also maximize the business value of using the cloud.
- It involves enhancing cloud cost efficiency by identifying and reducing mismanaged or excess resources, taking advantage of discounts to reserve higher capacity, and rightsizing computing resources to specific applications and workloads in our cloud environment.

When to Use:

- For previewing the cost optimization data, we need to continue to monitor it to ensure that you don't experience unexpected increases in billable usage. We are analyzing our usage regularly to determine if we have other opportunities to further filter out collected data that hasn't proven to be useful.

11.2 Report on Builder Page

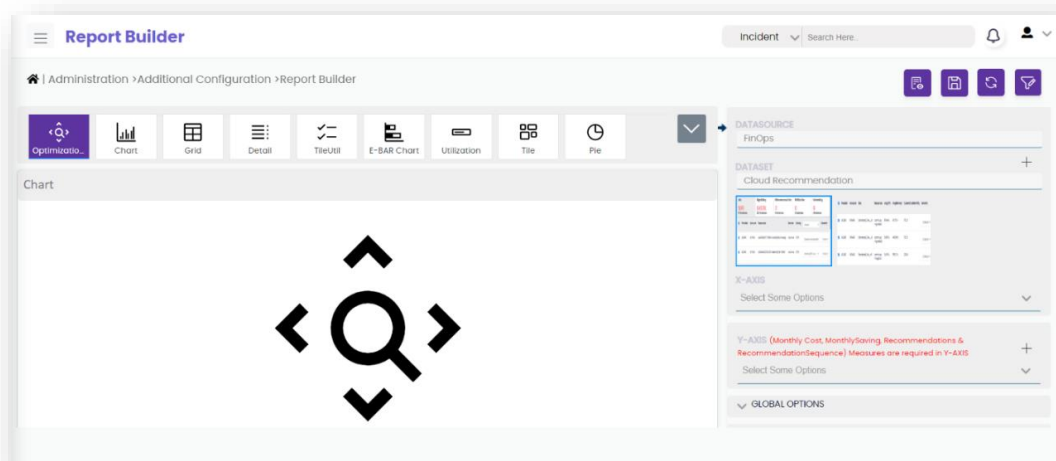


Figure 180 – Report Builder

Do the following:

1. In the Report builder page, click on **Optimization logo**.
2. Here we are fetching the data of FinOps, so we have selected FinOps in DATASOURCE Field and DATASET will be **Cloud Recommendation**.
3. Select the **dimension(X-AXIS)**. And there is a Technique Option which we must select only.
4. Select **measure(Y-AXIS)**. Here we recommend users select at least four options, which are Monthly Cost, Monthly Saving, Recommendations & Recommendation Sequence from the dropdown.
5. There are many options like X-axis, Y-axis, Global options, Grid options.
6. Under Global Option>No of Items: We can select Report Header Style to give a style to grid data.

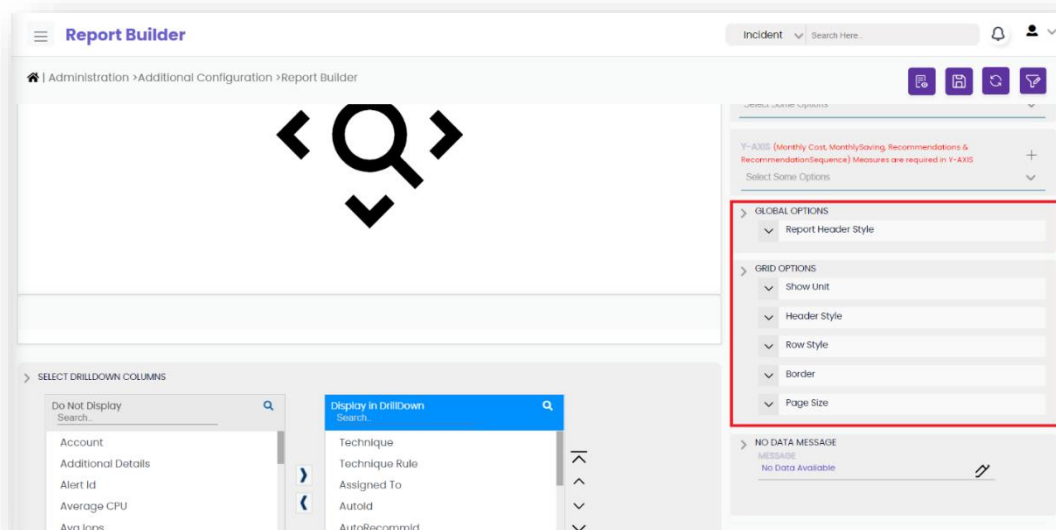


Figure 181 – Report Builder

7. And there is a feature available for Drill Down the column.
8. We can select the column name from the left panel to right panel.

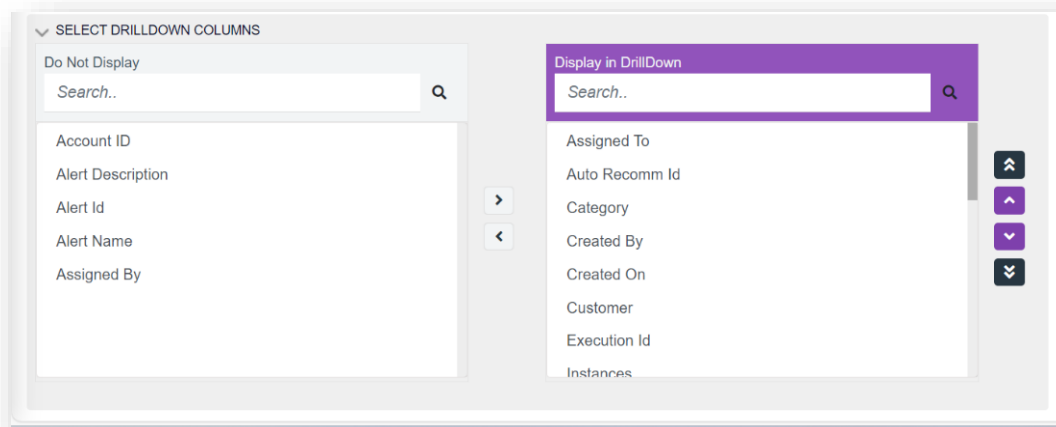


Figure 182 – Drilldown Columns

9. Click **Preview** to view the data in grid view.
10. There are following two options to view the data.
11. Without selecting any dimensions.
12. Technique instances.

Idle	Right Sizing	Recommendation	Utilization	Scheduling
\$95 Instances	\$43.3K Instances	0 Instances	0 Instances	0 Instances

Provider	Account	Size	Resource	Avail%	Availability	CurrentCapacity	Severity
Azure	MSA0	Standard_B4ms	compute migrated	184%	47.5%	178	Critical v
Azure	MSA0	Standard_B4ms	compute migrated	186%	48.5%	178	Critical v
Azure	MSA0	Standard_B4ms	compute migrated	140%	51.2%	204	Critical v

Figure 183 - Columns

- Can be able to export the report in pdf, ppt, and excel.

Report Builder

Administration > Additional Configuration > Report Builder

Chart

Excel

Idle	RI Recommendation	RI Utilization	Right Sizing	Right Sizing - Upsize	Scheduling
\$6.33K 9 Instances	\$0 0 Instances	\$0 0 Instances	\$47.43K 627 Instances	\$0 0 Instances	\$216.06K 599 Instances

Resources	Technique	Rule	Avg Disk Read I/O	Avg Disk Write I/O	Avg Memory	Cloud Provider	Monthly Cost	Per Unit Cost	Customer	Job Name	Monthly Savings RI	Optimization Technique Category
caissrgsrd01	default					AWS	\$ 717.12	\$ 1.000	HCL AWS Becton Dickinson	Identify Idle Instances	\$ 717.12	COST
caissrgsrd01	default					AWS	\$ 717.12	\$ 1.000	CADENT	Identify Right Sized	\$ 717.12	COST

GLOBAL OPTIONS

Report Header Style

GRID OPTIONS

Show Limit

Figure 184 – Report Builder Dashboard

- Can save the report to Dashboard.

11.3 Home Page

- Save the report from Report Builder page.

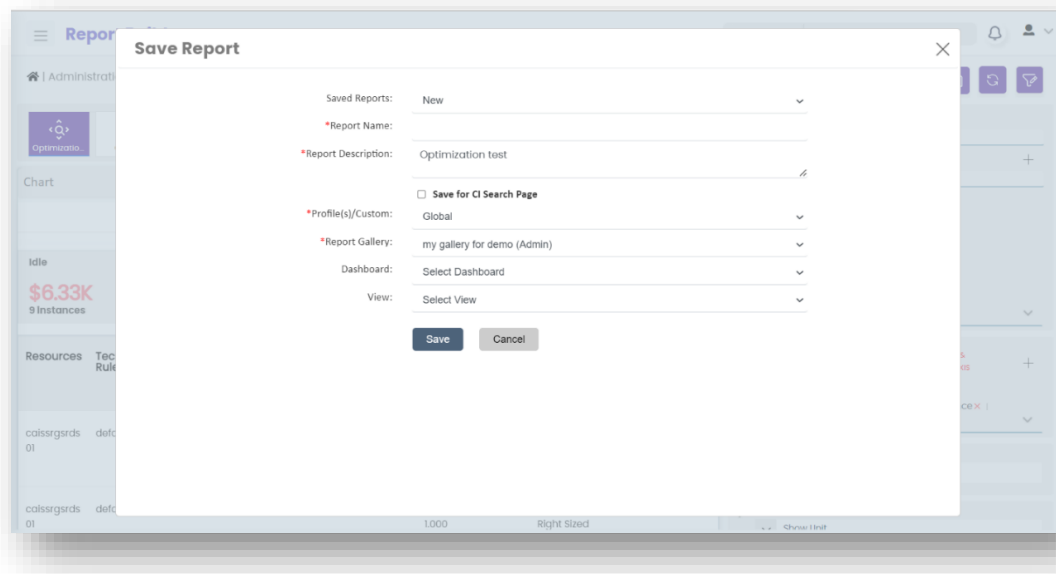


Figure 185 – Save Report

2. After saving it will be added to the homepage in the form of a widget.
3. There are export options, edit options, filtering, grid view option.

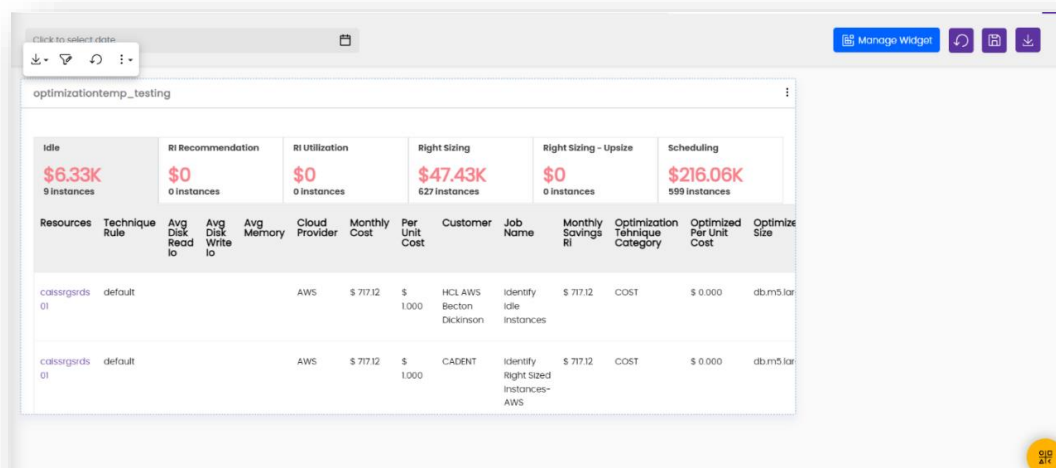


Figure 186 – Report Dashboard

4. Can be able to delete the widget from the home page.
5. Can be able to edit the widget.
6. Can be able to filter the data in the filter icon.
7. In advance setting option, you can be able to display the data in the form of radio button, dropdown, multiselect options.

Advance Setting

☐ Enable Group By Feature

Select Control Type

☒ Dropdown ☐ Multi-Select ☐ Radio

Select Filter

Account

Add

Filter Name	Control	Action
-------------	---------	--------

Apply Setting

Reset Setting

Figure 187 – Advanced Settings

12 Sankey Chart

Overview:

- A Sankey diagram is a flow diagram that shows nodes linked by flows, the quantity of each flow being represented as its width. This chart emphasizes the major transfers or flows within a system and helps to locate dominant contributions to an overall flow.
- A minimum of two dimensions and one measure is required. You can use up to five dimensions, but only one measure.
- The dimensions do not need to be of equal size on each side of the diagram.
- You can use the dimensional values to set the color of the flows in the chart.
- Link colors can be based on source or target anchor.

When To Use It:

- The sankey chart is useful when you want to locate the most significant contributions to an overall flow. The chart is also helpful when you want to show specific quantities maintained within set system boundaries.

Special settings:

- In AnyChart there are many settings that are configured in the same way for all chart types, including the Sankey diagram (for example, legend and other interactivity settings).

Special settings:

- Data
- Use the following data fields:
 - source to set sources of flows.
 - target to set destinations of flows.
 - value to set values.
- A data row specifies a [flow](#) linking two [nodes](#): their names are set in the source and target fields.
- Sample chart for Two dimensions:

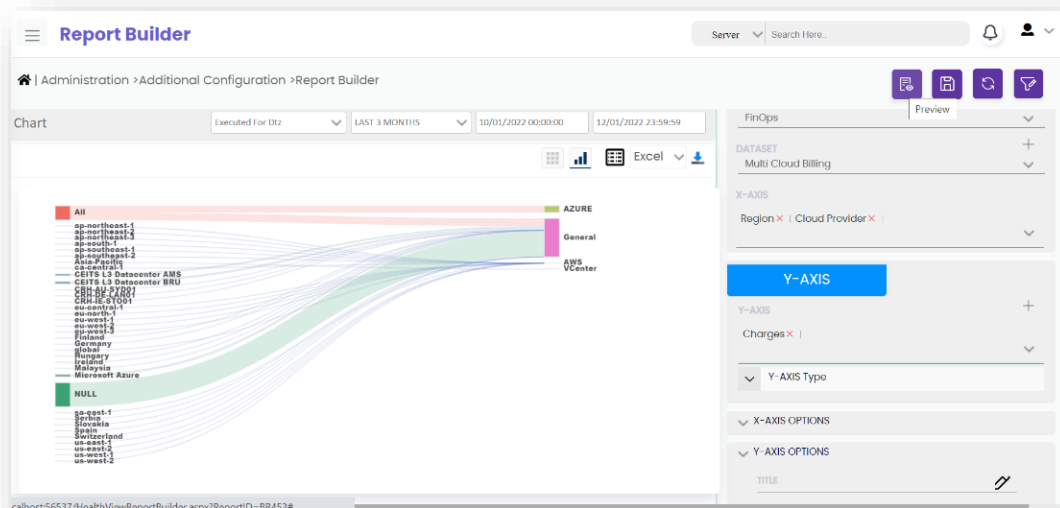


Figure 188 – Report Builder

- Sample chart for four dimensions:

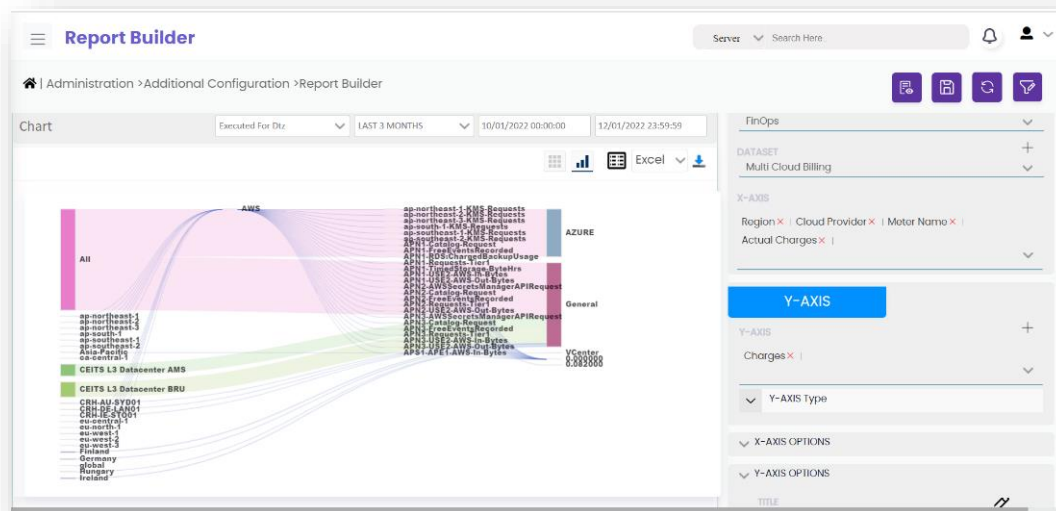


Figure 189 – Report Builder

Example of how we are getting data for chart:

```
var data = [
  {source: " GLOBAL ", target: " OnDemand ", value: $723.177K},
  {source: " Australia ", target: " GLOBAL ", value: $0.01},
  {source: " Brazil ", target: " GLOBAL ", value: $0.00},
  {source: " Canada ", target: " GLOBAL ", value: $0.00},
  {source: " GLOBAL ", target: " GLOBAL ", value: $0.00}
];

var chart = anychart.sankey(data);
```



Figure 190 – Report Builder

On the chart, the width of each flow represents its value, and the height of each node is proportional to the total value of either incoming or outgoing flows, depending on which value is greater. Nodes are automatically organized in multiple columns.

It is possible to add custom fields to your data.

You should avoid creating cycles in the data: if A links to itself, or links to B which links to C which links to A, chart cannot be drawn.

You can add up to five dimensions to your chart in property panel under X axis> Dimensions. The chart updates to reflect the added dimensions. The dimensions are displayed from left to right, with the first entered dimension always being the source dimension. The target dimension is always displayed to the right. When you add more dimensions, they are added to the right in the order they are entered.

Nodes:

- Nodes are elements linked by [flows](#). In your [data](#), you should specify the names of source and target nodes of each flow - use the source and to fields.
- On the chart, nodes are automatically organized in multiple columns. The height of a node is proportional to the total weight of either incoming or outgoing flows, depending on which weight is greater.

Flows:

- Flows are elements that connect [nodes](#). Each flow is specified by the names of its source and target nodes in the source and target [data](#) fields. The value in the value field defines the width of the flow.

Labels:

- The Sankey diagram will display a label next to its nodes by default.

Color mode:

- Sankey links can be colored in several ways to fill Style:
 - Solid
 - Gradient
 - Source
 - Target

Changing the appearance of the chart:

Link colors

- The colors of chart links are based on either the source or target anchors.
- To apply the source or target anchor color to chart links either use the string `'SOURCE'` or `'TARGET'`. You can also select a separate color by entering a color code string. The color should be a valid CSS color.

12.1 Report on Builder Page

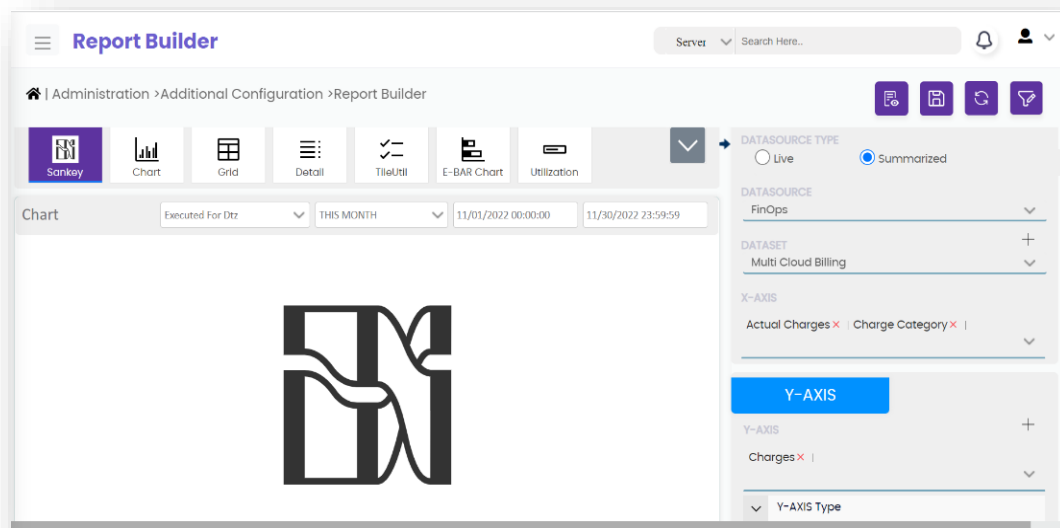


Figure 191 – Report Builder

Do the following:

1. In the Report builder page, click **Sankey logo**.
2. Select the **dimension** option on the properties. And there is the restriction that minimum 2 dimensions should select and maximum 5 dimensions.
3. Select **measure** option.
4. There were so many like X-axis, Y-axis, other chart options, Global options, Grid options.
5. Under X-axis there is few option – X-axis>DataLabel> Fonttype ,Fontsize, FontFamily, IntervalGap.
6. Under Global Option>No of Items: We can select 5,10,20,50,100 because we can select that number of data records from the report.
7. Under Grid Option> Grid Position: We can be able to change the position of grid data to show like bottom, top, Right, left.
8. And there is no available drill through and drill down option.
9. And select the duration for the report you want to create.
10. Click preview and be able to view the chart.
11. There are two options to view the data. Grid View and Graph View.
12. Can be able to export the report in pdf, ppt, excel.
13. Can save the report to Dashboard.

Adding additional dimensions

- You can add up to five dimensions to your chart in property panel under Data > Dimensions. The chart updates to reflect the added dimensions.
- The dimensions are displayed from left to right, with the first entered dimension always being the source dimension.
- The target dimension is always displayed to the right. When you add more dimensions, they are added to the right in the order they are entered.

Changing the appearance of the chart:

- Link colors
- The colors of chart links are based on either the source or target anchors. To apply the source or target anchor color to chart links either use the string `'SOURCE'` or `'TARGET'`. You can also select a separate color by entering a color code string. The color should be a valid CSS color.

12.2 Homepage

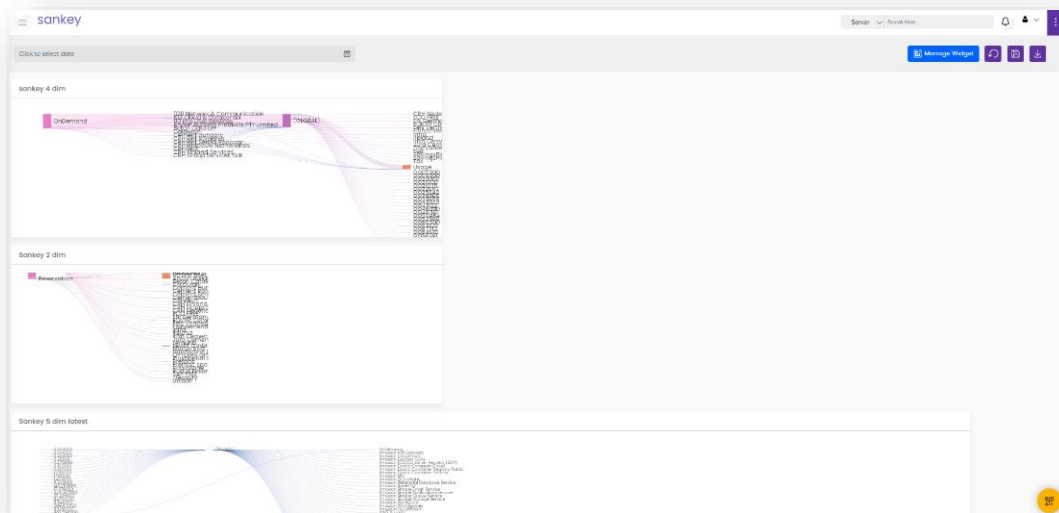


Figure 192 – Sankey Homepage

Do the following:

1. Save the report from the report builder page.
2. After the report is saved, it will be added to the homepage in the form of widget.

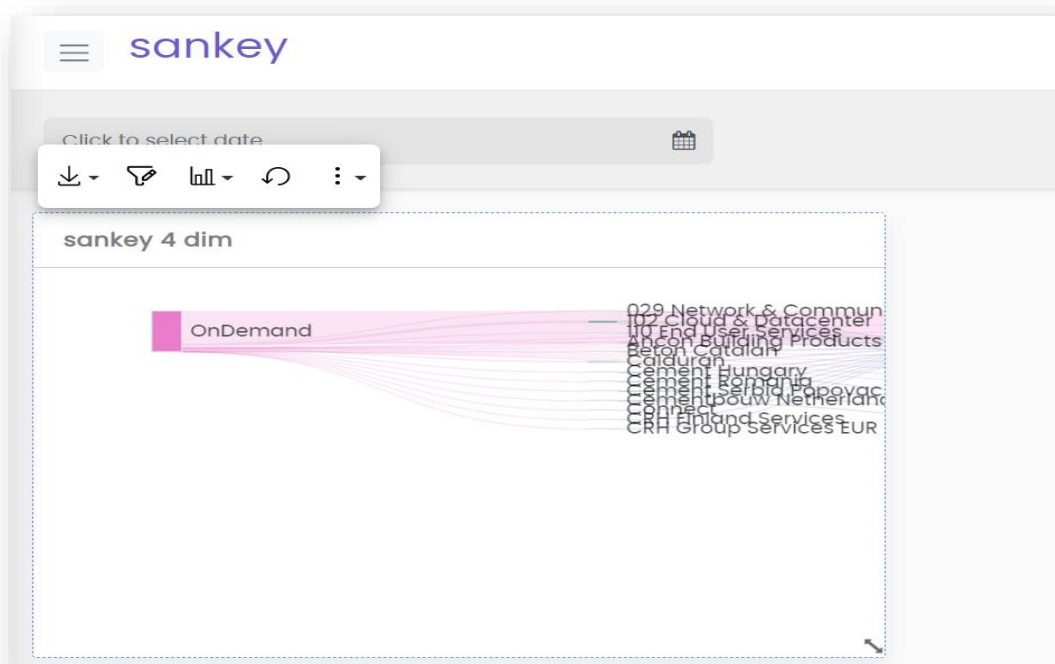


Figure 193 – Sankey

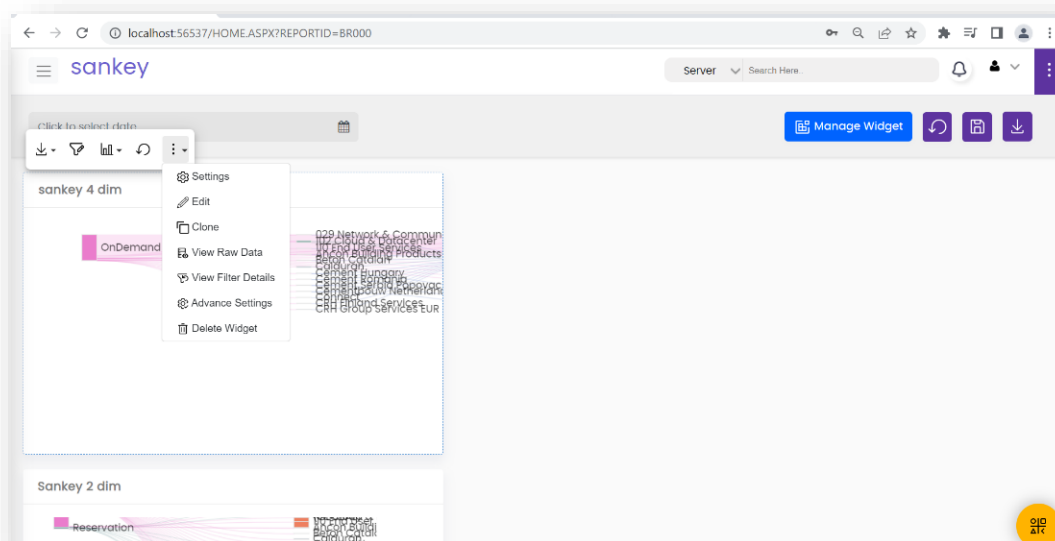


Figure 194 – Sankey

3. There will be options to edit and delete the widget from home page.
4. In advance setting options, data can also be displayed in the form of radio button and dropdown using multiselect options.

Advance Setting

×

☐ Enable Group By Feature

Select Control Type

☒ Dropdown
 ☐ Multi-Select
 ☐ Radio

Select Filter

Account

▼

Add

Filter Name	Control	Action
-------------	---------	--------

Apply Setting

Reset Setting

Figure 195 – Advanced Settings

DATASOURCE TYPE

☐ Live
 ☒ Summarized

DATASOURCE

FinOps

DATASET

Multi Cloud Billing

+

X-AXIS

Charge Category × | Charge To Company × |

▼

Y-AXIS

+

Y-AXIS

Charges × |

▼

Y-AXIS Type

▼

Figure 196 – Y-Axis Settings

13 Score Card

13.1 Introduction

- Score cards are basically meant to show metric collection data inside single widget(report). There are two types of score card supported by MyXalytics:
 - Score card
 - Tile view.
- Each row of score cards represent an entirely different Tool and dataset(metric). Score card provides us overall view representation of different kinds of metric in single report.
- Score card (Table):
 - This score card shows data in tabular form. In this form of score card, data is shown in rows and columns form.

13.2 Score card view

1. Below is the main screen of the score card where overall data is shown.

KPName	MET	MISSED	TOTAL	Comments
Response SLA % for All Priorities Incidents	548.00	123.0	671.00	This is also a test comment 3 Comments Add/View Comments
Resolution SLA % for All Priorities Incidents	No Data	No Data	No Data	This is the test comment 1 Comments Add/View Comments
Response SLA % for P1	No Data	No Data	No Data	Add/View Comments
Response SLA % for P4	494	106	600	Add/View Comments

Figure 197 – Score Card View

2. As per the configuration, any number of columns and rows can be shown inside the score card.
3. If someone configured drill though then next level of group by will be shown i.e. segregation of same data in another group by column. In the screen below, data is shown based on priority.

Priority	MET	MISSED	TOTAL
(GLOBAL)	3.00	9.0	12.00
Priority 2	2.00	0.0	2.00
Priority 3	49.00	8.0	57.00
Priority 4	495.00	105.0	600.00

Figure 198 - Score Card View

4. If drill though is not configured and in last level of drill through raw data will be shown in the popup screen.
5. In drilldown screen users can filter the data as per the selected filters.

6. In drilldown screen, users can also apply exception/exclusion on the record.

Action	Priority	Assignment_Group	Assigned_To	Name	Country
▶	Priority 4	Service Desk	GBP Integration	Priority 4 response	
■	Priority 4	Service Desk	GBP Integration	Priority 4 response	
▶	Priority 4	Service Desk	GBP Integration	Priority 4 response	
■	Priority 4	Service Desk	GBP Integration	Priority 4 response	

Figure 199 – Response SLA

7. Users can download the score card data in the excel, pdf and ppt format.

Step 1: How to Configure Score card

1. In health view report builder page, you need to select '**score card**' template.

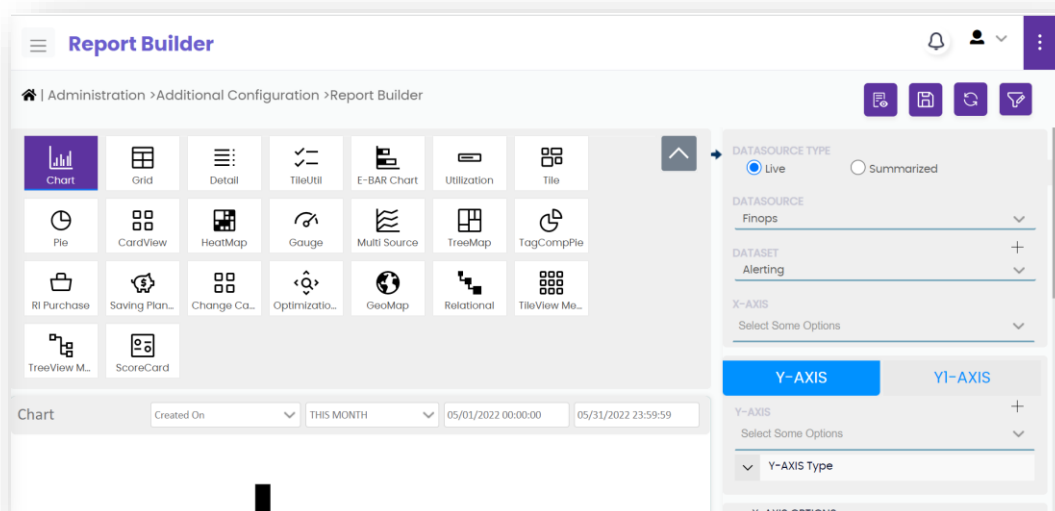


Figure 200 – Report Builder Chart

2. Once you click on the score card template, a new screen will come up. Where you need to choose 'Scorecard' from the list of options. When you click on 'score card' button you will redirect to the next screen

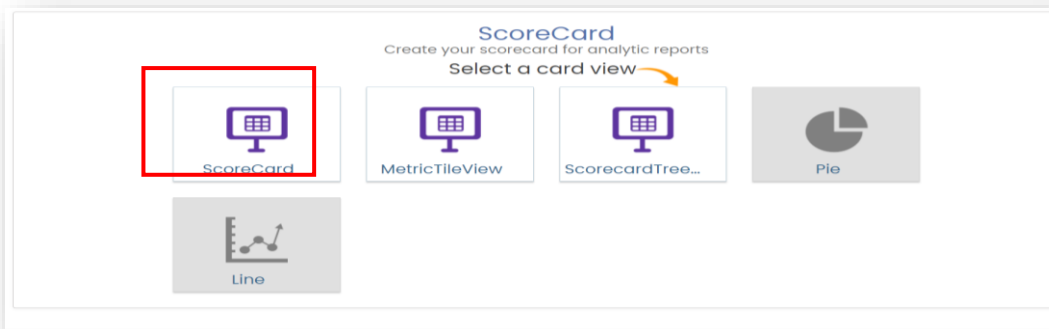


Figure 201 – Score Card

- Once you click on the template, a new screen will come up. User needs to choose any navigation type for the score card. Example, if user chooses 'Monthly' from the dropdown then monthly score card will be created. As soon as user click on 'Create New Table' button. Next screen will come up.

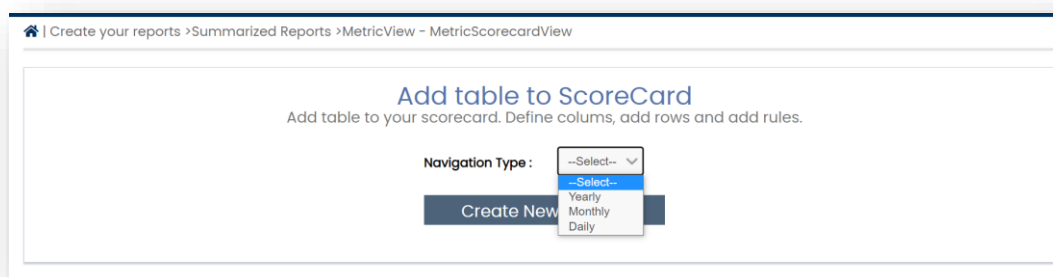


Figure 202 - Add Table to Scorecard

- Users can choose any option from the list below, i.e., Label, Measure and Trend Columns.
- If he selects 'Label' then he can enter hardcoded value inside the textbox. In case of measure and trend, the user can select configured measures of metric collection.
- Measure represents overall data inside one column.
- Trends are similar with measure, but they will show data for a duration, for example monthly trend, daily, hourly, weekly and quarterly trend. For example, in 3 months trend we can see three months overall data in one score card with respective month column.

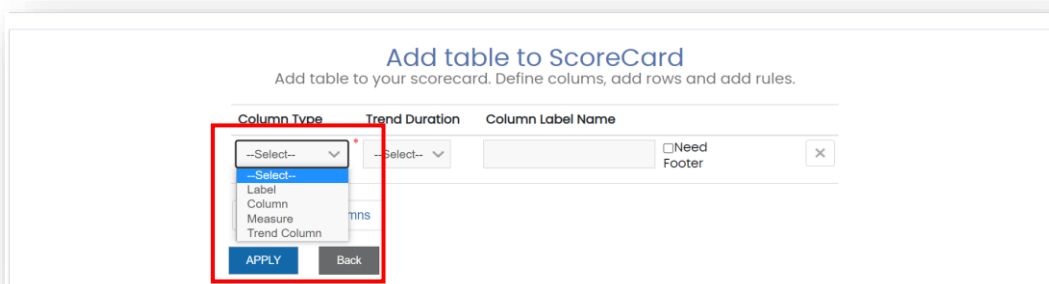


Figure 203 – Add Table to Scorecard

8. Users cannot choose trends and measure together in same score card. He can only choose either measure or trend. Below score card Label and Measure is selected and in 'Column Label Name' table header also specify.
9. Once click on the application button, the next screen will come up.

Figure 204 - Add Table to Scorecard

10. In below screen, user can configure the score card by clicking on 'Add Row' button. Users can add a new row to the score card.

Figure 205 – Metric Score Card View

By clicking 'Add Row' button, new screen will come up where you can configure score card row. Follow the steps below:

Step 2: How to Configure Score card row:

1. In the left 'Metric' section, choose tool and metric on which you need to create the score card.

Figure 206 - Metric Score Card View

2. In the left Data Display Settings' section, you need to choose measures. If there is a label, then enter text in the textbox.
3. You can also add unit, prefix, and suffix value before and after the measured data. As shown in the screenshot below.

The screenshot shows the 'Add Row' dialog with the 'Data Display Settings' tab selected. The left sidebar has 'Metric', 'Data Display Settings', 'Filter Settings', and 'Drill Down Settings'. The main area is a table with columns: ColumnName, Expression, CellPrefix, CellFormat, CellSuffix, CellDisplay, and Validation.

ColumnName	Expression	CellPrefix	CellFormat	CellSuffix	CellDisplay	Validation
KPI	Response SLA for P4					
MetCount	Sum #MetCount#	Met	0.00	#	☒	☒ validate
MissedCount	Sum #MissedCount#	Mis	0.00	#	☒	☒ validate
Total	Sum #Total#	Tot	0.00	#	☒	☒ validate

Buttons: Back, Apply Changes

Figure 207 – Add Row

4. In the left Filter Setting' section, User can choose any filter and add n number of filters by clicking on 'and' or 'or' button.
5. Users can choose to drill till sixth level. Based on drill through grouped data will be shown on the next level of score card.
6. If someone configured drill though then next level of group by will be shown i.e. segregation of same data in another group by column. In below screen drill through has been configured for 'Assignment group' and 'Category'. He can configure drilldown columns as well.
7. After all the configuration is done, click '**Apply Changes**' button.

The screenshot shows the 'Add Row' dialog with the 'Drill Down Settings' tab selected. The left sidebar has 'Metric', 'Data Display Settings', 'Filter Settings', and 'Drill Down Settings'. The main area contains settings for drill levels and selected columns.

Second Level Drill Through : Assignment_Group

Third Level Drill Through : Category

Fourth Level Drill Through : --Select--

Fifth Level Drill Through : --Select--

Sixth Level Drill Through : --Select--

Select Columns :

Selected Columns : Priority, Country, IncidentState, Subcategory

Buttons: Back, Apply Changes

Figure 208 – Add Row

8. As soon as, user clicks on '**Preview with Data**' button. Data will be shown inside the score card.

KPI	MetCount	MissedCount	Total
Response SLA for P4	Met 495.00 #	Missed 105.00 #	Total 600.00 #

Buttons: Preview With Data, Cancel Preview, Reset, Save

Figure 209 – ProView with Data

- User can add any number of rows inside the score card by clicking on 'Cancel Preview' button and then click on 'Add Row' button again and should follow the same process again, which is described above.

KPI	MetCount	MissedCount	Total
Response SLA for P4	Sum(#MetCount#)	Sum(#MissedCount#)	Sum(#Total#)

Buttons: Preview With Data, Cancel Preview, Reset, Save, Add Row, Edit, Delete

Figure 210 – ProView with Data

- To create trend type score cards. The following steps need to be followed:
- In first screen user needs to choose 'Trend column' rather than measure and choose duration as well.

Add table to ScoreCard
Add table to your scorecard. Define columns, add rows and add rules.

Column Type	Trend Duration	Column Label Name	Need Footer
Label	--Select--	KPI	☐
Trend Column	Last 3 Months	MetCount	☐

Buttons: Add More Columns, APPLY, Back

Figure 211 – Add table to Score Card

- All the other steps are similar with score card templates. Please follow them and click on 'Preview with Data' button. Users can see data in the format below because the user has chosen the last three months so last three months data is showing.

Report View : ◀ Apr 2022 ▶

Change Formatting

Show Formatting Rule

KPI	Jan 2022	Feb 2022	Mar 2022	Apr 2022
	398	920	980	600

Preview With Data

Cancel Preview

Reset

Save

Figure 212 – ProView with Data

14 Tile View

14.1 Introduction

This tile view shows data in the form of tiles i.e., boxes. Below is the tile view sample.

Tile View:

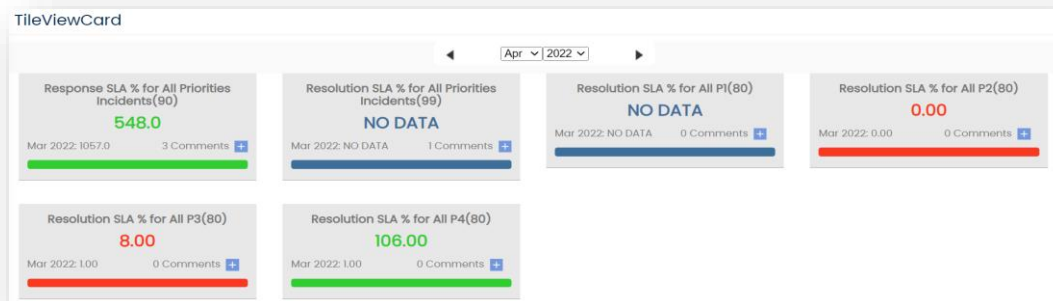


Figure 213 – Tale View Card

How Configured tile view

1. In health view report builder page, you need to select 'Tile view metric' template

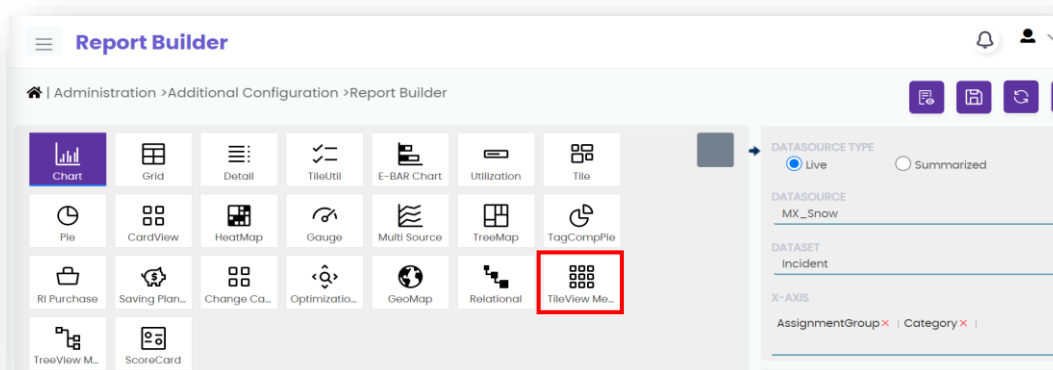


Figure 214 – Tale View Config

2. Once you click on the score card template, a new screen will come up. Where you need to choose 'Metric Tile View' from the list of options. When you click on 'Metric Tile View' button you will redirect to the next screen.

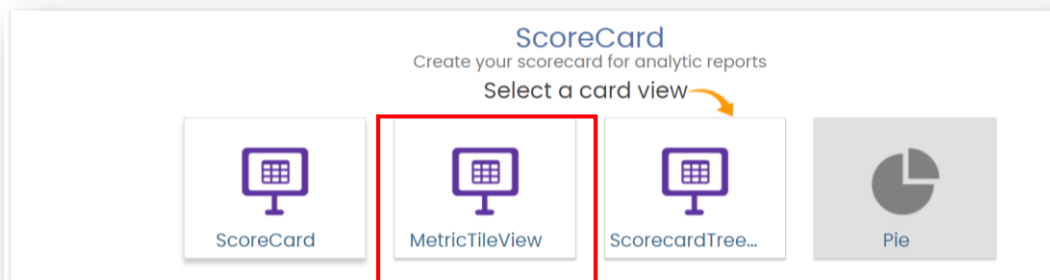


Figure 215 - Metric Teleview

3. Once you click on the template, a new screen will come up. User needs to choose any navigation type for the score card. Example, if user chooses 'Monthly' from the dropdown then monthly score card will be created. As soon as user click on 'Create New Table' button. Next screen will come up.
4. In the next screen, the user can see below four options which represent user can create four different types of tile view.
 - a. **Individual Analysis:** Only one data count will show for the month.
 - b. **Comparative Analysis:** Current month and last month data count will show.
 - c. **Individual Analysis Trend:** on time view current month data will show the last three-month bar chart. Or any trend duration which is configured by user.
 - d. **Comparative Analysis Trend:** on time the current month's data and last month's data will show the last three-month line bar chart. Or any trend duration which is configured by user.

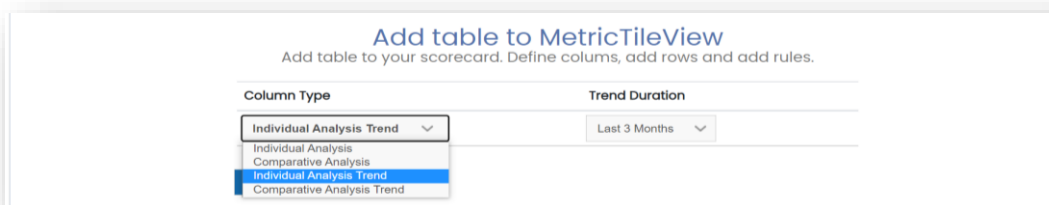


Figure 216 – Individual Analytic Trends

The rest of the options are the same as Score Card.

5. Below is the representation of tile view with line bar chart trend:



Figure 217 – Tale View Chart

Conditional Formatting:

- This framework works inside the score card as it is working in Health view report builder screen. There is a separate document that has been created to support it, please read that document inside the below path from the teams.
- Teams-> MyXalytics Tasks -> Technical KT -> Conditional Formatting Rule Framework
- Users can add conditions on widget (score card) in MyXalytics and based on applied conditions formatting needs to be changed on the score card.
- For example, if someone added condition to change background color as green, if data is greater than 100. In this scenario conditional formatting rule framework will change the background color of all the rows/columns where data will be greater than 100.
- Through this framework you can add multiple conditions. In each condition, it can provide specific formatting options such as background color, fore color, font size, font name, image etc.

15 Tile and Trend

Tile and Trend control – this new template allows user to get a comparative as well as historical visibility of a metric/KPI. Users can see what the Cost of this month Vs previous month is and can highlight the color if value is more or less than previous month. Also, the template allows the user to check the historical trend for the same KPI.

- We can use only one dimension and one measure.
- You can use the dimensional values to set the color of the flows in the chart.
- Link colors can be based on source or target anchor.

15.1 Report on Builder Page

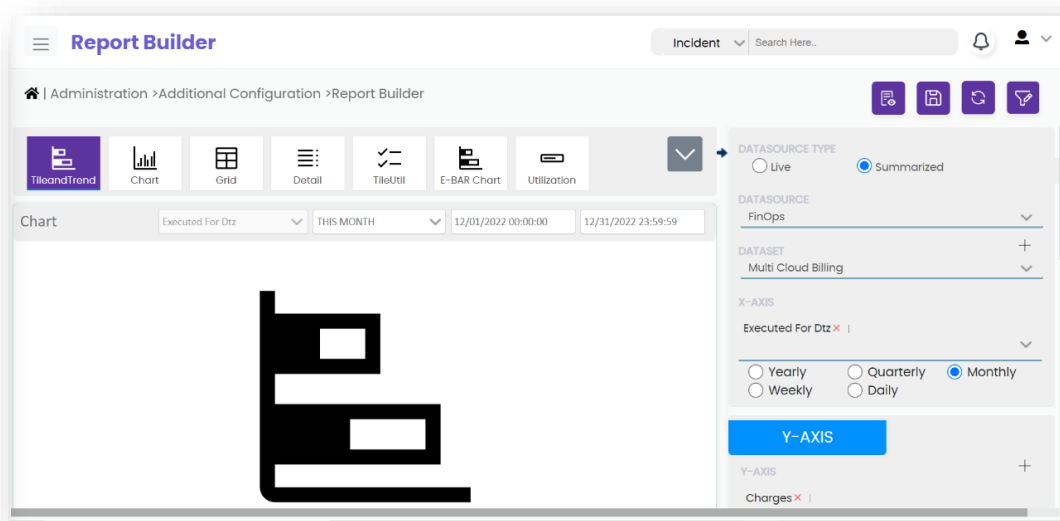


Figure 218 – Report Builder

Follow the steps below to build a report:

1. In the Report builder page, click **Tile and Trend** logo.
2. Select the **dimension** option on the properties. And there is the restriction that only 1 dimension should select.
3. Select the **Measure** option on the properties. And there is the restriction that only 1 **Measure** should select.
4. After selecting properties click on preview.

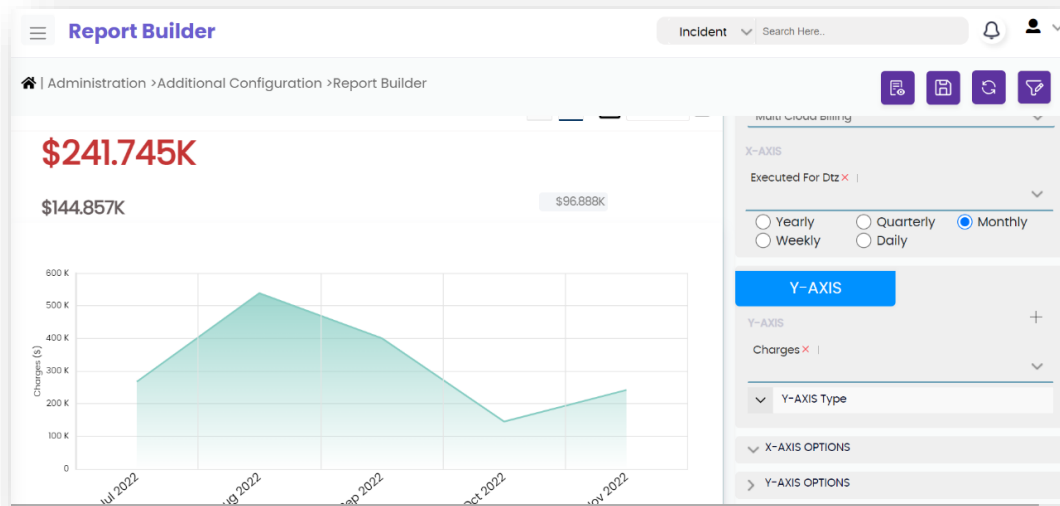


Figure 219 – Report Builder

5. There were so many like X-axis, Y-axis, other chart options, Global options, Tile options.
6. Under X-axis there are a few options: -
 - **Gridlines** - using these gridlines we display the x-axis line into the chart. If we need these lines, we select Enable and we provide the color change option.
 - **Data Label** - Using this option, we can give Font size and Text Style, Dimensions etc.
 - **Interval Gap** - Using this option, we can add the gap between X-axis Labels.

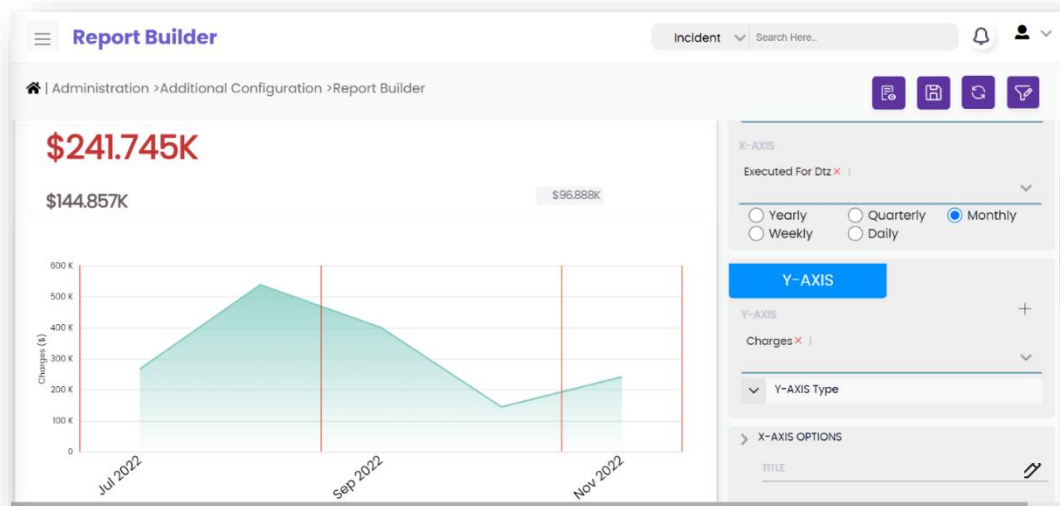


Figure 220 – Report Builder

7. Y-axis there is few option –Y-axis> Palette, Border color, Line width, Marker style, GridLines, Scale Line, Minimum Threshold, Maximum Threshold, Chart color (JSON), Label Format.

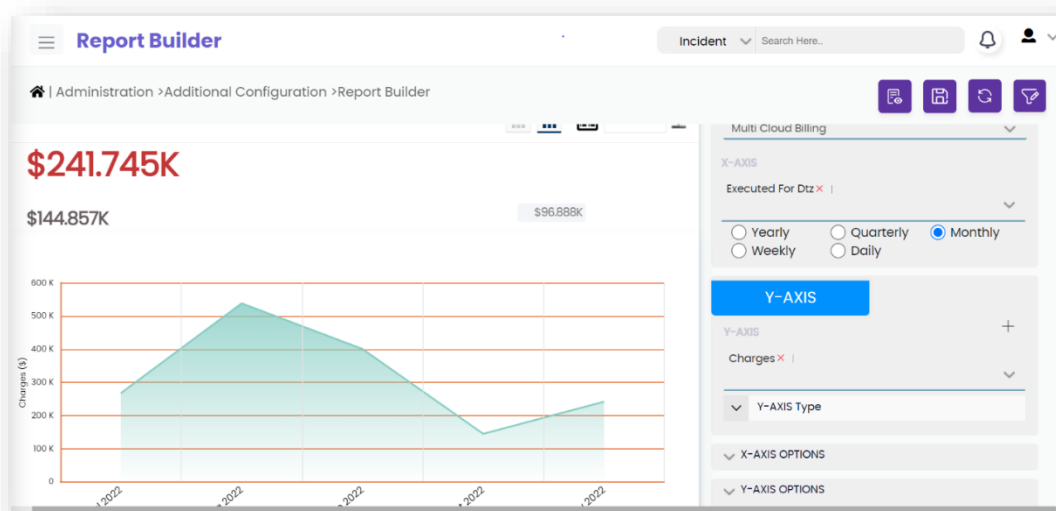


Figure 221 - Report builder

8. Under Other Chart Option>Opacity, Back color, Datapoints, Legend.
9. Using the Other Chart options:

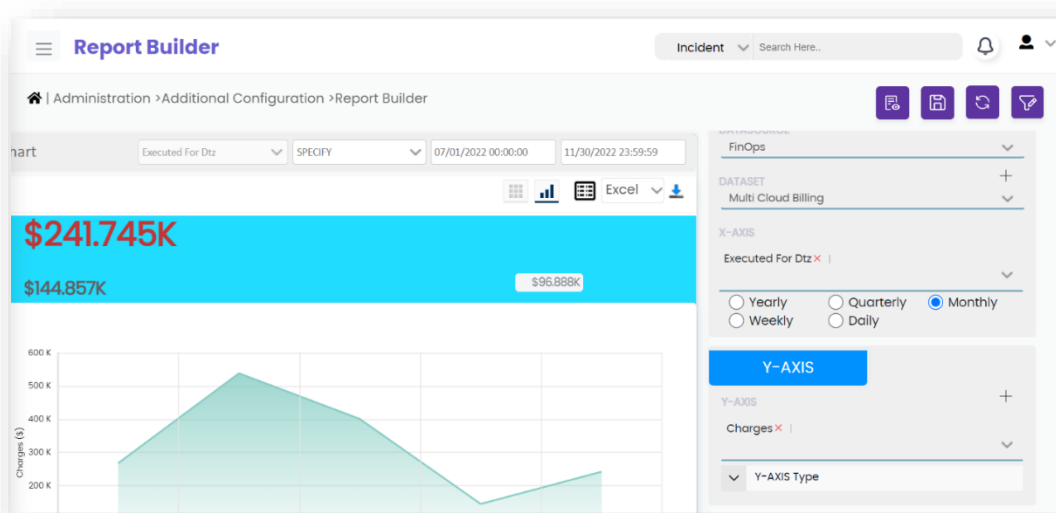


Figure 222 - Report Builder

10. Global Options> Sequence, Global date on widget, Grid, Drill Down Enable.
- **Grid option:** Using this option we can show the Tile. If disable, this option will hide the Tile.

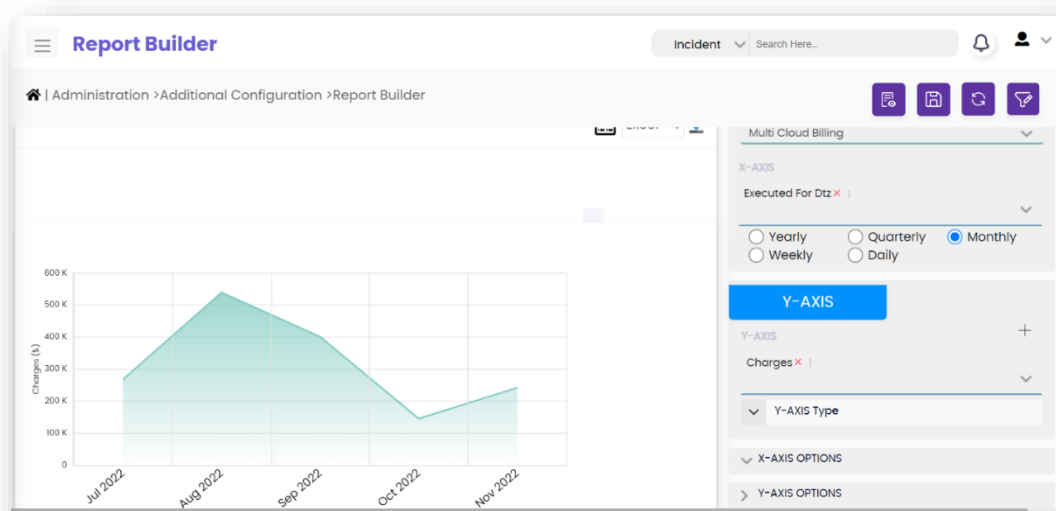


Figure 223 – Report Builder

- **Drilldown Enable:** Using this option once we click the pointer into any value it redirects to metricdrilldown page.
- 11. Under the Tile Option> Show unit, Comparison Types, Text Style, Page Style.
- **Show Unit** - Using this option we can disable the currency symbol in Tile.
- **Comparison Types** - Using this option, we can convert the value difference to percentage.
- **Text Style** - Using this option, we can increase the font size and Text and Alignment (left, Right, Center) etc. These options work only with Current Period value.

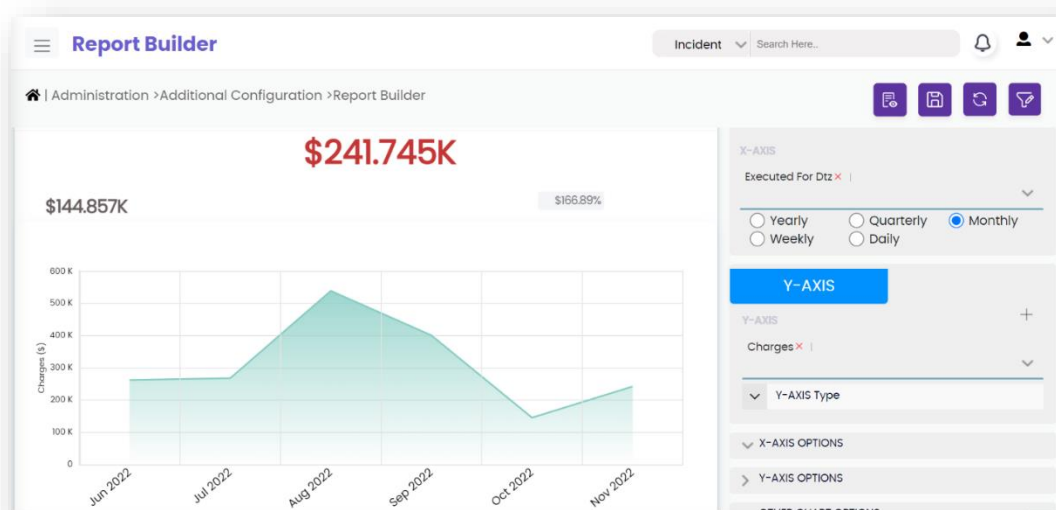


Figure 224 – Report Builder

- 12. This section consists of two options: Data View and Chart View.
- **Data View** - when we click data view only Tile display.

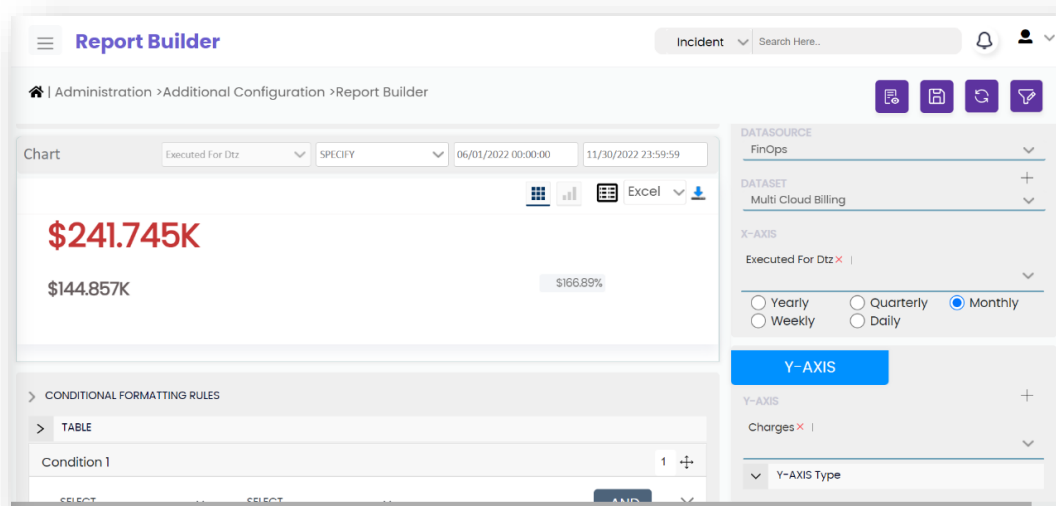


Figure 225 - Report Builder

- **Chart View** - When we click chart view Tile and Chart both will display.

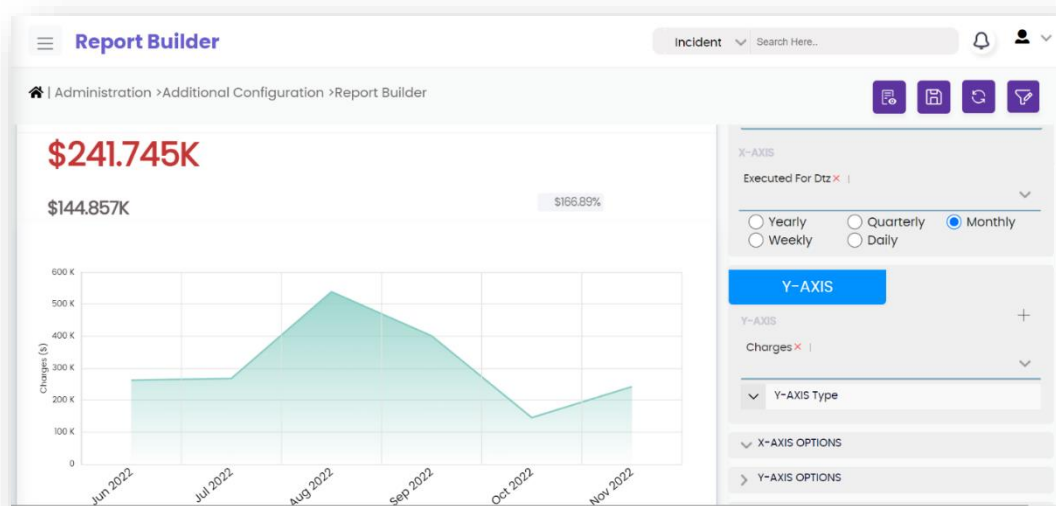


Figure 226 - Report Builder

13. Can be able to export the report in pdf, ppt, excel.
14. Can also save the report to Dashboard.
15. Click View Raw Data.

Data Source FinOps	DataSet Multi Cloud Billing	Group By Cloud Provider	Export to Excel
-----------------------	--------------------------------	----------------------------	--------------------

Record Count: 17		
Period	Cloud Provider	Charges
Aug 2022	AWS	3300.94
Aug 2022	Azure	410386.23
Aug 2022	General	170333.05
Jul 2022	Azure	6141.16
Jul 2022	General	352382.36
Nov 2022	AZURE	47317.69
Nov 2022	General	288314.06
Nov 2022	VCenter	79.49
Oct 2022	AWS	49.85
Oct 2022	AZURE	35776.79
Oct 2022	General	191375.80
Oct 2022	VCenter	90.01

Figure 227 – Record Count

Conditional Formatting Rules

- Using conditional formatting rules, we can add the font color, background color, font size, alignment, icons, font weight, border color for Tile.

CONDITIONAL FORMATTING RULES

TABLE

Condition 1

Current Period

Greater Than Equal To

0

AND

X

TABLE

Row

Target 1

Current Per

#08EBFF

None

None

None

None

None

Icon Suffix

Add Target

Figure 228 - Table

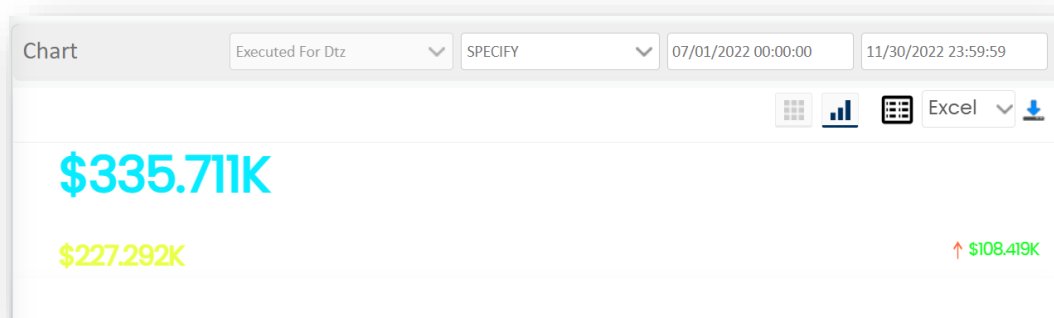


Figure 229 - Chart

- After applying the Conditional Formatting rules:

Figure 230 – Data source Config

16 Enabling a User in MyXalytics

1. Under Menu, enter the user in the search bar to find out UserMaster.

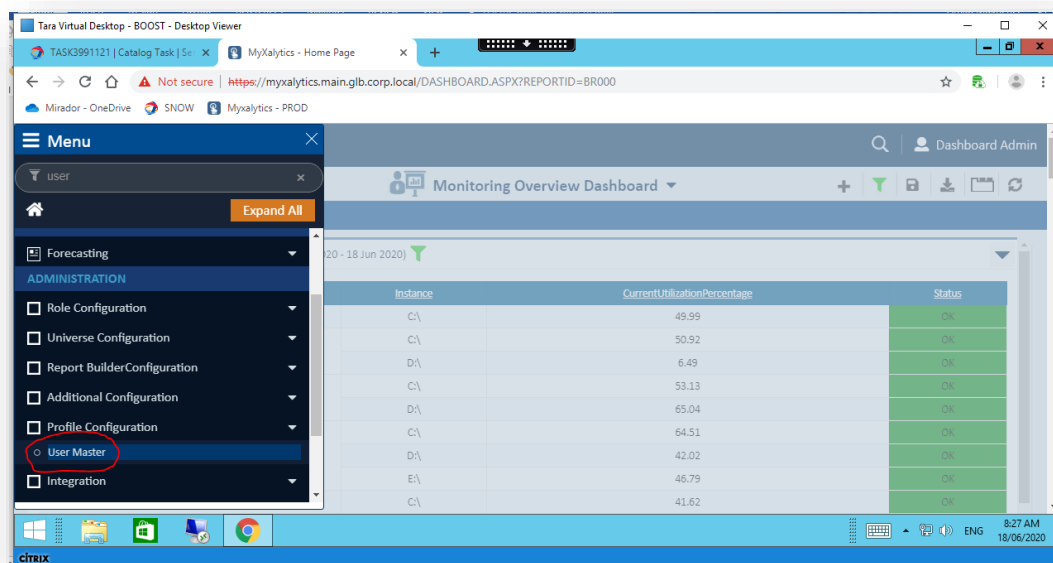


Figure 231 – User Master

2. Click User Master. The User Master screen appears.

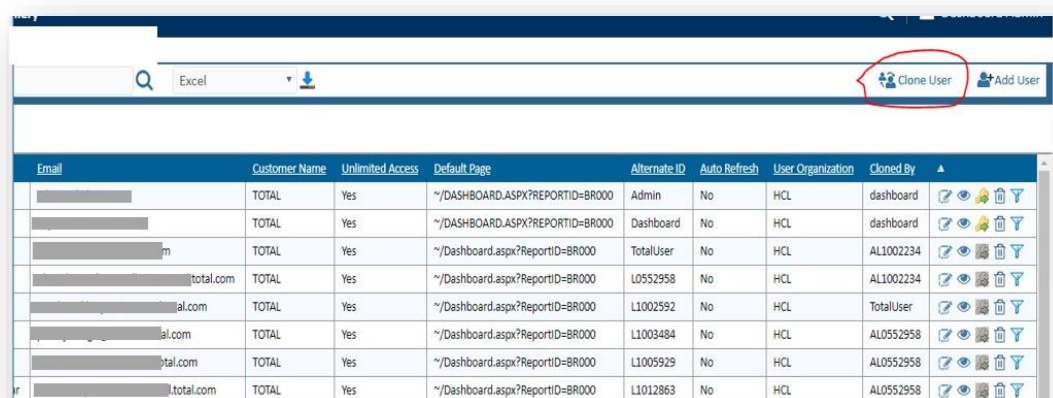


Figure 232 – User Master

3. Click on Clone User. Clone user screen will open.

Figure 233– User Master

4. Change the Username from Admin to Total User as shown in the figure below:

Figure 234– User Master

5. Provide Lid/JId as User Id, Name as Username and email Id as Email in appropriate box.

Figure 235 - User Master

6. Click on the save button as shown below.

Gallery

User Master

User Role Role1 User Name TotalUser

* User Name Sylvie LAFFITTE * Email sylvie.laffitte@total.com

Save Cancel

Save Cancel

Figure 236 - User Master

On Successful saving message will come "User created successfully." Or "User already exists".

17 Onboarding Process

To complete the existing monolithic MyXalytics App, we have started working on creating separate web services solutions.

In this document I mentioned Web API method Names only, in another document briefly explained regarding web API methods, please refer that document also.

Onboarding Process:

- New Customer Registration, Account Activation and Reset password process.
- Service subscription and edit services Process.
- Service Approval Process

Customer Registration

- Path: click the Sign in ---->Click the Sign up----->

User Name Display Name

Company

Email

Password

Confirm Password

Select Country

Sign up

Login to MyXalytics Activation Link

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DRYICE MyXalytics™ integrates reporting, modelling, analysis, dashboards, and event management, so you understand your organization's data and make effective business decisions.

Figure 237 – Customer Registration

Username:

- Users should be providing Username in alphabet.
- Username should not contain the Numbers and special characters.
- Username should not be less than 2 and not exceed than 30 Characters

Display Name:

- Users should be providing display name in alphabets and Numbers.
- Display name should not contain the special characters.
- Display name should not be less than 2 and not exceed than 15 Characters

Company Name:

- User should be providing company name in alphabets and Numbers.
- Company name should not contain the special characters.
- The company name should not be less than 2 and not exceed than 40 Characters.

Email:

- Users should be providing valid email.

Password:

- Password contains at least one upper letter, Lower letter, numbers and Special characters.
- Minimum 8 characters are required.

Confirm Password:

- Password and Confirm Password must be same.

Country:

- select country value and click signup button
- After successfully inserting the details then popup message showing like:

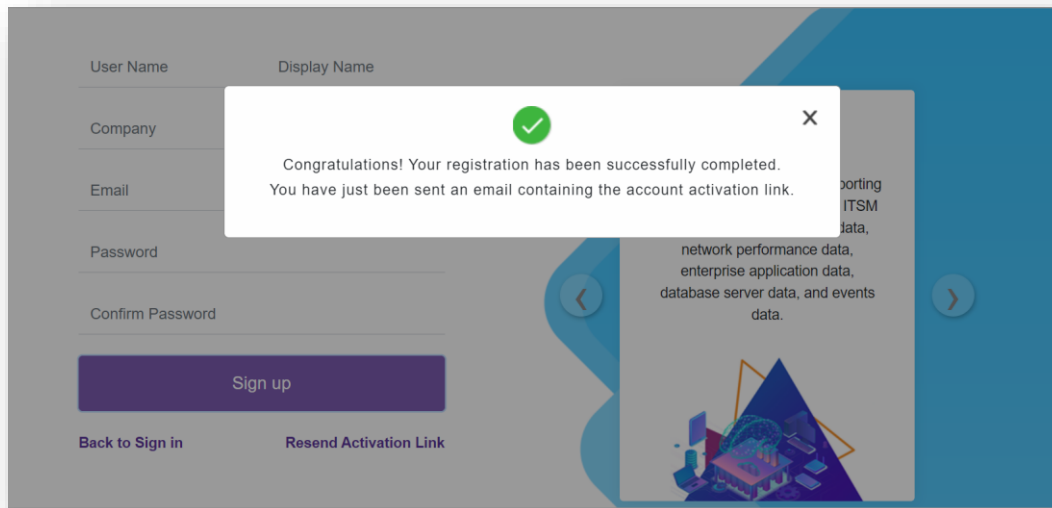


Figure 238 – Registration Confirmation

- If while inserting, got any error or network issues message showing like below screen shot:

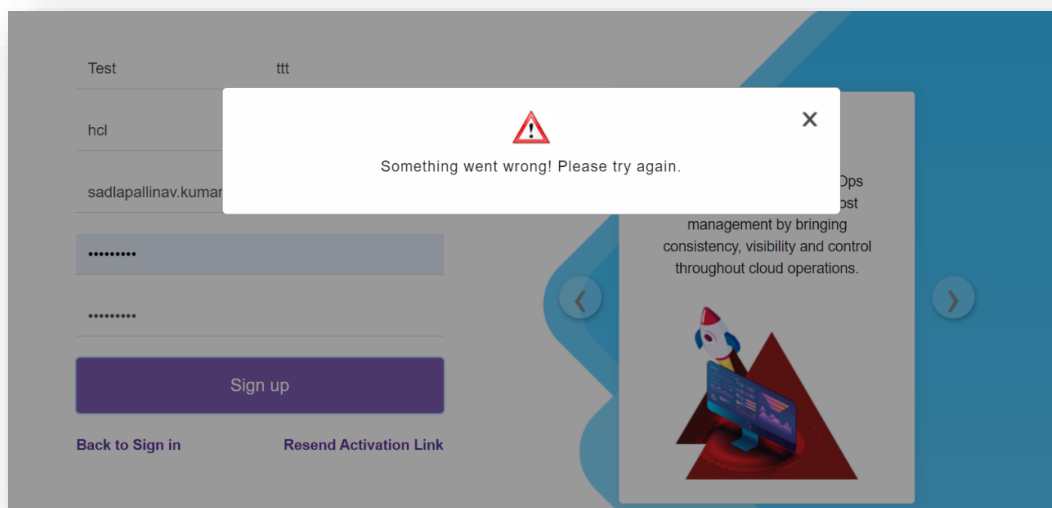


Figure 239 - Registration

- Registration successful then user receives following mail:

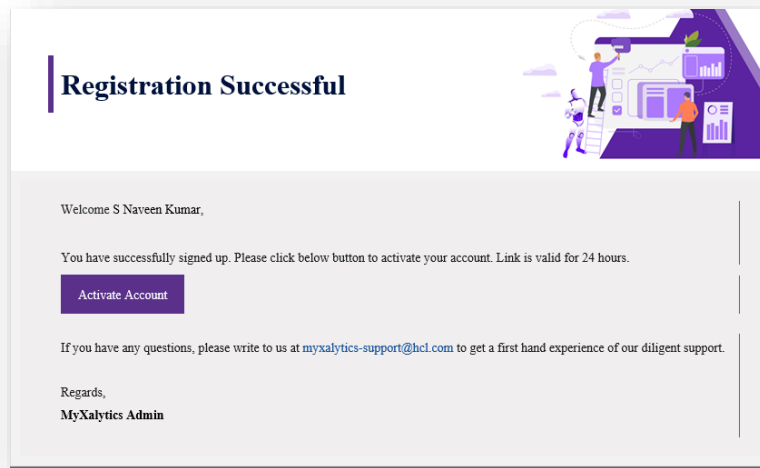


Figure 240 – Registration Mail

- Once click the activate account button user account will have activated successfully, for this process I am calling web API method is 'AccountActivationForSignUp ()'. This activation link expired automatically after 24 hours, and if the activation link expires, we can use resend activation code option.

Re-send Activation link

- Path: Click the Sign in --> Click the Sign up --> Click Resend activation link

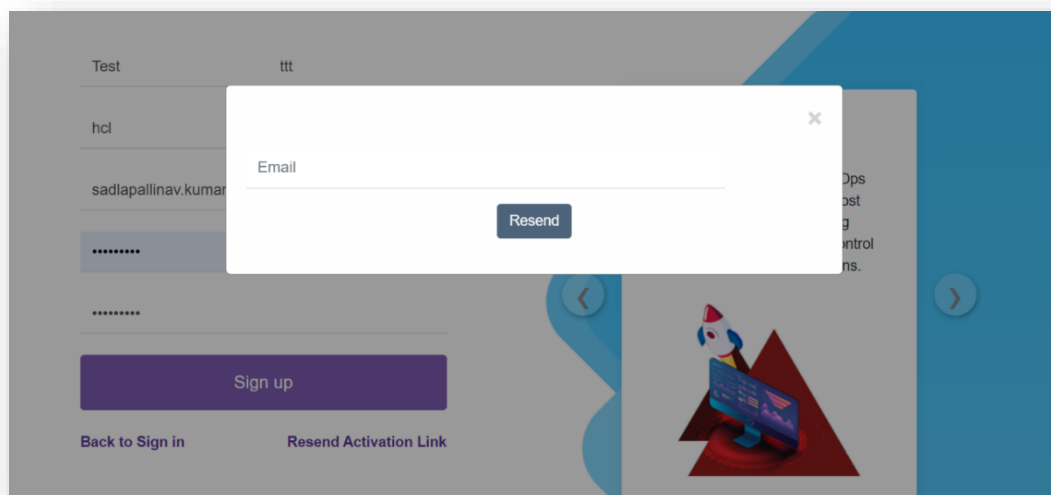


Figure 241 – Password Resend

- Once the resend activation code is clicked, the popup like the above screenshot will appear.
- After the activation link is sent successfully, the following popup message will appear.

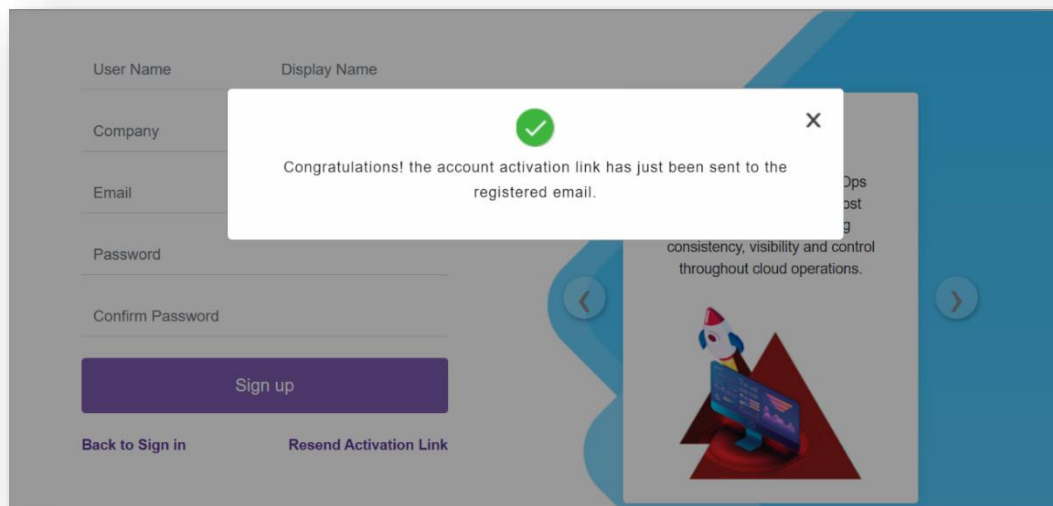


Figure 242 – Account Activation Link

- If any error occurs, the screen below will popup:

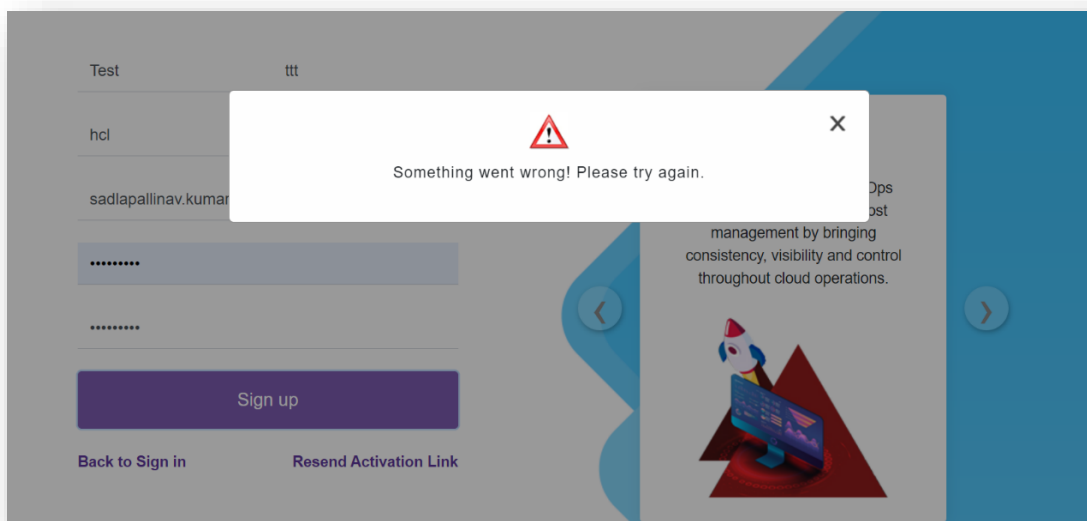


Figure 243 – Sign Up Form

- You should receive a mail with details on your registered email for further action. Do check the mail and do the needful as described in the mail.

This activation link expired automatically after 24 hours, if the activation link expires, we can use the same process again.

Reset Password:

- Path: click the Sign in ----> Click the reset password

Email

Send Password Reset Link

[Back to Sign in](#)

Figure 244 – Password Reset Link

- Click 'Back to Sign in' and enter the registered email. Click the 'send password reset link's button.
- If the details are correct, a successful message like the screen below should appear. Check your mail for further steps to reset the password.

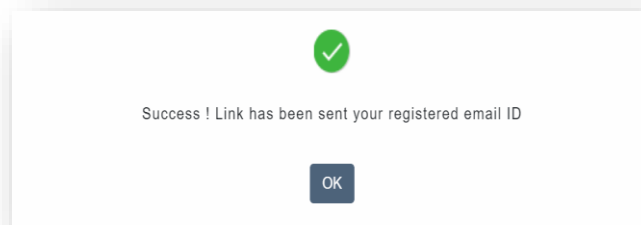


Figure 245 – Success Message

The link in the mail expires after 24hrs. If the link is expired, then request a new link using the steps above.

- Remember the points below while changing the password:
 - Password contains at least one upper letter, Lower letter, numbers, and Special characters.
 - Minimum 8 characters are required.
 - Password and Confirm Password must be same.
 - You should see a success message when a password is reset successfully.
- Create Service Request Order:
 - Once the user account is activated, you may enter your credentials to login to MyXalytics application.
 - Service Catalogue page will open if no order exists.
 - Based on the user login if no orders exist, it will be re-directed to the Service Selection console. If there are existing orders, it will redirect to dashboard console.

Service Selection Console:

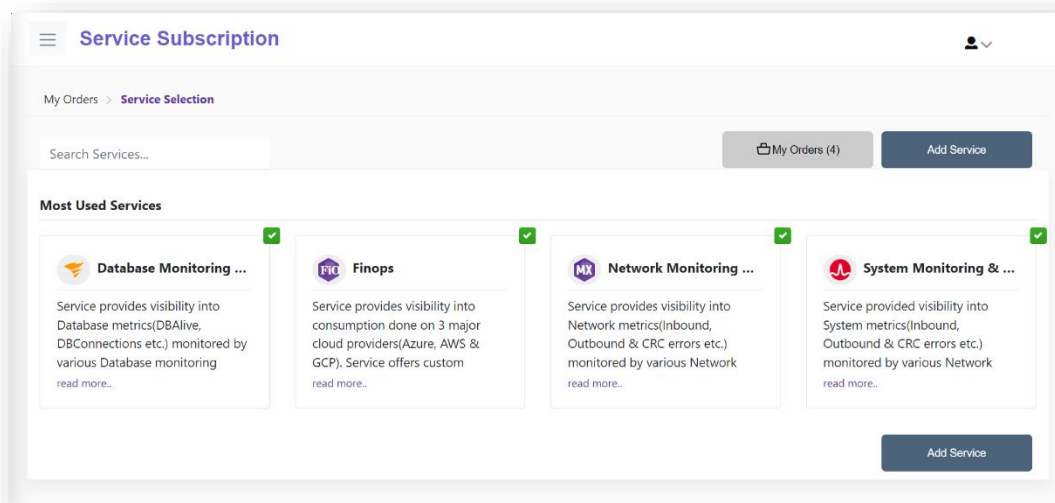


Figure 246 – Service Subscription

- Breadcrumbs showing for the user an existing current path.
- Filter the services to use the search option, and if you want to log out use the top right corner options as shown in the screenshot.
- To subscribe a service, select a particular service and click 'Next'. It will show console at the top and bottom side otherwise hide the 'Next' button.
- Use mouse over to read more... Service description will appear in tooltip format.
- Once select the services then user click the 'Next' button it will redirect to the services products page.

Service Products Console:

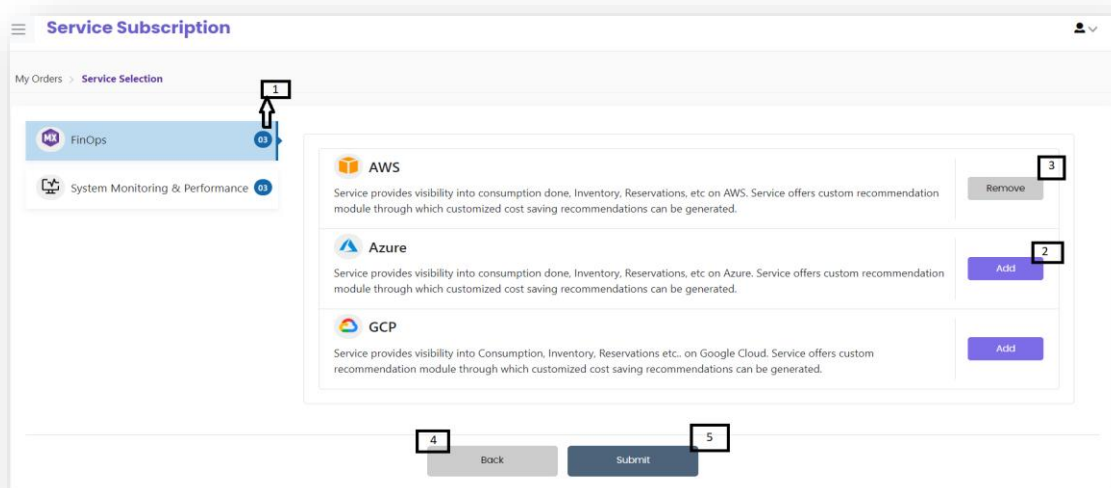


Figure 247- Service Subscription

- In this console left side panel we are getting details from the previous screen whatever user selected that services list
 - Showing all product service count in this circle.

- Previous screen whatever user selected that services list here displaying, in previous screen I selected only 'FinOps' and 'System Monitoring & performance' so here populating. If user click 'FinOps' based on FinOps ID get the product service objects, if user select the at least one service module services are by default added in their request Order.
- Once populating the product services here displaying two buttons, if users click the 'Add' button based on product service objects. If questions are their Popup will open and enter the answers, questions are not there directly added in list for this getting questions and answers

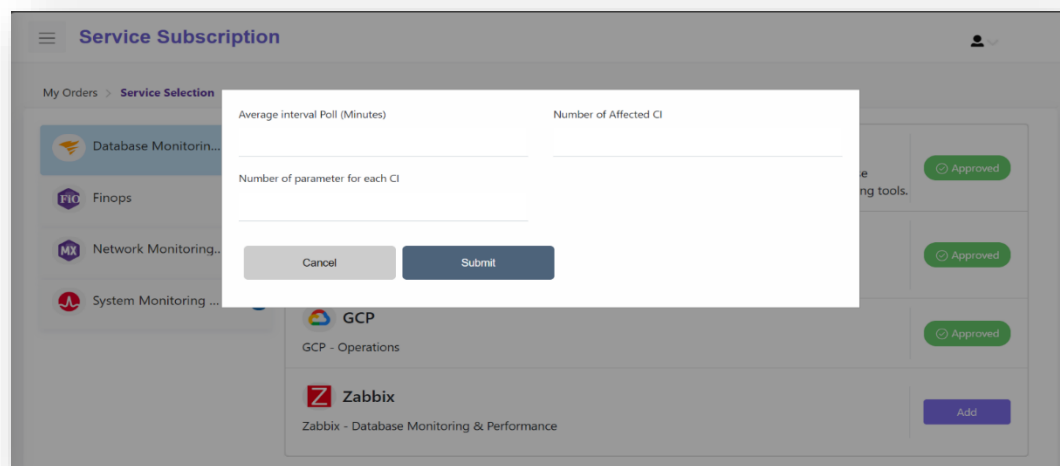


Figure 248 - Service Subscription

- Click '**Cancel**' button to cancel the popup. These fields are all mandatory to enter, users enter all answers in textbox and click the 'Submit' button questions are save in Array not in DB and popup will close once click the 'submit' button. Add button is changed to 'Remove' and if questions are not there for product objects if user click the add button it will add directly.
- Once add the product service objects then user don't want that service, he can remove by using 'Remove' button. If the user clicks the remove button it will ask for a confirmation message like the screenshot below.

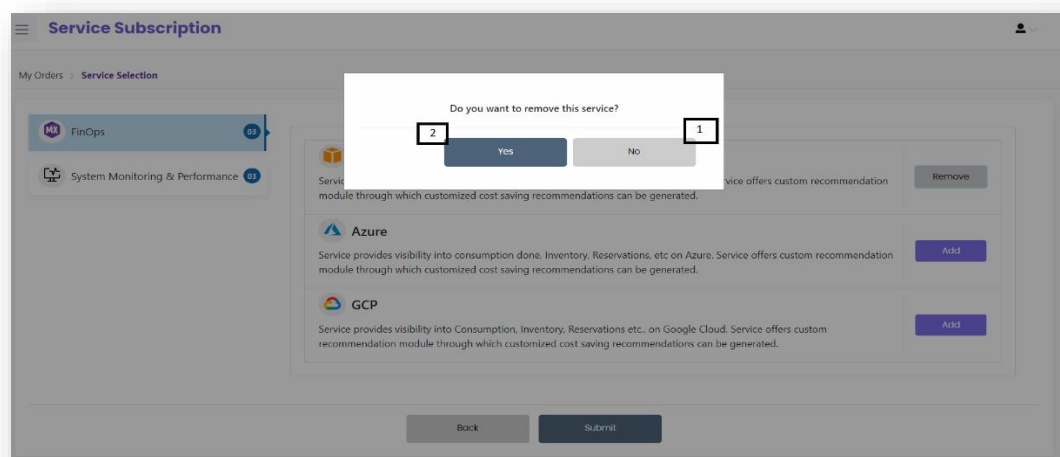


Figure 249- Service Subscription

- In the above screenshot click the 'Yes' to remove the selected services and click 'NO' popup will have closed.
- These services are divided into three parts.
 - Shared
 - Dedicated

- Module
- **Shared:** Many Customers are using same database is called shared. If users select the shared or dedicated services whatever module under services are there all services are subscribing to them automatically.
 - If users select the dedicated services whatever module under services are there all services are subscribed to automatically.
 - If User wants to go the previous screen click the 'Back' button. If once click the back button it will redirect the service selection console, then the user needs to create the request order same process will be following again.
 - Once added the services then click the 'Submit' buttons details are save into our Database tables. Then user able to see the screenshot message.

Figure 250 - Service Subscription

- Records are saved successfully then user and approve got mail for request order and user will redirect to another console.
- The following screenshot represents Request order sample email template:

Figure 251 – Request Order

- After saving the records it will redirect to request raised console.

Request Raised Console:

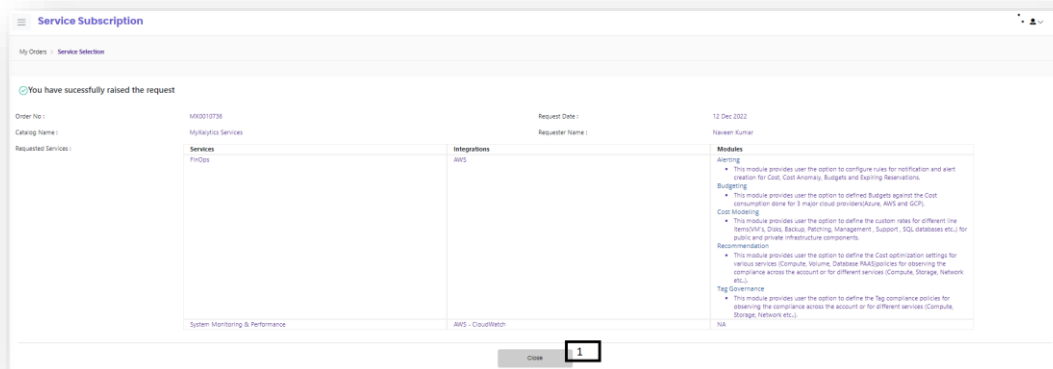


Figure 252 – Request Raised Console

- Once Request has been created that details are shown in console. Click the 'Close' button, it will redirect to the Service dashboard console. After creating a request order this request will go to the service approval process.
- Service Subscription Dashboard Console
- After the Created request order successfully, it will redirect to the user dashboard console for this console. In this dashboard If status is 'Pending' then 'Create New'.
- Request' button is disabled. Once System Admin approved the request, the status will be changed for you to create the next request.

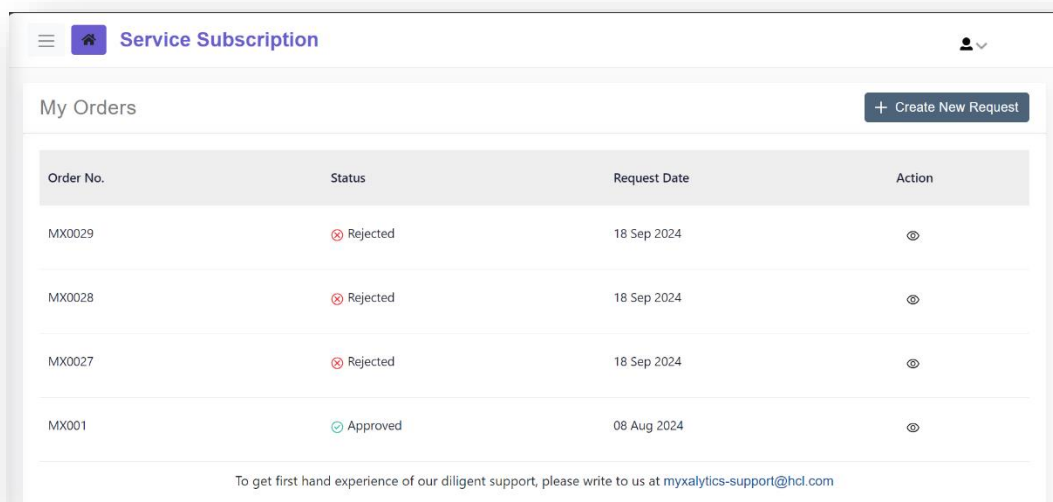


Figure 253 – Service Subscription

- If user wants to edit the that request order services, he can click the Edit icon in dashboard console and in this dashboard, status is 'Pending' then 'Create New Request' button is disabled. Once System Admin can approve that request then status will be changed and need to allow create the next request.
- If user click the View icon button it will show all services what user added under the request Order, follow the below screen shot.

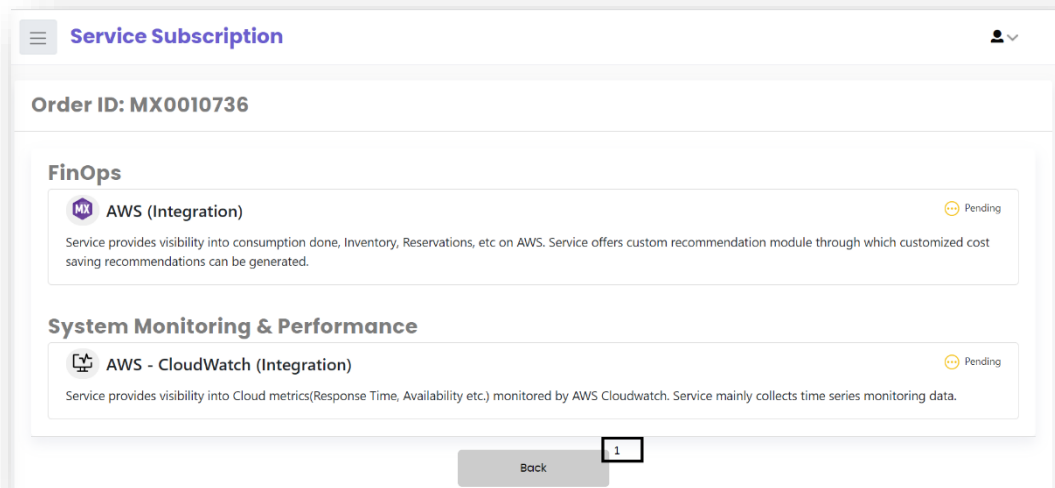


Figure 254 – Service Subscription

- Users click the 'Back' button the console will hide and return the dashboard console.

Update Service Request Order:

- Once you click the Edit icon in dashboard console, it will be redirect to the service selection page.

Service Selection Console:

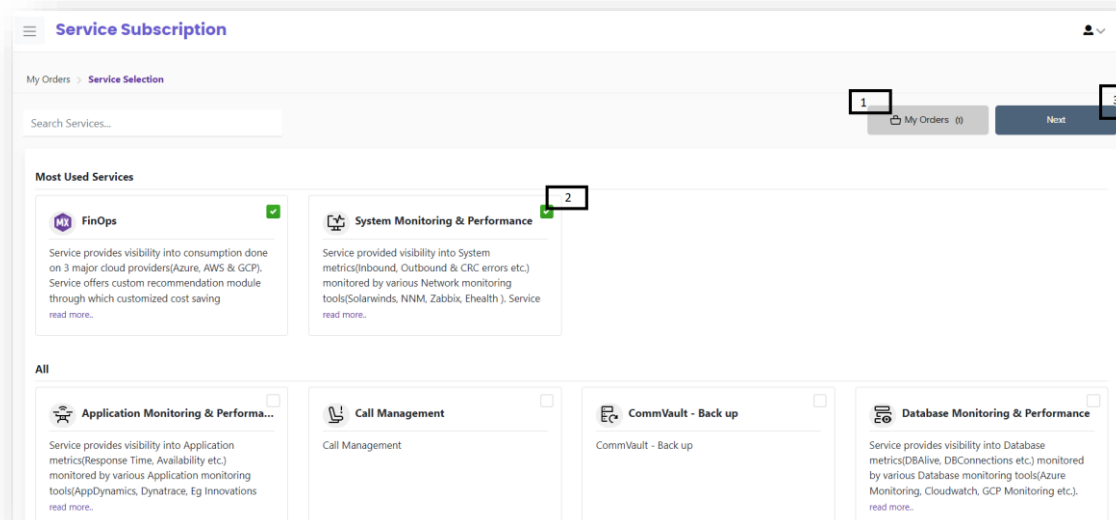


Figure 255 – Service Selection

- Using My Orders option user have how many orders they requested that count here showing, if user clicks 'My Orders' button it will redirect to the user dashboard console.
- Based on this request order whatever user requested those services binding unchecked by default, if user don't want those services, they can remove that service.
- Users want any other service they can select the services then user click the 'Next' button it will redirect to the services products page. Once clicks the 'Next' button it will redirect to the below the following screenshot.

Service Products Console:

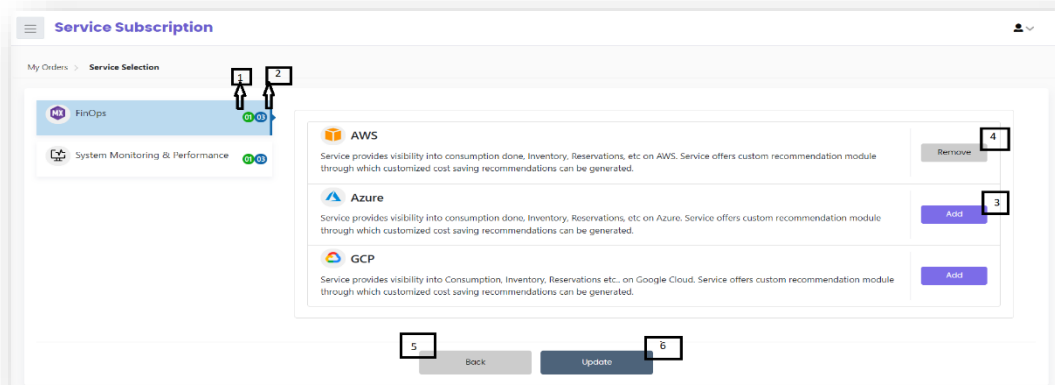


Figure 256 – Service Subscription

- In green color circle showing current request order selected product services count.
- In blue color circle showing total product services based on service sub type ID.
- In this request order in 'FinOps' under some services are already selected so 'Remove' button is showing. If users don't want that service, they can remove it by using this option.
- If User wants to go the previous screen, click the 'Back' button. If once clicks the back button it will redirect the service selection console, then you need to update the request order. The same will be followed from the start.
- Once added the services then click the 'Update' buttons details are updated into our Database tables
- Once records are updated successfully, both you and the approver will get an email, for update request order and user will redirect to another console. Find the following screenshot for while updating Request order user got sample email template like this.

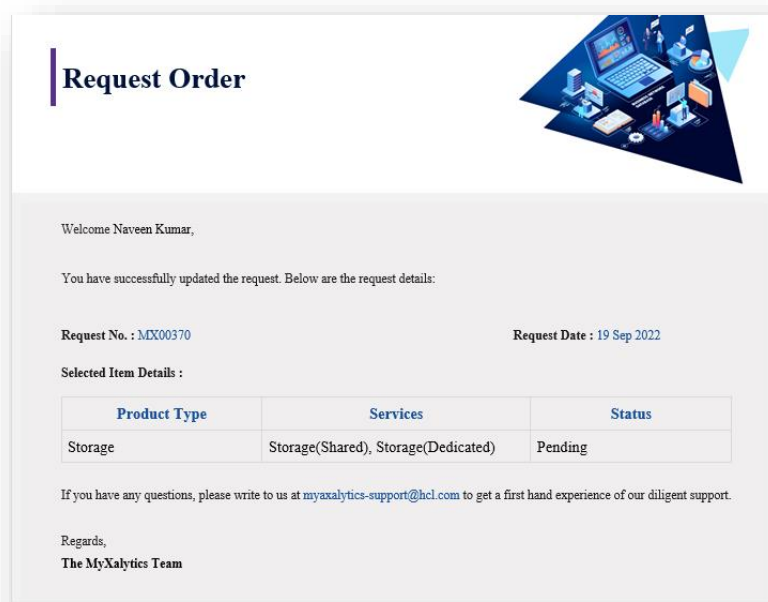


Figure 257 – Request Order

- After updating the request order, it will redirect to another console like the following:

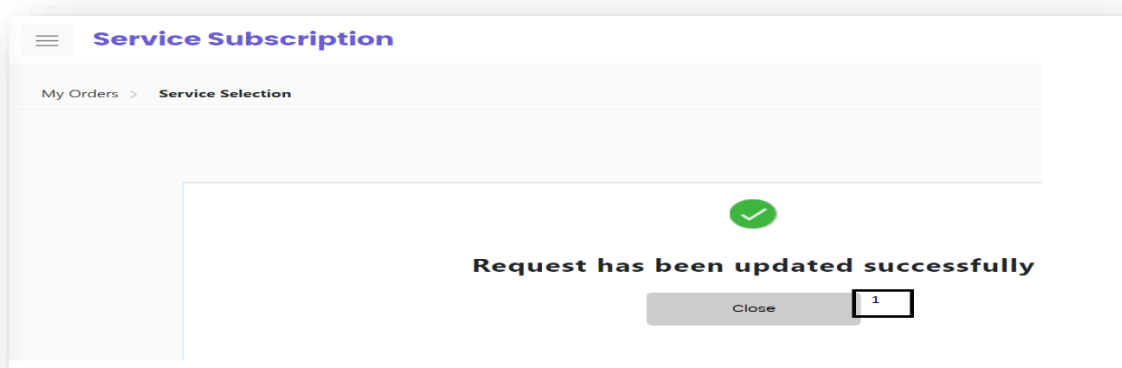


Figure 258 – Service Selection

- If you click the 'Close' button it will redirect to the Service Dashboard console. After updating request order, it will go to the service approval process.

Service Approval:

- Path: Please do follow the below path and get access for approval page.

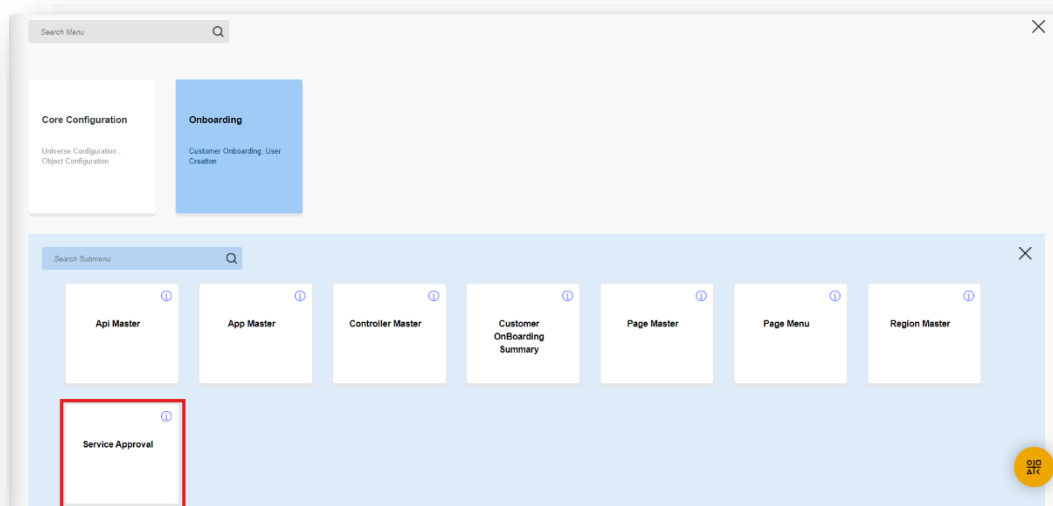


Figure 259 – Administration Onboarding

- Once get the Service approval page dashboard like showing below screen shot.

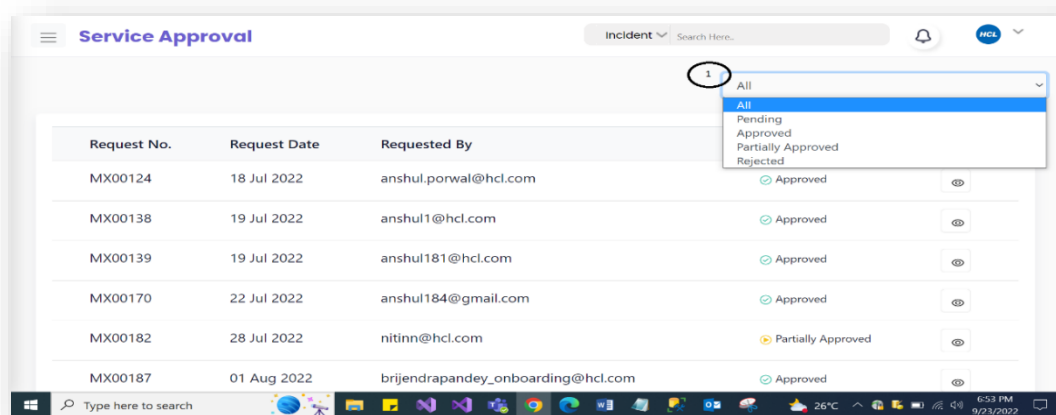


Figure 260 – Service Approval Dashboard

- In the given dropdown, five types of filter options are available based on System Admin selection. After clicking the view icon button dashboard showing like following the below screen shot.

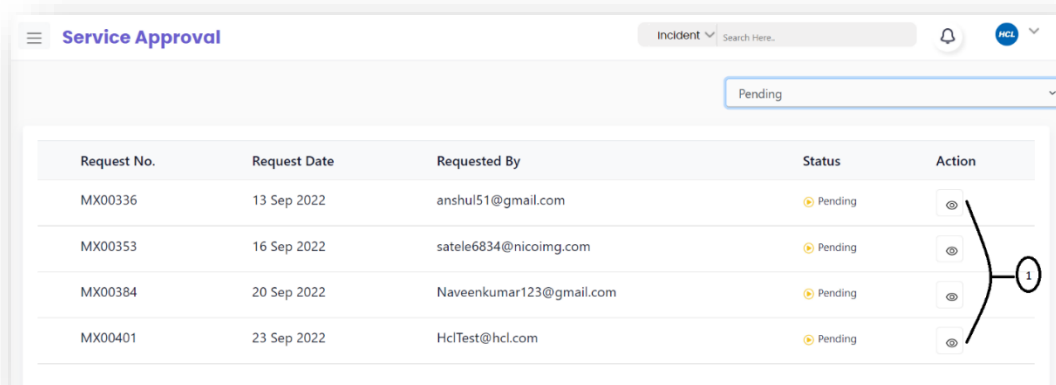


Figure 261- Service Approval Dashboard

- In the above dashboard console showing all records are pending for approval, in that System Admin can click the view icon of anyone request order screen will display like below screen shot.
- If request order status is “Pending” then System Admin click the View icon console will be displaying like following screenshot.

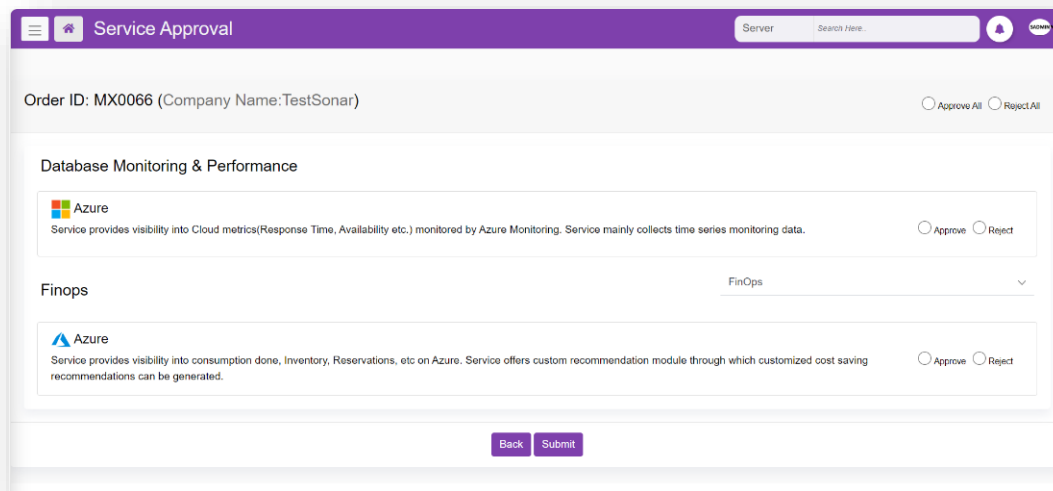


Figure 262 – View Icon Console

- In the above dashboard console showing all records are pending for approval, in that System Admin can click the view icon of anyone request order screen will display like below screen shot.
- If Request order status is “Pending” then System Admin click the View icon console will be displaying like following screenshot.

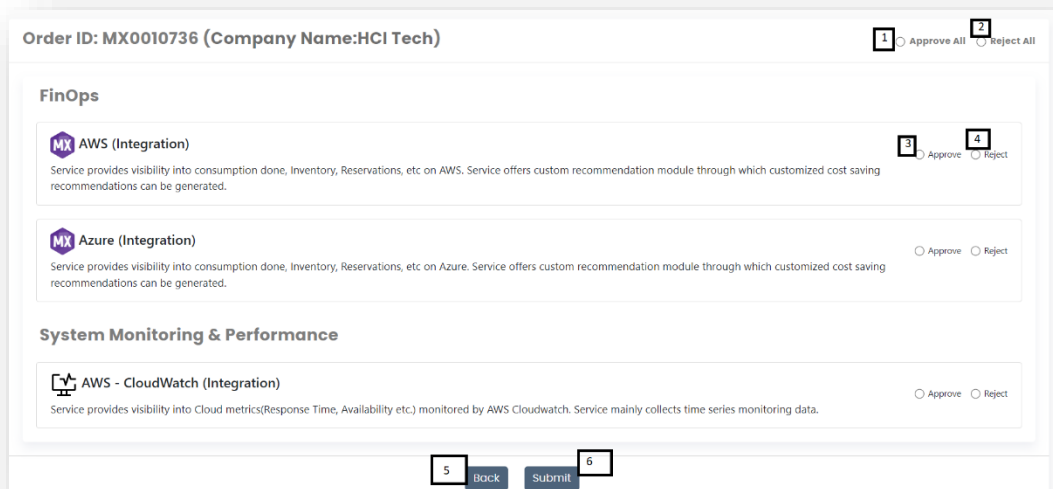


Figure 263 – View Icon Console

- If System Admin will do the overall Approve services, then use the approval all option.
- If System Admin will do the overall Reject services, then use all Reject options.
- If System Admin needs individual services approve, then use approve option
- If System Admin needs individual services reject, then use reject option, If System Admin click reject radio button it will open popup. Popup should be looking following the screen shot. Then enter the reason and click **Save**.

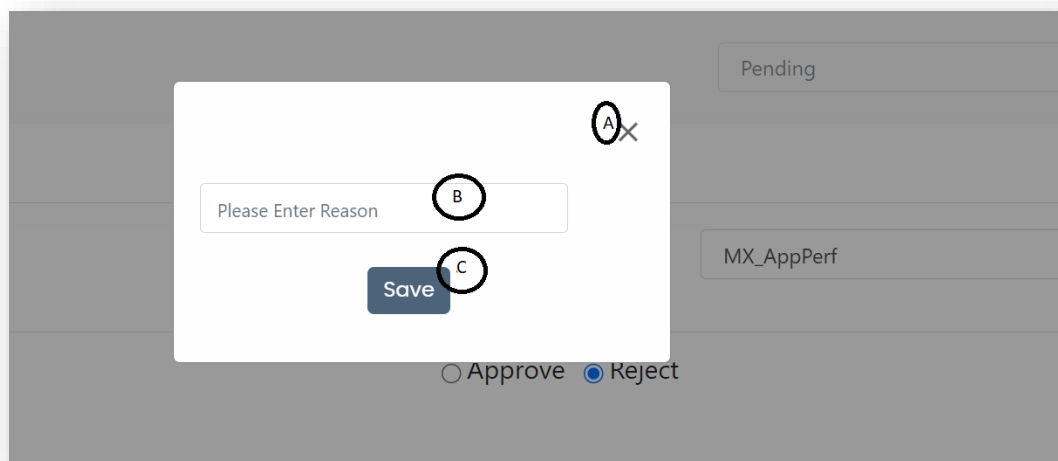


Figure 264 – Reason Input Box

- If System Admin click the “Save” button, reject reason value is mandatory. Once enter textbox value then click the “Save” button that value will have stored in one array (Temporarily store).
- If more than two tool instances drop down will be visible to System Admin, for this dropdown fetching data from ‘Tool Master’ table based on service sub type Id whatever tool names are available those details are getting. If System Admin click the “Close” button it will redirect to the Service approval dashboard console.
- Once select all services approve/reject then click the “Submit” button to save. Then, Engagement Id will have generated, and user account will be converted to Permanent MyXalytics user.
- After Successfully approval process user got two mails like Order status and Welcome Onboard emails. Sample Order Status email template like following screen shot.

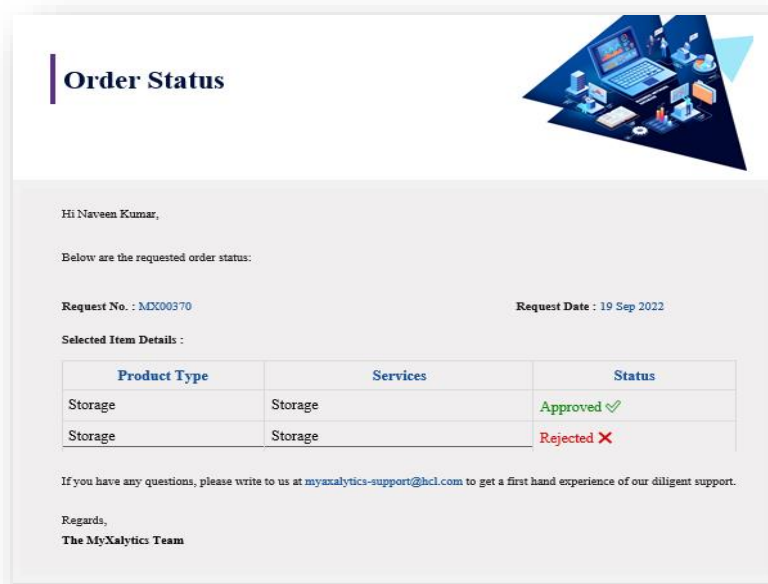


Figure 265 - Encryption Key Rotation

- Sample Welcome Onboard email template like following screen shot:

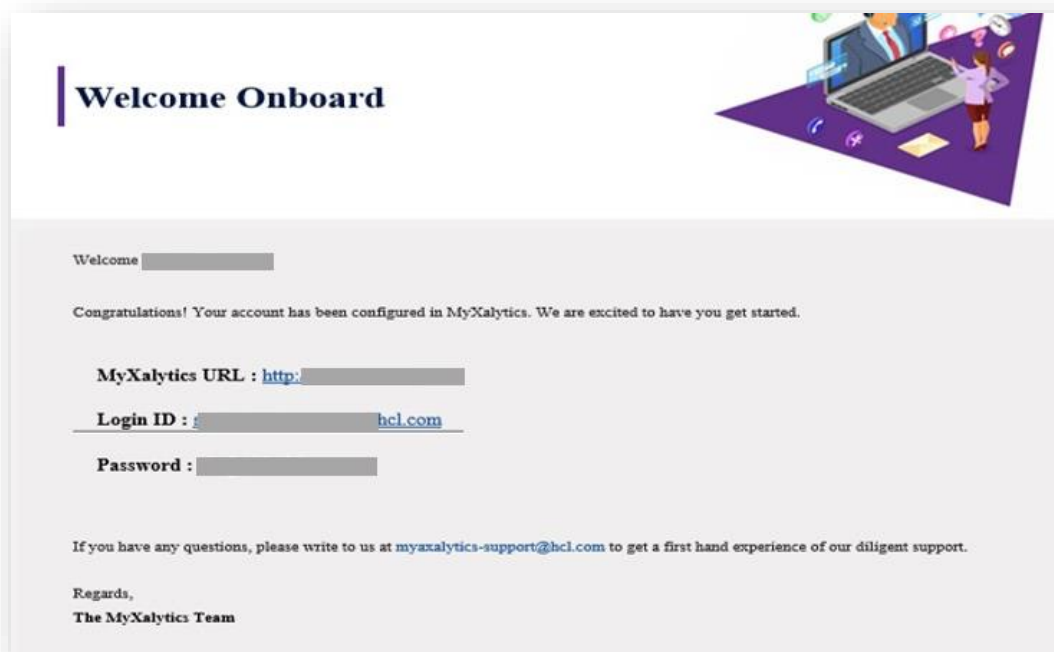


Figure 266 – Welcome Onboard Email

- If Request order status is Except “Pending” then System Admin click the View icon console will be displaying like following screenshot.

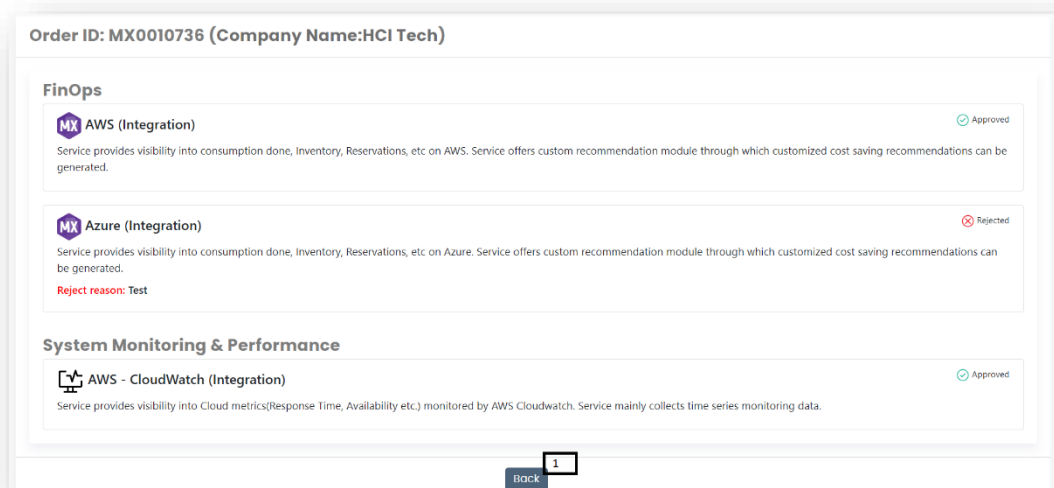


Figure 267 – View Icon Console

- Once Click the “Close” button this console will hide, and it’s redirect to the approval Dashboard.
- Request order is approved successfully then user will login into our MyXalytics Application. The following screenshot below is our MyXalytics application Login Page.
- User ID is whatever at the time of customer registration given the email need to enter in user Id and whatever at the time of customer registration password given that password need to enter in Password Textbox.

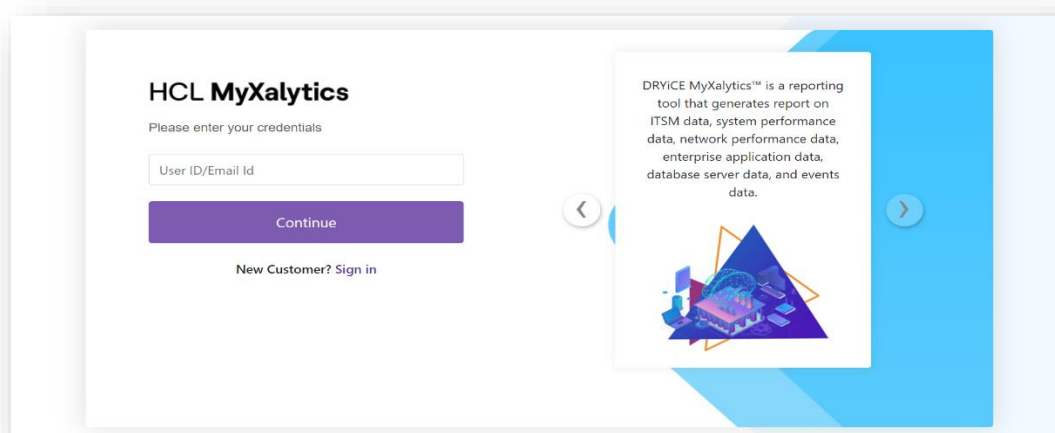


Figure 268 – MyXalytics Login

Score Card:

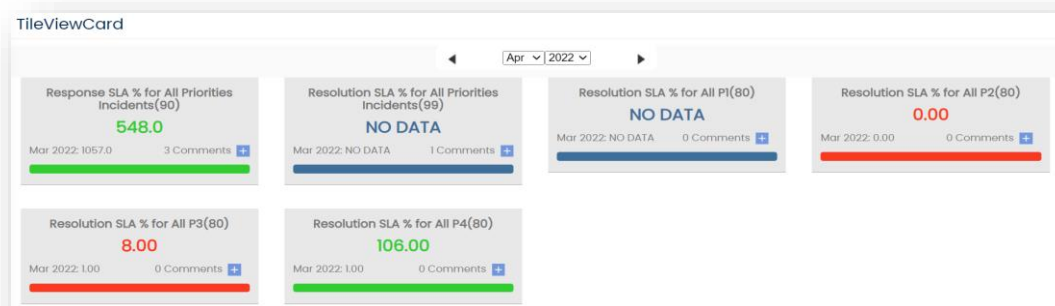
ScoreCardView

◀ Apr 2022 ▶

KPIName	M T	MISSED	TOTAL	Comments
Response SLA % for All Priorities Incidents	548.00	123.0	671.00	This is also a test comment 3 Comments Add/View Comments
Resolution SLA % for All Priorities Incidents	No Data	No Data	No Data	This is the test comment 1 Comments Add/View Comments
Response SLA % for P1	No Data	No Data	No Data	Add/View Comments
Response SLA % for P4	494	106	600	Add/View Comments

Figure 269 – Score Card View

Tile View:



ScoreCardView

Apr | 2022

KPIName	MET	MISSED	TOTAL	Comments
Response SLA % for All Priorities Incidents	548.00	123.0	671.00	This is also a test comment 3 Comments Add/View Comments
Resolution SLA % for All Priorities Incidents	No Data	No Data	No Data	This is the test comment 1 Comments Add/View Comments
Response SLA % for P1	No Data	No Data	No Data	Add/View Comments
Response SLA % for P4	494	106	600	Add/View Comments

Figure 270 – Score Card View

- In backend, tool stores the virtual as well as physical measure/measures for reference.

18 FinOps Practitioner Advisory workflow

Objective:

The document is aimed at letting PS/FinOps admin understand the scope and workflow for configuring, publishing and consuming the FinOps advisories. Document lists down the use cases which are getting handled by this module.

Scope:

Administration and consumption of public cloud advisories via MyXalytics.

This Module consists of two Consoles:

1. Administration console to be used by FinOps practitioners to create/publish the public Cloud Advisories.
2. The end User console will be used by User to consume Advisory.

WorkFlow:

- Advisory Administration
- Sequence Diagram

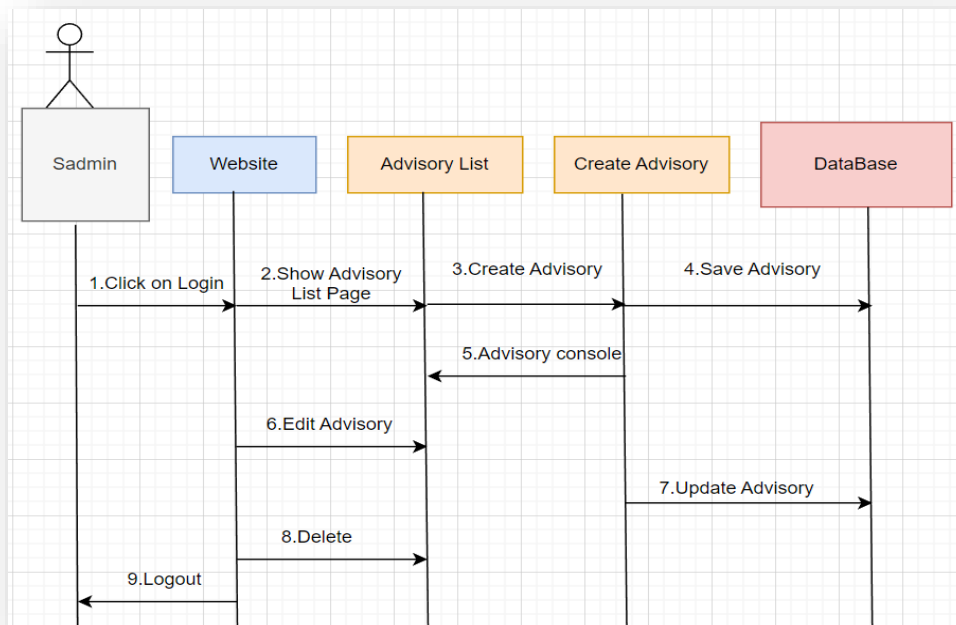


Figure 271 – Sequence Diagram

As per the workflow FinOps Practitioner (Super User role) will use MyXalytics advisory console to create and publish public cloud advisories. End-user console will showcase these published Advisories to the User basis subscribed integrations (AWS, GCP, AZURE and General). At any point in time, the latest advisories will be visible to the User, historical advisory will not be accessible to the User.

Below are the Use Cases/Scenarios for the Advisory admin console:

- All the advisories should be listed for the User based on engagement he belongs to, and the Cloud provider integration subscribed to by the engagement.
- For already available advisories edit/delete options will be available.
- Only users with Super admin role can access the admin console.
- Users with Super admin role can click the delete button to deactivate the advisory.

- Users with Super admin role can create new advisory for a cloud provider if no advisory for the particular cloud provider exists. Validation will be available for the same.
- If no cloud provider integrations are subscribed by the user, then General advisories should be available.
- General advisories should be shown as first advisory.
- Advisories for 4 cloud providers (AWS, Azure, GCP and General) will be available.
- There will not be any engagement specific advisories but Global advisories only.
- Do not allow creating duplicate advisories for providers.
- Description text should be minimum three characters. No max limit to be defined as of now. In future after gauging the standard text size validation will be defined.
- Recommendation textbox will allow the alphabets, Special characters and numbers to be entered.
- The recommendation text should be minimum three characters. No max limit to be defined as of now. In future after gauging the standard text size validation will be defined.
- After entering recommendation content admin can change that content by using text editor.
- User can change the content with following styles in text editor formatting options
- Audit fields will be logged (when and who is modified/added) whenever any change/insertion is done.
- Advisory once created will instantly be visible to users of all engagements for consumption which means advisory is global for a dedicated/shared instance of MYXA.
- Advisory admin console text editor should show style changes instantly i.e. text formatting should be allowed to be seen before saving.
- Products will be provided out of box 1 advisory for each cloud provider (AWS, Azure, GCP and General)

Pre-requisites:

- Super admin role is required to access the advisory console and add cloud provider specific advisories.
- FinOps practitioners must be users of engagement ID “BC01”. This engagement is a shared engagement hence able to publish and maintain the global data.
- Advisories should be published by the Super user globally.
- Advisories will be manually updated as per the latest inputs from FinOps practitioners in each environment/instance of MYXA.
- For adding the advisory admin console will look like below screenshot

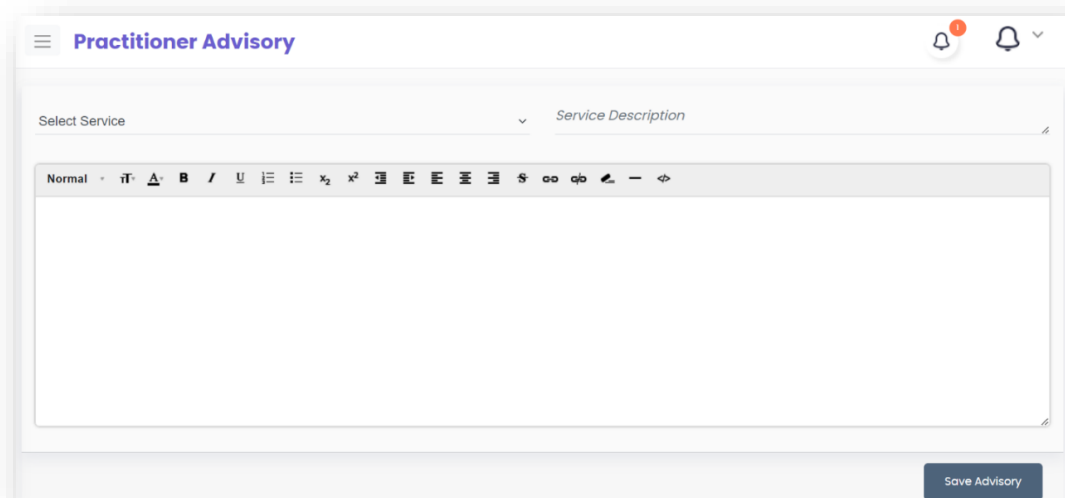


Figure 272 – Practitioner Advisory

Role Bases Access Control (RBAC):

- Application will handle Permissions by using RBAC and .Net core WEB API Token.
- As per OOB permissions this console will be added to super admin role only.

UI/API:

- Console will be built on MVC as a dedicated page and interaction will happen via API's built on .net Core.

End user console:

- Users should be able to view and export the advisories. If a customer has not opted for a cloud provider integration, then advisory for other cloud provider will not be visible to the user. Any customer who opts for FINOPS will be able to access advisories by default. These advisories are available to users in a read-only manner.

Sequence Diagram:

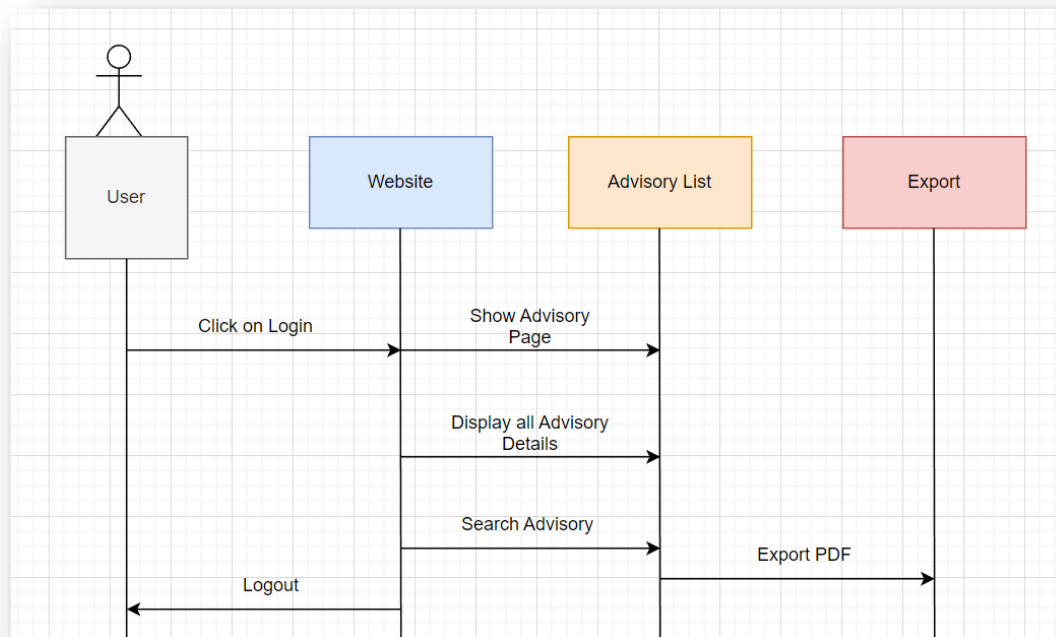


Figure 273 – Sequence Diagram

Advisory console sample:

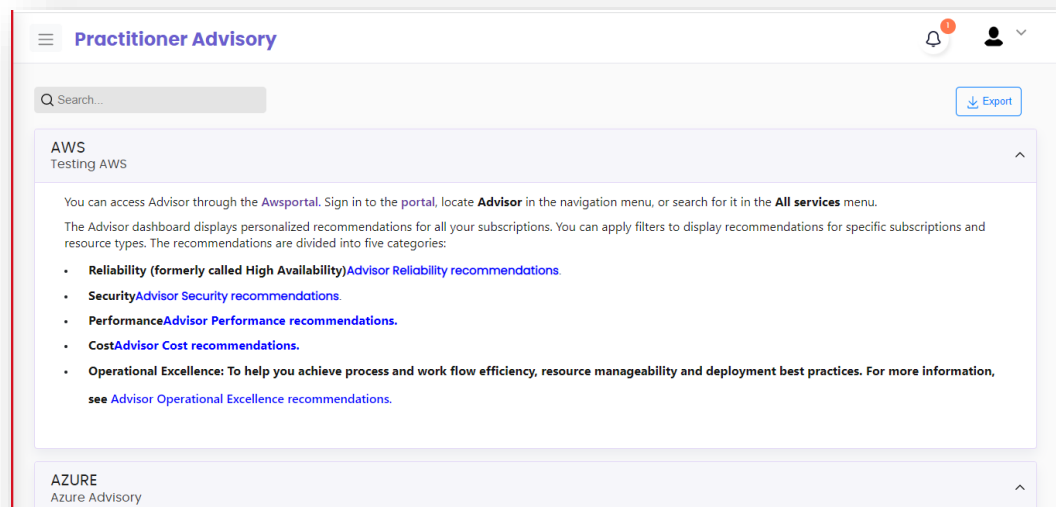


Figure 274 – Practitioner Advisory

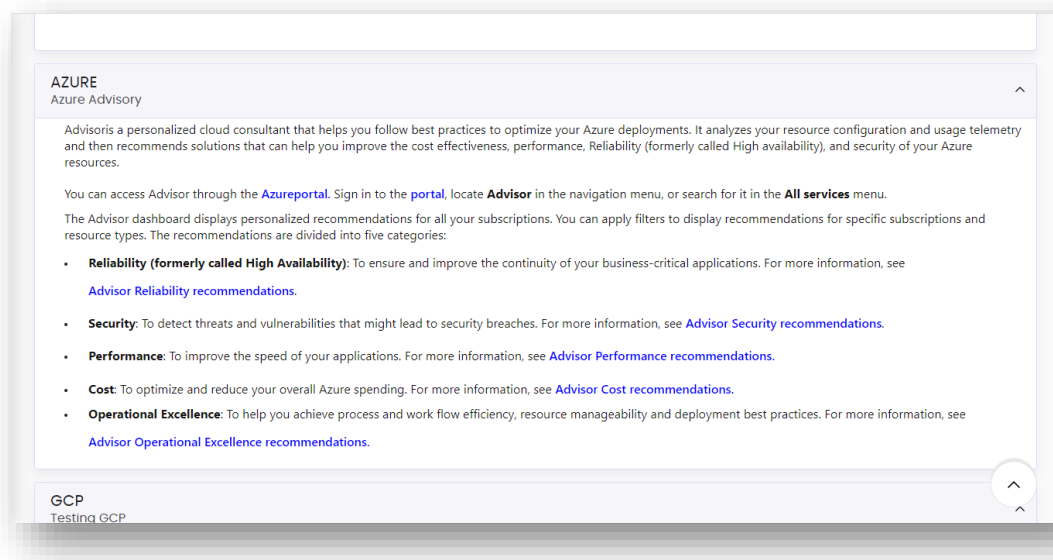


Figure 275 – Azure Advisory

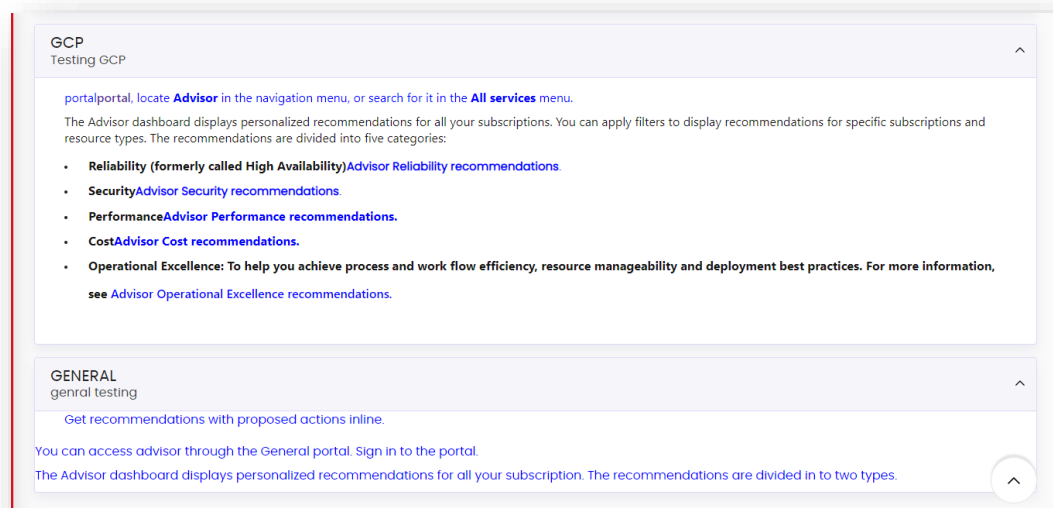


Figure 276– GCP Testing

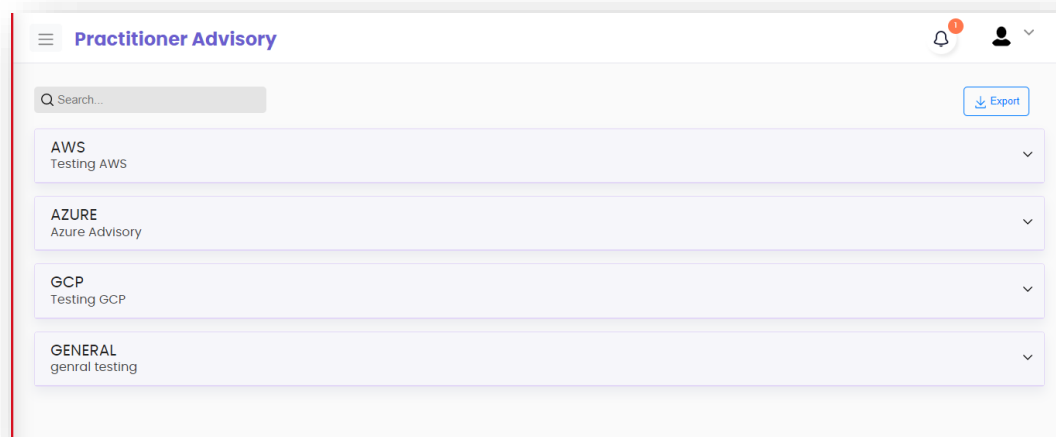


Figure 277 – Practitioner Advisory

Use Cases:

- This console is accessible only by the Users.
- Permissions will be controlled by using RBAC and .Net core WEB Api Token.
- Users can view advisories for the public cloud integration opted by the engagement to which user belongs.
- Users can be able to download advisories in (PPT/PDF/EXCEL).
- All providers and recommendations will be shown section wise.
- In this console if user clicks the hyper link based on URL it will redirect to place on Popup.
- If Advisory is not available, then console will show "No Advisory Available".
- In System admin only General advisory is shown by default and then it will be shown on show advisory page for Sadmin. In Admin credentials by default, it will show the advisory in Sadmin's create advisory until created from create advisory of the admin's engagement.

19 Candle Template

19.1 Overview

- This Candle Chart Data Visualization is developed to handle the Performance related DataSource's
- And this chart visualization is populated on Date basis Dimensions
- And This required 3 measures consist of Average, Minimum, Maximum with that values this chart will showcase us the visualization of Candle.
- We can use this Candle Chart when you need to see any of the Dataset's Average, Minimum and Maximum together in a single Candle stick

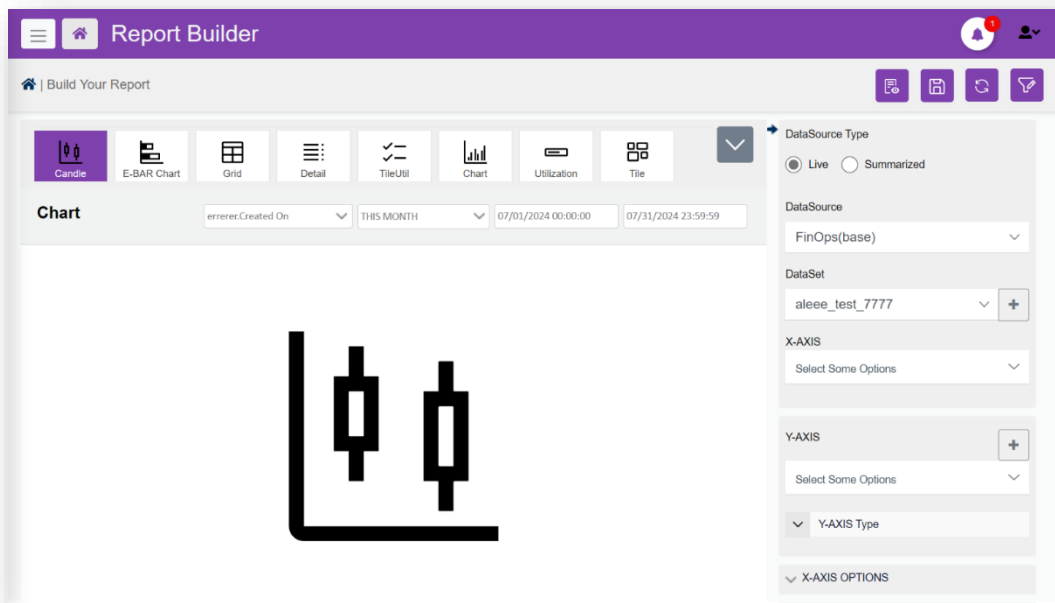


Figure 278 – Candle Chart

19.2 Sample Steps to Create Candle Template in Report Builder (* Mandatory Fields)

1. **DATASOURCE TYPE*** – Live by Default
 2. **DATASOURCE*** - Select MX_SysPerf option from the Dropdown
 3. **DATASET*** – Select any Dataset
 4. **X-AXIS*** – Should select only one Date option
 5. **Y-AXIS*** – Should select all three options
- Click on the Preview button. The chart will be populated

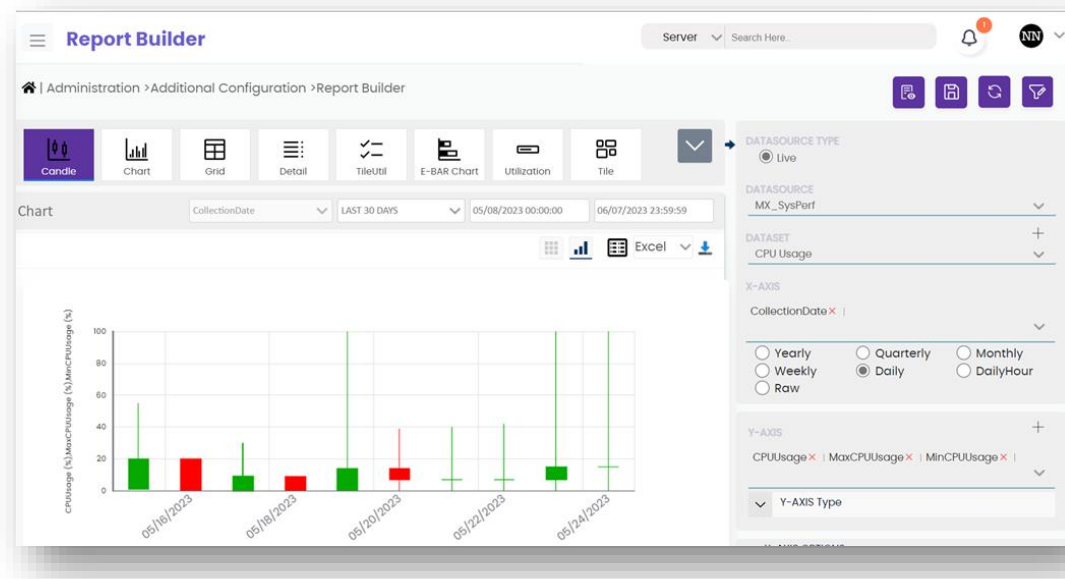


Figure 279 – Candle template in Report Builder

19.3 Properties (Optional)

You can modify the Template Designs by,

1. **X-AXIS Options** - Title and Label Properties, Font color, Font Family, Grid Lines, Interval
2. **Y-AXIS Options** - Title and Label Properties, Palette, Threshold, Scale, Grid Lines,
3. **Other Chart Options** - Chart Title, Back color, Show Unit
4. **Global Options** - No. of items, Sequence, Global Date on Widget, Drilldown, Grid
5. **Grid Options** - Pivot, Grid Position, Hyperlink, Page Size, Row Style, Border, Measure
6. **No Data Message** - Message and their properties.

19.4 Steps To Save Candle Template as Report in Home Page

1. Click on Save Icon Button
2. In Saved Reports, Default option is New to create a new report
3. In Report Name, Type a Report Name
4. In Report Description, Type a Report Description
5. In Profile(s)/Custom, select Global/My Report
6. In Report Gallery, New Gallery
7. In Dashboard, Create a new Dashboard
8. In View, create a New View and save it
9. And Go to Home Page to toggle the Menu in the list you can search your Saved Dashboard
10. And click it and your View will be appearing on the screen.

Save Report

Saved Reports:

New

*Report Name:

CANDLE TEMPLATE

*Report Description:

CANDLE TEMPLATE

☐ Save for CI Search Page

*Profile(s)/Custom:

Personal

*Report Gallery:

My Reports

Dashboard:

Test Candle Dashboard

View:

Test Candle Dashboard View

Save

Cancel

Figure 280 – Candle Save Report

19.4.1 Saved widget

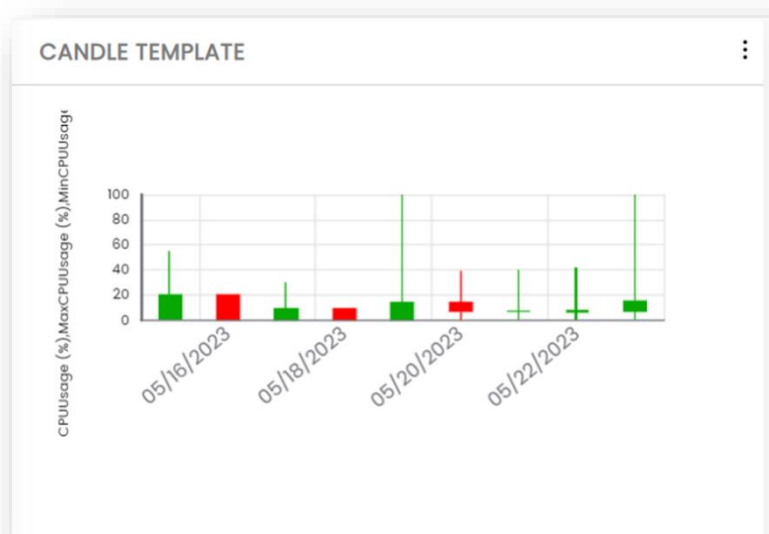


Figure 281 – Candle Saved Template

19.4.2 Saved Report

1. And you can Edit your saved report template by clicking on Three Dot on the top right
2. Clicking on Edit you will be redirected to the Report builder page with properties you have selected.
3. Also delete the widget from home dashboard and can also filter the data using the filter settings and advance settings option to display the other filtered options.

19.5 Default Color Settings:

1. When the open value is less than close value (open < close) it is Increase Green in color.

2. When the open value is greater than close value (open > close) it is Decrease Red in color.

19.6 Tooltip value showcase

There would be 4 labels visible on the tooltip such as open, close, lowest, highest

1. Close - Represents the Average value From the Measures
2. Lowest - Represents the Minimum value From the Measures
3. Highest - Represents the Maximum value From the Measures
4. Open - Represents the previous Date closed value (which is Average of Previous Date value)

19.7 View and Export Functionality

1. This candle chart has both grid view and Graph view shown in above images.
2. Exporting the report from the report builder page with pdf, ppt, excel is available.
3. As well as that, you can export the reports saved in the above following formats.

19.8 Features not available:

- DrillThrough Functionality is not applicable for the candle Template.

20 Topology Template

20.1 Overview

The Topology Chart Visualization is to showcase the relational View of Network types with their Latency passing from one Machine to another Machine and this chart visualization is populated basis on Relational Type like from Parent to Child or Source to Destination.

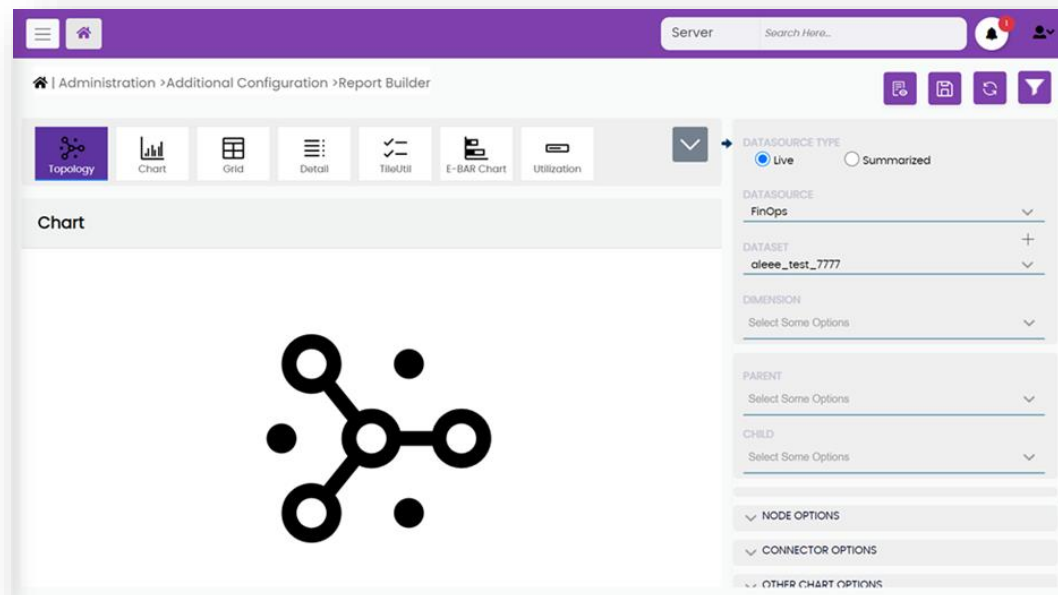


Figure 282 – Topology Template

20.2 Steps To Create Topology Template in Report Builder (Sample View) (* Mandatory Fields)

1. DATASOURCE TYPE* –Select LIVE
2. DATASOURCE* - Select FinOps
3. DATASET* – Select TOPOLGOY
4. DIMENSION* – Select the Dimensions that are required for this template to have the relational such has (Parent, Parent Type, Child, Child Type, Level, Status)
5. SOURCE* – Select one from the Dimension selected list which is Source/Parent.
6. DESTINATION – Select one from the Dimension selected list which is Destination/Child.
7. Measures* - Select one Measure (Like Latency which will pass from one nod to another node)
8. Click on Preview button to populate the chart.
9. If the selected Dataset doesn't have any relation between there or missing some Dimension to create the relational. A message will show as "Provided fields in dataset does not seem to have relation with each other. Please use suitable fields."

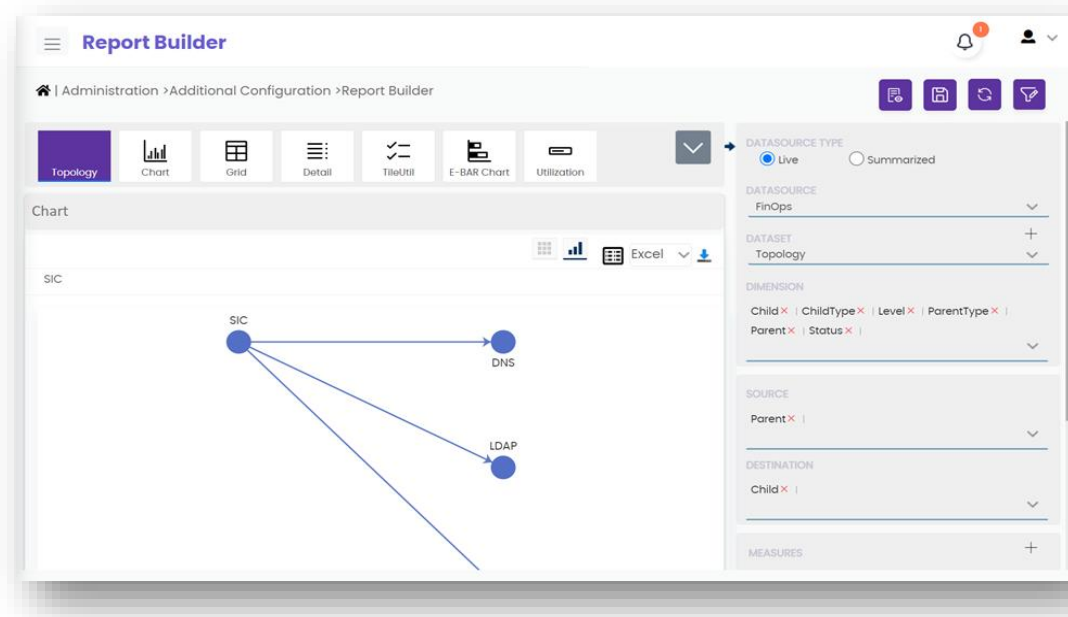


Figure 283 – Topology Chart View

20.3 Properties (Optional)

You can modify the Template Designs by,

20.3.1 Responsive Type

– Layout:

- Axis – Populated as Left to right in Straight Lines. (By Default)
 - Level 1, Level 2, Level 3 Increment used to Increase the Distance between the nodes.

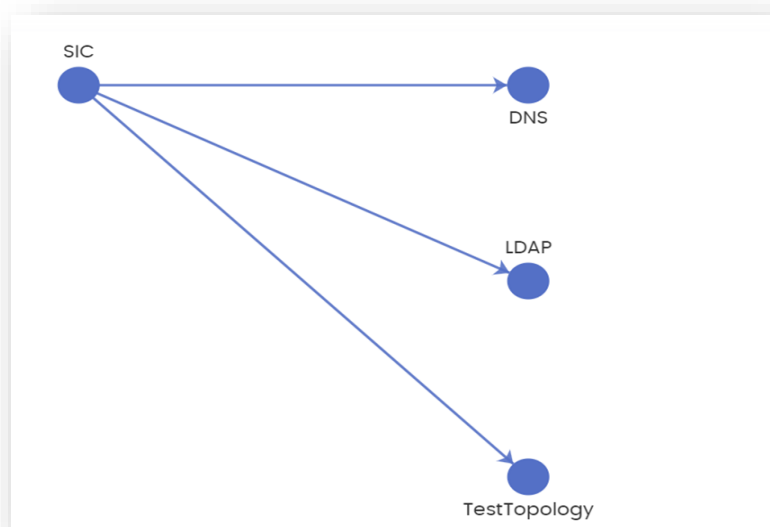


Figure 284 – Axis Layout

- Circular – Populated as Circular.

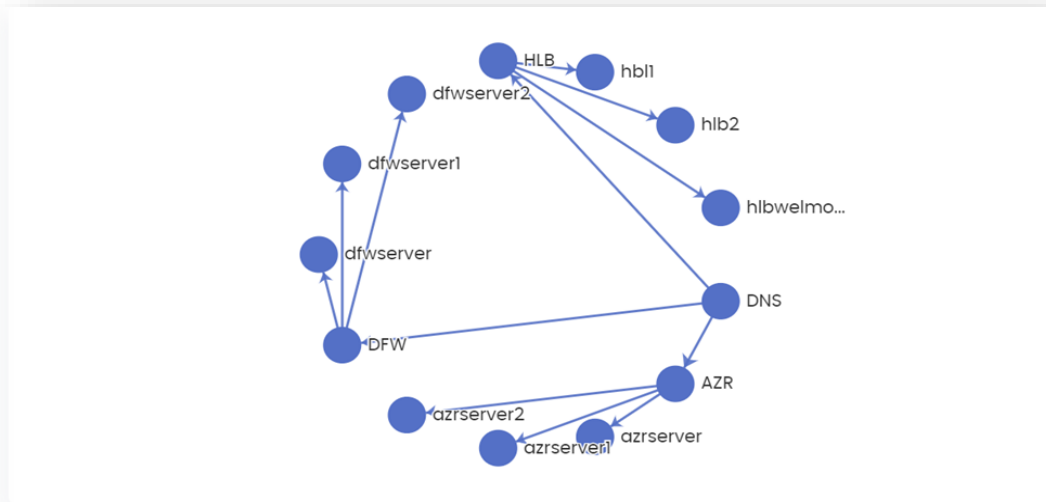


Figure 285 – Circular Layout

- Force – Populated as Force-Directed like Floating
 - **Repulsion** – To increase the Floating Space between each node.
 - **Edge Length** – To increase the Connector Length on this Forced Layout

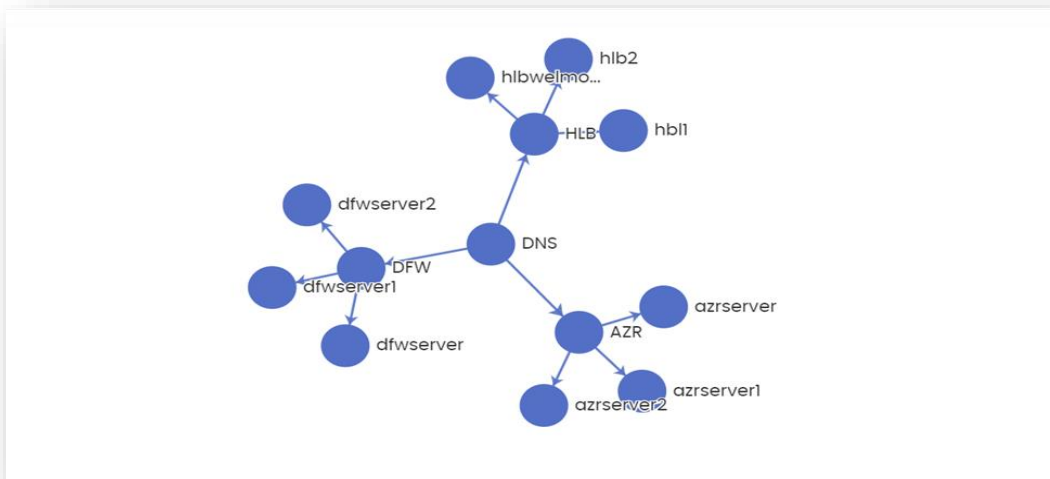


Figure 286 – Force Layout

- Roam:
 - True - Used to Drag the whole chart and Move the Chart
 - False – To Disable the dragging and Moving of the Chart and keep the chart in Static position.

20.3.2 Node Options

- Node Data Label:
 - Enable/Disable the Label of the Node
 - Font Family
 - Font Size
 - Font Weight
 - Font Rotation

- Node Symbol Size
 - Node Symbol Increase Value Dropdown

20.3.3 Connector Options

- Connector Data Label
 - Enable/Disable the connector label
 - Font Color
 - Font Family
 - Font Size
- Connector Line Style
 - Solid - straight single line, dashed – dashed line, Dotted – dotted line

20.3.4 Other Chart Options

- Chart Title
 - Font Color
 - Background Color
 - Font Family
 - Font Size
- Back Color
 - Fill Background color of the Chart Container

20.3.5 No Data Message

- Message (Set Message When there is No Data Available)
 - Font Color
 - Font Size
 - Font Family
 - Font Position

20.4 Steps To Save Topology Template as Report in Home Page

1. Click on Save Icon Button
2. In Saved Reports, Default option is New to create a new report
3. In Report Name, Type a Report Name
4. In Report Description, Type a Report Description
5. In Profile(s)/Custom, select Global/My Report
6. In Report Gallery, New Gallery
7. In Dashboard, create a new Dashboard or Choose old Dashboard
8. In View, create a new View or Choose old View
9. And save it
10. And Go to Home Page to toggle the Menu in the list you can search your Saved Dashboard
11. And click it and your View will be open with the Saved Template

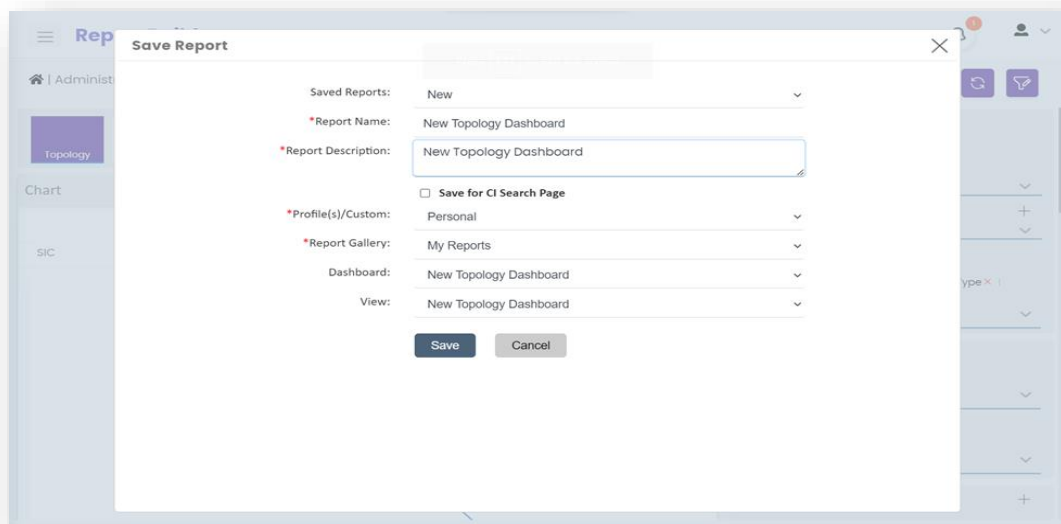


Figure 287 – Save Topology Report

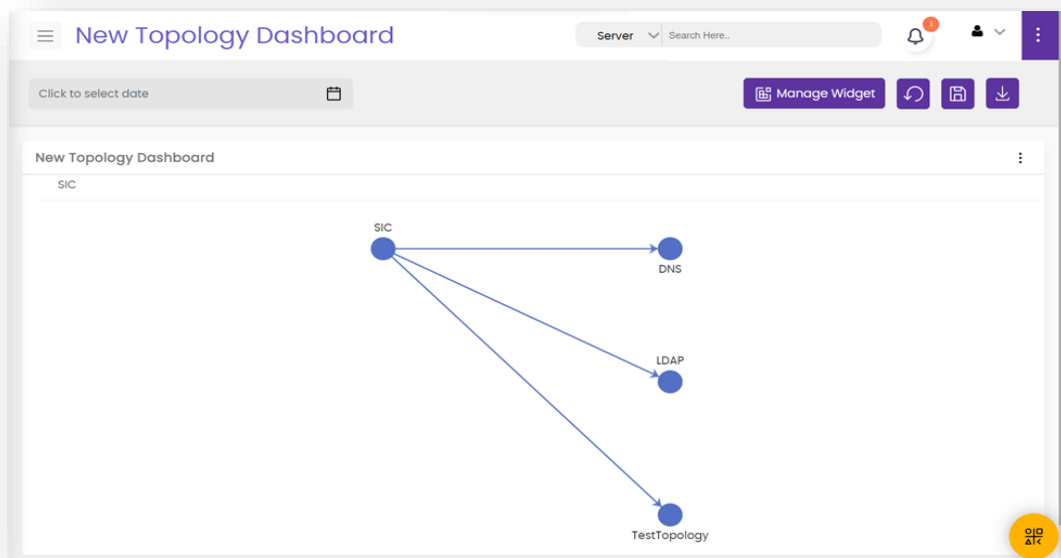


Figure 288 – Saved Report

12. And you can Edit your saved report template by clicking on Three Dot on the top right
13. Clicking on Edit you will be redirected to the Report builder page with properties you have selected.
14. Also delete the widget from home dashboard and can also filter the data using the filter settings and advance settings option to display the other filtered options

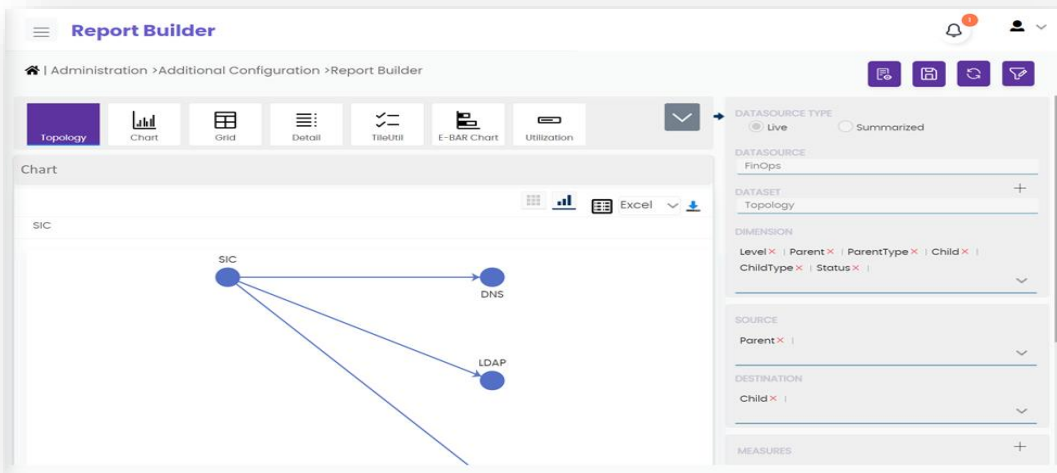


Figure 289 Saved Report in Report Builder

20.5 Drillthrough Functionality

1. There are 3 Level Drillthrough available for this template, where 1st Level showcase the Beginning of The Source/Parent on One Level Relational like from One node to another Node. clicking one of the child nodes will drillthrough to 2nd Level.

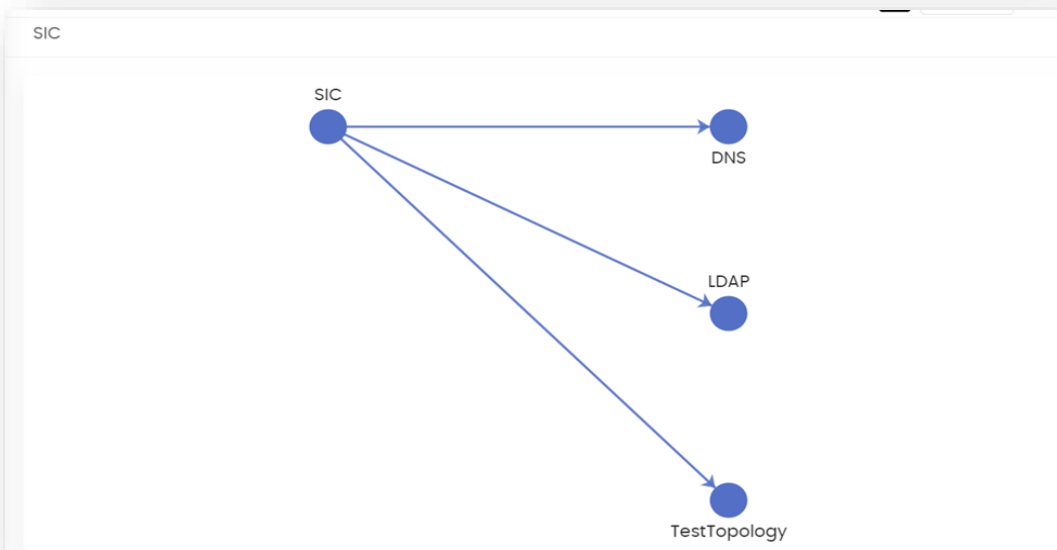


Figure 290 – First Level

2. On the 2nd Level, the chart will showcase the 2-level Relational like from Parent to Child and Child to Grandchild of the Node that you selected on the 1st Level. Clicking on the Least child/Grandchild will drillthrough to 3rd Level.

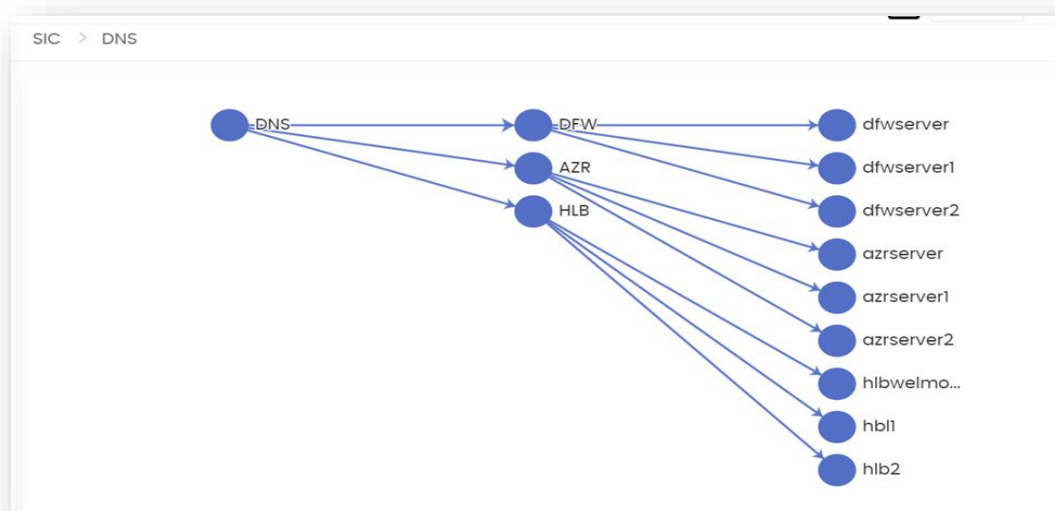


Figure 291 – Second Level

3. On 3rd Level (Last Level), the Chart will showcase the Full Hierarchy View of the Topology on basis of the Dataset provided which starts from one server and ends at multiple servers



Figure 292 – Third Level

4. And with Drillthrough Functionality we have a Breadcrumb Feature which enables us to move backward and forward on Level's which is available on the Top Left Corner above the Chart.
5. Breadcrumb states that First Level will be Default Parent/Source Name and basis of the user click on which Node it will Direct the Path of the Route so that user can Understand and use that functionality to move back and forth.

20.6 Conditional Formatting Chart

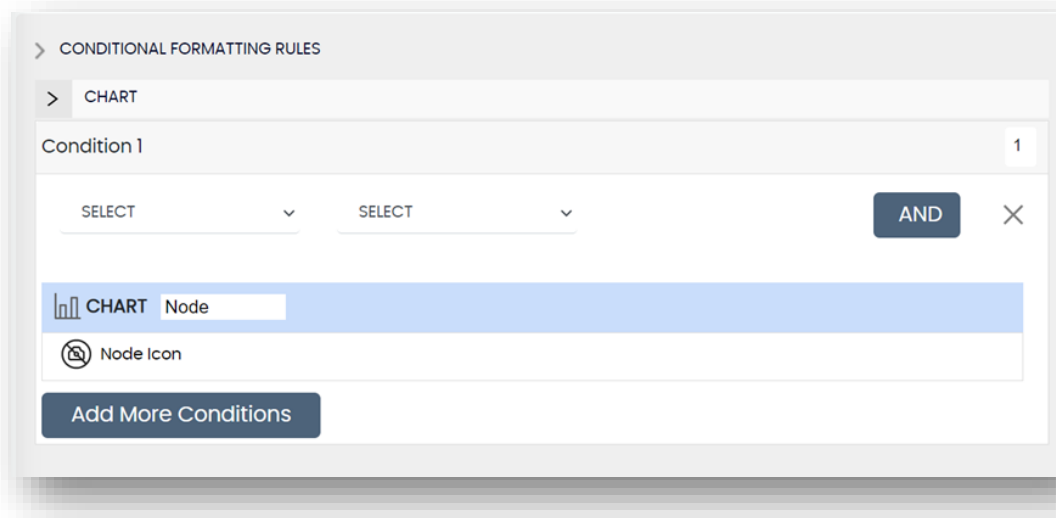


Figure 293 – Conditional Formatting

- Conditional Formatting for the Chart enables users to Apply different Color for the Connector and different icons for the Node based on condition.
- First Dropdown, for choosing which Dimension/Measure should be the condition to be applied.
- Second Dropdown, for choosing the operators
 - For String Type,
 - IS – Check for Exact Match of Dimension name
 - Contains – Check for the word whether it contains the values
 - For Numeric Type, (Measure)
 - Greater Than
 - Less Than
 - Equal To
 - Greater Than Equal To
 - Less Than Equal To
- Third Dropdown, for Entering the user input (String values or Numeric values)
- And Using “AND” button user can make multiple operators for single Condition with Measure (Numeric Types)
- For the Measure (Numeric Types), User can handle by selecting Connector in the Dropdown. Which allows the user to see the flow path of connector where the values/Measure passing fulfills the condition on each Level by Drillthrough and in the 3rd Level we will be having all the Latency values Passing through from one node to another node.

Condition 1

Latency(Measure) Greater Than 1000 AND

Latency(Measure) Less Than 2000 AND

CHART Connector

Item Format: #16FF1A

Figure 294 - Condition

- And For the Dimension (String Types), User can handle by selecting Node in the dropdown. Which allows the user to see the icon which fulfills the condition on every level by drillthrough.

Condition 2

Parent Is SIC AND

CHART Node

Node Icon

Figure 295 – Condition (Cont.)

- And user can multiply condition, by clicking “Add More Conditions” button. If any of the conditions are the same as the previous condition the new condition will override the old one.

Add More Conditions

Figure 296 – Add more Conditions

- Example 1, for Conditional formatting:
 - For Connector: (Numeric Value/Measures) - Latency
 - Latency > 1000 && Latency < 2000 (This will make connector path with green line flows till where the Latency Value available in the Level 3 Hierarchy)

> CHART

Condition 1 1

Latency(Measure)	Greater Than	1000	AND	X
Latency(Measure)	Less Than	2000	AND	X

CHART Connector

Item Format:  #16FF1A

Add More Conditions

Figure 297 – Chart Condition

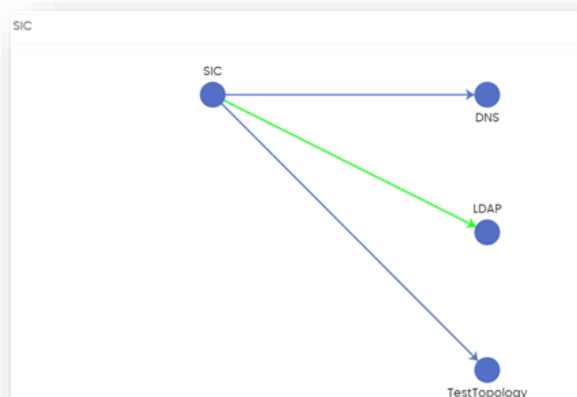


Figure 298 – Level 1



Figure 299 – Level 2

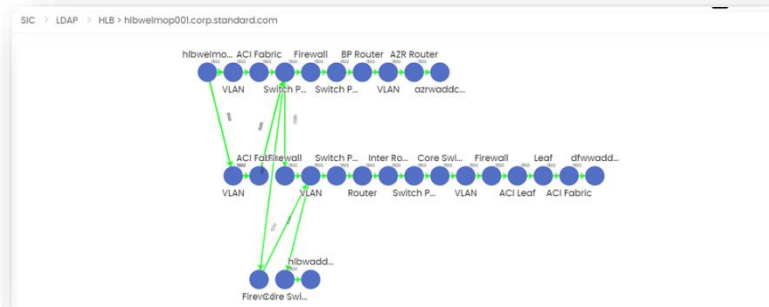


Figure 300 – Level 3

– Example 2:

- For Node: (String/Dimensions) – Parent, Child, ParentTypes, ChildType
- The Dimension selected operator “IS” with value hold “sic” will have the Icon selected by the user.
- For this Sample Data in Dimension Parent, Parent Type, Child, Child Type will behave the same. Like “Child” as “sic” will change the icons, since we handle all the data as node and connector.

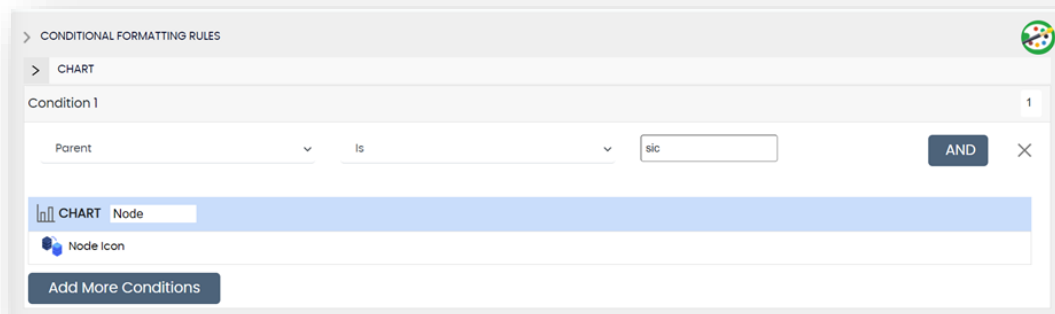


Figure 301 – Chart Condition

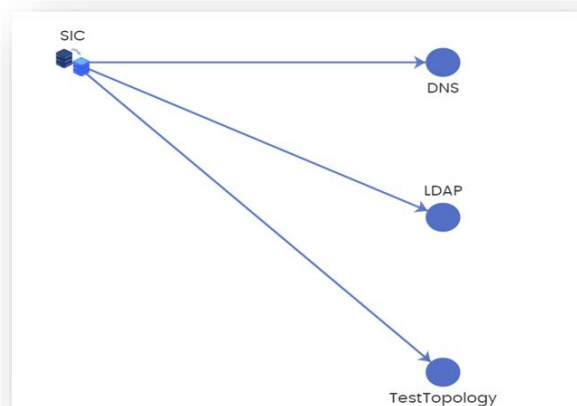


Figure 302 – Icon Example

– Example 3:

- For Node/Connector: Dimension -> Is -> Status
- For this Dimension, we can handle Connector and Node, since we have flow path.
- Status contains Danger, Ok and Warning. By using this we can modify the color or icon thing.

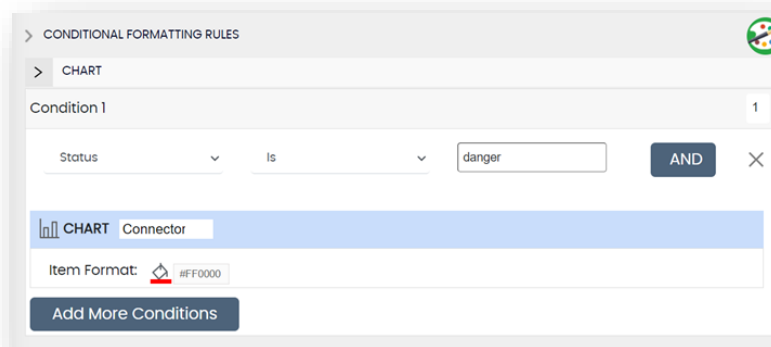


Figure 303 – Chart Condition

- Status Dimension “Is” Danger will change show use the flow path from beginning to end where the danger status is flowing.

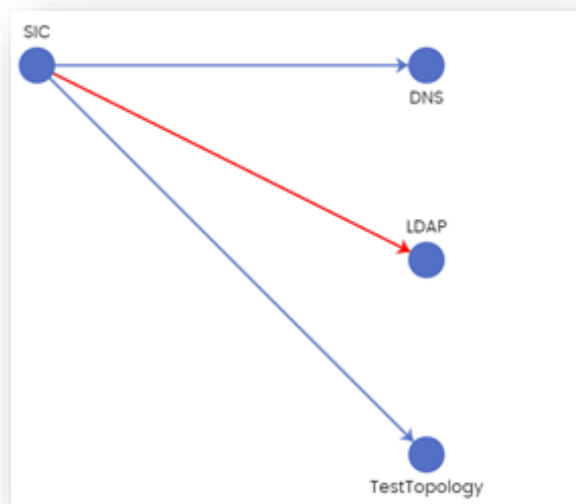


Figure 304 – Level 1

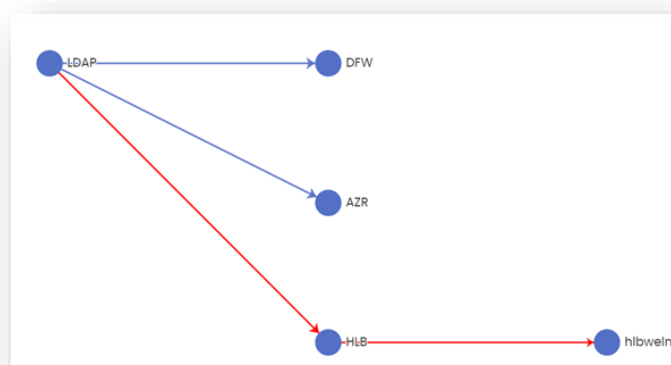


Figure 305 – Level 2

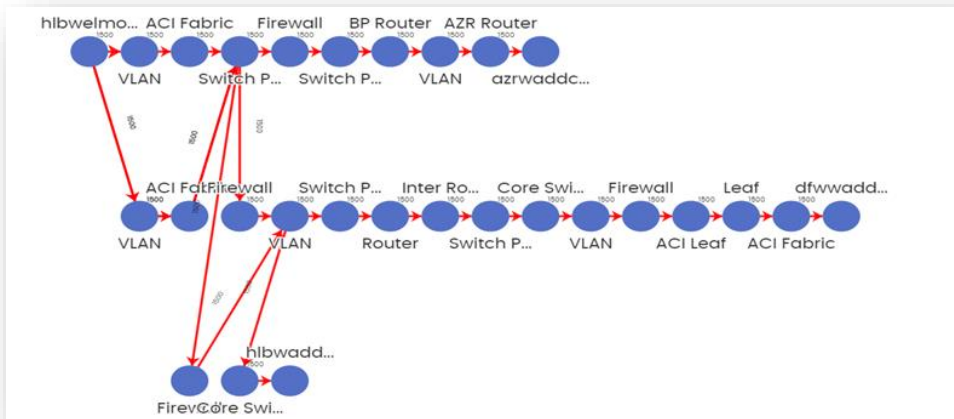


Figure 306 - Level 3

- Adding 2nd Condition for the Node with Dimension Status will now show us both Node and Connector For this specific Dimension.

Condition 2 1

Status Is danger AND X

☒ CHART Node

● Node Icon

Add More Conditions

Figure 307 – Condition (Cont.)

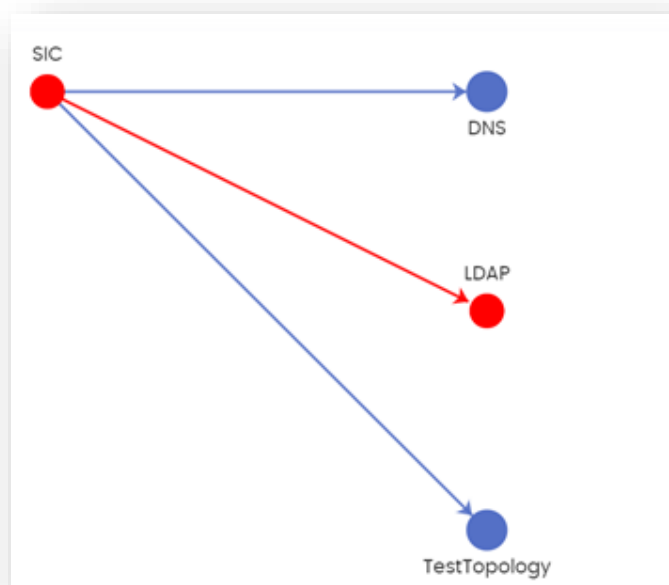


Figure 308 – Level 1

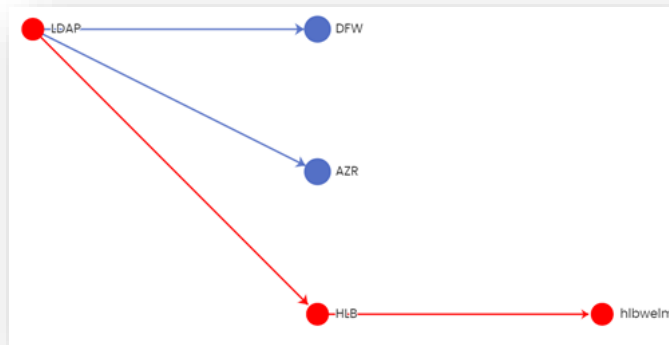


Figure 309 – Level 2

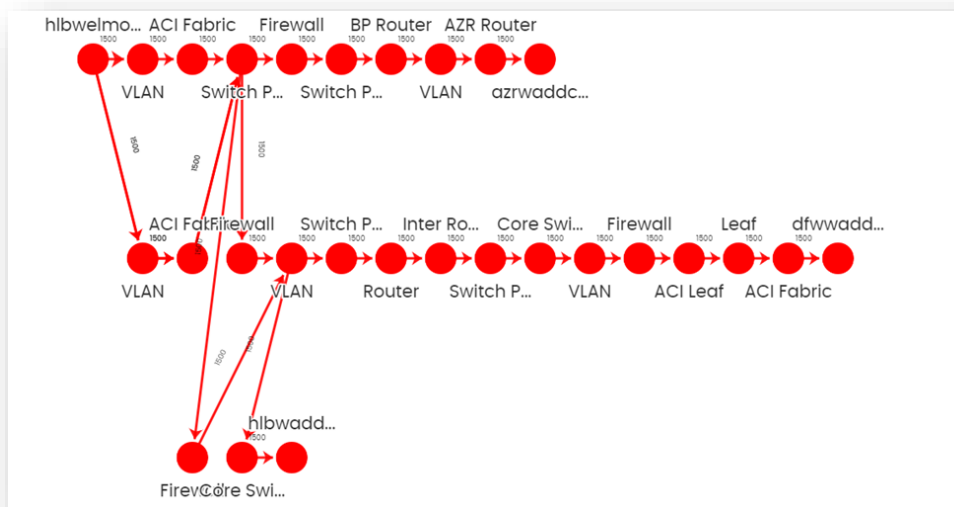


Figure 310 – Level 3

- Icon Conditional Formatting View:

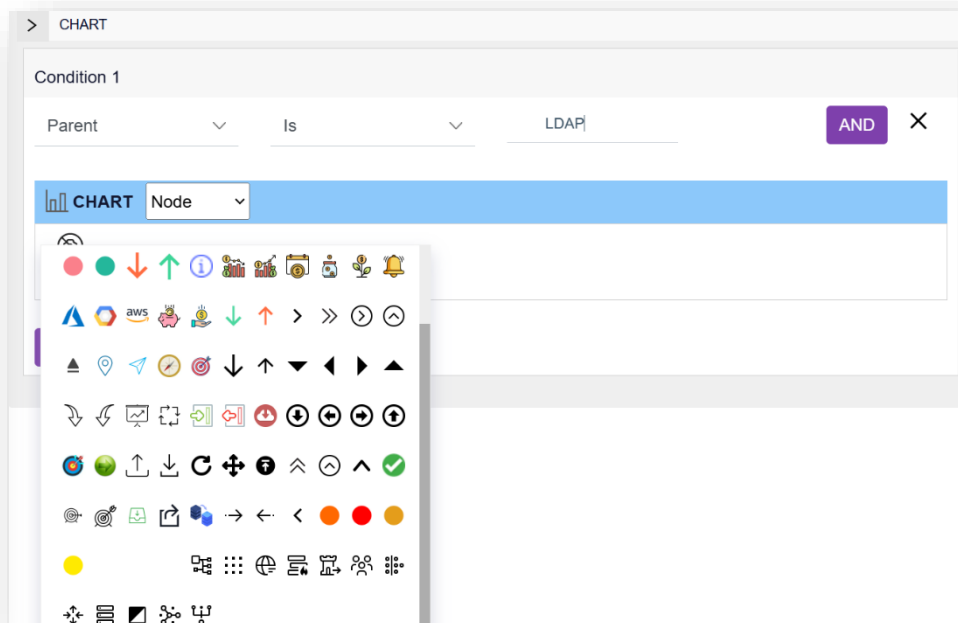


Figure 311 – Selecting Icons

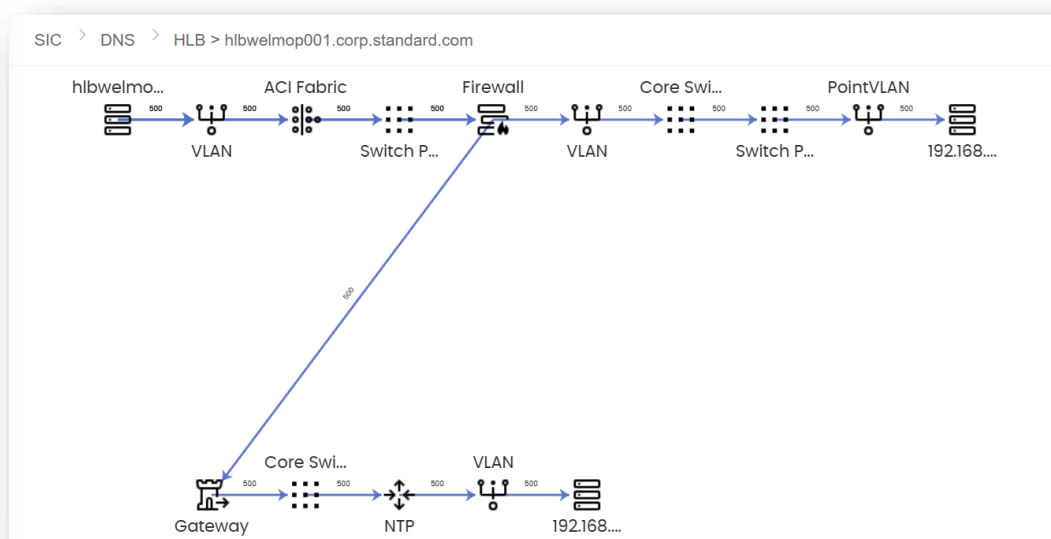


Figure 312 – topology View with Icons

20.7 Points to Remember / Limitation of Topology Template: (In this Sample Dataset)

20.7.1 Properties

- Dimension – Parent, ParentType, Child, ChildType, Level is mandatory, and status is optional
- Measure – One Measure is mandatory
- Parent – Select the Parent
- Child – Select the Child

20.7.2 Condition Formatting

1. **For Dimension** – String Type – Parent, Child, Parent Type, Child Type - used to handle the condition using Node icon, where we use it for to change the icon symbol using “is” and “contains” operator.
2. **For Measure** – Numeric Type – used to handle the condition using connector line, it used to showcase the flow path from beginning/source to end/destination where the value is passing on which servers on the 3rd Level.
3. **For Dimension** – String Type – STATUS – Handles Connector and Node since each node and connector have a flow path for this dimension so that use can view briefly where something goes wrong or right, by changing the icon and line color.
4. **From 3rd Level** - you can format the icon using both Parent, ParentType, Child, ChildType names (which shows in tooltip) if they are different.
5. Adding Same condition as previous condition, old condition will be overridden by the new condition.

20.7.3 Miscellaneous

1. When the nodes are more than 50 on Third Level, the Node size and font size is statically set.
2. Use Breadcrumb feature to move back/previous level.
3. Dataset for this template is created manually, particularly for this SIC and dataset can be changed for other type of network view or any other by the help of dataset creation section below.
4. If provided dataset is not matched with relation, “Provided fields in dataset does not seem to have relation with each other. Please use suitable fields.” Text will be populated.
5. We cannot use the filtering options and date trends for this template. Since, we will be required to have the whole data which has relationship basis, where filtering will remove their relation.
6. Scheduler and Export are not enabled in this release.

21 TimeLine Template

21.1 Overview

The Timeline Chart Visualization is to showcase the resource change history details of a particular CI.

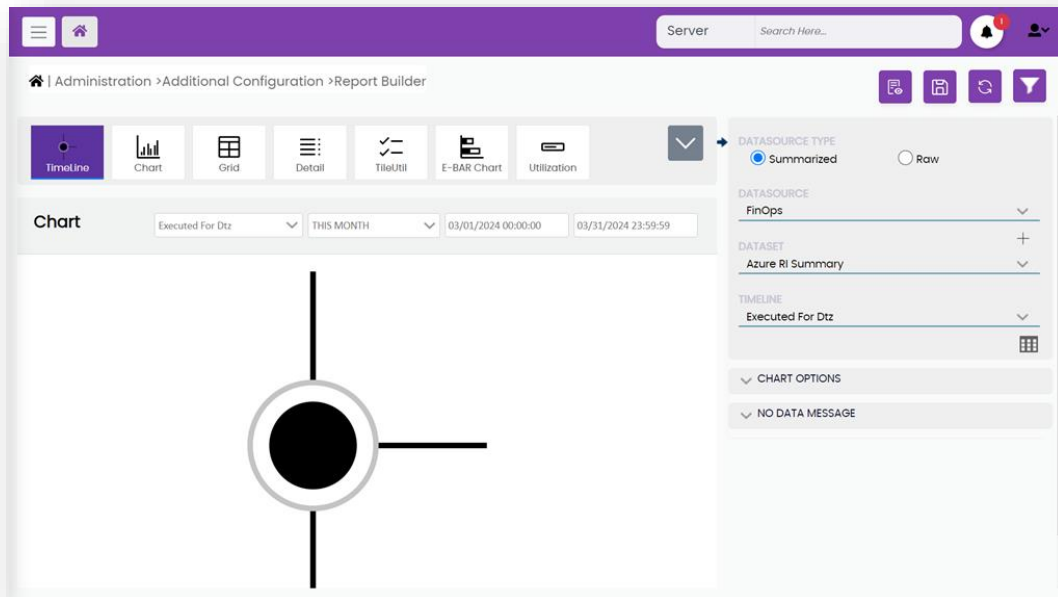


Figure 313 – Timeline Template

21.2 Steps To Create Timeline Template in Report Builder (Sample View) (* Mandatory Fields)

1. DATASOURCE TYPE* –Select Summarized or Raw
2. DATASOURCE* - Select Any
3. DATASET* – Select Any
4. TIMELINE* – Select any one Date Type Column
5. DIMENSIONS* - Click on Table Icon below the Timeline Dropdown to choose the required columns for the content (Select All by Default)
6. Click on Preview button to populate the chart.

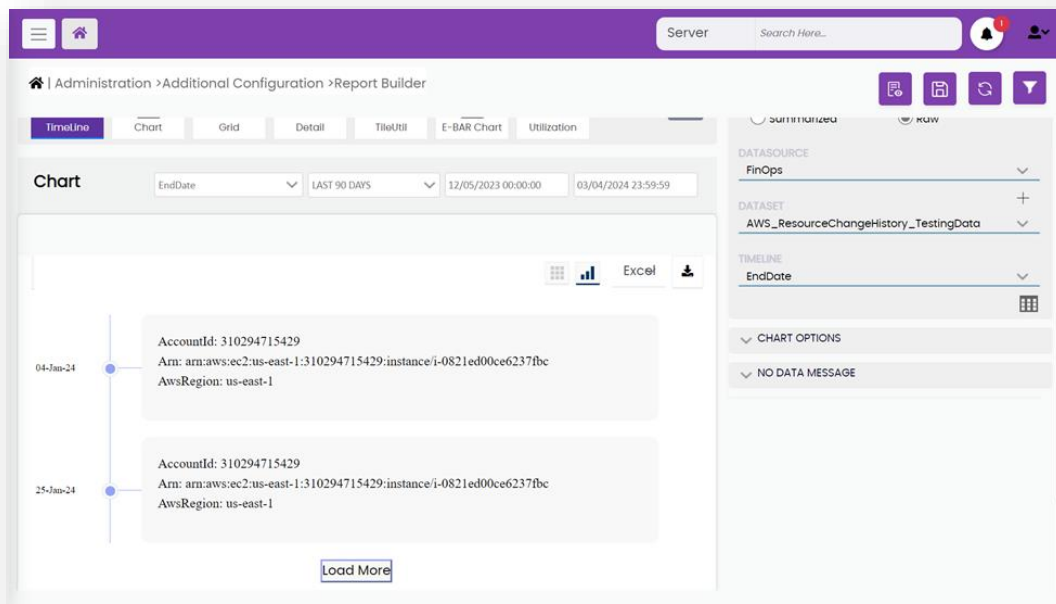


Figure 314 - sample screen shot of timeline template

21.3 Properties (Optional)

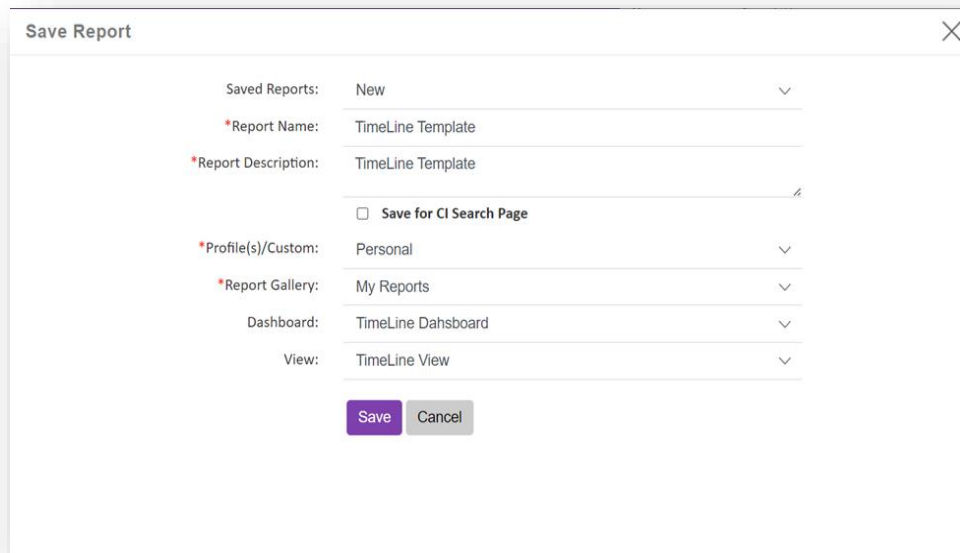
You can modify the Template Designs by

- Chart Options
 - Content Options
 - Font Color
 - Font Family
 - Font Size
 - Date Options
 - Font Color
 - Font Family
- No Data Message
 - Message (Set Message When there is No Data Available)
 - Font Color
 - Font Size
 - Font Family
 - Font Position

21.4 Steps To Save Timeline Template as Report in Home Page and Insight

1. Click on Save Icon Button
2. In Saved Reports, Default option is New to create a new report
3. In Report Name, Type a Report Name
4. In Report Description, Type a Report Description
5. In Profile(s)/Custom, select Global/My Report
6. In Report Gallery, New Gallery

7. In Dashboard, create a new Dashboard or Choose old Dashboard
8. In View, create a new View or Choose old View
9. And save it
10. And Go to Home Page to toggle the Menu in the list you can search your Saved Dashboard
11. And click it and your View will be open with the Saved Template

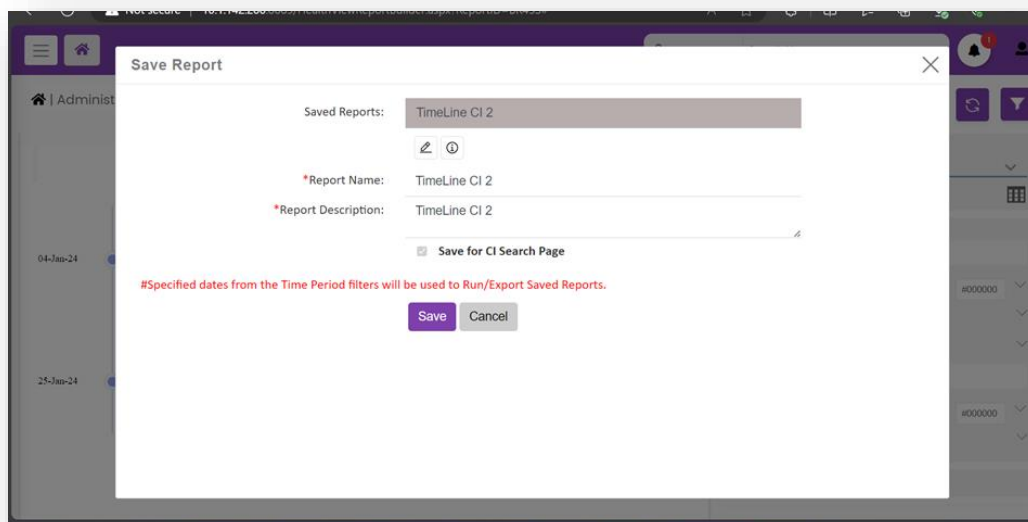


The image shows a 'Save Report' dialog box with the following fields and options:

- Saved Reports: New
- *Report Name: TimeLine Template
- *Report Description: TimeLine Template
- ☐ Save for CI Search Page
- *Profile(s)/Custom: Personal
- *Report Gallery: My Reports
- Dashboard: TimeLine Dahsboard
- View: TimeLine View
- Buttons: Save, Cancel

Figure 315 – Save Options

12. Select the Save for CI search Page Checkbox to Save it in CI for Mapping.



The image shows the 'Save Report' dialog box with the 'Save for CI Search Page' checkbox checked. The fields are filled with 'TimeLine CI 2'. A red warning message is displayed below the checkbox:

#Specified dates from the Time Period filters will be used to Run/Export Saved Reports.

Buttons: Save, Cancel

Figure 316 – Saved CI

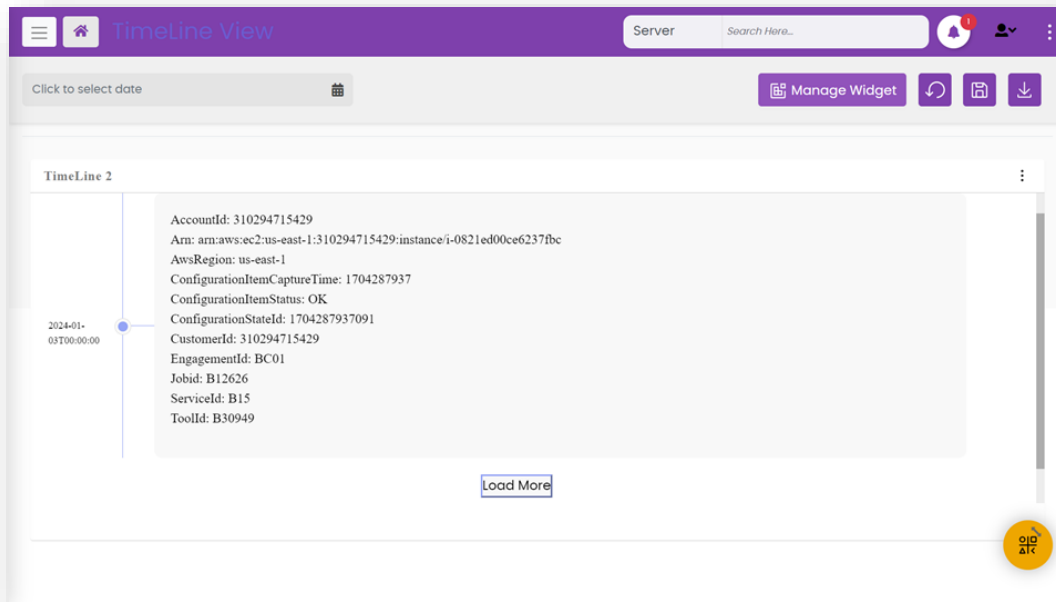


Figure 317 - Saved Report on Home Page

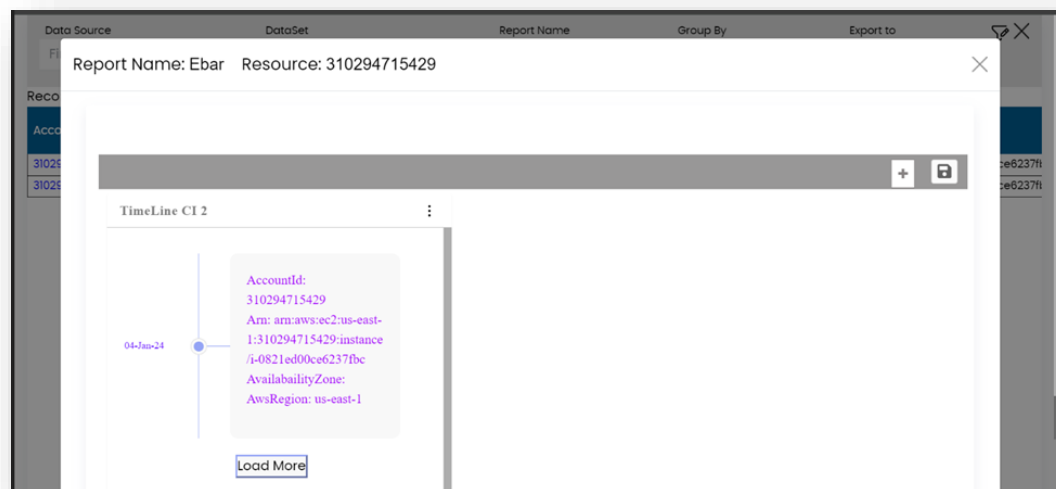


Figure 318 – Saved Report on CI Page

13. And you can Edit your saved report template by clicking on Three Dot on the top right
14. Clicking on Edit you will be redirected to the Report builder page with properties you have selected.
15. Also delete the widget from home dashboard/un map in CI

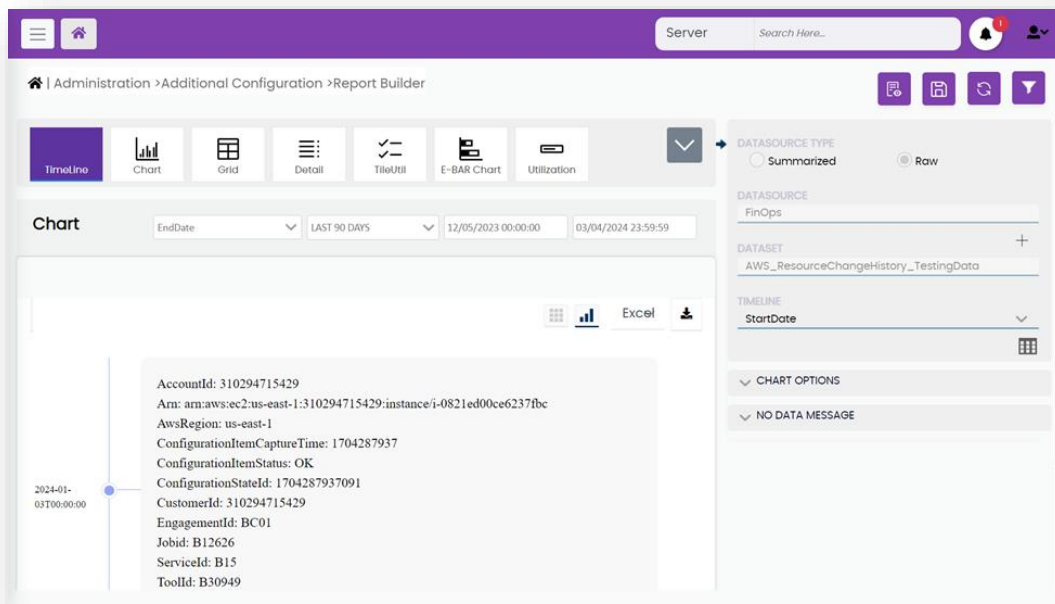


Figure 319 - Edit Saved Report in Report Builder

21.5 Points To Remember/ Limitation

1. Timeline Dropdown will contain only Date Type Values (Can be changed in Universe Configuration), and it is Mandatory to select the dropdown and Validation message will be displayed if there are no options available to select.
2. And select at least one column in the Dimension Selection (using Table Icon Drilldown Selection Columns)
3. When there is more Data, we can use Load More button option to load more data.
4. Export for Chart and Scheduler is not Enabled in this release.

22 Geo Health Template

22.1 Overview

The GEO HEALTH Chart Visualization is to showcase its near to the real time health status respective to the CI based on hierarchy.

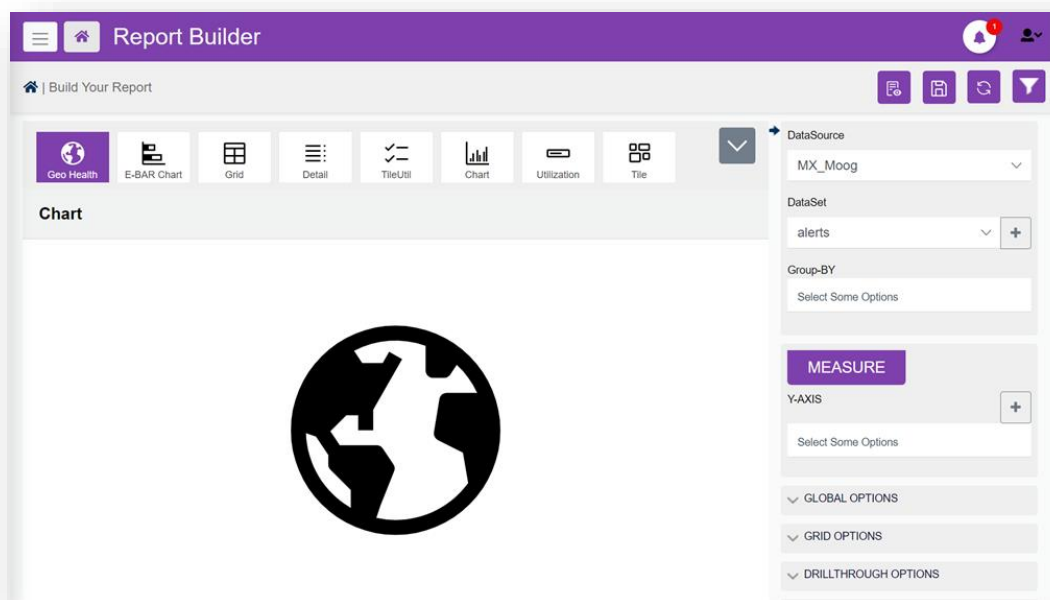


Figure 320 – Geo Health Template



Figure 321 – Geo Health View

22.2 Steps To Create Geo Health Template in Report Builder (Sample View) (* Mandatory Fields)

1. DATASOURCE* - Mx_Moog
2. DATASET* - Geo Health Master
3. Group-By* - Country
4. Measure* - Status
5. Click on Preview button to populate the chart.

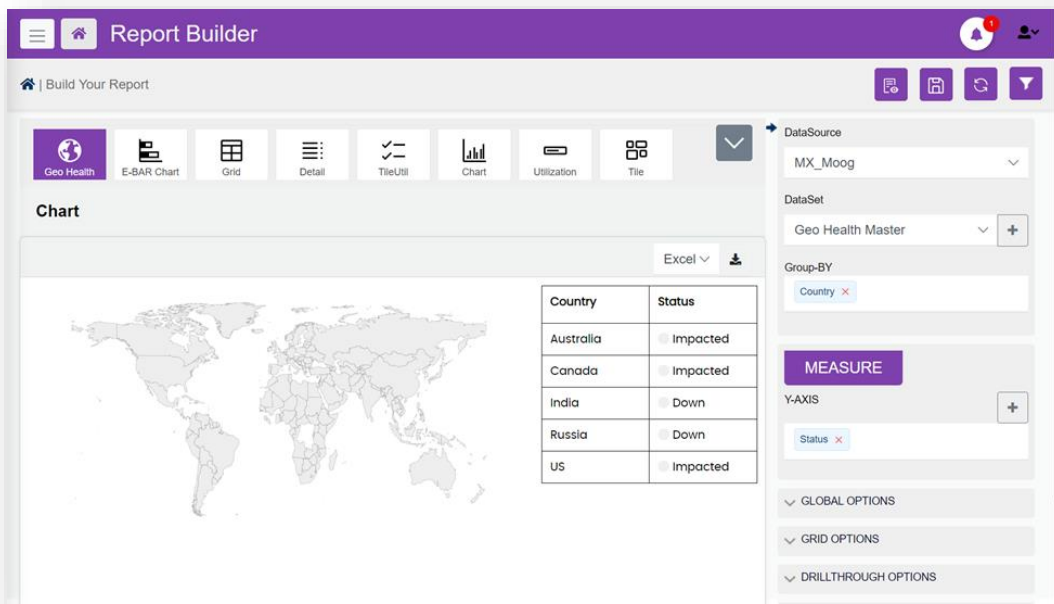


Figure 322 – Sample Screen Shot of Geo Health Template

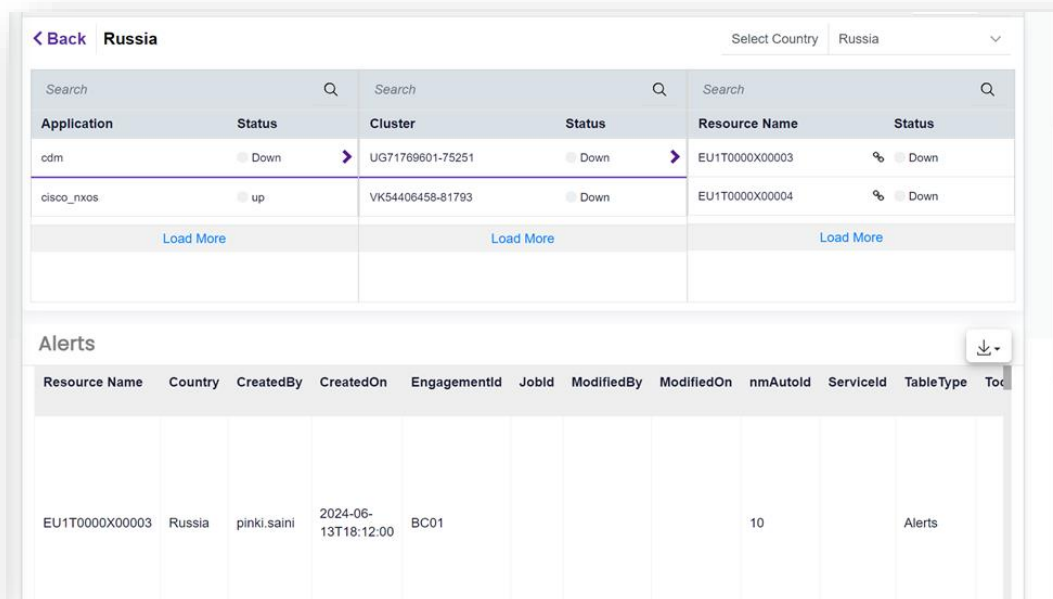


Figure 323 – Sample Screen Shot of Drill Through on Geo Health Template

22.3 Properties (Optional)

You can modify the Template Designs by,

- Global Options
 - No. of Items (To Limit the data)
 - Sequence (Ascending/Descending the order of 1st Level Grid)
 - Grid – (Show/Hide the 1st level grid)
 - Report Header Style (Saved widget report header styles)
 - Font Color

- Font Family
- Font Size
- Font Position
- Font Weight
- Show/Hide
- Border Line Color
- Page Size (Handled for pagination/Load More on all Levels of Grid)
- Raw Data Page Size (Handled for Load More on Raw/Alert Data)
- Grid Options
 - Grid Position (Position of 1st Level grid)
 - Header Style (Header Styles for the 1st Level grid)
 - Enable/Disable
 - Line Height
 - Font Color
 - Background color
 - Font Family
 - Font Size
 - Font Position
 - Font Weight
 - Row Style (Row Styles for the 1st Level grid)
 - Enable/Disable
 - Line Height
 - Font Color
 - Row Color
 - Alternate Row Color (Vice Versa)
 - Font Family
 - Font Size
 - Font Position (Dimension)
 - Font Position (Measure)
 - Font Weight
 - Wrap Text
 - Border (Border color of the 1st Level grid)
 - Border Color
 - Position (To apply the Color on the Border)
- Drillthrough Options
 - Enable/Disable
 - Level 2 (to) Level 6
- No Data Message (To handle when there is no data)
 - Message (Set Message When there is No Data Available)
 - Font Color
 - Font Size

- Font Family
- Font Weight

22.4 Conditional Formatting

22.4.1 Table

- To change color of the bubble on the grids, choose the color below from the Bubble Color option.
- This Bubble color option value will be reflected based on the condition specified on all levels.
- The rest of the options of the table will work only on 1st level grid.

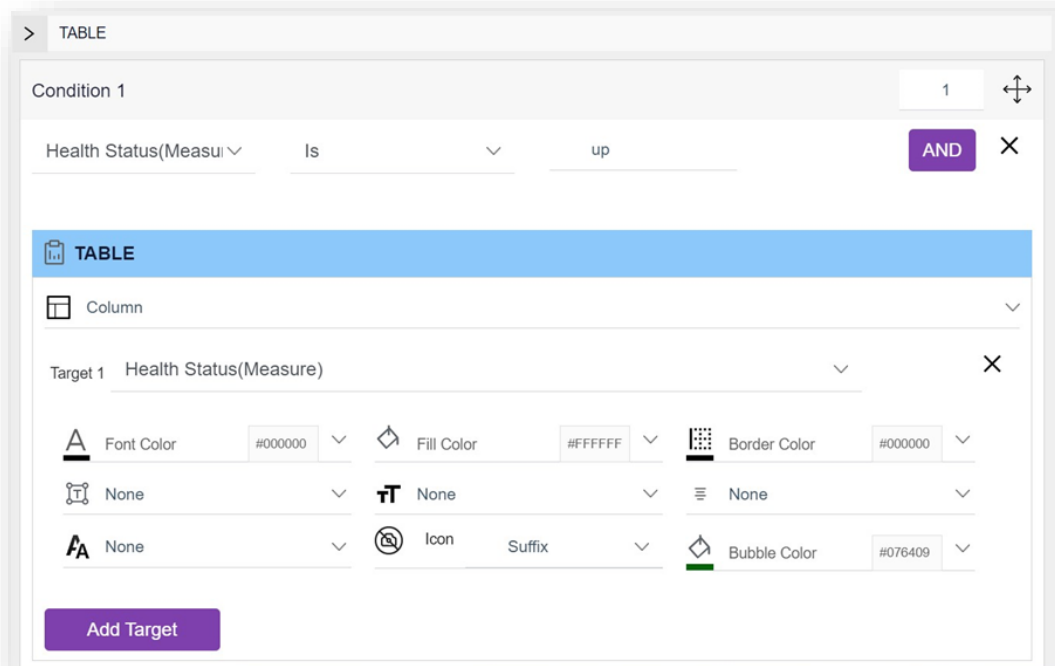


Figure 324 – Table Conditional Formatting

22.4.2 Chart

1. Conditional formatting can be used to format the chart based on their country name (Group-By/Dimension) or by selected Measure.
2. Select the Group-By/Dimension/Measure
3. Select the condition
4. Enter the input
5. Choose the Color
6. Also chart conditional formatting can be handled using AND & Operator.

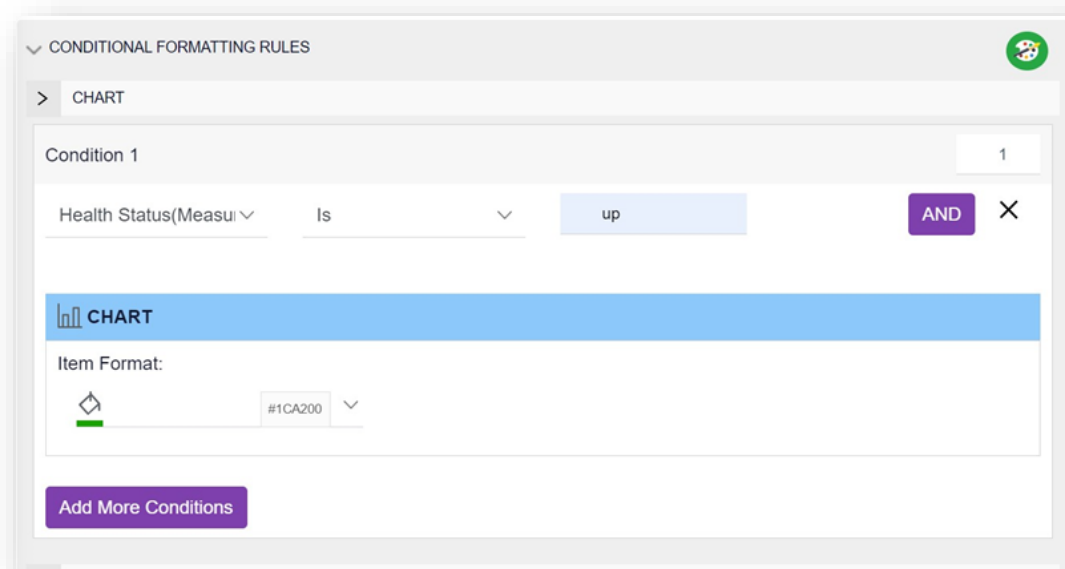


Figure 325 -Chart Condition

22.5 Steps To Save Geo Health Template as Report in Home Page and Insight

Click on Save Icon Button

1. In Saved Reports, Default option is New to create a new report
2. In Report Name, Type a Report Name
3. In Report Description, Type a Report Description
4. In Profile(s)/Custom, select Global/My Report
5. In Report Gallery, New Gallery
6. In Dashboard, create a new Dashboard or Choose old Dashboard
7. In View, create a new View or Choose old View
8. And save it
9. And Go to Home Page to toggle the Menu in the list you can search your Saved Dashboard
10. And click it and your View will be open with the Saved Template

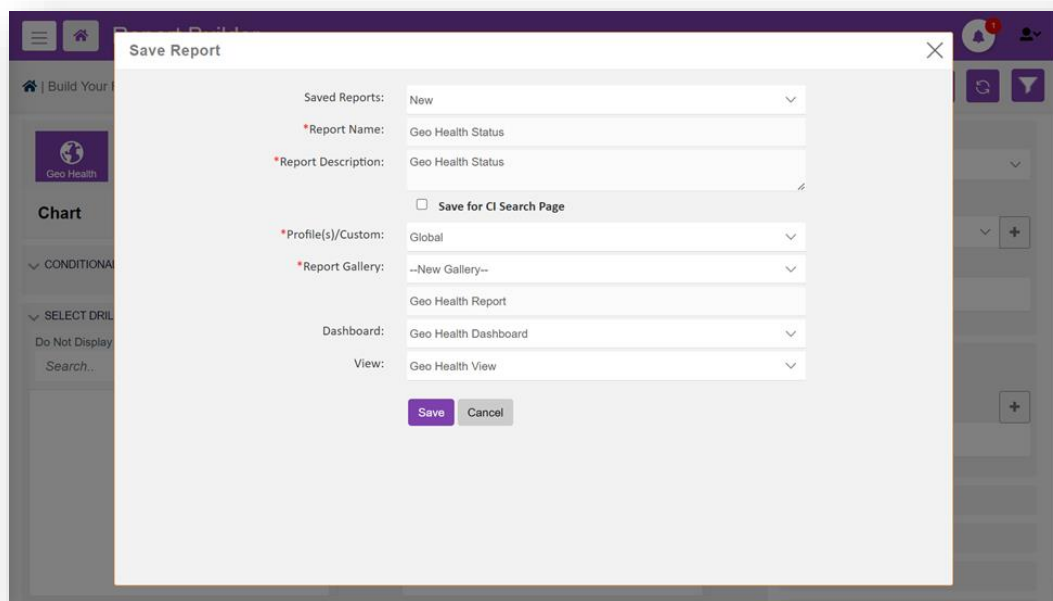


Figure 326 – Save Options

11. Select the Save for CI search Page Checkbox to Save for CI search Page.

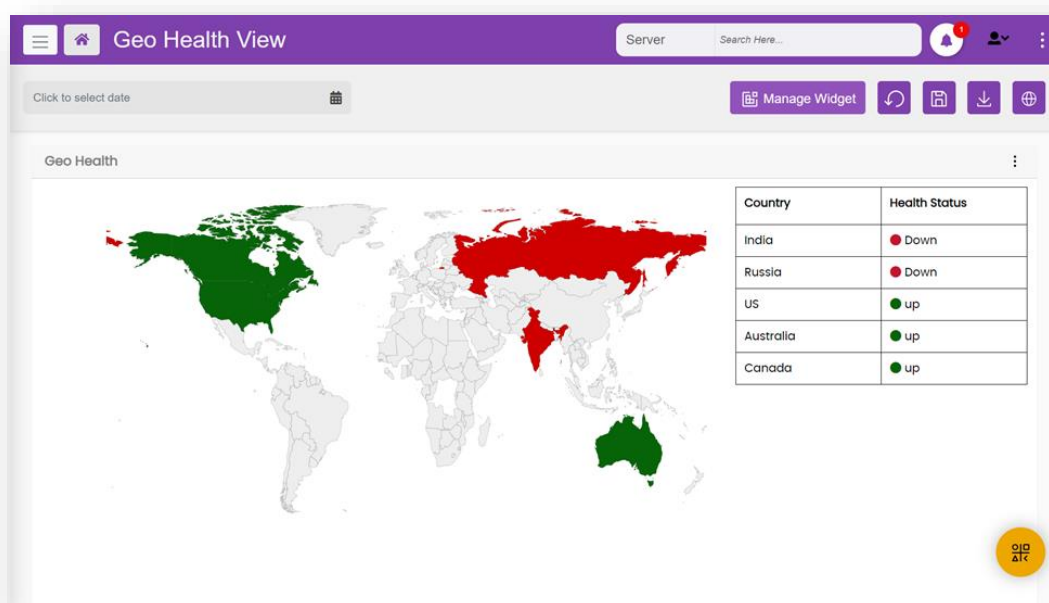


Figure 327 – Saved Report on Home Page

12. To open Insight on geo health template, click on any country with the Data and the insight link icon will be visible on specified Primary Column in Universe Configuration which can choose from the Drillthrough Level.

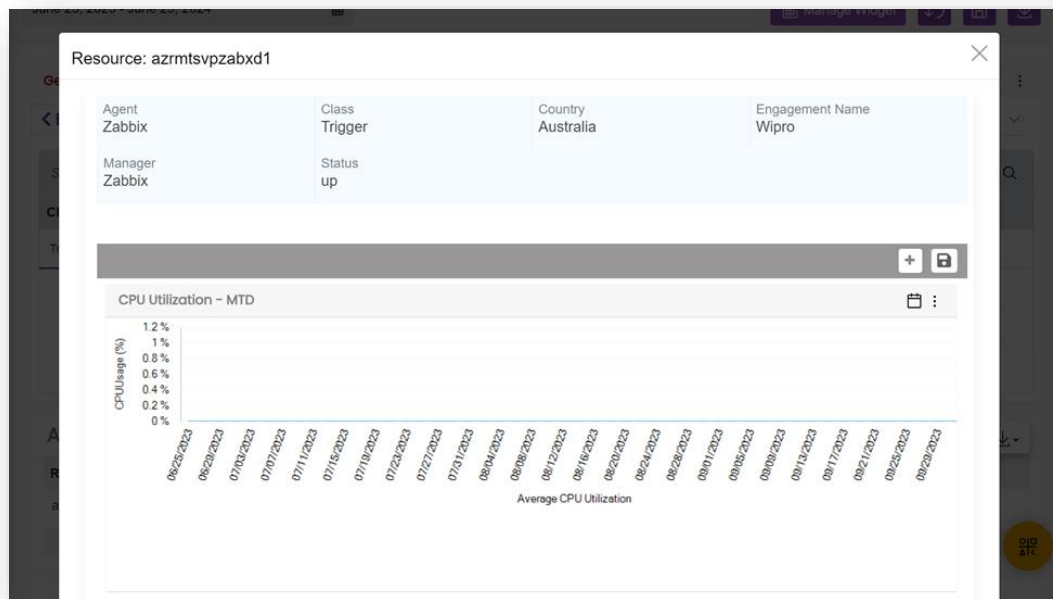


Figure 328 -Saved Report on CI Page

13. And you can Edit your saved report template by clicking on Three Dot on the top right
14. Clicking on Edit you will be redirected to the Report builder page with properties you have selected.
15. Also delete the widget from home dashboard/un map in CI

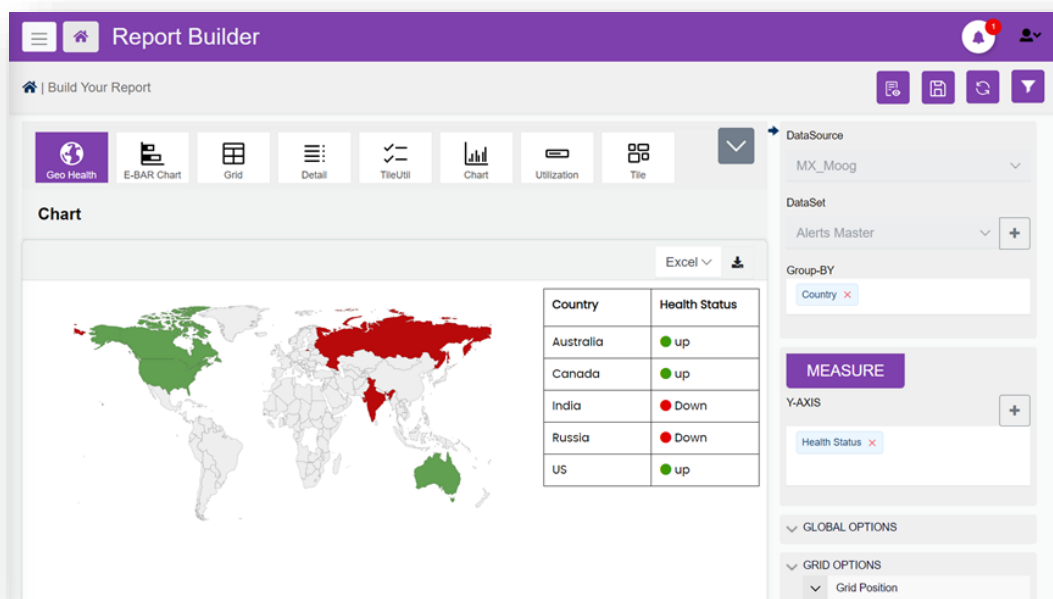


Figure 329 – Edit Saved in Report Builder

22.6 Drillthrough and Other Features

22.6.1 Drillthrough

1. Default, the drillthrough option will be enabled, and without any level selected when clicking on the chart it will drillthrough and populate the raw data.

2. Choosing the dropdown values on each level, the data will be populated with the drillthrough dropdown value selected.

Search		Search		Search	
Agent	Health Status	Manager	Health Status	Resource Name	Health Status
cdm	Down	Nimsoft	Down	EU1T0000X00003	Down
Load More		Load More		Load More	

Figure 330 – Drill Through

22.6.2 Raw Data

1. Choose the columns that need to be visible on the raw data in Drillthrough from the report builder

SELECT DRILLDOWN COLUMNS

Do Not Display

Search..

Created By
Remarks
Status Value
Type
Status
Created Date
SelfJobId

Display in DrillDown

Search..

Alert Id
Agent
Agent Location
Class
Country
Manager
Description

↑
↑
↓
↓

Figure 331 – Column Selection

Resource Name	Alert Id	Agent	Agent Location	Class	Country	Manager	Description
EU1T0000X00003	19552094	cdm	UG71769601-75251	EU1T0000X00003	Russia	Nimsoft	Average (2 samples) disk free on F: is now 12%, which is below the warning threshold (20%) out of total size 300.0 GB
							Average (2 samples) disk free on

Load More

Figure 332 – Raw Data

22.6.3 Search

1. To use the search, click on the country where the data is available, and based on the selected drillthrough levels, on each level top of the grid the search input field will be available
2. Enter the Value to be searched and click on the search icon of the level grid
3. Based on the value entered the data will be fetched from the Database and will be populated. In case no data, "No Data Available" message will be populated.
4. And on the search of the level, it will take the first ACTIVE value and will fetch the data for the next level grid data.
5. Users can reset the values by removing the value from the input field and enter the search again.
6. The Active Value will select up to N-1 level and the last level will not have active value automatically. Users can click on it to change the active value on last or any level of data.
7. Based on the Active Value selected, the Alert Data will be populated if the status (Measure) is DOWN OR IMPACTED.
8. To select the Columns that need to be visible on the Alerts/Drilldown Data, we select from the Drilldown Data Selection Available on Report Builder.

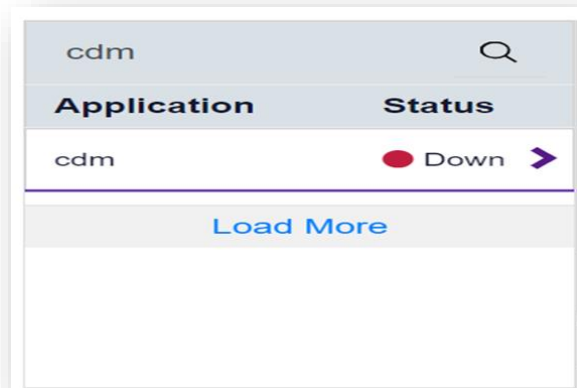


Figure 333 - Search

22.6.4 Pagination/Load More

1. To handle Load more/Pagination, In Report Builder > Properties > Grid Options > Page Size (For Grid Levels) & > Raw Data Page Size (For Raw Data)
2. Based on the selected Page size the Load more on Drillthrough and 1st level grid will be populated.
3. In the 1st Level Grid, it is handled by Pagination and the rest of the Drillthrough levels or handled by Load More option including the Alert/Drilldown Data.
4. Clicking on Load More will fetch more data based on the page size and it will append with existing data.

Search	Search	Search
Application	Platform	Resource Name
cdm	EU1T0000X00003	EU1T0000X00003
Status	Status	Status
Down	Down	Down
Load More	Load More	Load More

Alerts				
Resource Name	Country	Alert Id	Agent	Description
EU1T0000X00003	Russia	19552166	cdm	Average (2 samples) disk free on F: is now 12%, which is below the warning threshold (20%) out of total size 300.0 GB
Load More				

Figure 334 – Pagination/Load More

22.6.5 Dropdown

Users can choose the country from the dropdown based on the available of data, that will populate the data again based on the selected country.

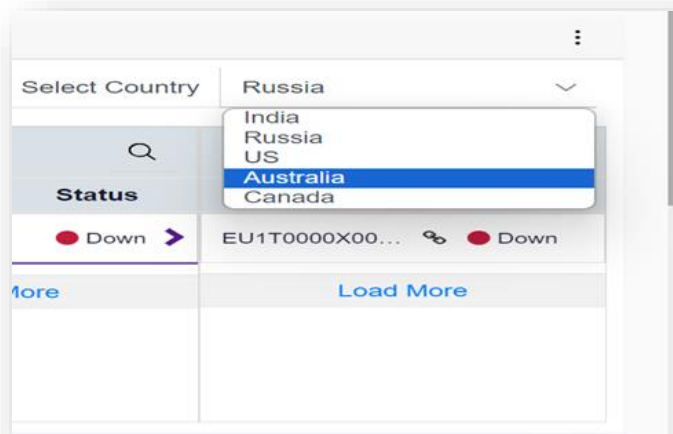


Figure 335 – Dropdown

22.6.6 Filter

22.6.7 Dashboard Linkage

- In Report builder, Filter can be handled through quick filter

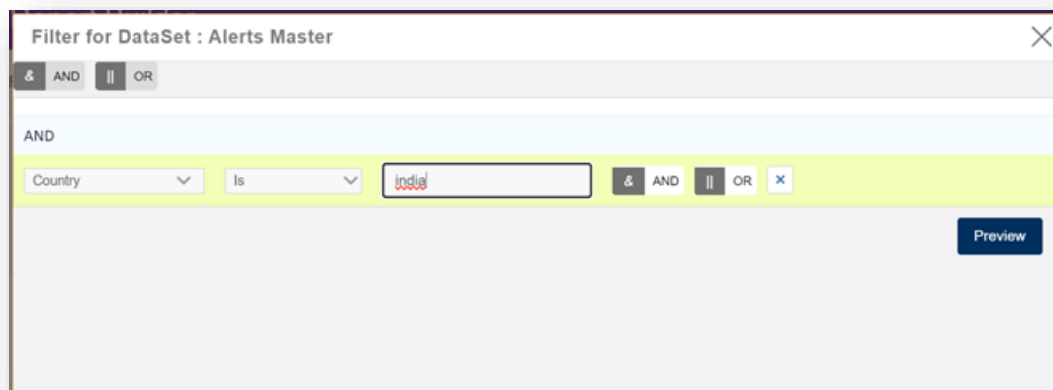


Figure 336 – builder Filter

- In Dashboard, the filter can be handled through Widget filter and Global filter.

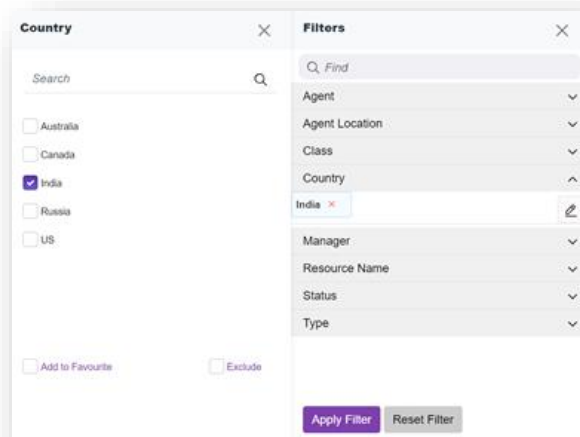


Figure 337 – Widget Filter

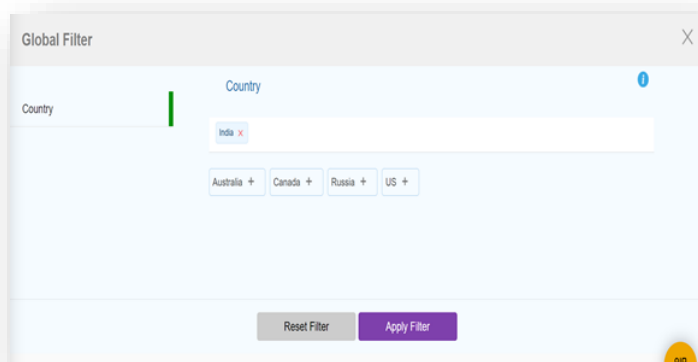


Figure 338 – Global Filter

22.7 Points To Remember

1. Table conditional Formatting Bubble Color option alone will work on all Level and rest of the options will only work on 1st Level Grid.
2. Conditional formatting will override the properties values applied on Grid options in report builder for the 1st level grid.

22.8 Limitation of geo health status

1. We will show max 6 Level hierarchy in this View.
2. If the Lower node of any hierarchy is down, then complete hierarchy will show down.
3. First Level we show Geo Map with grid and after that data will come in grid Format.
4. Insight (CI) link will only be available from home Dashboard and Insight (CI) link will be disabled in Report builder.

22.9 Export Functionality

1. In Geo Health Template, we have implemented export functionality. This functionality is implemented for Report builders, Home page as well as individual widget export.
2. The export formats can be seen as PPT, PDF, Excel and CSV.

3. Export of First level of the Geo Health template, Images and data will be shown
4. Export of second level of the Geo Health template, Images will be shown.
5. Export of raw data will show only data.

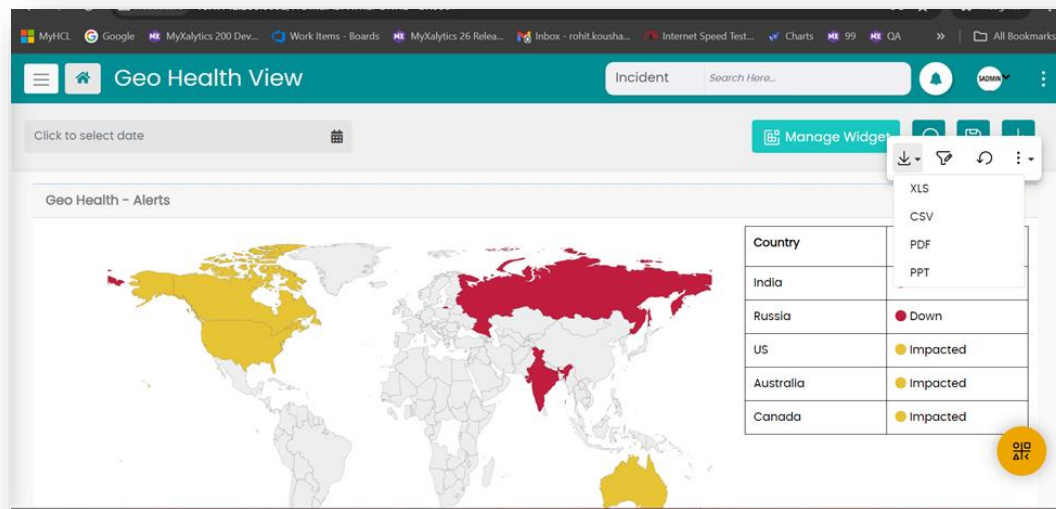


Figure 339 – Individual Widget Export in Home Page

22.9.1 Report Builder

- **First Level:** Export of First level of the Geo Health template, Images and data will be shown.

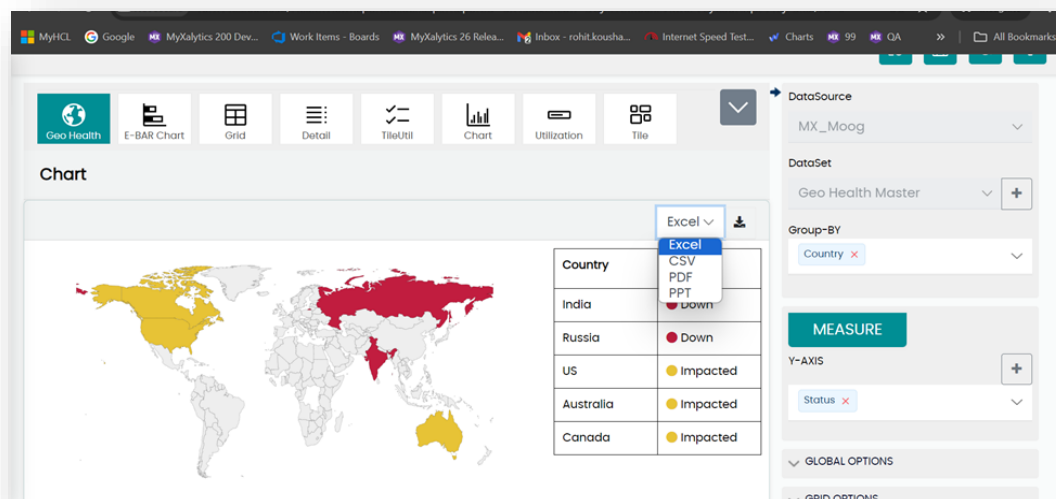


Figure 340 – Report Builder Export (First Level)

- **Second level:** Export of second level of the Geo Health template, Images will be shown.

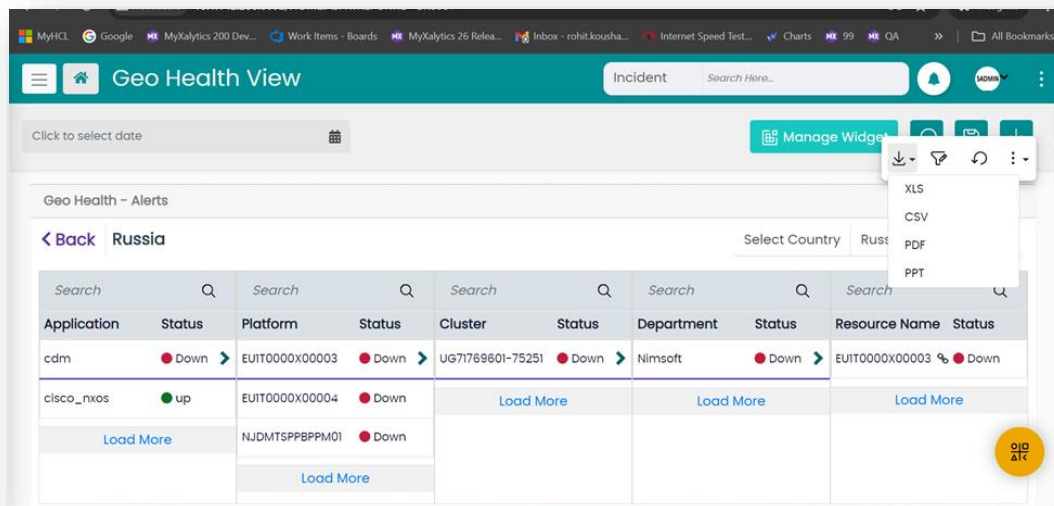


Figure 341 – Report Builder Export (2nd Level)

- **Raw Data:** Export can also be seen in drilldown in excel and csv formats.

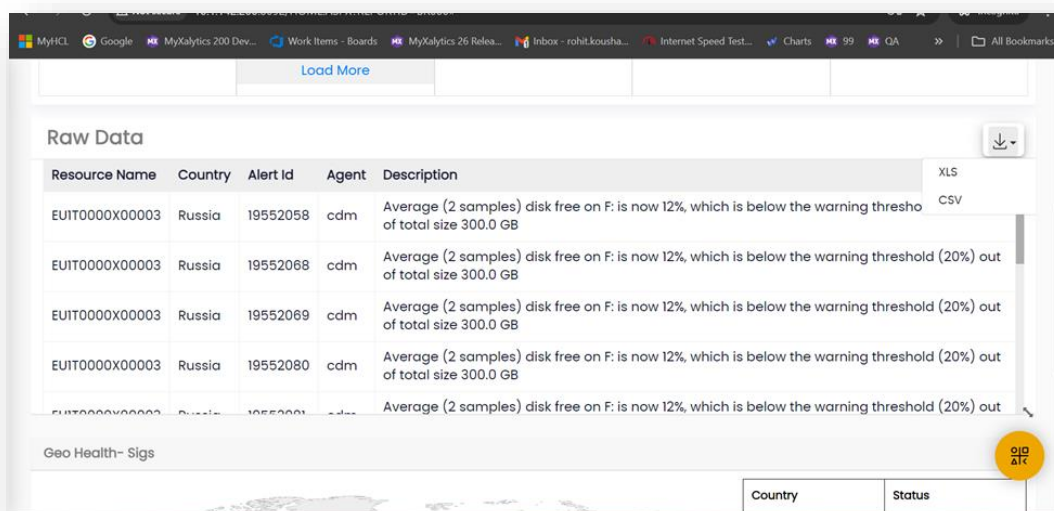


Figure 342 - Report Builder Export (2nd Level)

22.10 Scheduler Functionality

1. Scheduler is also enabled for geo-health and can be scheduled in PPT, PDF, Excel and CSV.
2. If we schedule as an attachment, then First level images and data should come as attachment in pdf, ppt, excel format.
3. If we schedule not as an attachment, then First level images and data should come in body of the mail.
4. If we select raw data, then raw data should come as an attachment.

22.11 State-level visualization and Location-based markers

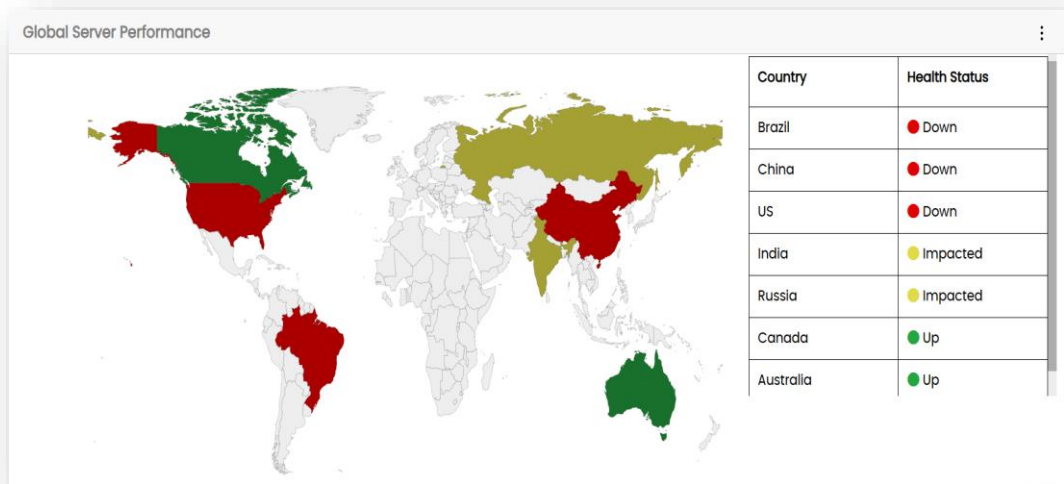


Figure 343 – Global Server Performance

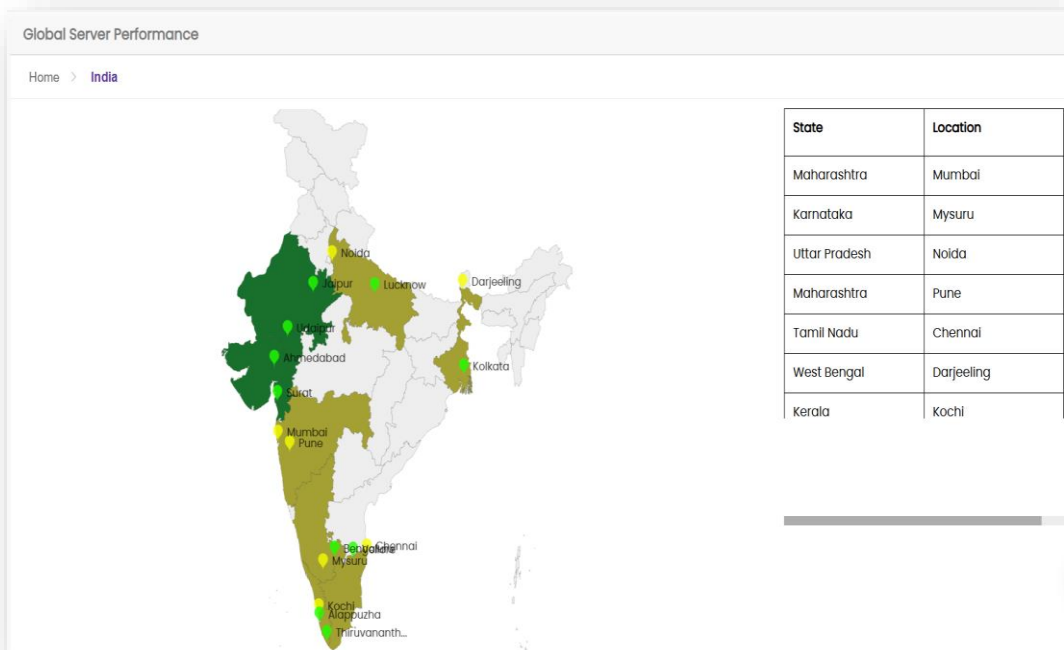


Figure 344 – Global Server Performance (Cont.)

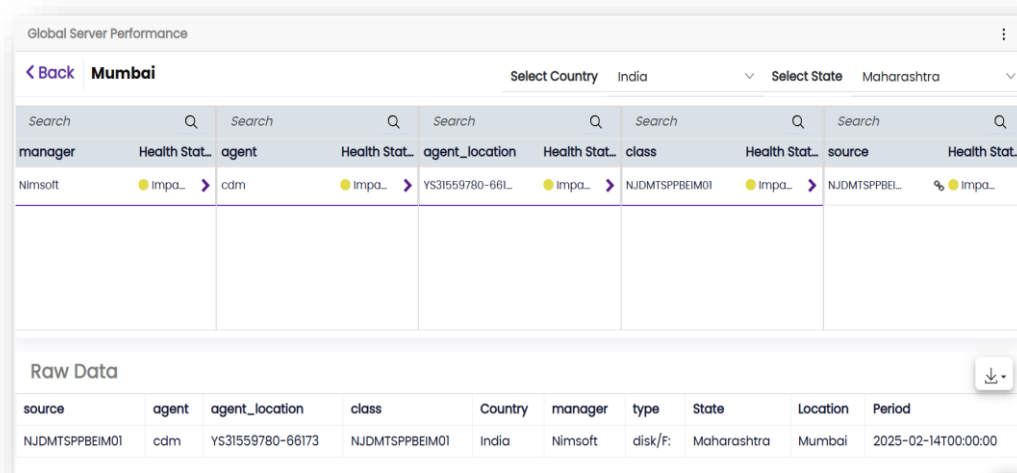


Figure 345 – Global Server Performance (Cont.)

- The Geo Health Status template has been enhanced to support State-level visualization and Location-based markers, providing a deeper and more interactive geographic analysis experience.
- Previously, the template supported only a world map view with a single Group By: Country option. With this enhancement, users can now:
 - a. View state-level maps for specific countries.
 - b. Drill down into a grid and raw data from the state view.
 - c. Use location markers (based on latitude and longitude) for precise data point visualization.
 - d. Apply conditional formatting to customize marker colors based on specified rules.

22.12 Key Enhancements Explanation

22.12.1 Group By: Country(Geo Type: Country) (Default Behavior))

1. Works the same as the existing functionality.
2. Displays the world map with country-wise data.
3. Clicking on a country allows users to drill through into more detailed views (if enabled).

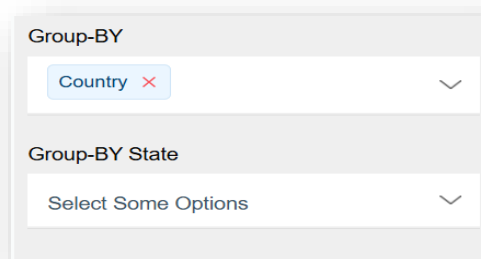


Figure 346 – Global Server Performance (Cont.)

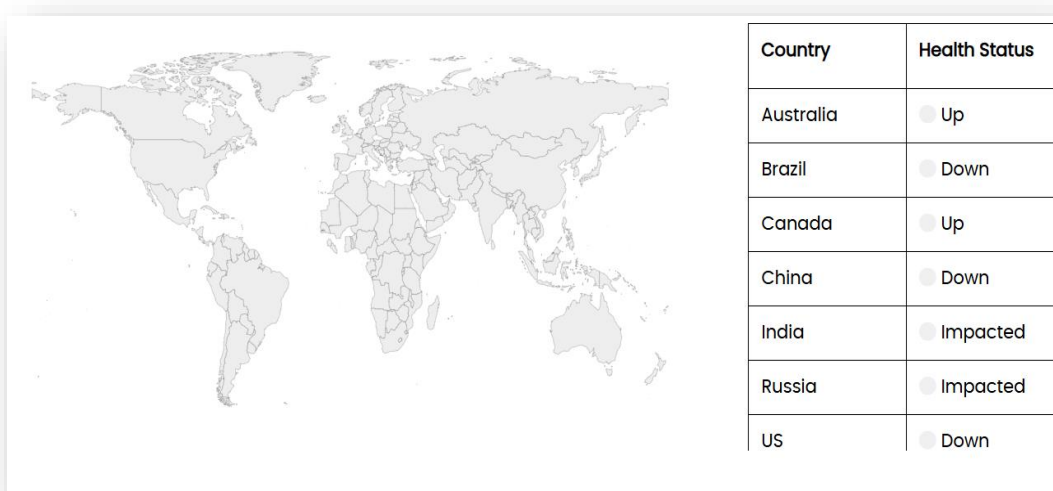


Figure 347 – Global Server Performance (Cont.)

22.12.2 Group By: Country(Geo Type: Country) +

– Group By State: State (Geo Type: State)

- Use this when users need both:
 - A world map view with country-wise data, and
 - The ability to drill through into a country-level map showing state-wise data.
- On selecting a country, the template loads that specific country's map, segmented by states.
- Clicking on a State allows users to drill through into more detailed views (if enabled)

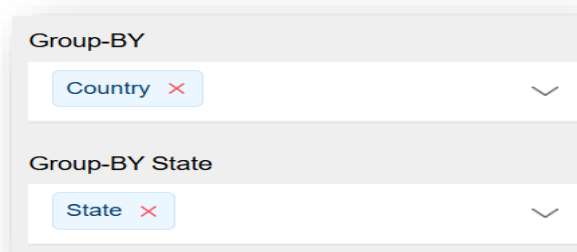


Figure 348 – Global Server Performance (Cont.)



Figure 349 – Global Server Performance (Cont.)

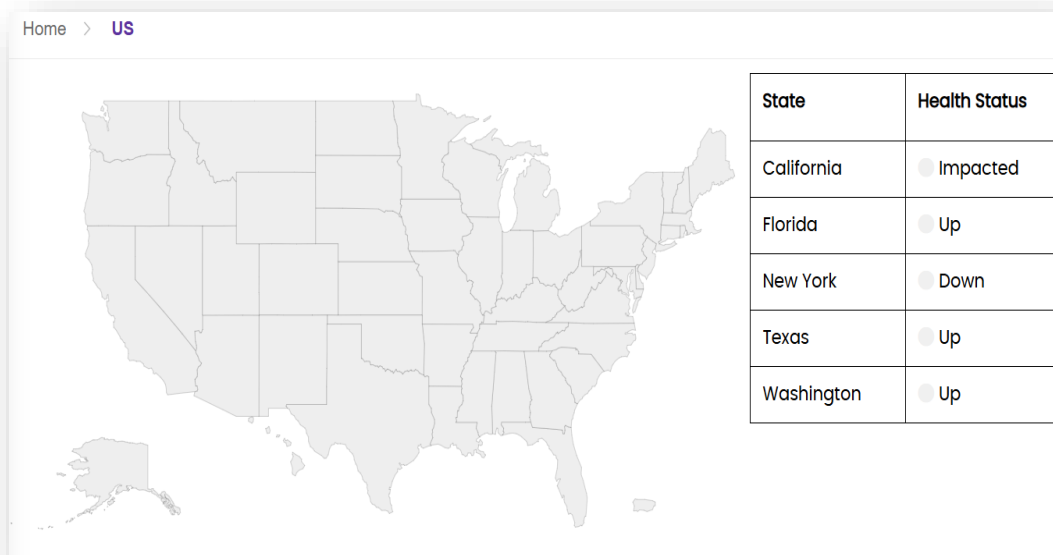


Figure 350 – Global Server Performance (Cont.)

- Along with Country Dropdown there will be New State Dropdown in this scenario.

manager	Health St.	agent	Health St.	agent_location	Health St.	class	Health St.	source	Health St.
Nimsoft	Up	sqlserver	Up	GA25766455-2...	Up	njdmtsvpnshu01	Up	NJMTPVCENI	Up

source	agent	agent_location	class	Country	manager	type	State	Location	Period
NJMTPVCENI	sqlserver	GA25766455-23341	njdmtsvpnshu01	US	Nimsoft	NJDMTS5-NJMTPVCENI-transactions_Total	Washington	Seattle	2025-02-28T00:00:00

Figure 351 – Global Server Performance (Cont.)

22.12.3 Group By: Country(Geo Type: Country) +

- Group By State: State (Geo Type: State) +
- Group By Location: Location (Geo Type: Location).
 - Recommended when users require:
 - A world map view with country-level data,
 - Drillthrough into state-level map for a selected country,
 - Plus, location markers (latitude & longitude) for precise pinpointing within each state.
 - Markers represent specific regions, facilities, or events, providing high-resolution geographic insights.
 - Clicking on a Marker Pointer allows users to drill through into more detailed views (if enabled)

Group-BY

Country X

Group-BY State

State X

Group-BY Location

Location X

Figure 352 – Global Server Performance (Cont.)



Figure 353 – Global Server Performance (Cont.)

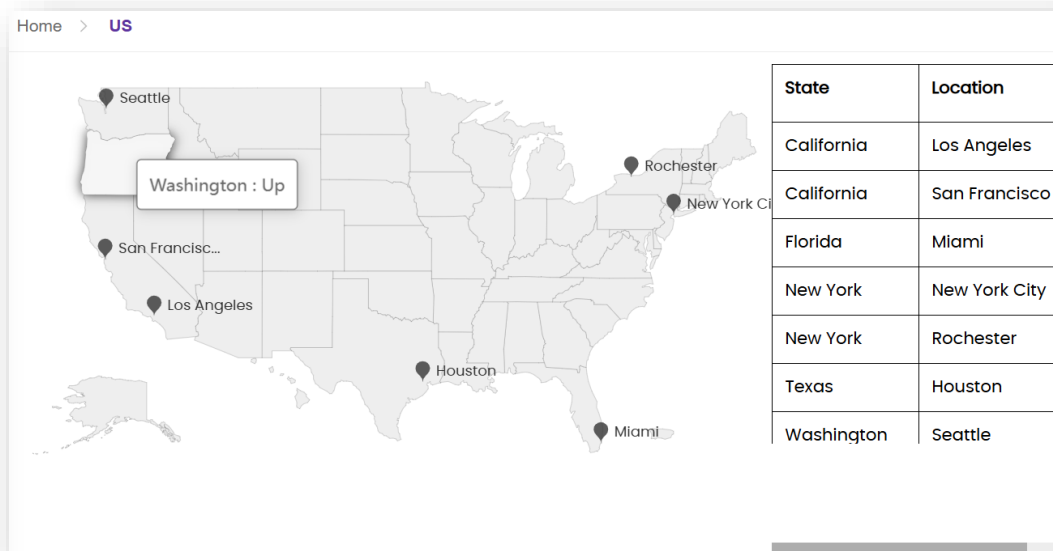


Figure 354 – Global Server Performance (Cont.)

- As per the Scenario only State Dropdown will be available in the Drillthrough Grid/Raw View.

Server Performance by State in US

< Back Washington Select State Washington

Search	Q	Search	Q	Search	Q	Search	Q	Search	Q
manager	Health St.	agent	Health St.	agent_location	Health St.	class	Health St.	source	Health St.
Nimsoft	Up	sqlserver	Up	GA25766455-2...	Up	njdmtsvpnshu01	Up	NJMTPVCENI	Up

Raw Data

source	agent	agent_location	class	Country	manager	Remarks	type	State	Location	Period
NJMTPVCENI	sqlserver	GA25766455-23341	njdmtsvpnshu01	US	Nimsoft		NJDMTS5-NJMTPVCENI-transactions._Total	Washington	Seattle	2010

Figure 355 – Global Server Performance (Cont.)

22.12.4 Group By: State(Geo Type: State) (Direct Country Map View)

- Allows users to bypass the world map and directly load a specific country map.
- Achieved by selecting Group By: State instead of Group By: Country.
- Renders the state-wise view immediately, based on the selected country's available data.

Group-BY

State ×

Country Dropdown

India

Figure 356 – Global Server Performance (Cont.)

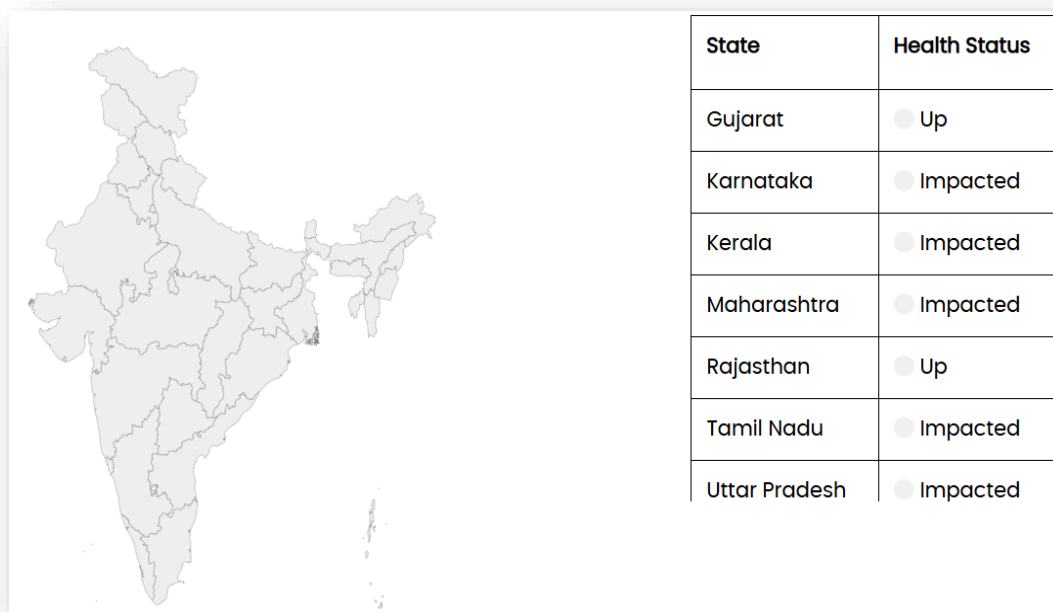


Figure 357 – Global Server Performance (Cont.)

22.12.5 Group By: State(Geo Type: State) +

- Group By Location: Location (Geo Type: Location) (Location-Based Markers)
 - When state-level grouping is selected:
 - Users can enable Group By: Location to activate location markers.
 - Displays marker symbols on the state map using latitude and longitude.
 - These markers help:
 - Pinpoint exact data points (e.g., hospitals, outbreaks, testing centers),
 - Provide a more detailed and actionable view of health data.

Group-BY

State

Country Dropdown

India

Group-BY Location

Location

Figure 358 – Global Server Performance (Cont.)

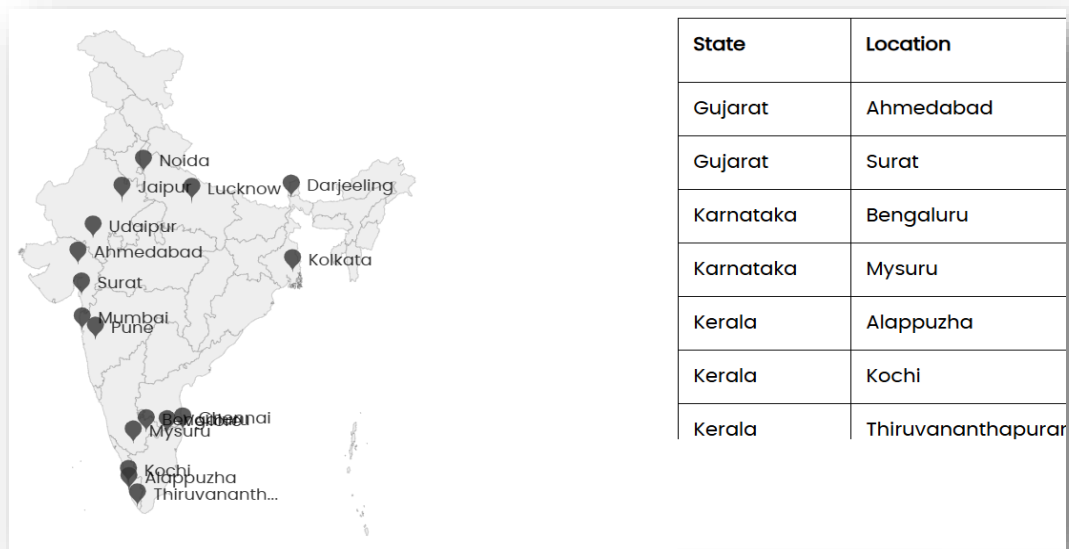


Figure 359 – Global Server Performance (Cont.)

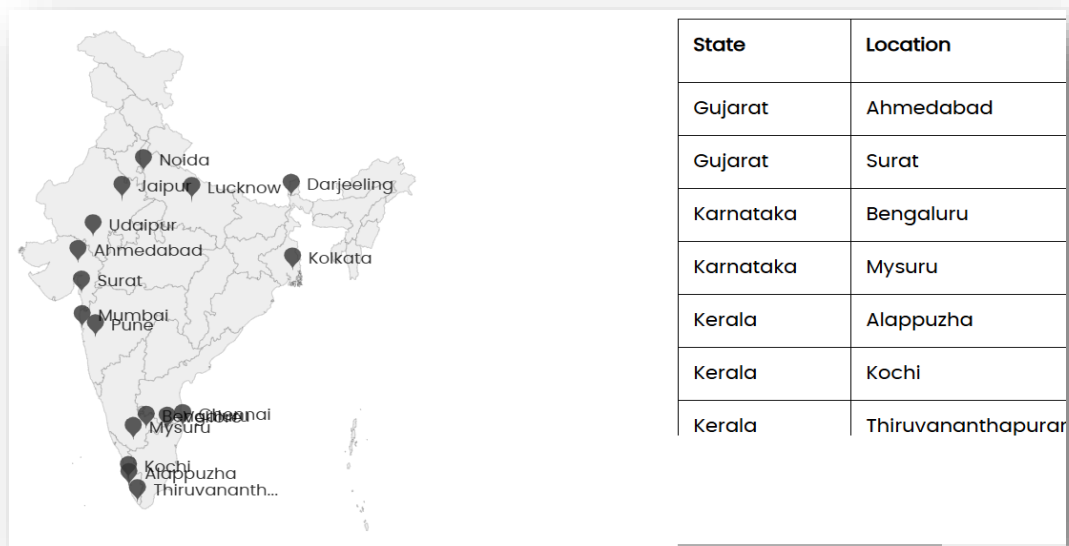


Figure 360 – Global Server Performance (Cont.)

Table 2 – Global Server Performance (Cont.)

Configuration	Result
Group By: Country	Displays world map; clicking a country drill into grid-level and raw data view (Existing feature).
Group By: Country + Group by State: State	Displays world map; clicking a country drill will load a country map with state-level data with further drill into grid-level and raw data view.

Group By: Country + Group by State: State + Group By Location: Location	Displays world map; clicking a country drill will load a country map with state-level data with marker symbols at specific latitude/longitude positions and further drill into grid-level and raw data view.
Group By: State	Directly loads a country map with state-level data (skips world view). Drills into grid-level and raw data view.
Group By: State + Group by Location: Location	Shows state map with marker symbols at specific latitude/longitude positions.

22.13 Conditional Formatting for Location Markers

The Group by Location feature has been enhanced with Conditional Formatting options, allowing for dynamic and data-driven customization of marker colors on the map.

- New Feature: Location Color in Chart Conditional Formatting
 - A new setting called "Location Color in Chart Conditional Formatting" is now available.
 - Users can define rules or conditions to dynamically customize the color of each marker on the map based on the data values.

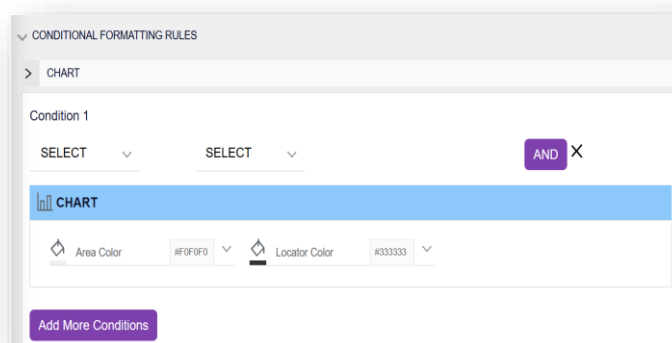


Figure 361 – Global Server Performance (Cont.)

22.13.1 Dual Color Picker Support

- Previously: Only a SINGLE-COLOR picker was available for coloring the map regions.
- Now: Two distinct color options are available:
 - Area Color – Used to color map regions (e.g., countries, states).
 - Locator Color – Used to color the marker (pin) that represents the specific location on the map.

22.13.2 Conditional Formatting Sources

Conditional formatting for locator markers can be configured using one of the following:

- By Measure,
 - Select a Measure from the properties panel.
 - The color of the locator will reflect the value of the selected measure based on the defined Conditions.

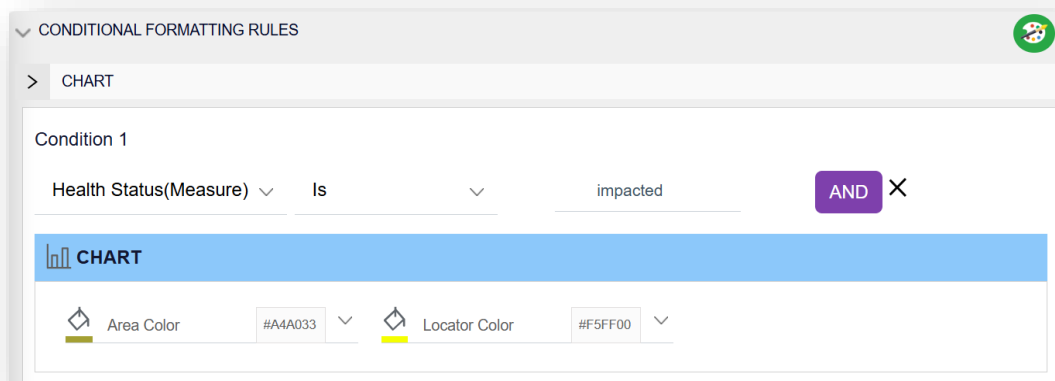


Figure 362 – Global Server Performance (Cont.)

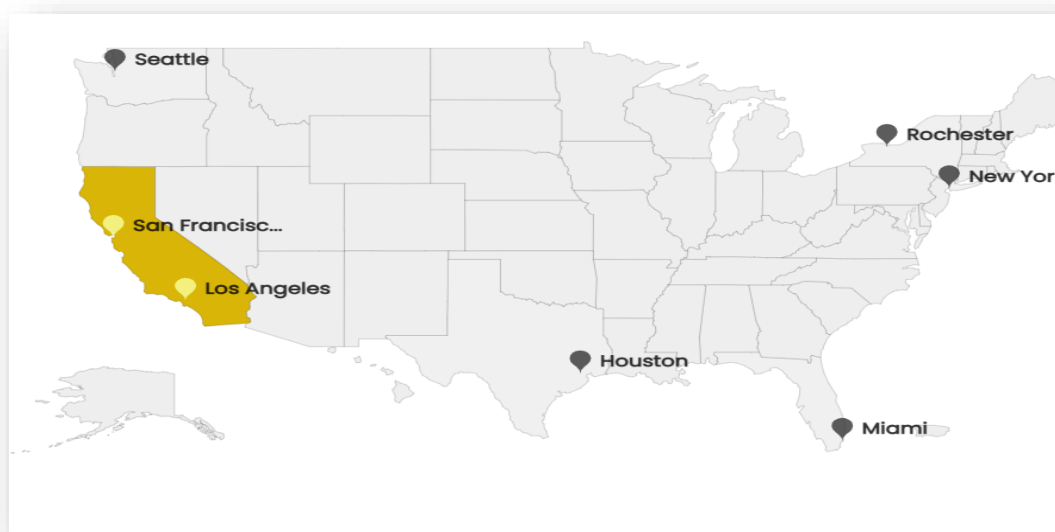


Figure 363 – Global Server Performance (Cont.)

- By Group By Location Properties
 - Select a Group by Location property (e.g., City, Facility Name).
 - Colors can be assigned based on specific values or categories within the selected location dimension.

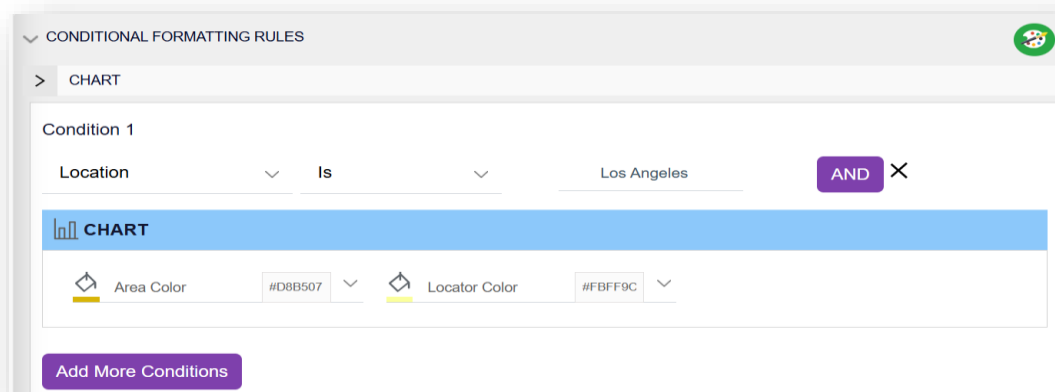


Figure 364 – Global Server Performance (Cont.)

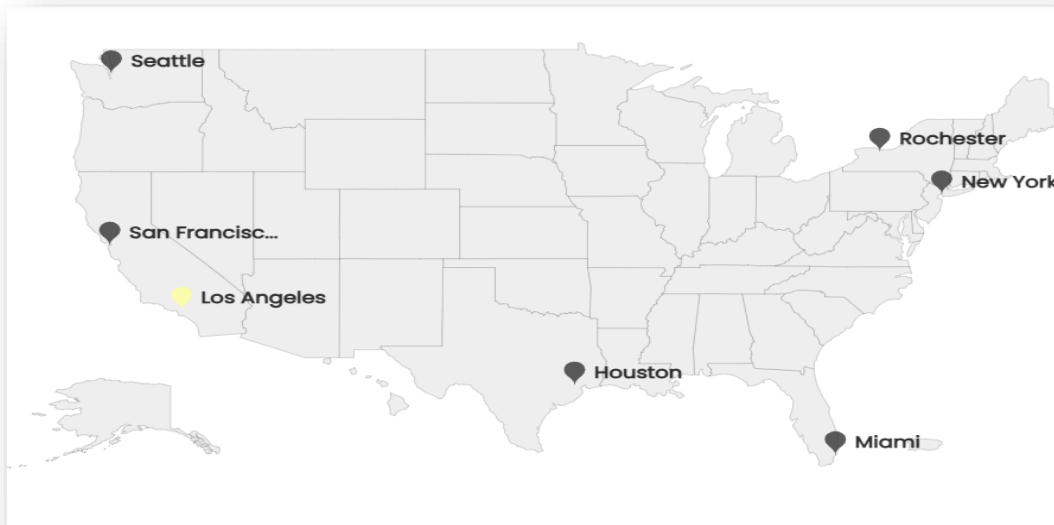


Figure 365 – Global Server Performance (Cont.)

22.13.3 Example: Area and Locator Color using Measure

- Imagine a scenario where:
 - Area Color (State-level) is based on Health Status Impacted, Down and Up.
 - Locator Color (Location markers) is based on Health Status Impacted, Down and Up.

CHART

Condition 1

Health Status(Measure) Is impacted AND X

CHART

Area Color #D8B507 Locator Color #FBFF9C

Condition 2

Health Status(Measure) Is down AND X

CHART

Area Color #AF0000 Locator Color #FFB569

Condition 3

Health Status(Measure) Is up AND X

CHART

Area Color #20963B Locator Color #0CFE08

Figure 366 – Global Server Performance (Cont.)

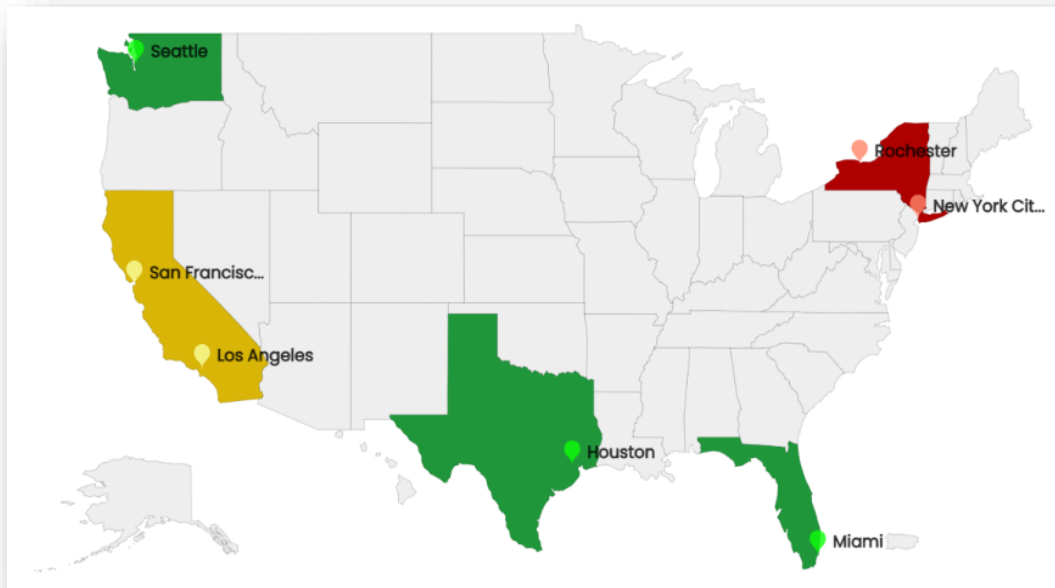


Figure 367 – Global Server Performance (Cont.)

22.14 New Property:

22.14.1 Location Itemstyle

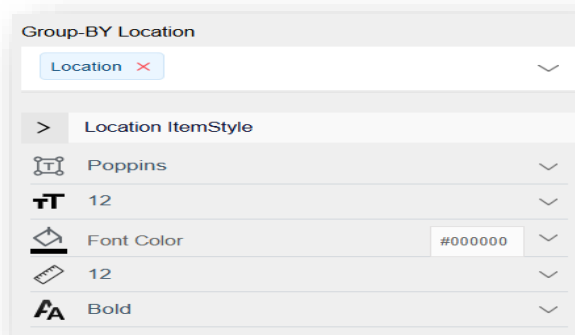


Figure 368 – Global Server Performance (Cont.)

- To enhance control over locator label styling, a new property called Location Item style has been introduced.
- When is it available?

This property becomes visible and configurable only when a Group By: Location value is selected.

- What can be customized?

Users can personalize the appearance of the locator labels (text shown with markers) by adjusting the following settings:

- Font Family – Choose the typeface for the label text.
- Font Size – Adjust the size of the label text.
- Font Color – Set the color of the text displayed on the marker.
- Font Length – Control the maximum number of characters shown.

- Font Weight – Set the text weight (e.g., normal, bold).

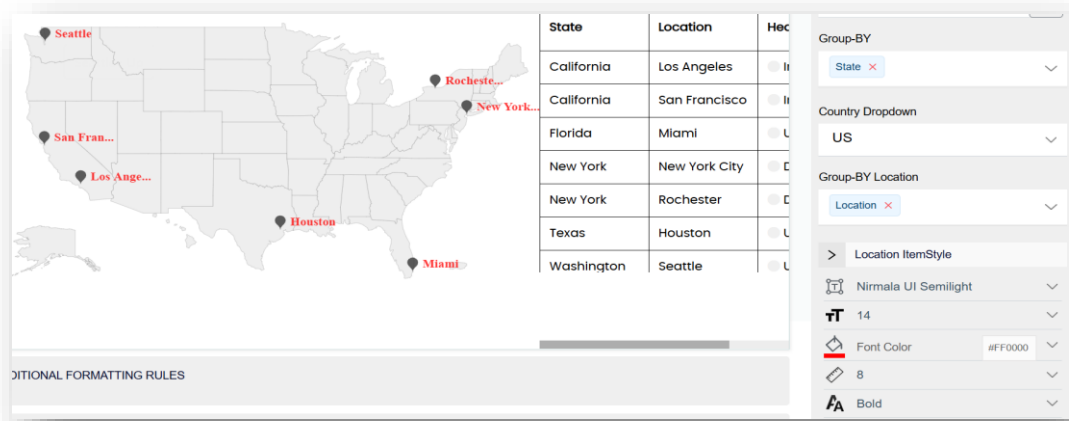


Figure 369 – Global Server Performance (Cont.)

22.14.2 Date Filter has been enabled

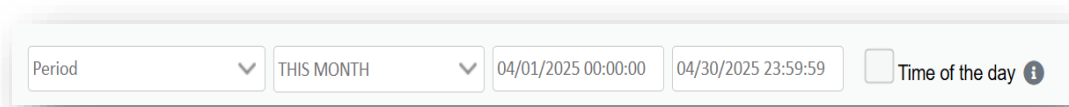


Figure 370 – Global Server Performance (Cont.)

- The filter feature date is now active on the Geo Health Template. This allows users to retrieve data based on a selected date range.
- The Global Date setting on widget properties has been enabled. Previously, this setting was disabled, and data was fetched without any date-based filtering.

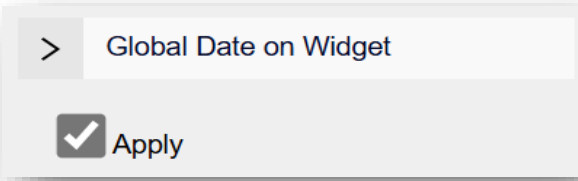


Figure 371 – Global Server Performance (Cont.)

- The Global Date Filter and Date Settings are now fully functional on the Home Page, enabling users to filter and view data by custom date ranges.

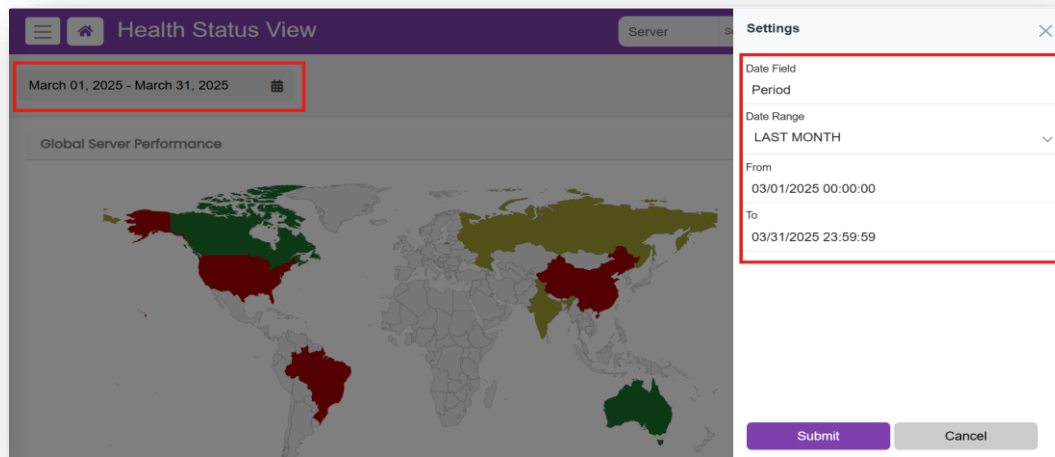


Figure 372 – Global Server Performance (Cont.)

22.14.3 Multi Measures with Tooltip

1. Users can now select multiple measures, with a minimum of 1 and a maximum of 3.
2. Only the 1st measure will be used for the grid-level view, following the existing behavior.
3. All selected measures will be included in the Map Tooltip at both the World and Country levels.
4. Conditional formatting will apply only to the 1st measure; other measures are currently used only for filtering.
5. The order of selected measures determines how they appear in the tooltip.
6. Each measure will be displayed on a separate line in the tooltip.

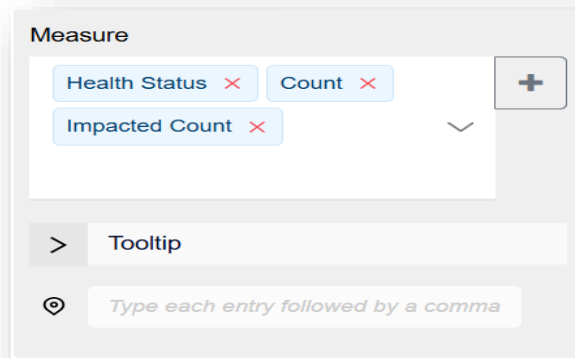


Figure 373 – Global Server Performance (Cont.)

7. Default Tooltip View (if no custom text is entered):
 - #Country/State Name #: Measure1 Value
 - Measure2 Column Name: Measure2 Value
 - Measure3 Column Name: Measure3 Value

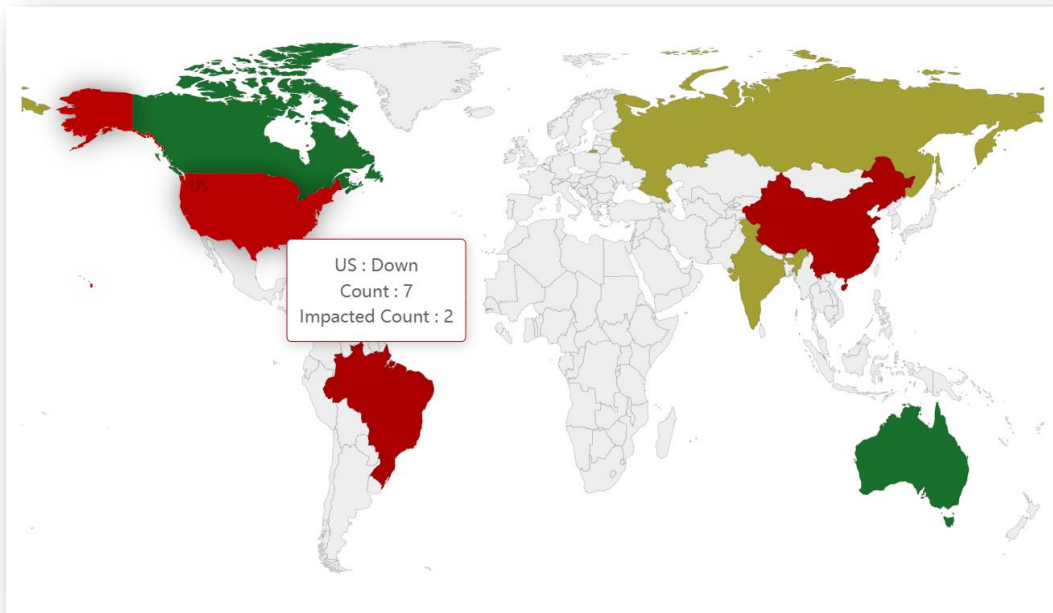


Figure 374 – Global Server Performance (Cont.)

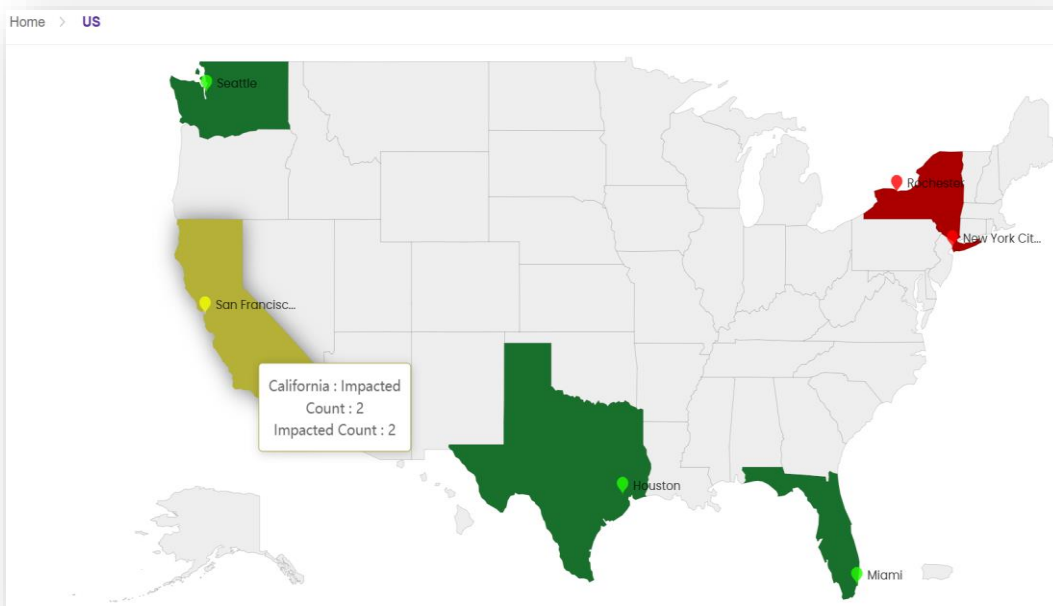


Figure 375 – Global Server Performance (Cont.)

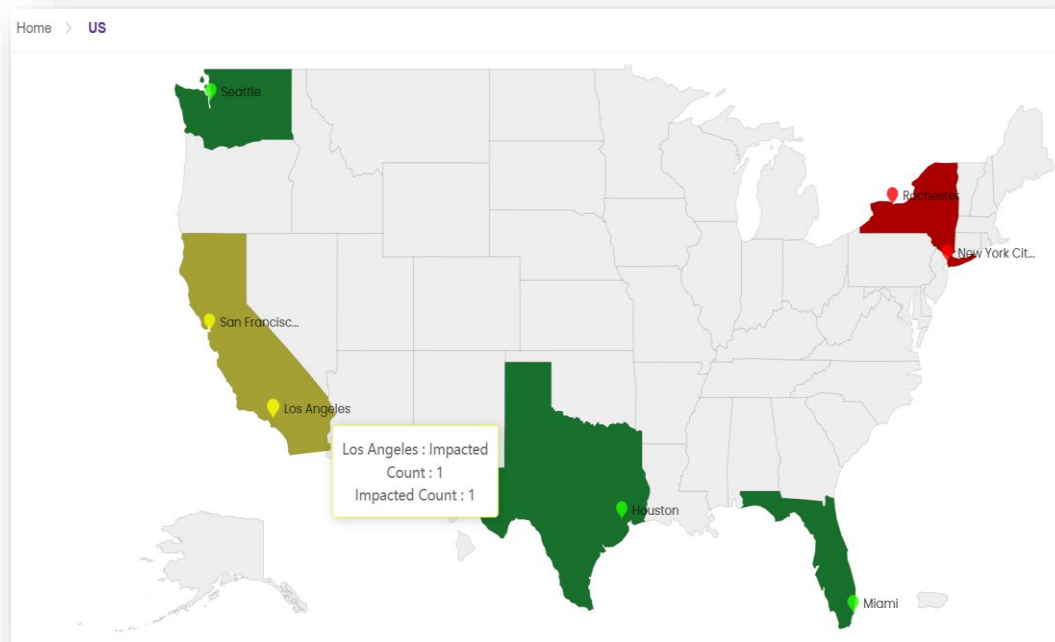


Figure 376 – Global Server Performance (Cont.)

8. Custom Tooltip View (if custom text is entered):

- [#Country/State Name] [Custom Text] [Measure1 Value]
- [Custom Text] [Measure2 Value]
- [Custom Text] [Measure3 Value]

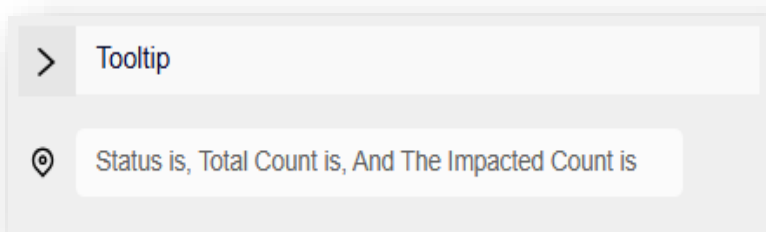


Figure 377 – Global Server Performance (Cont.)

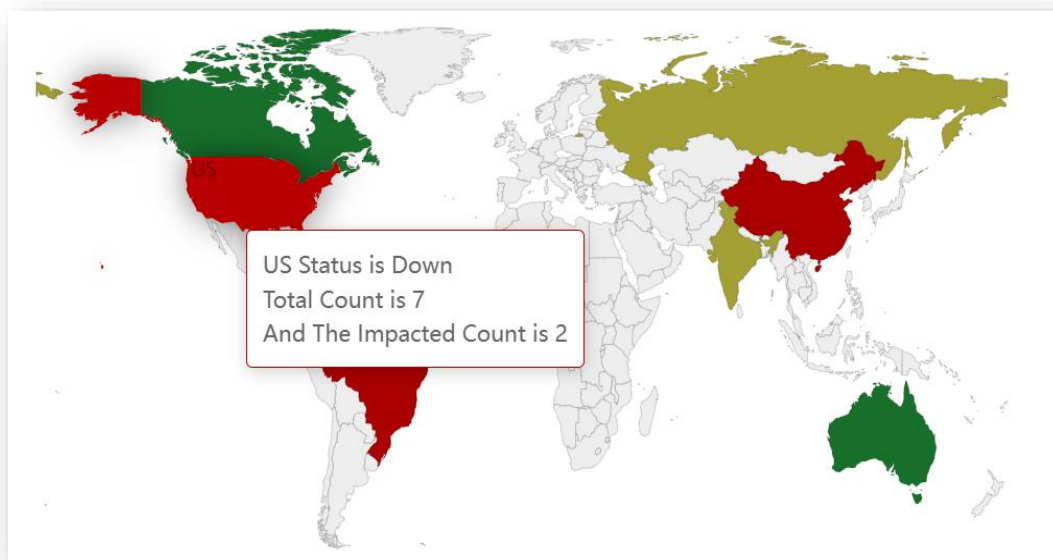


Figure 378 - Default View (World Map):

22.15 Points to Remember

- **Default View (World Map):**
 - The world map remains the default view when Group By: Country is selected.
- **State-level and Location-based Features:**
 - These features are only enabled when applicable data and dimensions are selected.
- **Measure Type Compatibility:**
 - Numeric/Integer type measures are now compatible, in addition to String Type measures.
 - These can be used in conditional formatting as well.
- Ensure that the sequence is sorted by the Health Status measure in ascending order, so the data appears in a logical sequence: Down, Impacted, and then Up in both Country level and state level.
- **Country-Level and State-Level Drillthrough:**
 - Enabled countries: India, United States, and Canada.

If there's a name mismatch or font language discrepancy, the map may not populate.

- Based on customer requirements, additional countries will be enabled one by one.
- **Zooming and Moving Functionality:**
 - Group By: Country: Zooming and moving functionalities are disabled.
 - Group By: State or drillthrough from Country: Zooming and moving are enabled, allowing users to focus on location markers (pins) without overlapping labels.
- When Group By: State is selected, the Country dropdown value is used automatically to filter the dataset by the Country (Geo Type: Country - Last one if multiple Country Type is configured in Universe Configuration will override all the above one) to show only States belonging to that country.
- Except for filtering, only the 1st Measure is used in the grid, drillthrough, conditional formatting, exports and all other areas as existing. The remaining measures are not utilized in these areas.
- **Compatibility with Existing Functionalities:**
 - All existing functionalities remain unchanged and are fully compatible with the new enhancements.

22.16 Summarization

Multiple measures in Drilldown report – Summarization:

- Enable the selection of multiple dimensions and measures for aggregation option to enable and disable summarization. At most one option can be checked from Drilldown and Summarization
- Dimensions and measures will be available for performance reports and while using summarization. An option to enable and disable summarization has been enhanced in Grid, Ebar, Pie, Comp Tile, Gauge, Tile, Score and Trend, Heatmap, and Chart templates.
- We selected the grid chart showing below.

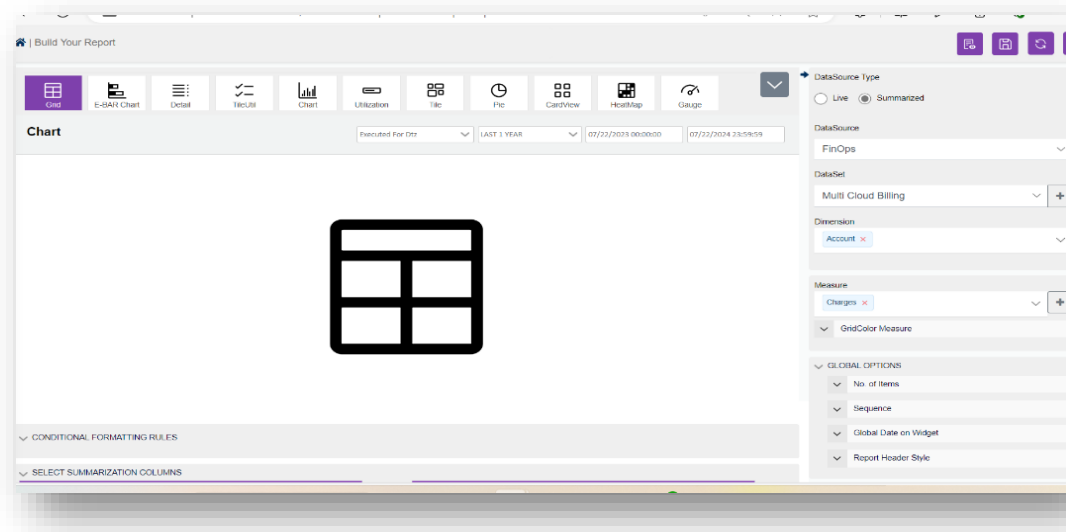


Figure 379 - Selected Grid chart

- The below image shows us the summarization option by clicked enable checkbox

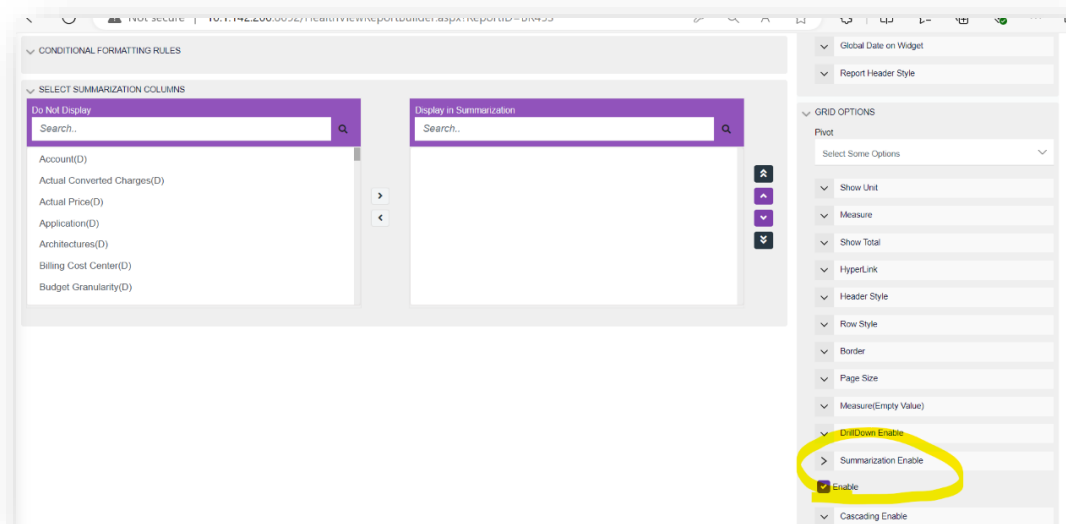


Figure 380 – Enable Summarization

- users are navigated to select summarization columns to another side shown below image

- In column name mentioned (D) that column is dimension and if the column is mentioned (M) that column is Measure

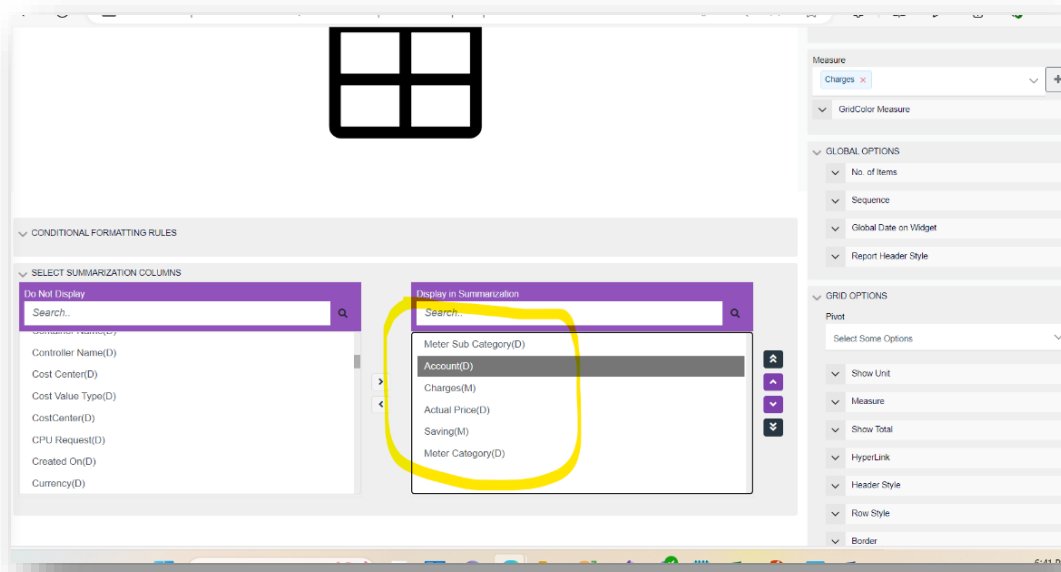


Figure 381 - Select Summarization Columns

- After clicking preview button It is showing data user click any value in charges column

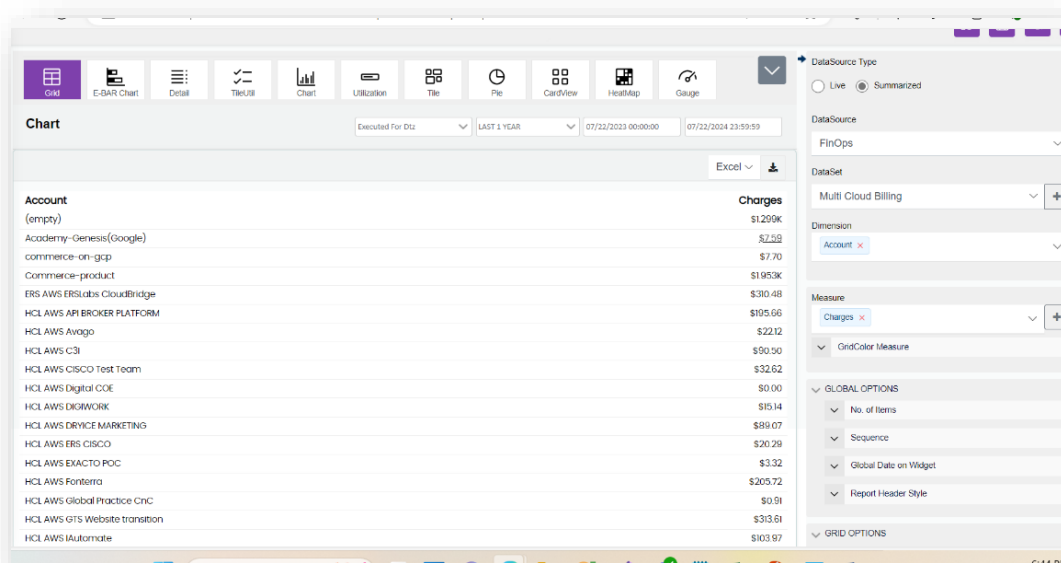


Figure 382 – Summarization Data

- The clicked value in charges column is an open drilldown page the summarization option is available is shown below image
- Here whatever column we selected in summarization those will come drilldown page summarization.

Motor Sub Category	Account	Charges	Actual Price	Saving	Motor Category
(empty)	HCLAWS EXACTO POC	0.00	0.0000000000		(empty)
(empty)	HCLAWS Master Reseller Account	19686 \$9	0.0000000000		(empty)
(empty)	HCLAWS Borderless Engineering	0.00	0.0000000000		(empty)
(empty)	HCLAWS CISCO SON-M&A program	0.00	0.0000000000		(empty)
(empty)	HCLAWS-CUST-BAKTER-HATM	0.00	0.0000000000		(empty)
(empty)	HCLAWS-ERS-INT-SWZN	0.00	0.0000000000		(empty)
(empty)	HCLAWS-ERS-INTERNALPOC	0.00	0.0000000000		(empty)
(empty)	HCLAWS-ERS-SPS@hcl.com	0.00	0.0000000000		(empty)
(empty)	HCLAWS-INFRA-DWP-MM-SEMPRA	0.00	0.0000000000		(empty)
(empty)	HCLAWS-INT-USAA-POC	0.00	0.0000000000		(empty)
(empty)	HCLAWS-MMA-INT@hcl.com	0.00	0.0000000000		(empty)
(empty)	HCLAWS-Tocana-BSESV	0.00	0.0000000000		(empty)
(empty)	HCLTech-AWS-CUST-GOOGLE	0.00	0.0000000000		(empty)

Figure 383 - Detailed Summarization Data in Report Builder

- After Save Grid Go to home page then click value on charges column and it is open drilldownpage the summarization option is available is shown below image

Motor Sub Category	Account	Charges	Actual Price	Saving	Motor Category
(empty)	ERS AWS ERS Labs CloudBridge	0.00	0.0000000000		(empty)
(empty)	HCLAWS DRYICE MARKETING	0.00	0.0000000000		(empty)
(empty)	HCLAWS ERS CISCO	0.00	0.0000000000		(empty)
(empty)	HCLAWS MSI Architecture Group	0.00	0.0000000000		(empty)
(empty)	HCLAWS Plutone Degree	900.00	0.0000000000		(empty)
(empty)	HCLAWS-CUST-DATAWAVE-Natwest Bank	0.00	0.0000000000		(empty)
(empty)	HCLAWS-ING-CUSTDEMO@hcl.com	0.00	0.0000000000		(empty)
(empty)	HCLAWS-INT-MBEU-Hydra-POC	0.00	0.0000000000		(empty)
(empty)	HCLAWS-PTS	0.00	0.0000000000		(empty)
(empty)	HCLAWS-SmartTest-POC	0.00	0.0000000000		(empty)
(empty)	HCLAWS-SONAAS-POC	0.00	0.0000000000		(empty)
(empty)	HCLAWS-TELCO-PROD@hcl.com	0.00	0.0000000000		(empty)
(empty)	HCLTech-AWS-CUST-ESOP	0.00	0.0000000000		(empty)
(empty)	HCLTech-AWS-CUST-AMMT-TESTING	0.00	0.0000000000		(empty)
(empty)	HCLTech-AWS-CUST-NOVODISK	0.00	0.0000000000		(empty)
(empty)	HCLTech-AWS-CUST-UNIFIED	900.00	0.0000000000		(empty)

Figure 384 - Detailed Summarization Data in Report Builder (Home Page)

22.17 Report Sharing via URL:

Users can now share report links within the same Engagement or Customer in MyXalytics. This feature allows colleagues to view and clone reports without altering the original.

- Global and Personal Reports:
 - Both types of reports can be shared across profiles, enabling collaboration regardless of user roles or access levels.

- User Access Considerations:
 - Users without access to the tool where the report was created may have limited interaction.
 - Lack of access to specific datasets or dimensions can restrict exploration of the report.
- "Report Link" Option in Widgets:
 - Each widget in the report builder now includes a "Report Link" option in Home page and Manage widget section.

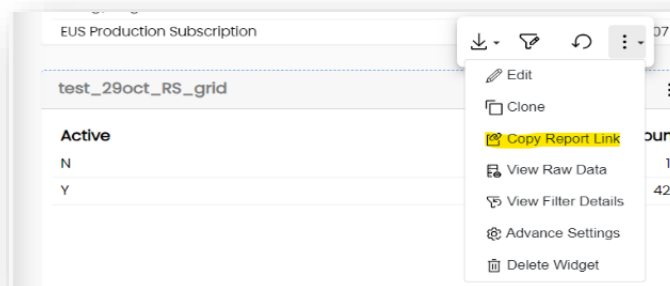


Figure 385 – Link Sharing Options

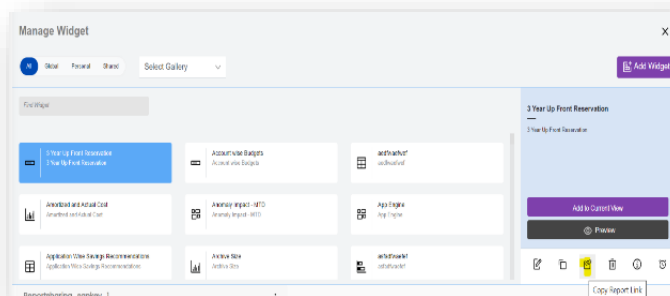


Figure 386 - Link Sharing options (Cont.)

By clicking this copies the report's URL to the clipboard for easy sharing via chat or email.

- Recipient Experience:
 - When recipients open the shared URL, they will need to authenticate.

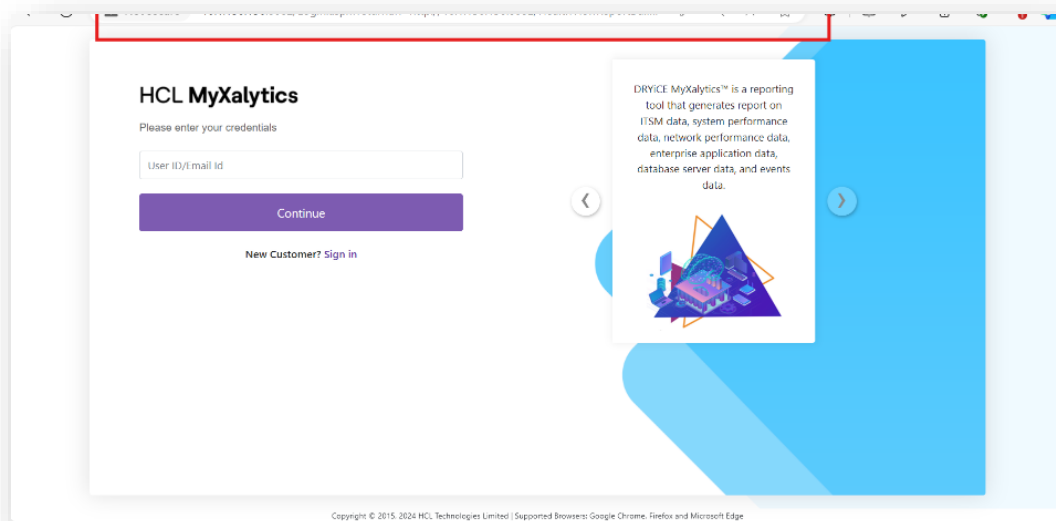


Figure 387 - Login Window

- After logging in, they will be directed to the report builder with prepopulated filters and can further customize their view.
 - Users can save their modified reports to their gallery.
 - If a deleted report is accessed, users will see a message: "The link is inactive". Please contact the administrator for assistance."
 - URL Behavior and Filters:
 - Shared URLs will open the report builder with the relevant filters applied.
 - An auto-preview feature will provide an initial view of the report.

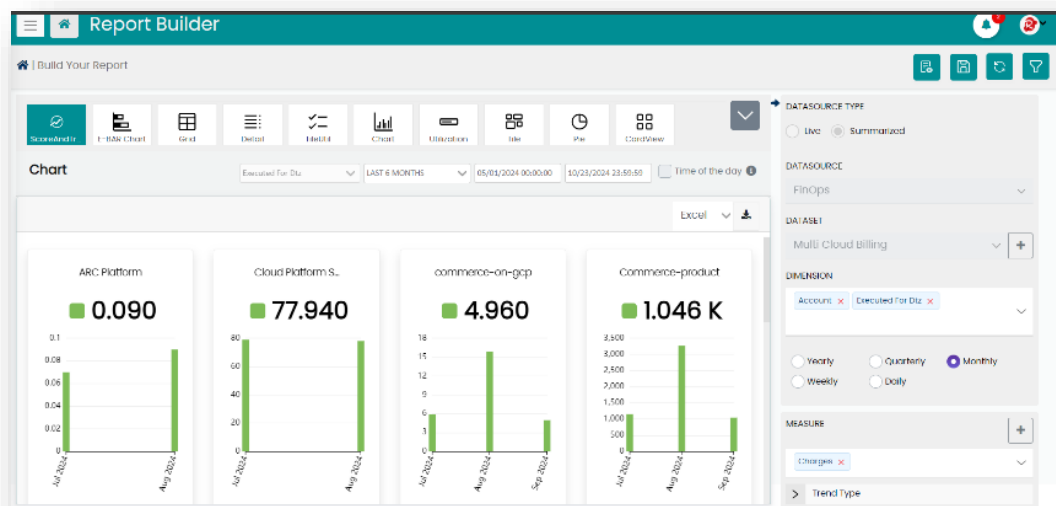


Figure 388 - Report for Authorized Users

- Data Security Filters:
 - Original report filters will respect data security rules, ensuring users only see data they have permission to access. If not, users will get Access Denied

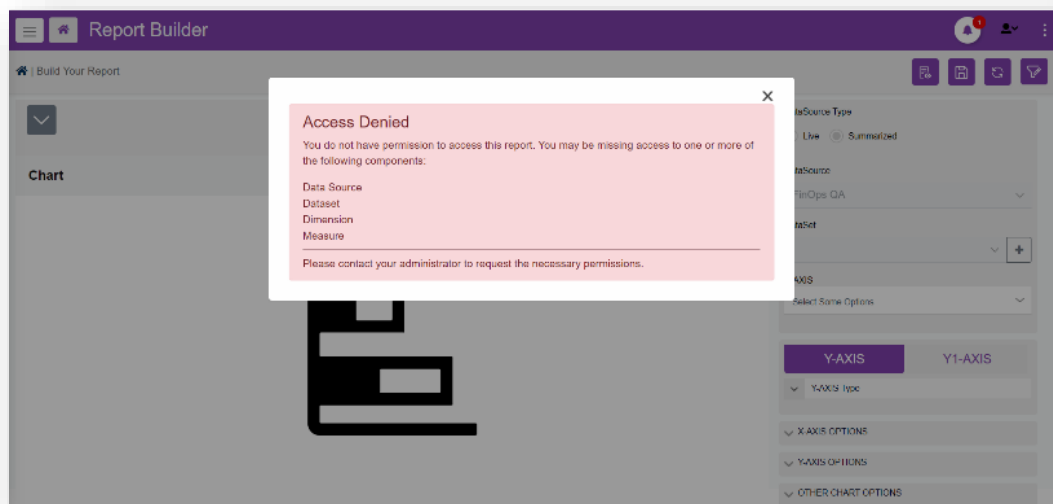


Figure 389 - Access Denied Message for Unauthorized Users

23 Dashboard linkage

Enable the Dashboard linkage feature on Multi Source template:

1. The Linkage feature that is configured by the user allows them to redirect to configure dashboards.
2. This feature will be applicable on dimension value only.
3. Right click on Grid value It show below option

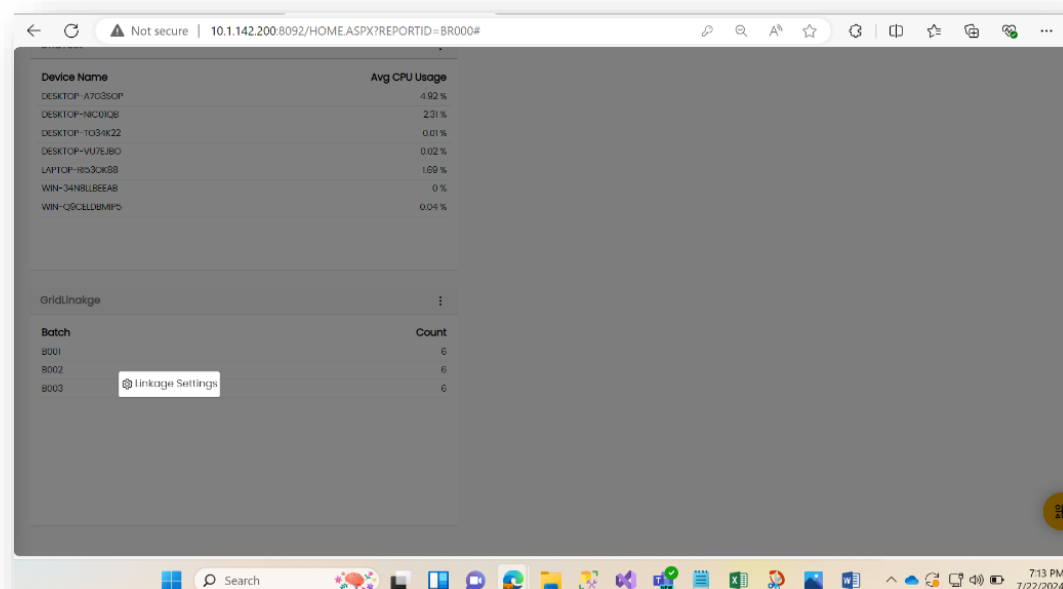


Figure 390 - How to enable dashboard Linkage

4. Click on linkage settings It is open settings Popup on right side It is showing
5. If a user wants to open a different dashboard on clicking on that value, then the user selects that specific dashboard for that value. By this setting default dashboard will override with specific dashboard which user set from the console.
6. If a user wants a different dashboard open on different values, then the user needs to set the selected dashboard value for those different values.
7. Once a user sets the configuration and clicks on submit button then these settings will save in the database for that report. Now linking options will enable to the user.

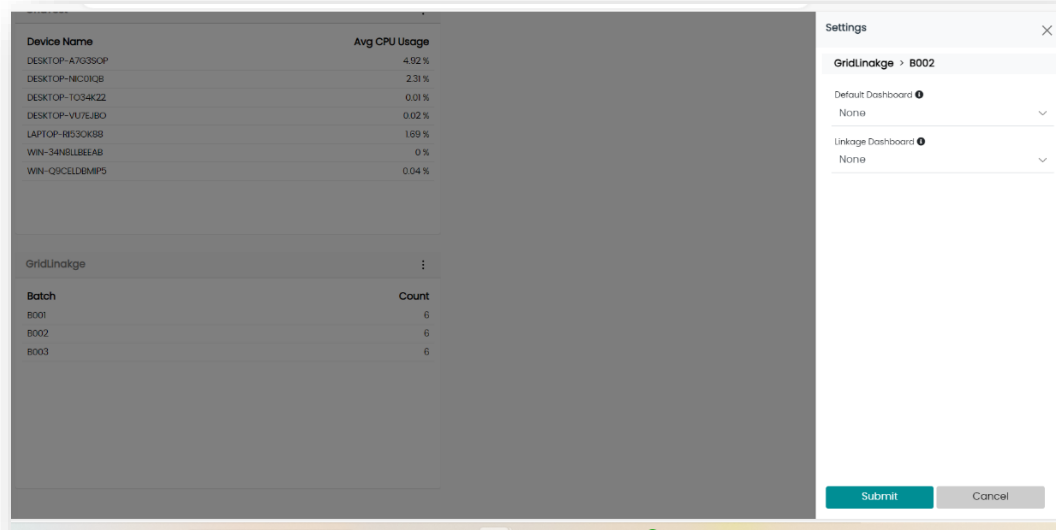


Figure 391 - Dashboard Linkage Configuration

- After you click on a dimension, it will navigate to the selected dashboard and filter the report accordingly

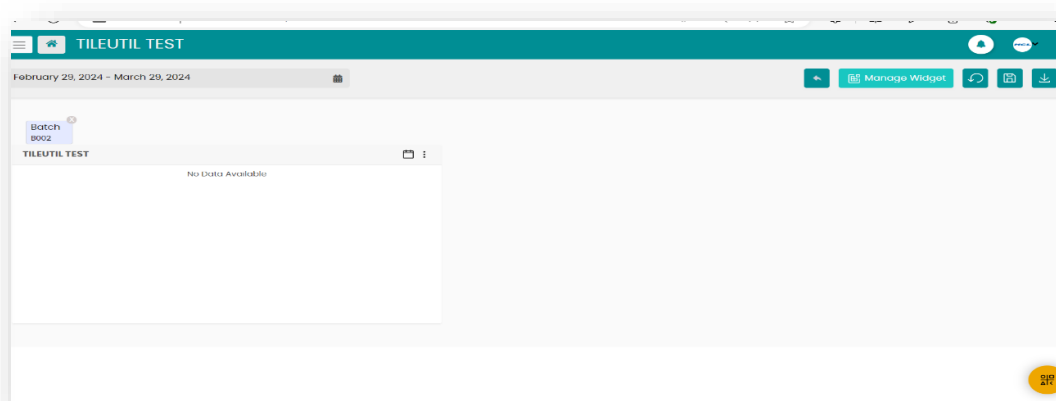


Figure 392 - Dashboard Linkage Flow

- Once user Click on the Back button previous Dashboard is open

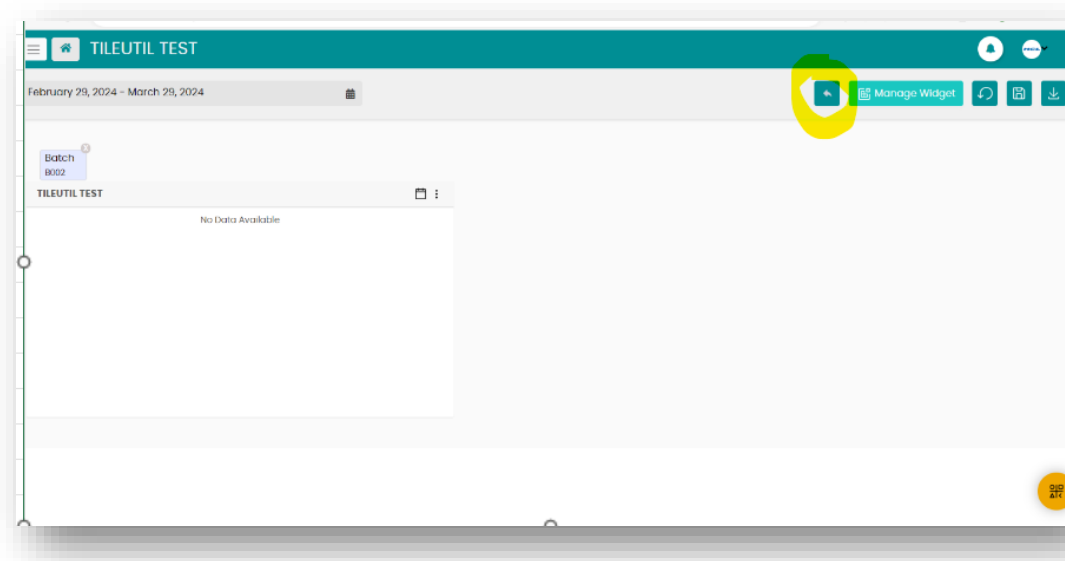


Figure 393 - Back to Previous Screen

24 Score and Trend

Overview

The Score and Trend template refers to a type of report or visualization that shows both scores and trends. This would allow you to see both the current performance (the score) and how this performance has changed over time (the trend).

Scores

Scores represent the current performance or evaluation of a particular entity; these scores are typically numerical ratings or assessments based on predefined criteria or metrics.

Trends

Trends refer to the changes or developments in performance over a period. Trends are often visualized through bar and line chart that show how scores have evolved over days, weeks, months, or even years.

In the following sections of this document, we will provide a detailed guide on how to use the Score and Trend Feature, including step-by-step instructions and tips for getting the most out of this powerful tool.

- After logging into the application, follow the steps outlined in the screenshot. This will lead you to the score and trend Template.

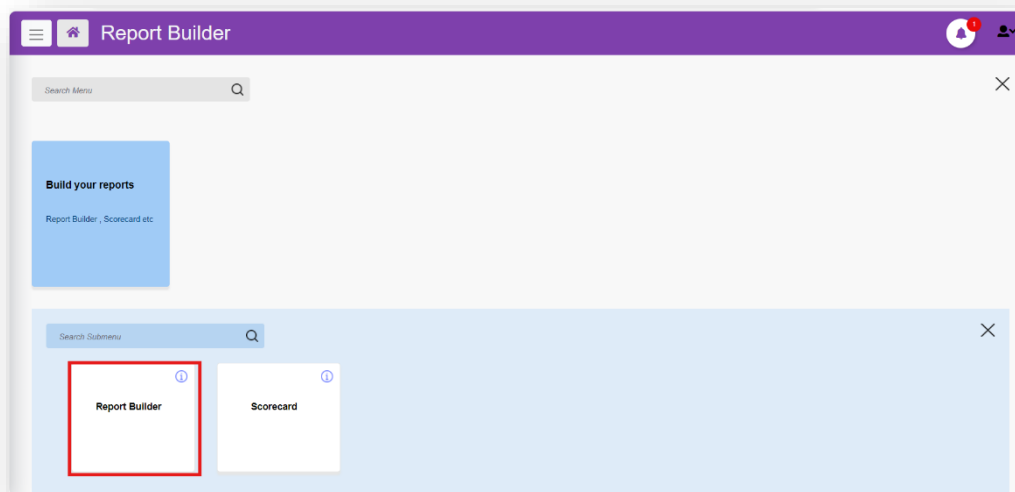


Figure 394 – Report Builder Path

- After selecting the ' Score and Trend ' template, the final output will appear as shown in the screenshot below.

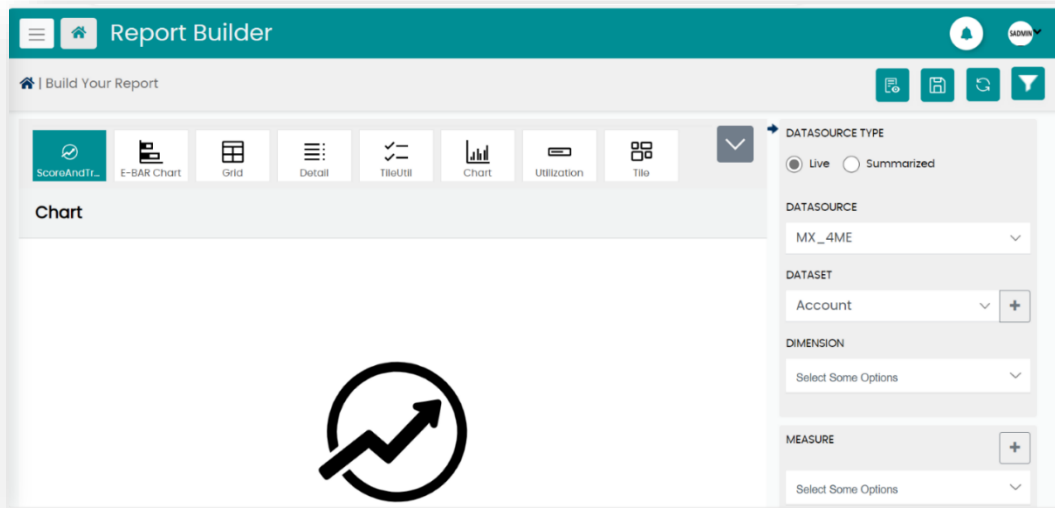


Figure 395 - Creating Score and Trend Report

24.1 Score Section

1. First, select the data source type, either 'Live' or 'Summarized Data'.
2. Next, choose the specific data source you want to use.
3. Ensure that at least one dimension and one measure are selected.

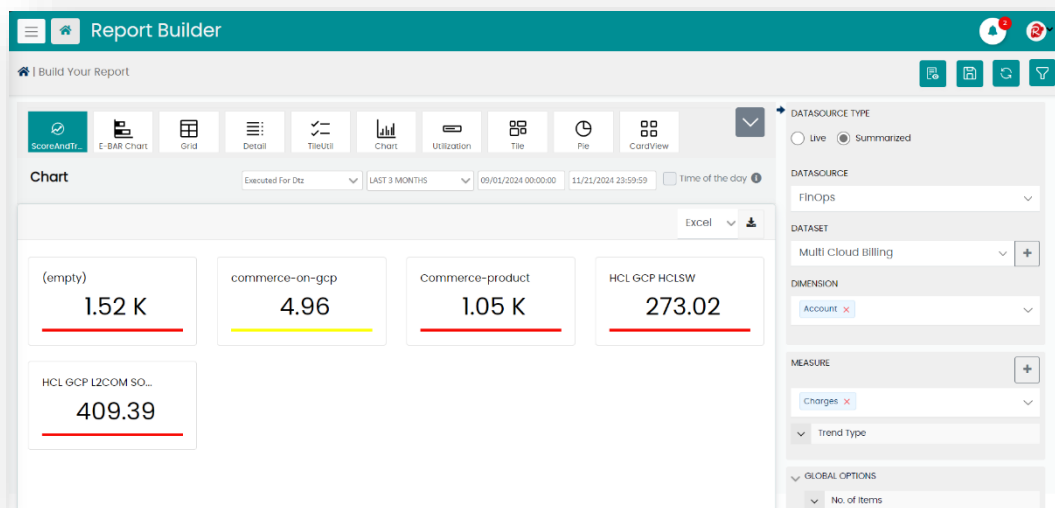


Figure 396 – Score Report

4. This is how the templet looks here there are two types of here score and trend let's begin with score The first part of the template is score
5. This section likely contains information or data related to scores, such as numerical ratings, points, or evaluations.

24.2 Chart Properties:

Here in the chart options, it includes bucket range, dimension style, measure style and drill down options are available for this score.

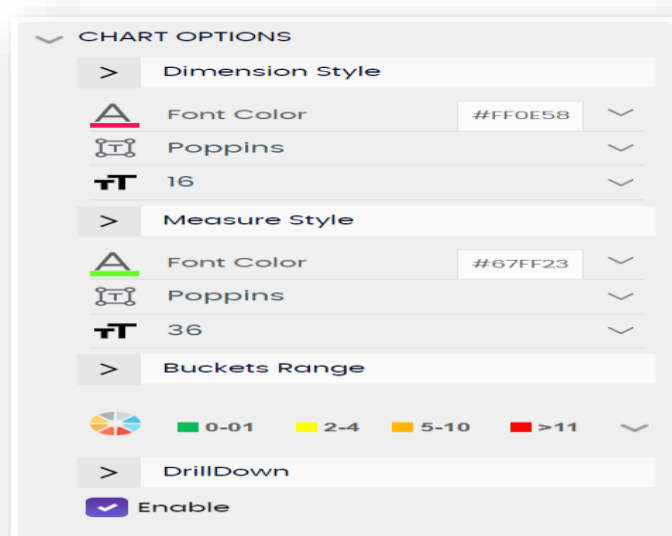


Figure 397 – Chart Option

- **Dimension Style:** This section allows you to format the font and text color of the dimension labels on the templet. In the example, the font color is set to #FF0E58 (a bright pink) and the font is set to Poppins at a size of 16.
- **Measure Style:** This section allows you to format the font and text color of the measure labels on the templet. In the example, the font color is set to #67FF23 (a light green) and the font is set to Poppins at a size of 36.
- **Buckets Range:** This section allows you to specify the ranges for the buckets in a histogram chart. The example shows a histogram with four buckets: 0-1, 2-4, 5-10, and >11.
- **Drill Down:** This section allows you to enable or disable drill down for the chart. Drill down allows you to click on a data point on measure to see more detail about that data point. In the example, drill down is enabled.

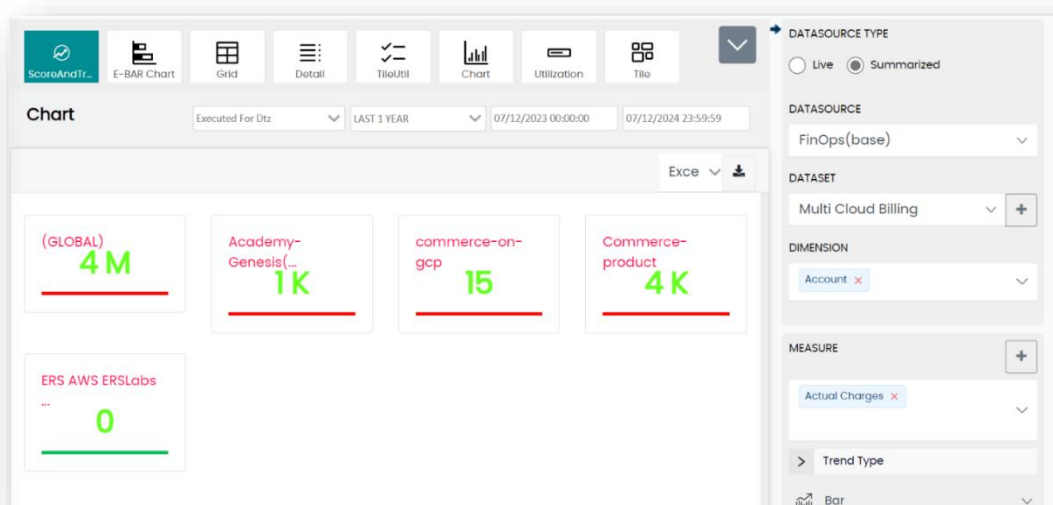
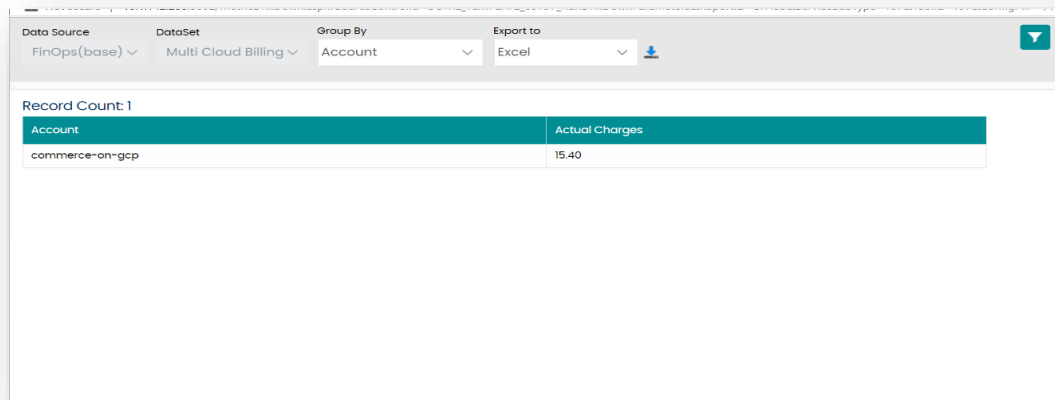


Figure 398 – Chart Options Applying Score Report

- When you click on the drill down option on measure the drill down page will open and look like below.



The screenshot shows a web interface for a drill-down report. At the top, there are four dropdown menus: 'Data Source' (FinOps(base)), 'DataSet' (Multi Cloud Billing), 'Group By' (Account), and 'Export to' (Excel). To the right of the 'Export to' menu is a download icon. Below the filters, it says 'Record Count: 1'. A table with two columns, 'Account' and 'Actual Charges', displays one row of data: 'commerce-on-gcp' and '15.40'.

Account	Actual Charges
commerce-on-gcp	15.40

Figure 399 – Drill Down Console

- Here there is an option to export in excel, pdf, ppt, csv and option to group you can Select whatever you want the data in dropdown.

24.3 Summarization Option

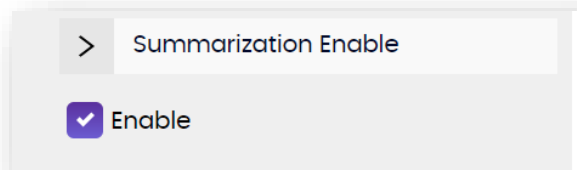


Figure 400 – Enable Summarization

- Select Summarization Columns: This section lists all the columns in the dataset. You can check the boxes next to the columns that you want to include in the summary.
- Do Not Display: When a box is checked in this section, it means that the column will not be included in the summary.
- Here only the summarization columns will be visible.

The screenshot shows a web interface with filters at the top: Data Source (FinOps(base)), DataSet (Multi Cloud Billing), Group By (Summarization), and Export to (Excel). Below the filters, it says 'Record Count: 19'. The table has five columns: Account, Actual Converted Charges, Actual Price, Application, and Architectures. It lists ten accounts, all with zero charges and prices, and all categorized as '(GLOBAL)' with architecture 'x86_64'.

Account	Actual Converted Charges	Actual Price	Application	Architectures
HCL AWS API BROKER PLATFORM	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL AWS Softwareization	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL Technologies	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-Agilent Field-Portal	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-DIGI-PLAT-NGN-PBF-COE	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-ERS-INT-SWZN	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-ERS-INTERNALPOC	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-ERS-PAS	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-ING-CUSTDEMO@hcl.com	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-INT-ORGANIC-MTAAS-POC	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-NEO-INT@hcl.com	0.000000	0.0000000000	(GLOBAL)	x86_64
HCL-AWS-Securitylab@hcl.com	0.000000	0.0000000000	(GLOBAL)	x86_64

Figure 401 – Summarize Console

24.4 Report Header Properties

The 'Report Header Style' panel shows various formatting options for the report header. It includes settings for font color, font family, font size, text alignment, font weight, visibility, and border line color, each with a corresponding icon and a dropdown menu for selection.

Property	Value
Font Color	#7d7d7c
Font Family	Poppins
Font Size	16
Text Alignment	Left
Font Weight	600
Show	Yes
Border Line Color	#CCCCC

Figure 402 – Report Header Properties

Based on the above properties, we can change the report header name style.

24.5 Conditional formatting:

- Before applying conditional formatting, Score will look like below

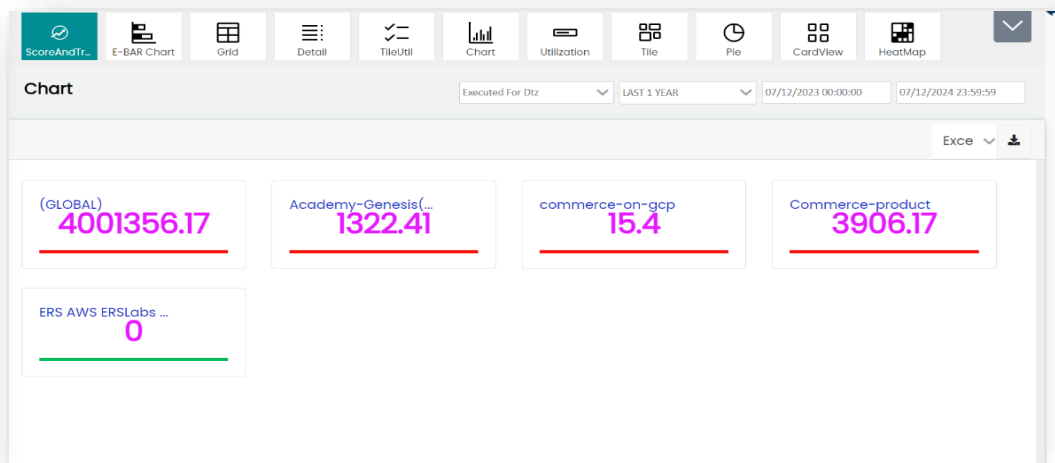


Figure 403 – Before Applying Conditional formatting

- After applying Conditional formatting Score will look like below

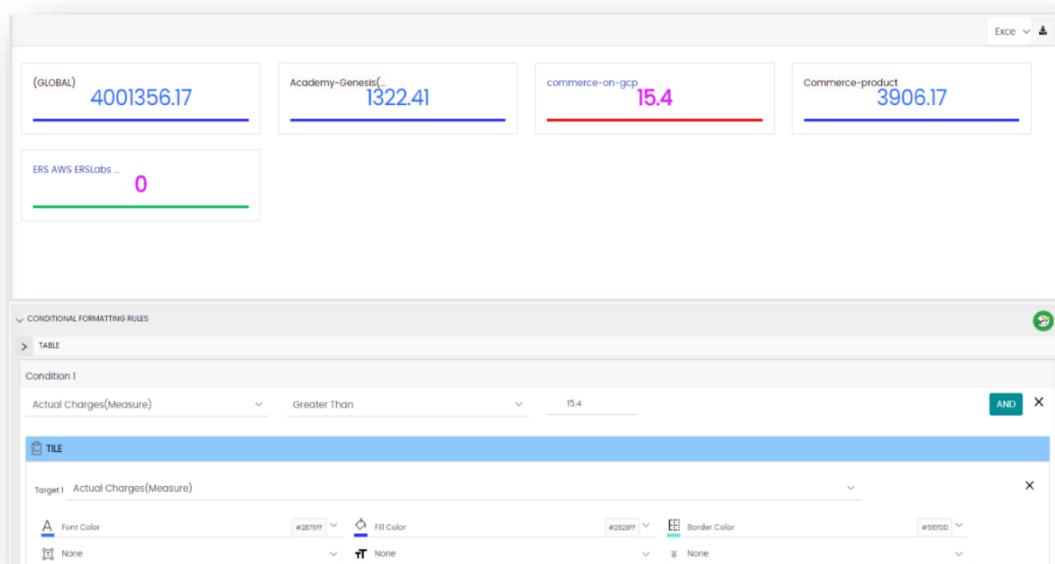


Figure 404 – After Applying Conditional formatting

When we apply conditional formatting for measure these colors (bucket range) will be overridden by conditional formatting. And conditional formatting will be given as first preference.

- Global Options:
 - The global options include Number of Items, Denomination, Sequence
 - Number of Items: This field likely allows you to set the number of data points that will be included in the score.
 - Denomination: This field is likely where you can set the unit that will be used for the data values on the chart.
 - X-Axis As: This option likely controls whether the x-axis (the horizontal axis) of the chart is sorted in ascending order (from least to greatest)
- After selecting all the above options score will look like below

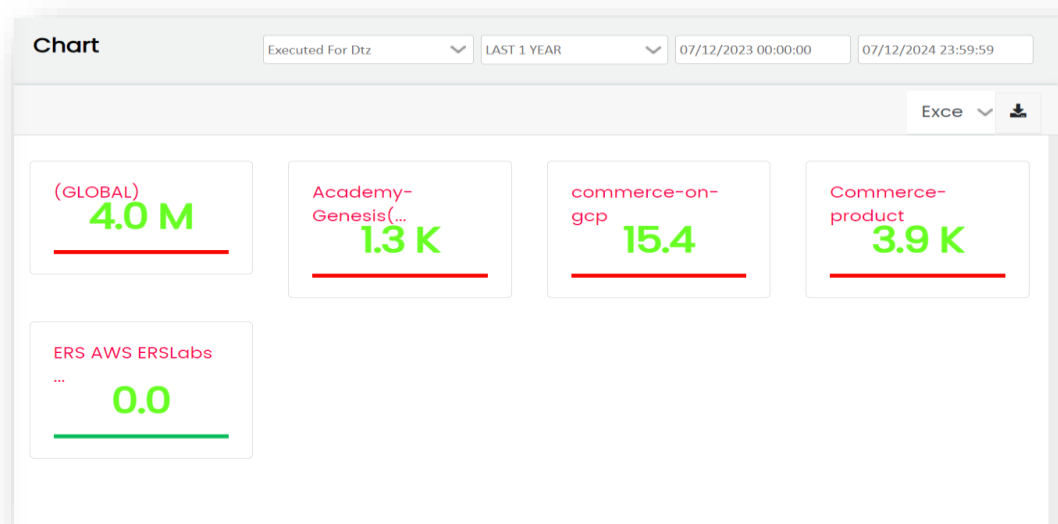


Figure 405 – Applying Global options

24.6 Drillthrough PROPERTIES

Here this is the drill through option we can select up to 4 levels for this templet when we apply drill through condition it will look like below. The drill through functionality will be activated on measure values in both the Report Builder console and the Home Page console. If this option is not enabled, the drill through functionality will not work.

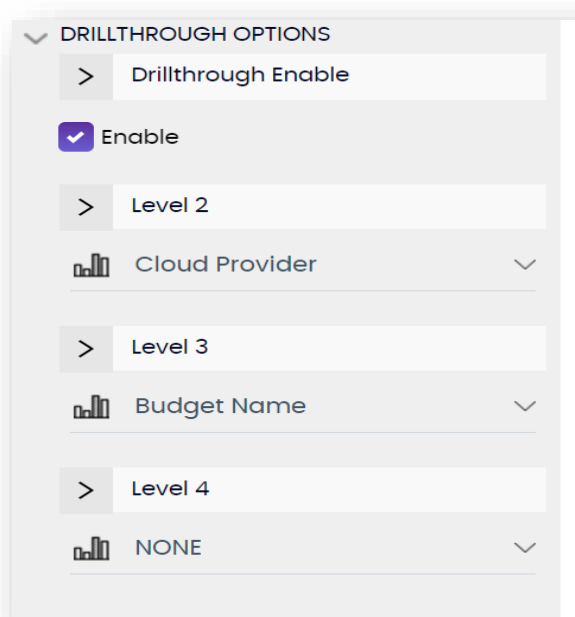


Figure 406 – Drill through Properties

- The Drillthrough functionality for score will look like below.

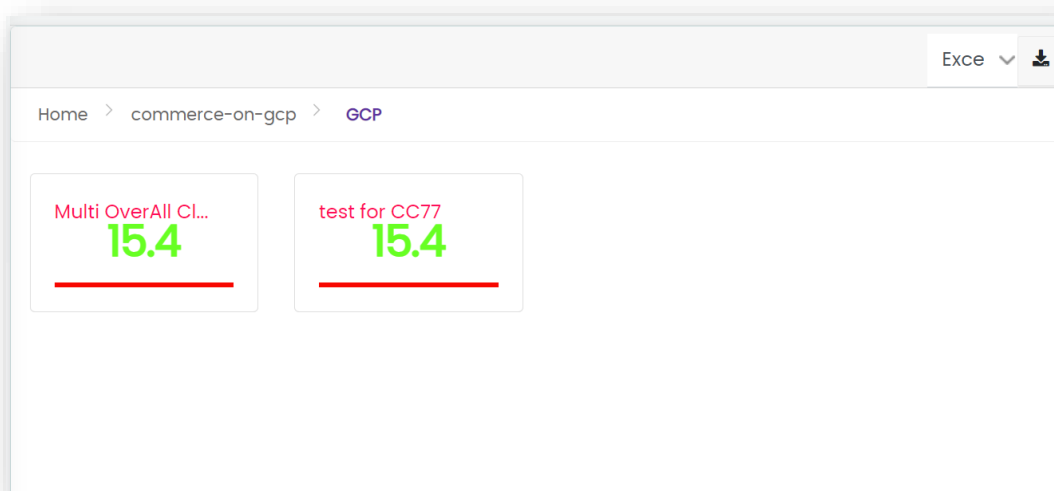


Figure 407 – After Applying Drill through Properties

24.7 Home Page Dashboard

After the report is saved, it will be visible on the home dashboard, as shown in the screenshot below.

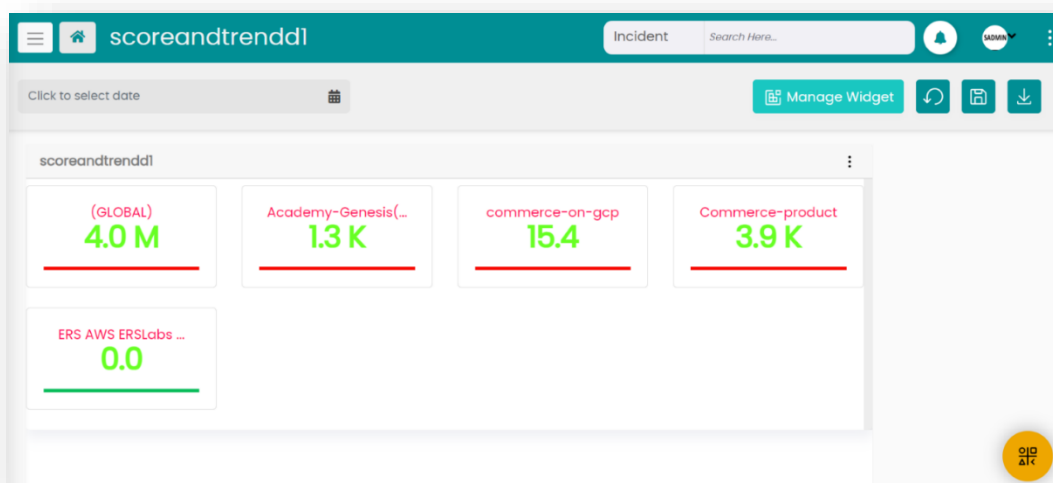


Figure 408 – Home Page Dashboard

- There are export options, edit options, filtering as shown in the screenshot below.

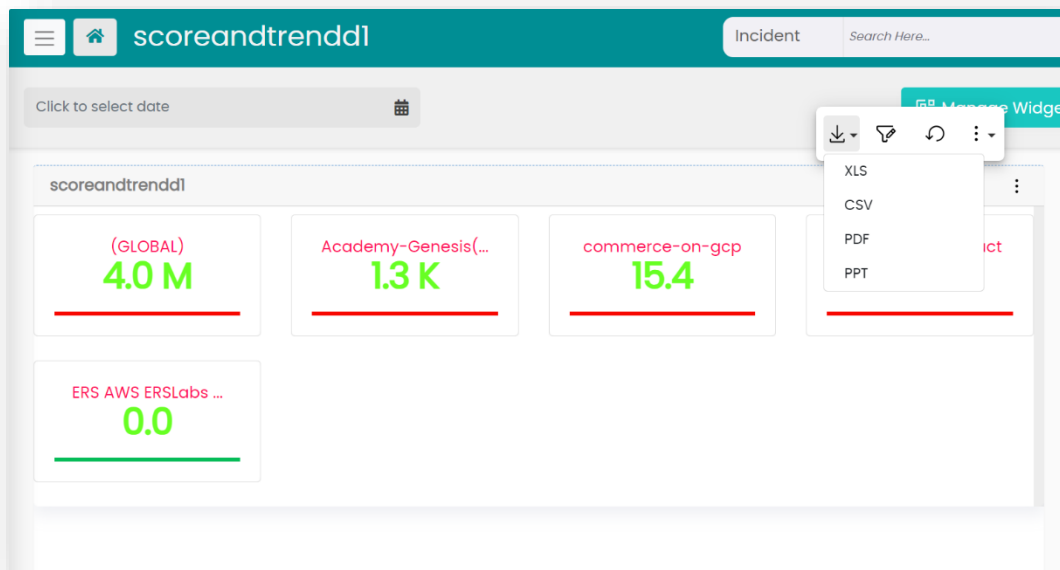


Figure 409 – Export Functionality Options

- We can delete the widget from the home page.
- We can edit the widget.
- We can filter the data using the filter icon.
- In the advanced settings option, you can choose to display the data in the form of radio buttons, dropdowns, or multi-select options.

24.8 Trend Section

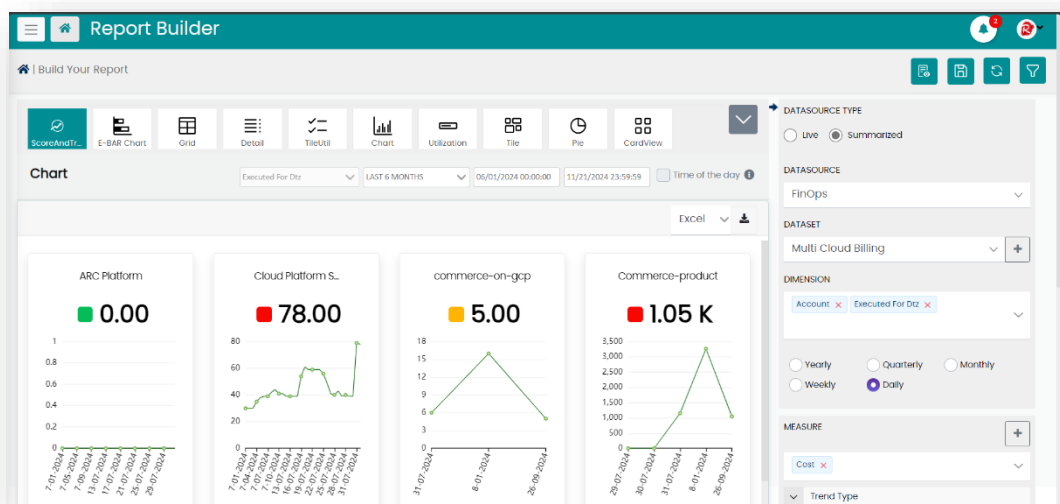


Figure 410 – Score and Trend Graphical Representations

Here based on dimension data, the trend will look like below. Here you can select Yearly, Quarterly, Monthly, Daily options are available you can select any of the option below.

DIMENSION

Account

Executed For Dtz

Yearly

Quarterly

Monthly

Weekly

Daily

MEASURE

+

Actual Charges

Figure 411 – Dimension

- Here's a breakdown of what the trend report shows:
 - **X-Axis:** The x-axis is labeled "Mar 2024" which suggests that the trend shows data for a single month, March 2024.
 - **Y-Axis:** The y-axis is not labeled but appears to show numeric values. The scale seems to range from 0 to 1500 with tick marks at 300, 600, 900, 1200, and 1500.

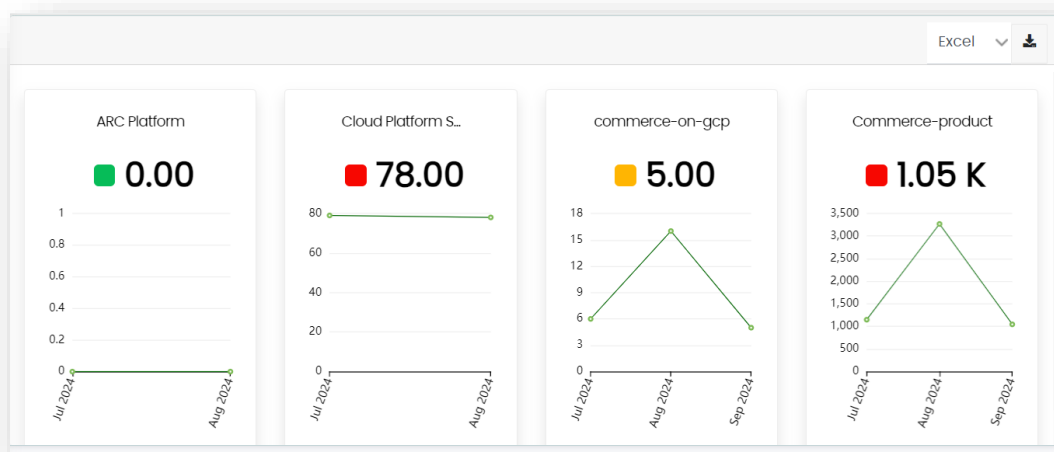


Figure 412 – Monthly Based Score and Trend

- For the yearly report it will look like this:

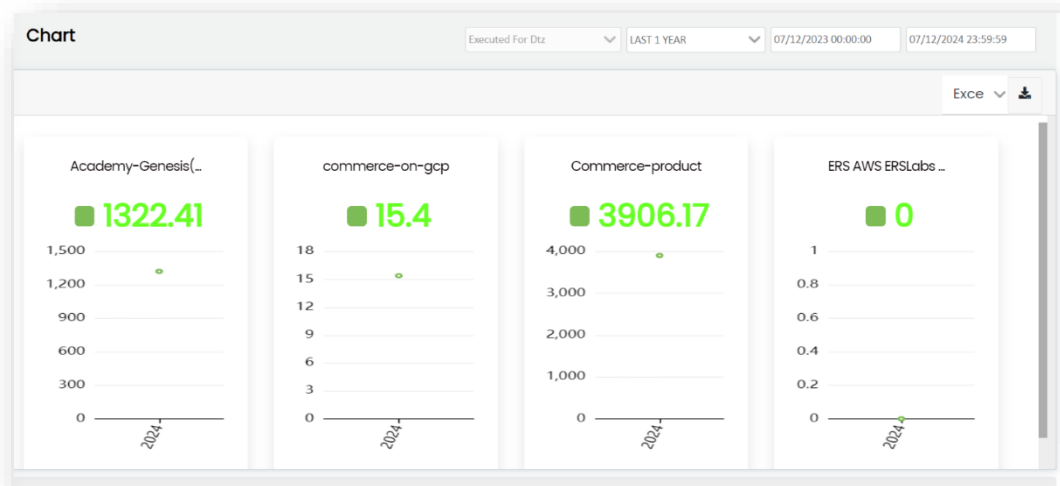


Figure 413 – Monthly Based Score and Trend

- **Trend Type:** There are two options for Trend Line type and bar type
 - **Line charts** are best suited for showing trends over time. They use a line to connect data points, allowing you to see how the data changes over time. In the example a line chart would be a good choice to see how the value of Executed For dimension changes over time (assuming the x-axis represents time).
 - **Bar charts** are good for comparing categories. They use bars to represent the values of different categories. In the example you sent, a bar chart would be a good choice to see how the value of Executed For dimension compares between different months (assuming the x-axis represents different months).

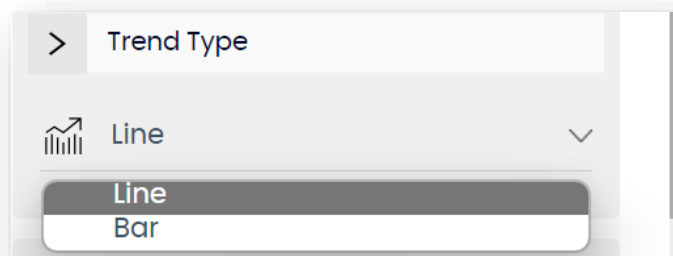


Figure 414 – Trend Type

- **Line Chart:** The image below refers to the Line Chart.

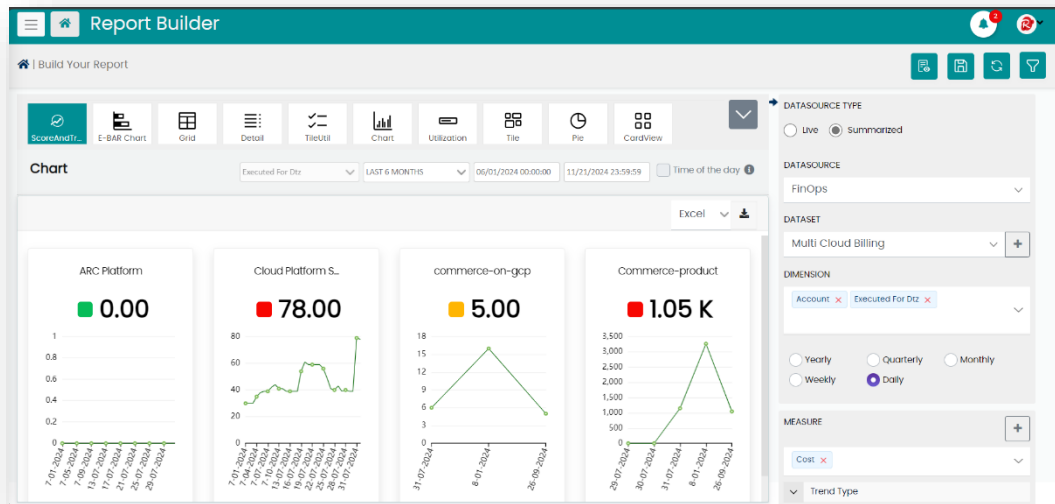


Figure 415 - Score and Trend Line Chart

- Bar Chart: The below image refers to the Bar Chart.

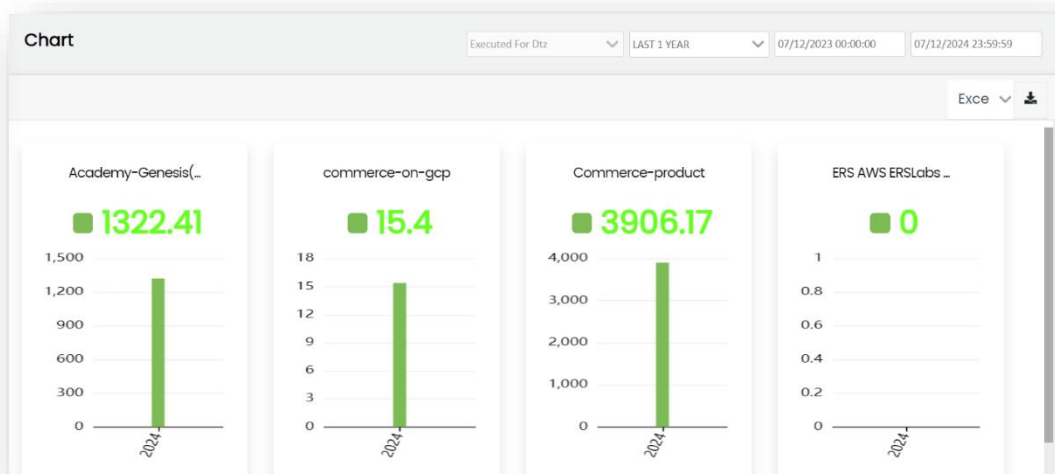


Figure 416 – Score and Trend Bar Chart

- **Chart Options:** The Chart Options Contains Dimension Style, Measure Style, Buckets Range, Drilldown
 - **Dimension Style:** This section allows you to format the font and text color of the dimension labels on the templet. In the example, font is set to Poppins at a size of 16.
 - **Measure Style:** This section allows you to format the font and text color of the measure labels on the templet.
 - **Buckets Range:** This section allows you to specify the ranges for the buckets in a histogram chart. The example shows a histogram with three buckets: Low, Medium, High
 - **Drill Down:** This section allows you to enable or disable drill down for the chart. Drill down allows you to click on a data point on measure to see more detail about that data point. In the example, drill down is enabled.



Figure 419 – Grid Lines Properties

- After Enabling Grid Lines Option, the Trend report will look as below:

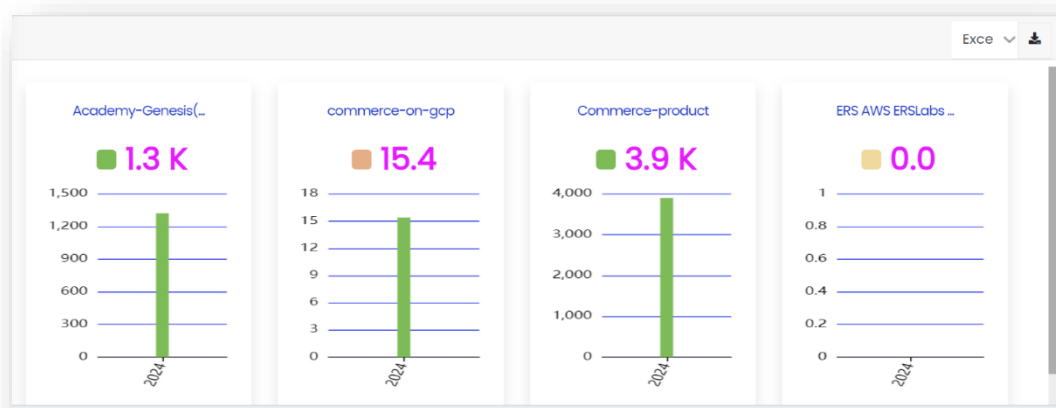


Figure 420 – After Enabling Grid Lines

24.9 No Data Message Properties

- No data message will be shown when there is no data.
- If you want to adjust the font style, font size, font format, and text alignment of the 'no data available' message, you can use these options to format it to your preference.

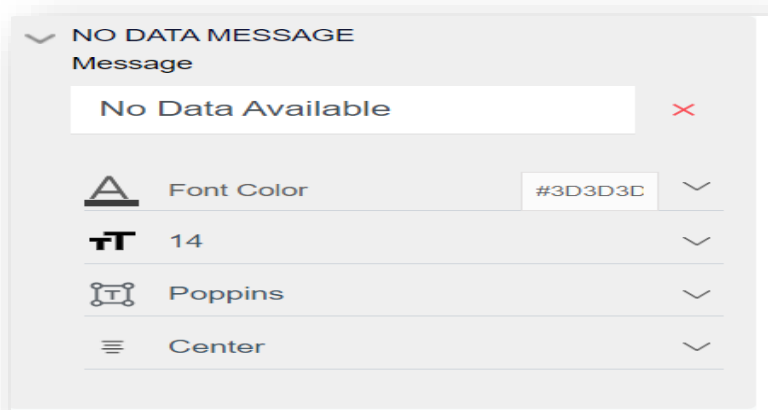


Figure 421 – No Data Message Properties

24.10 Score and Trend Home Page Dashboard

- After the report is saved, it will be visible on the home dashboard, as shown in the screenshot below.

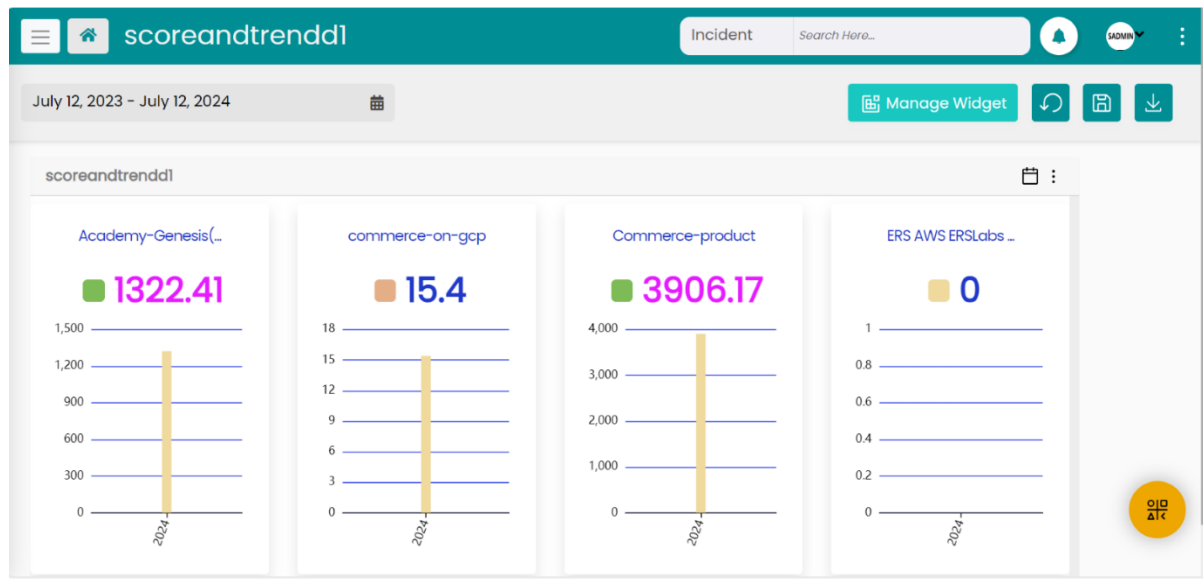


Figure 422 – Score and Trend Dashboard

25 Tile Group by Comparison

25.1 Overview

- The Tile Group by Comparison section of our application provides a powerful tool for comparing and analyzing different data sets side by side.
- This feature allows users to group data tiles together based on specific criteria, enabling a more streamlined and efficient comparison process. With the Tile Group by Comparison feature, users can easily identify patterns, trends, and discrepancies between different data sets.
- This can be particularly useful in scenarios where users need to compare data from different time periods or different business units.
- This feature is designed with flexibility and ease of use in mind. Users can customize the grouping criteria based on their specific needs, and the interface is intuitive and user-friendly, making it easy even for beginners to start making meaningful comparisons.

In the following sections of this document, we will provide a detailed guide on how to use the Tile Group by Comparison feature, including step-by-step instructions and tips for getting the most out of this powerful tool.

1. After logging into the application, follow the steps outlined in the screenshot. This will lead you to the Tile Group by Template.

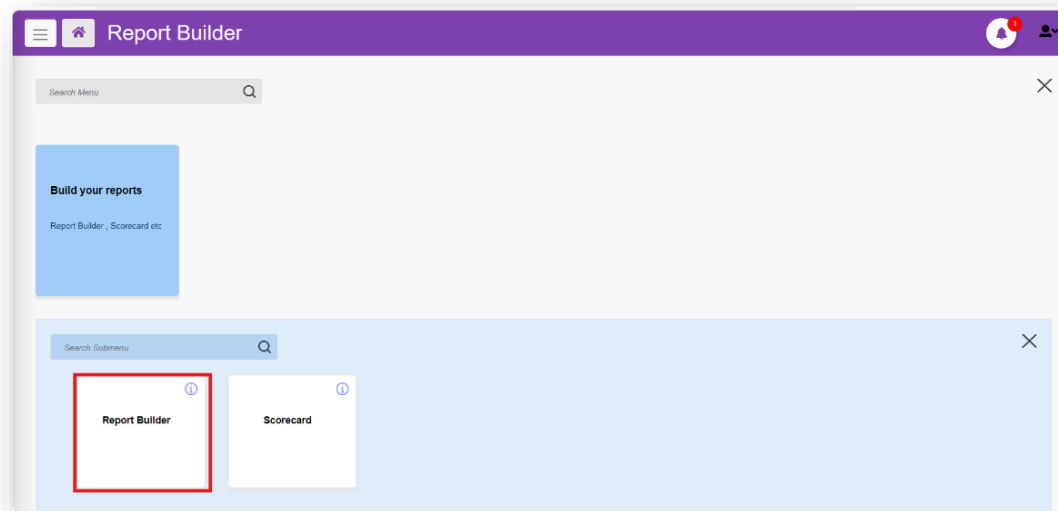


Figure 423 – Report Builder Path

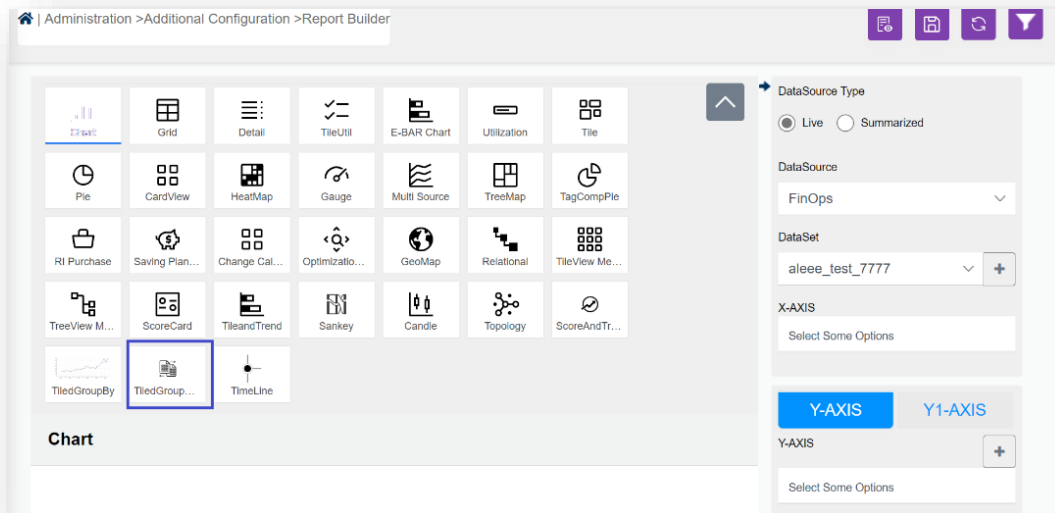


Figure 424 – Tile Group by Comparison Path

2. After selecting the 'Tile Group by Comparison' template, the final output will appear as shown in the screenshot below.

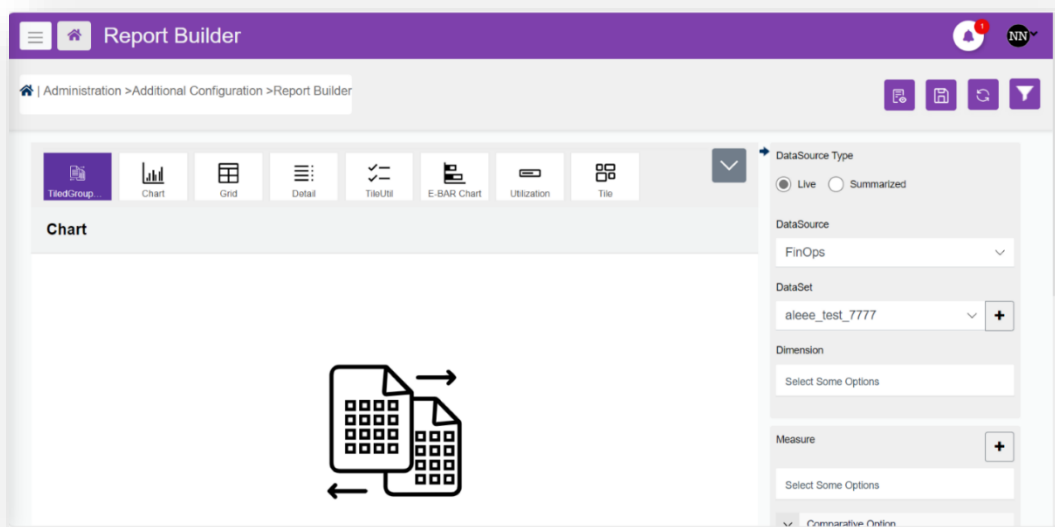


Figure 425 – Creating Tile Group by Comparison Report

3. First, select the data source type, either 'Live' or 'Summarized Data'.
4. Next, choose the specific data source you want to use.
5. Ensure that at least one dimension and one measure are selected.

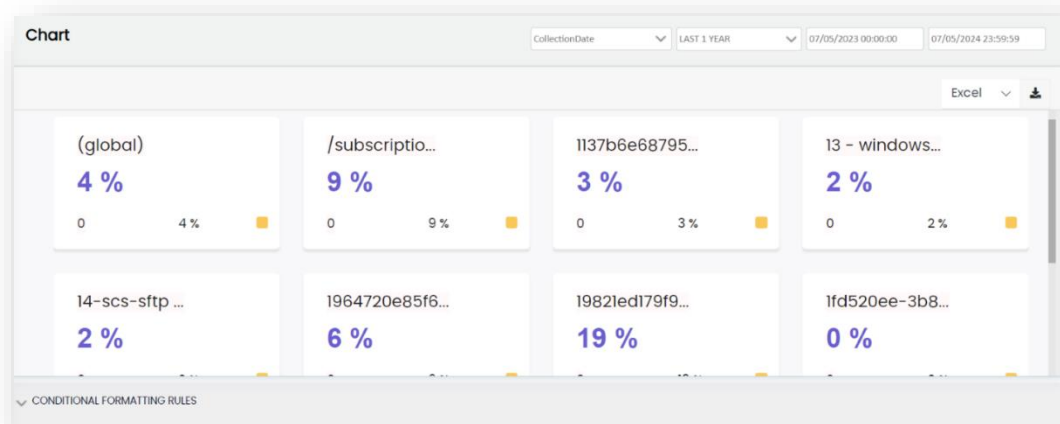


Figure 426 – Tile Group by template

This is how the templet looks here. The value 0 indicates previous month value and 4% in blue color indicates the current value. And 4% in yellow indicates the difference between both 0 and 3%.

- **Red:** Used for negative differences. In this case, the current value (7%) is lower than the previous month (11%).
- **Yellow:** Used for positive differences. If the current value and the previous month's value were the same, it would be displayed in yellow.
- **Green:** Used for positive difference. If the current value is higher than the previous month's value.

If we apply conditional formatting, then it will override these colors and conditional formatting selected colors will get applied.

25.2 Comparative Property

- Use the 'Comparative Option' property to select the desired time periods.
- Upon opening the 'Comparative Option' property, you will see several options populated, as shown in the screenshot below.
- In the first dropdown we have four values like
 - Previous Period
 - Previous Year
 - Previous year same period
 - Specify
- Previous Period:
 - This option allows you to compare data with the immediately preceding period. For example, if you're currently viewing data for the month of May, selecting this option would show data for April.
- Previous Year:
 - This option enables a year-over-year comparison. If you're currently viewing data for 2022, selecting this option would show data for 2021.
- Previous Year Same Period:
 - This option allows for a more specific year-over-year comparison. If you're currently viewing data for May 2022, selecting this option would show data for May 2021.
- Specify:
 - This option provides the most flexibility, allowing you to manually define the comparison period. You could choose any past period for comparison, regardless of its relation to the current period

- Pre Text and Post text values before and after the measure are referred to as the pre-value and post-value, respectively.
- Based on the data, we display the selected calculation, whether it's a difference or a percentage calculation.
- Some text will be displayed after the value of the selected calculation.

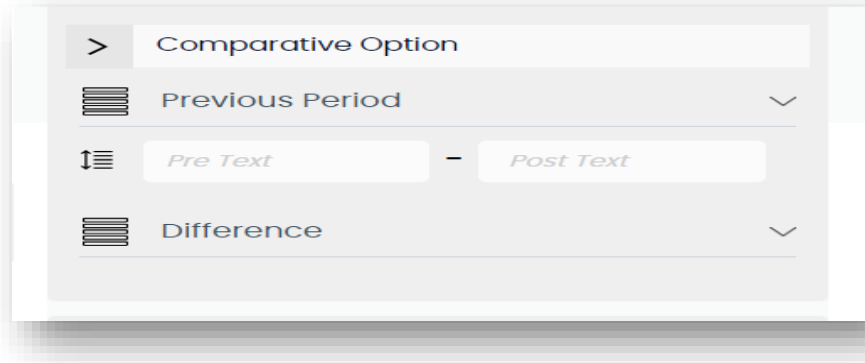


Figure 427 – Comparative Property

- The percentage will show the percentage% between current and previous value

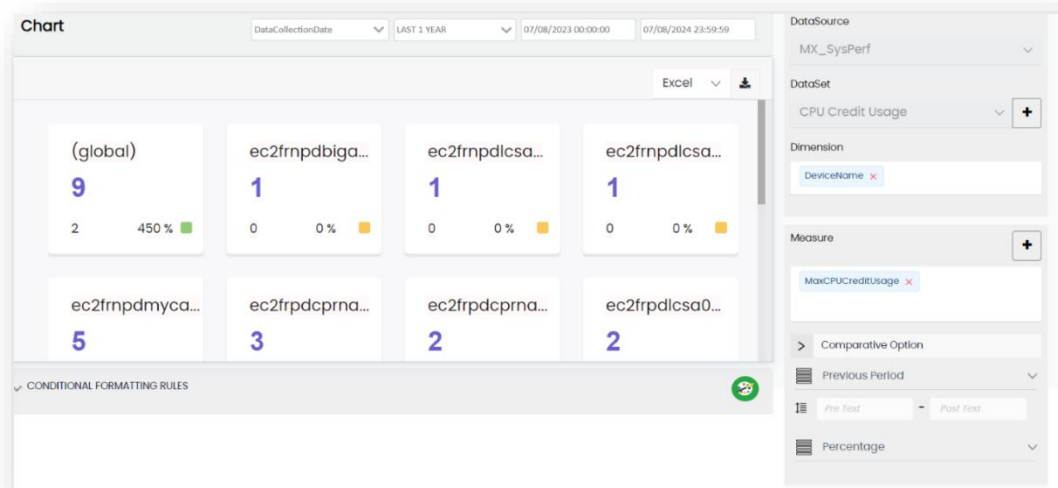


Figure 428 – Percentage Tile Group by Template

25.3 Conditional formatting

Here we have applied the conditional formatting for measure it will look like above.

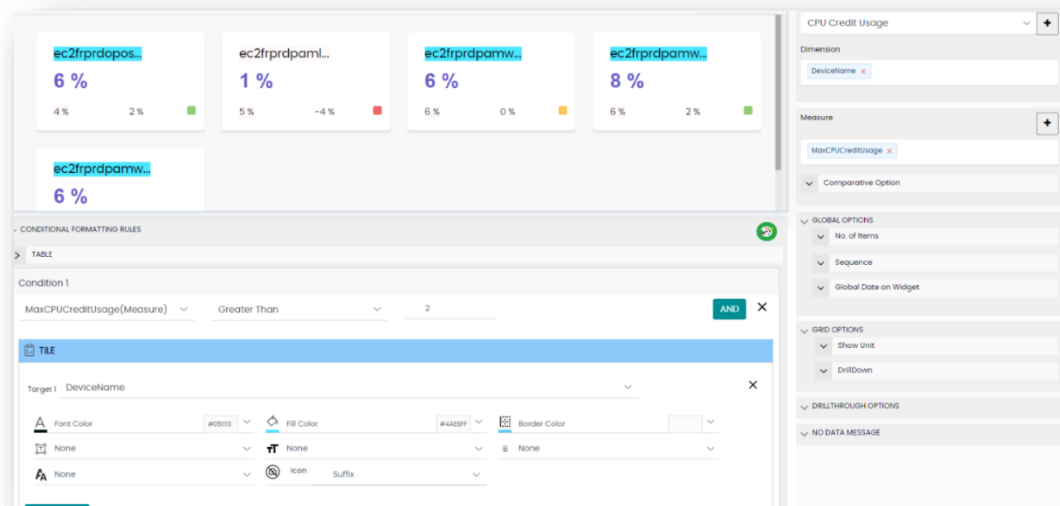


Figure 429 – After Applying Conditional Formatting

25.4 Global Options

- Next, we move to the 'Global Option' section. When opened, it will appear as shown in the screenshot below.
- In the 'Number of Options', if you select 'All', all records will be displayed. If you select a particular value, the display will be limited to records based on that value.
- In the 'Sequence' section, data will be displayed based on the sequence of values you have selected. The data can be displayed in either descending (desc) or ascending (asc) order.
- In the 'Global Date on Widget' section, if you enable this option, the date will be filtered on the home page console. If this option is disabled, the global date option will not be applied to your report.

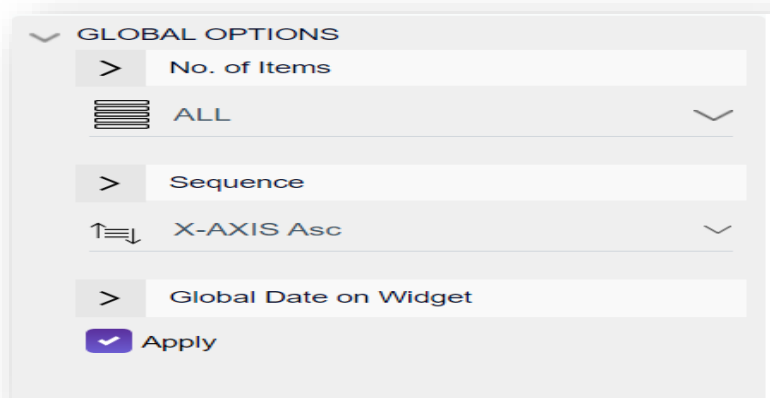


Figure 430 – Global Properties

25.5 Grid Options

- Next, we move to the 'Grid Option' section. When opened, it will appear as shown in the screenshot below.

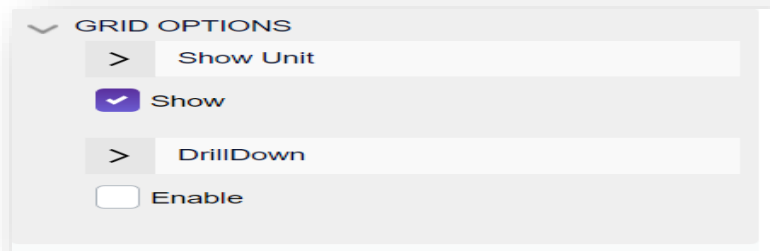


Figure 431 – Grid Properties

- If you enable the 'Show Unit' option and your data includes a dollar symbol (\$), the symbol will be displayed. If this option is disabled, the dollar symbol will be hidden. It will look like the following when you enable show unit option.

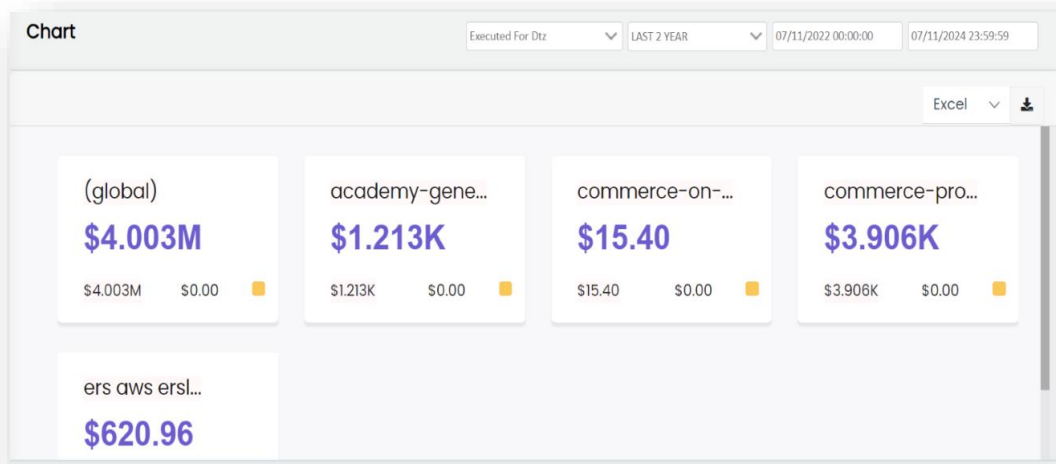


Figure 432 – Tile Group by Template with Unit

- If you enable the 'Drill Down' option, the drill down functionality will be activated on measured values in both the Report Builder console and the Home Page console. If this option is not enabled, the drill down functionality will not work. It will look like below when you enable drill down.

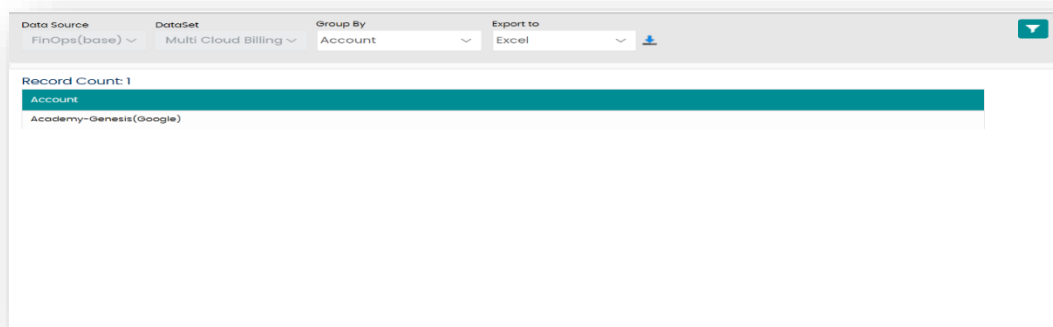


Figure 433 – Drilldown Console

25.6 Drillthrough Properties

- We are moving to the 'Drill through Option' section. When opened, it will appear as shown in the screenshot below.
- Here this is the drill through option we can select up to 4 levels for this templet when we apply drill through condition it will look like below. The drill through functionality will be activated on measure values in both the Report Builder console and the Home Page console. If this option is not enabled, the drill through functionality will not work

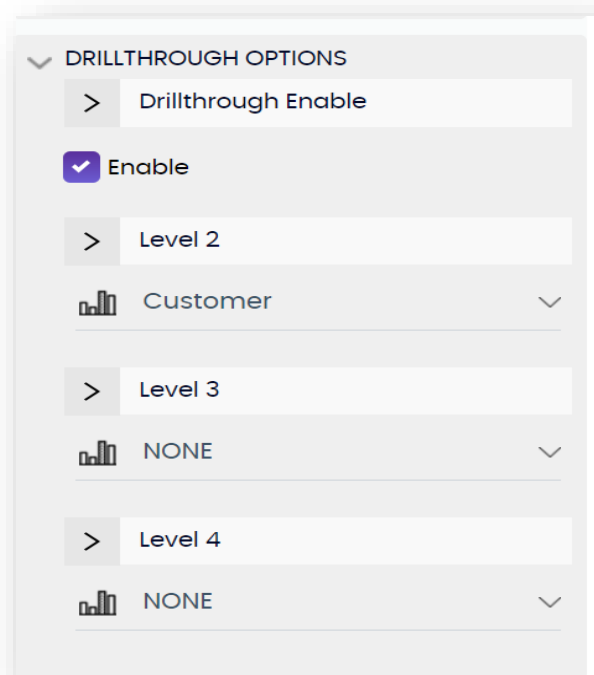


Figure 434 – Drillthrough Properties

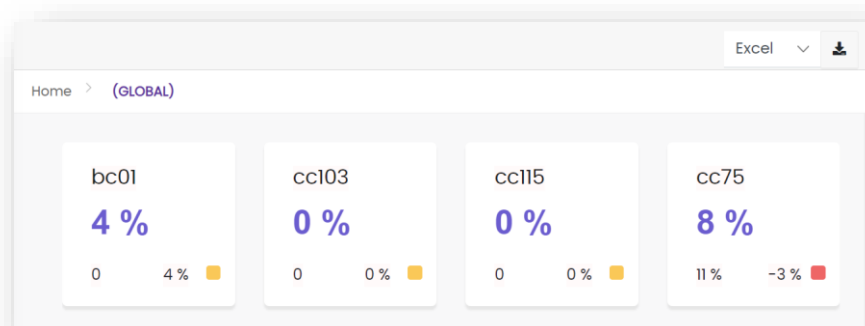


Figure 435 – Drillthrough Console

25.7 No Data Message

- We are moving to the 'No Data Message' section. When opened, it will appear as shown in the screenshot below.
- If the selected period data is not available, this message will be displayed to the customer.

- If you want to format the 'no data available' message in a particular way, you can click on the edit icon.
- Once click the edit icon it will appear as shown in the screenshot below.

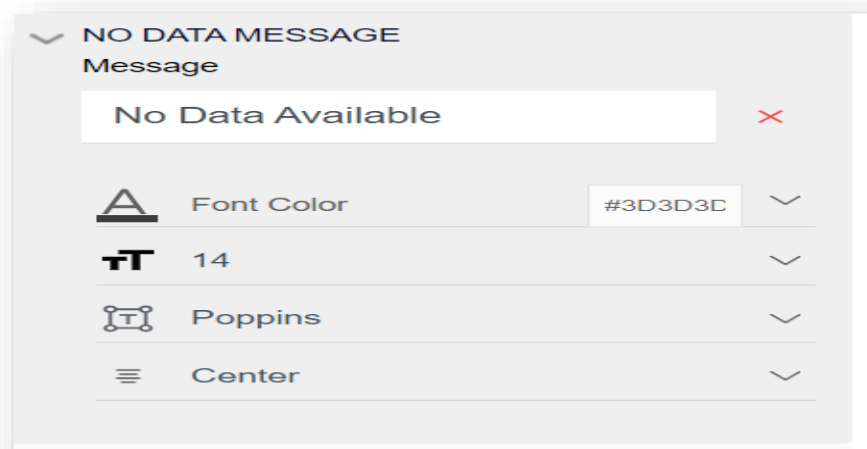


Figure 436 – No Data Properties

- If you want to adjust the font style, font size, font format, and text alignment of the 'no data available' message, you can use these options to format it to your preference.

25.8 Report Header style

Based on this option, we can add styles for the report name, which will apply to the report name on the dashboard.

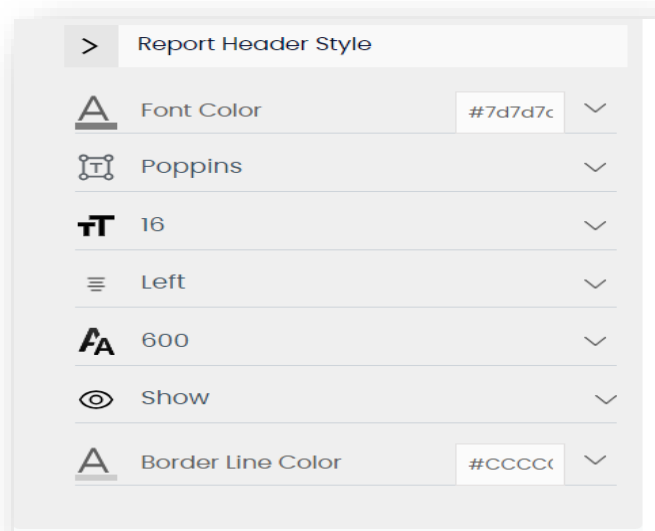


Figure 437 – Report Header Properties

25.9 Home Page

After the report is saved, it will be visible on the home dashboard, as shown in the screenshot below.

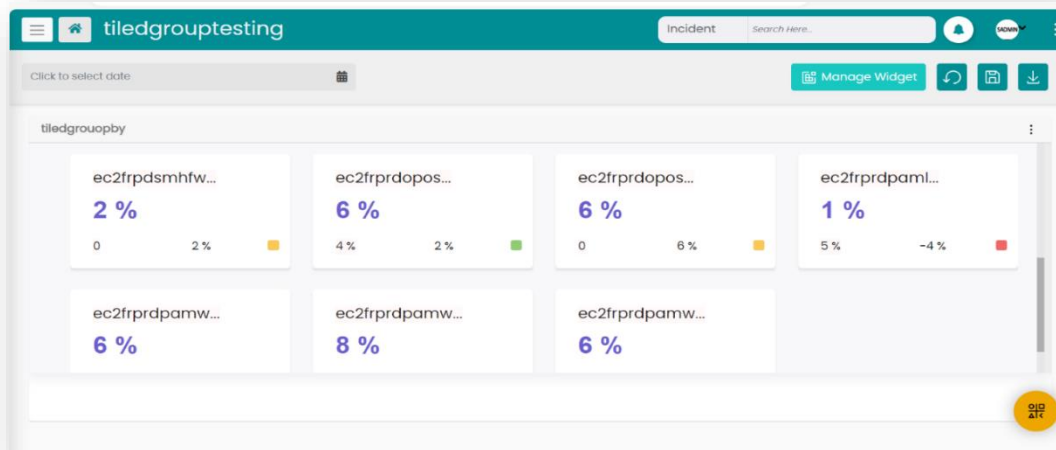


Figure 438 – Tile Group by Dashboard

- There are exporting options, editing options, filtering as shown in the screenshot below.

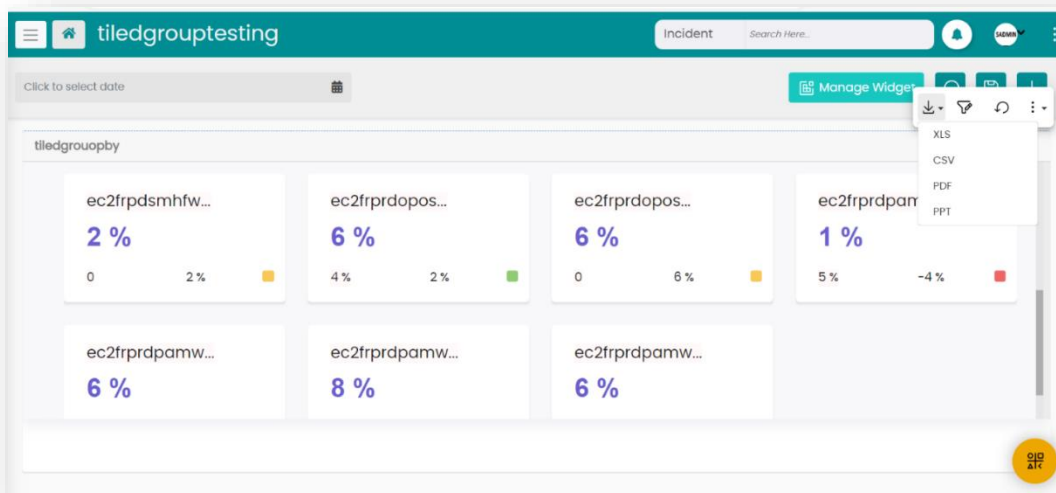


Figure 439 – Export Options

- We can delete the widget from the home page.
- We can edit the widget.
- We can filter the data using the filter icon.
- In the advanced settings option, you can choose to display the data in the form of radio buttons, dropdowns, or multi-select options.

26 Trend Documentation (Device Summary Report)

26.1 Overview

Trend Template on Report Builder to showcase the data visualization of device summary on trend basis.

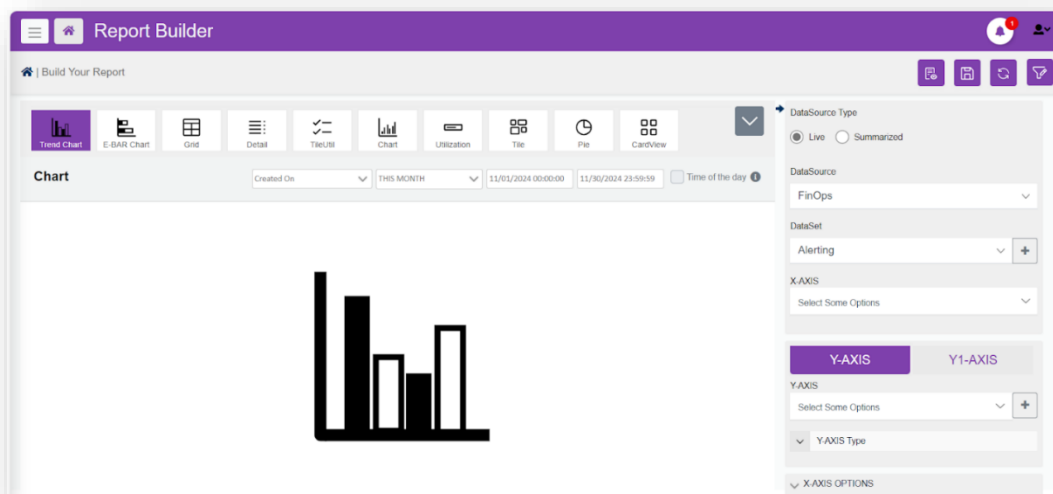
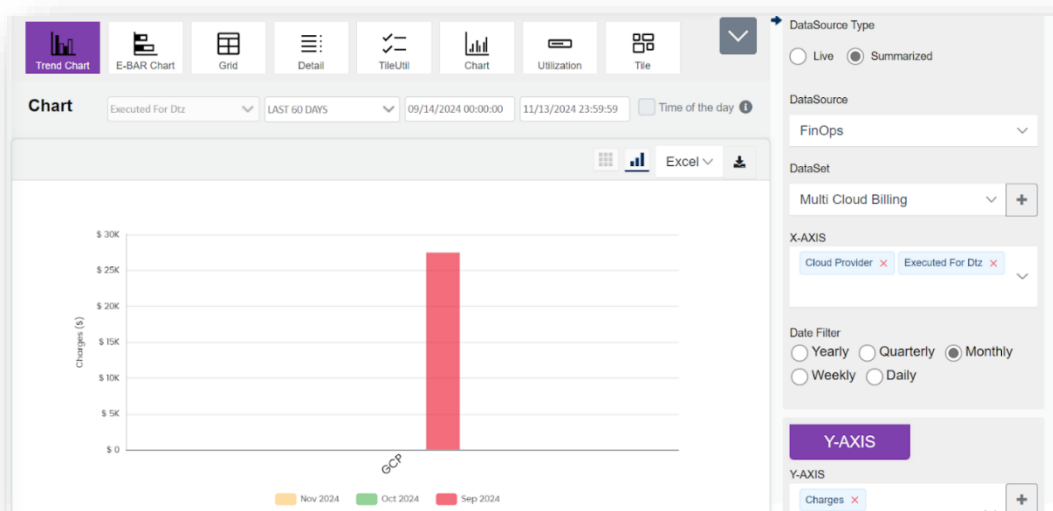


Figure 440 – Timeline Template

26.2 Steps To Create Trend (Device Summary) Template in Report Builder (Sample View) (* Mandatory Fields)

1. DATASOURCE TYPE* - Summarized
2. DATASOURCE* - Mx_FinOps
3. DATASET* - Multi Cloud Billing
4. X-Axis* - Cloud Provider and Executed for Dtz
5. Y-Axis* - Charges
6. Click on the Preview button to populate the chart.



26.3 Properties (Optional)

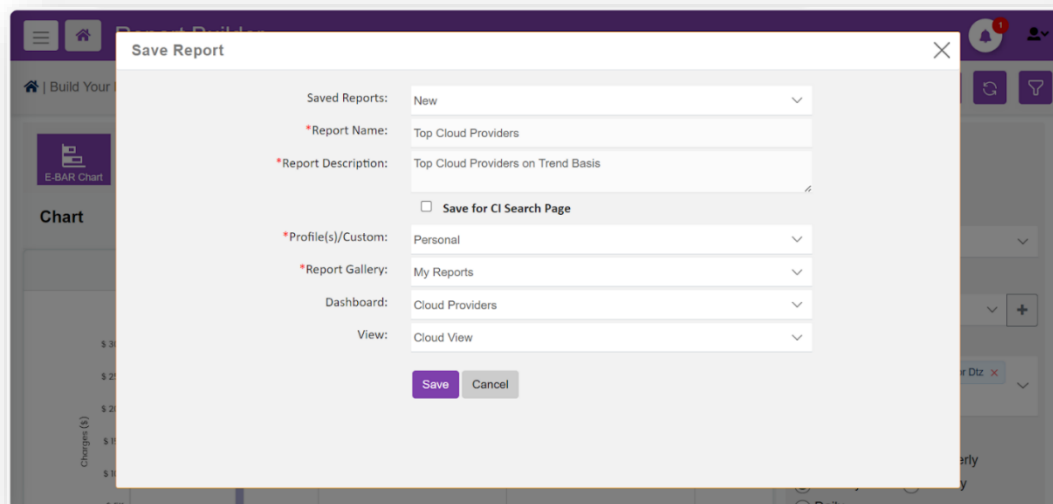
You can modify the Template Functionality/Design by,

- Date Filter
 - Yearly, Quarterly, Monthly, Weekly, Daily
- Y-Axis Types
 - Bar, Line, StackedArea
- Y1-Axis Types
 - Bar, Line
- X-Axis Options
 - Title - Input, Font Color, Font Family, Font Size
 - Gridline - Enable/Disable
 - Data Label - Enable/Disable, Font Family, Font Size, Font Color, Font Length, Font Weight, Font Angle
 - Interval Gap - Space Between the X-axis Labels
- Y-Axis Options
 - Title - Input, Font Color, Font Family, Font Size
 - Palette - Multi Color or Single Color
 - Gridlines - Enable/Disable
 - Scale Line - Enable/Disable, Min Scale, Max Scale
 - Minimum Threshold - Input, Line Color, Line Type
 - Maximum Threshold - Input, Line Color, Line Type
 - Label Format - Font Color, Font Family, Font Size, Format
 - Y-Axis Title - Show/Hide
- Y1-Axis Options
 - Title - Input, Font Color, Font Family, Font Size
 - Palette - Multi Color or Single Color
 - Scale Line - Enable/Disable, Min Scale, Max Scale
 - Minimum Threshold - Input, Line Color, Line Type
 - Maximum Threshold - Input, Line Color, Line Type
 - Label Format - Font Color, Font Family, Font Size, Format
- Other Chart Options
 - Chart Title - Input, Font Color, Background Color, Font Family, Font Size
 - Strip Width
 - Border Color - Enable/Disable, Line Color
 - Opacity - Very Low, Low, Medium, High
 - Back Color - Background Color
 - Datapoints - Enable/Disable, Points
 - Legend - Enable/Disable, Font Family, Font Size, Number of. Legends, Position
 - Show Unit - Show/Hide
 - Cascading - Enabled/Disabled
- Global Options
 - No. of Items
 - Sequence - X-AXIS Asc
 - Global Date on Widget- Apply
 - Grid - Show

- DrillDown - Enabled
- Summarization Enable - Enable
- Show Aggregate - Enable
- Report Header Style - Font Color, Font Family, Font Size, Font Position, Font Weight, Show Line, Border Line Color
- Grid Options
 - Pivot
 - Grid Position - Default
 - Show Unit - Show
 - Show Total - Enable, Row
 - Grand total – Enable or Disable, Row and Column
 - HyperLink - Show
 - Header Style - Enable/Disable, Input (Line Height), Font Size, Font Color, Background Color, Font Family, Font Size, Font Position, Font Weight
 - Row Style - Enable/Disable, Input (Line Height), Font Color, Row Color, Alternate Row Color, Font Family, Font Size, Font Position, Measure Font Position, Font Weight, Font Wrap, Font Format, Font Data Point
 - Border - Border Color, Border Position
 - Page Size
 - Measure (Empty Value) – Input
- Drillthrough Options
 - Drillthrough - Enable/Disable, Level 2, 3, 4
- No Data Message (To handle when there is no data)
 - Message (Set Message When there is No Data Available), Font Color, Font Size, Font Family, Font Weight

26.4 Steps To Save Trend (Device Summary) Template as Report in Home Page and Insight

1. Click on Save Icon Button
2. In Saved Reports, Default option is New to create a new report
3. In Report Name, Type a Report Name
4. In Report Description, Type a Report Description
5. In Profile(s)/Custom, select Global/My Report
6. In Report Gallery, New Gallery
7. In Dashboard, create a new Dashboard or Choose old Dashboard
8. In View, create a new View or Choose old View
9. And save it
10. And Go to Home Page to toggle the Menu in the list you can search your Saved Dashboard
11. And click it and your View will be open with the Saved Template



The 'Save Report' dialog box is shown over a blurred background of a dashboard. The dialog has a title bar with a close button (X). Inside, there are several fields and a checkbox:

- Saved Reports:** A dropdown menu with 'New' selected.
- *Report Name:** A text field containing 'Top Cloud Providers'.
- *Report Description:** A text field containing 'Top Cloud Providers on Trend Basis'.
- Save for CI Search Page:** An unchecked checkbox.
- *Profile(s)/Custom:** A dropdown menu with 'Personal' selected.
- *Report Gallery:** A dropdown menu with 'My Reports' selected.
- Dashboard:** A dropdown menu with 'Cloud Providers' selected.
- View:** A dropdown menu with 'Cloud View' selected.
- Buttons:** 'Save' (purple) and 'Cancel' (grey) buttons at the bottom.

Figure 442 – Save Options

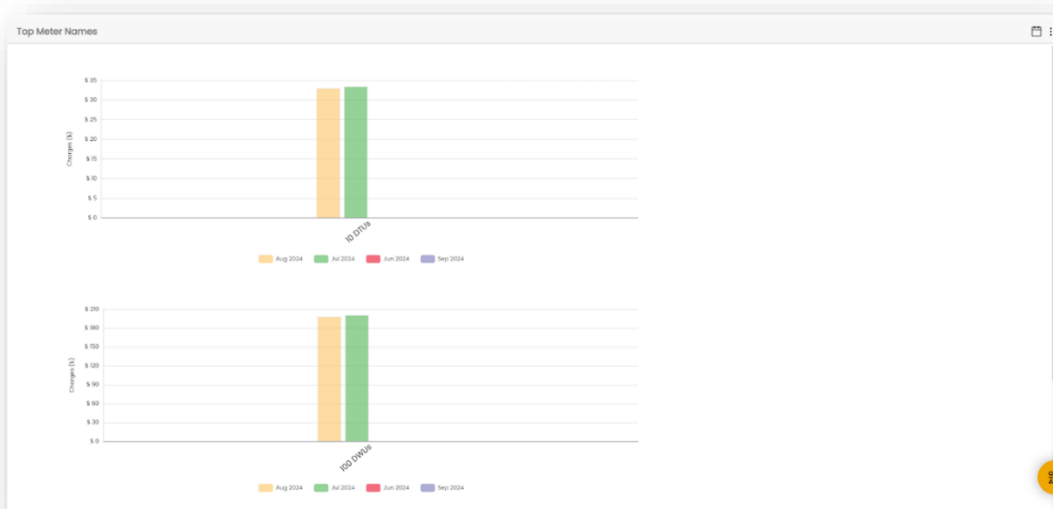


Figure 443 – Saved Report on Home Page

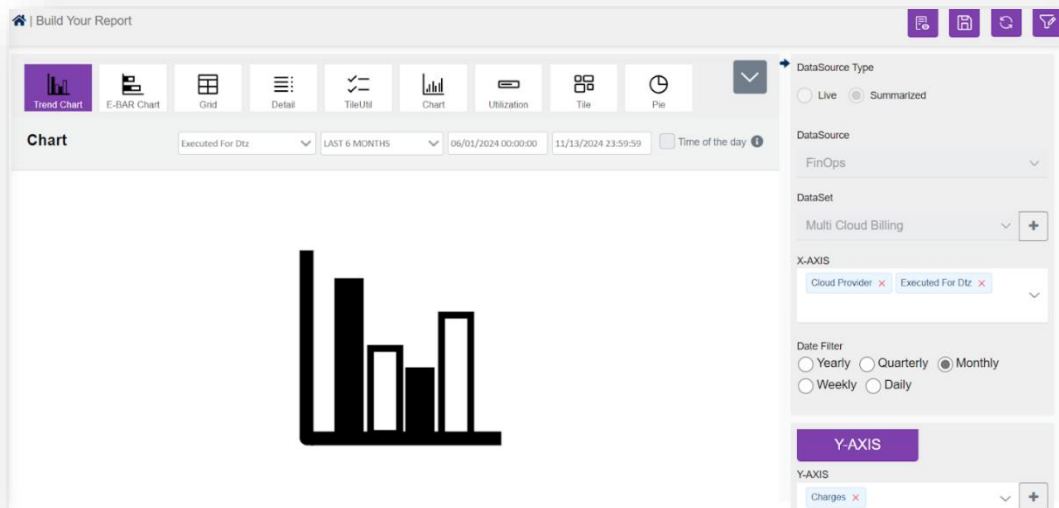


Figure 444 – Edit Saved Report in Report Builder

26.5 Concepts and Explanation

N number of Bar Chart (Selected Chart Type) will be populated based on the selected Dimension the data it holds.
Example: Each Cloud Provider will have a bar Chart like AZURE, GCP, AWS etc.



Figure 445 – Trend Chart

Table 3 - Cloud Provider, Executed for Dtz

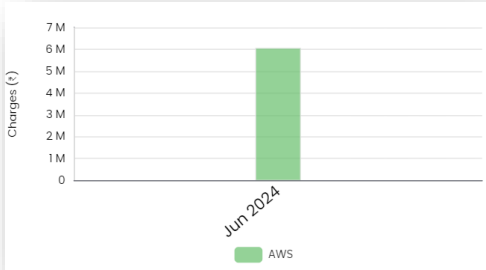
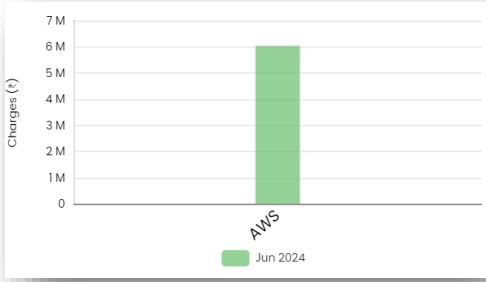
EXECUTED FOR DTZ, CLOUD PROVIDER	CLOUD PROVIDER, EXECUTED FOR DTZ
 Figure 446 – Executed for Dtz, Cloud Provider	 Figure 447 – Cloud Provider, Executed for Dtz
– 1st Scenario: When selecting the Date type first, X-Axis will be based on Date Type and 2nd selected Dimension will be the chart and Measures will be the Y-Axis	– 2nd Scenario: When selecting the Date Type second, X-Axis will be based on the 2nd selected Dimension and the Date type will be the chart, and Measures will be the Y-Axis.



Figure 448 – 1ST Scenarion with Actual Data View



Figure 449 – 2nd Scenario with Actual Data View

26.6 Limitation of Trend (Device Summary).

1. Minimum and maximum 2 Dimension should be Selected
2. 2(two) Dimensions can be Either Trend Based, or other Dimension based on the user need.
3. Minimum and maximum 1 Y-AXIS/MEASURE should be Selected, and Y1-Axis/MEASURE is optional and can be selected up to 10.
4. When Trend Based Dimension is selected in one of those 2 Dimensions, Y1-Axis will be disabled.
5. We cannot zoom in or zoom out the chart due to the chart is populated on single X-Axis Data based on the Selected (Dimension /X-Axis)

26.7 Other Available Existing Functionalities

26.7.1 Drillthrough

Choose the dropdown values on each level with the type, the data will be populated on Drillthrough.

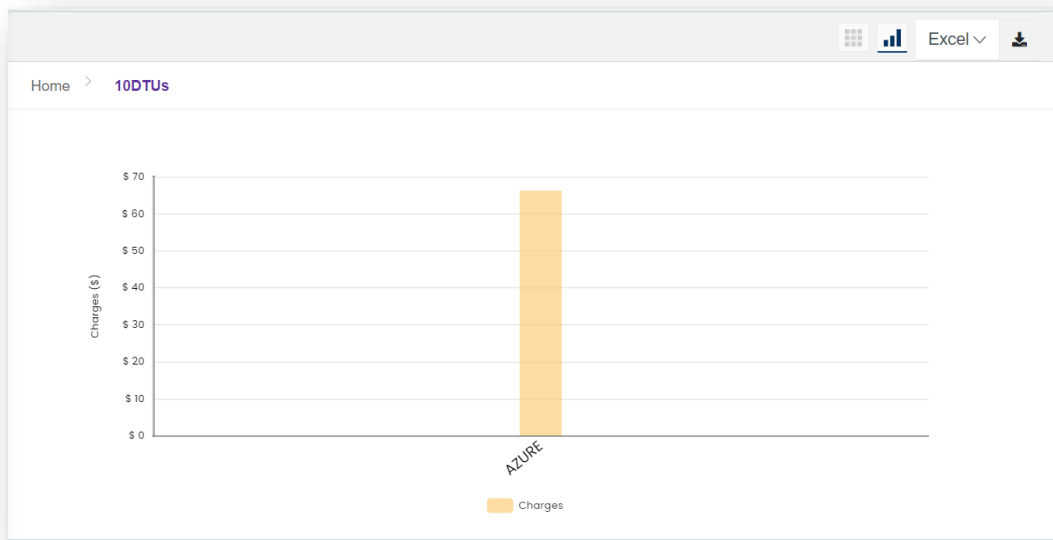


Figure 450 – Trend Chart

26.7.2 Drilldown Data

Choose the columns that are needed to visible on the raw data in when drilldown on chart or grid from the report builder/homepage

Figure 451 – Drilldown Columns

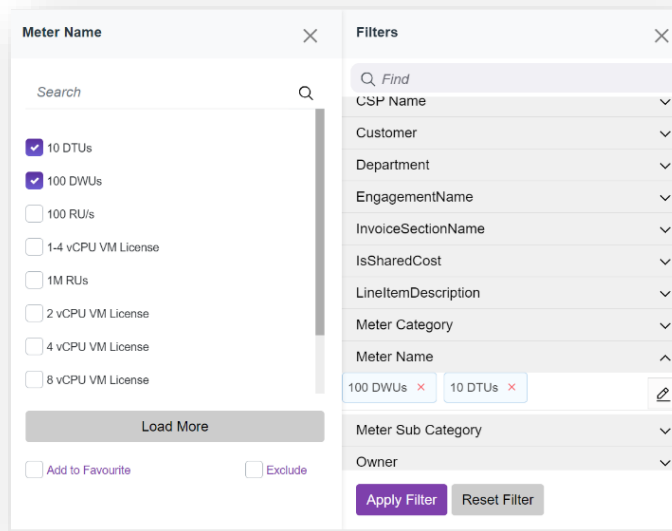


Figure 454 – Widget Filter

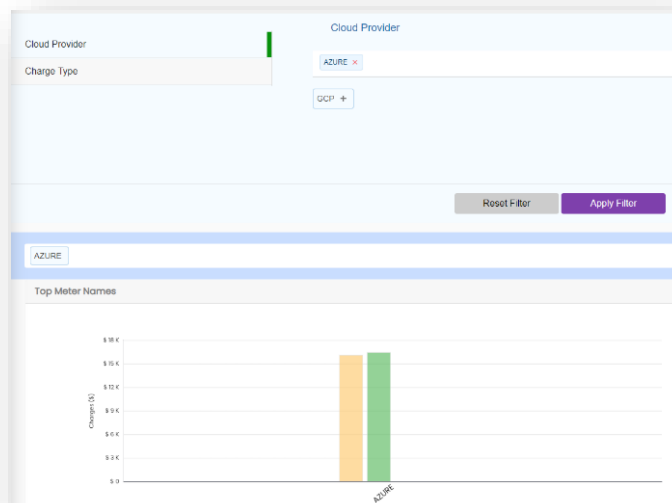


Figure 455 – Global Filter

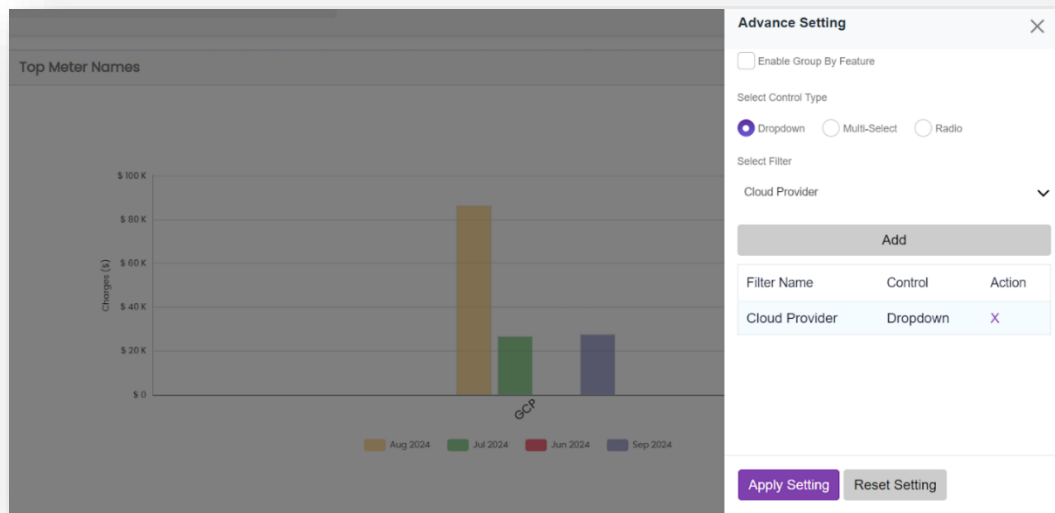


Figure 456 – Advanced Settings

26.7.4 Conditional Formatting

26.7.4.1 Table

CONDITIONAL FORMATTING RULES

TABLE

Condition 1

Charges(Measure) Greater Than 50 AND X

TABLE

Column

Target 1 Charges(Measure)

Font Color #000000 Fill Color #FFFFFF Border Color #EFEFEF

Franklin Gothic Medium 20 Center

Bold Icon Suffix

Add Target

Add More Conditions

Figure 457 – Conditional Formatting

26.8 Export Functionality:

The export feature allows users to download reports in multiple formats, including Excel, CSV, PPT, and PDF. Each report can include multiple charts, and when exporting, each chart is captured as a screenshot and attached to the final report in the selected format.

26.8.1 Multiple Export Formats:

The report can be exported in four different formats: Excel, CSV, PPT, and PDF.

26.8.2 Chart Screenshots:

For every chart included in the report, a screenshot is taken and embedded into the exported file. The number of charts in the report determines how many screenshots are captured and included.

26.8.3 Handling Export in Different Formats:

- **Excel/CSV:** Charts are embedded as images, preserving the visual data representation.
- **PPT:** Charts are added as slides with screenshots of each chart.
- **PDF:** Charts are added to the PDF document as images in the appropriate sections.

26.8.4 Consistency:

The export functionality ensures that no matter how many charts are present, each one is properly captured and included in the final exported file, maintaining the integrity and visual representation of the report.

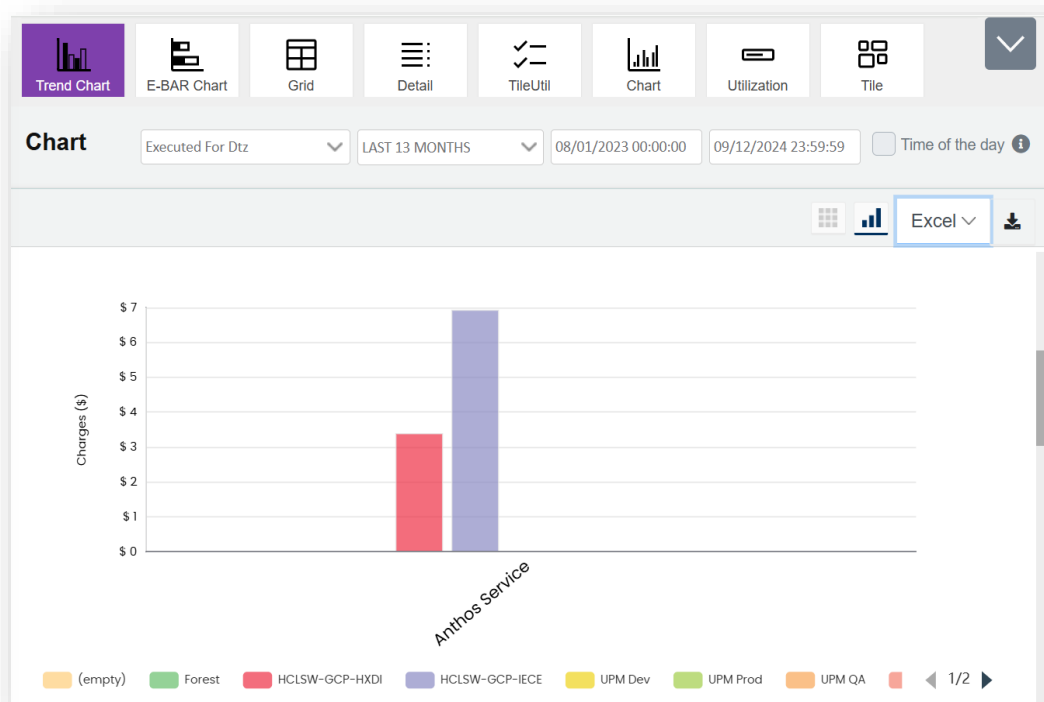


Figure 458 – Report Builder Export:

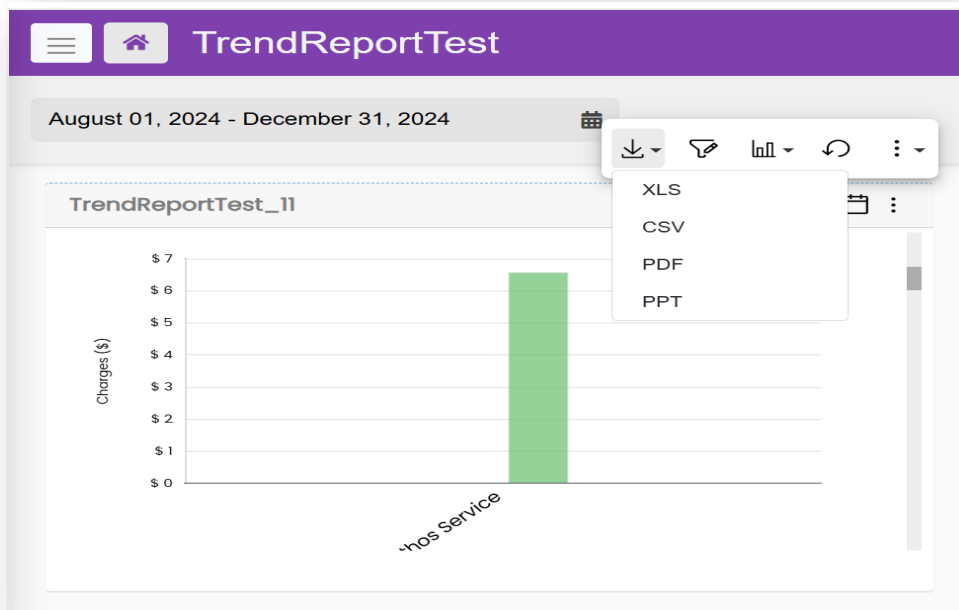


Figure 459 – Homepage Widget Export:

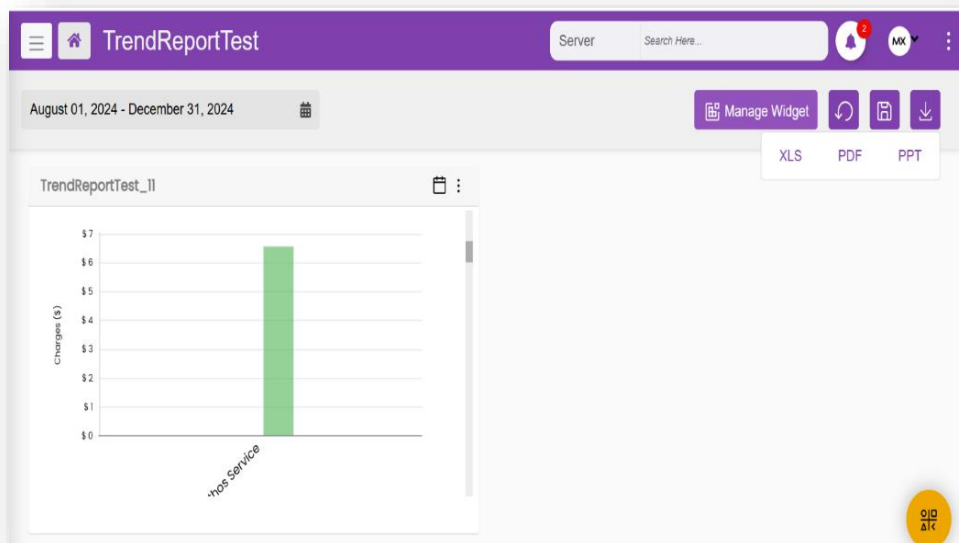


Figure 460 – Home Page Export:

27 Example within a single report in Ebar chart

Enable user to control if date needs to be used for plotting series or elements. Users would like to compare the cost for each month for each subscription. One should be able to see mini trends for each subscription on a single chart. Users should still be able to plot a combined trend for each subscription.

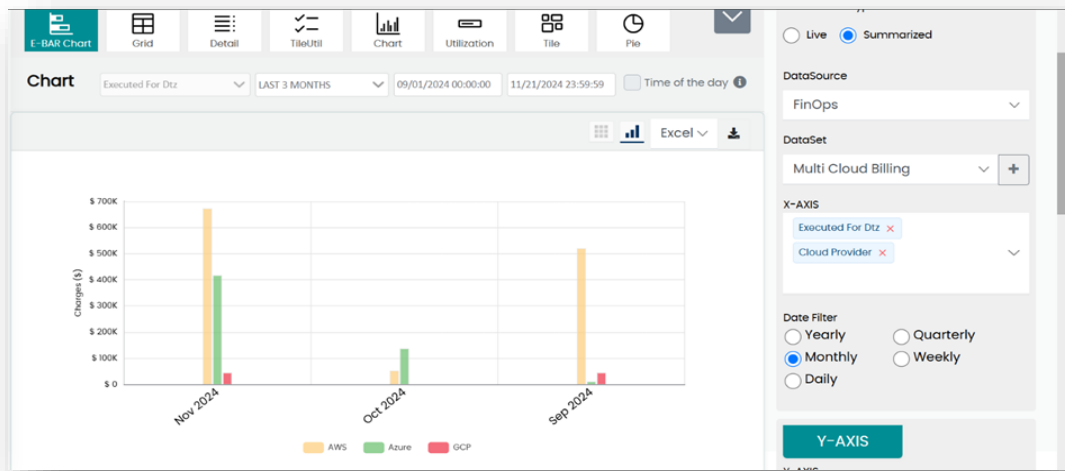


Figure 461 – Mini Trend Chart

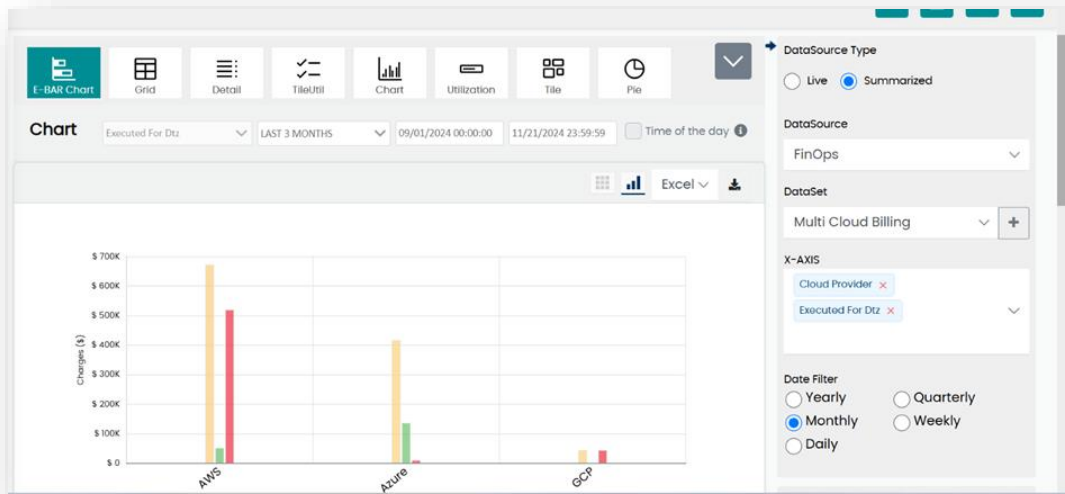


Figure 462 – Mini Trend Chart (Cont.)

- Grand Total – Enable or Disable – Row and Column

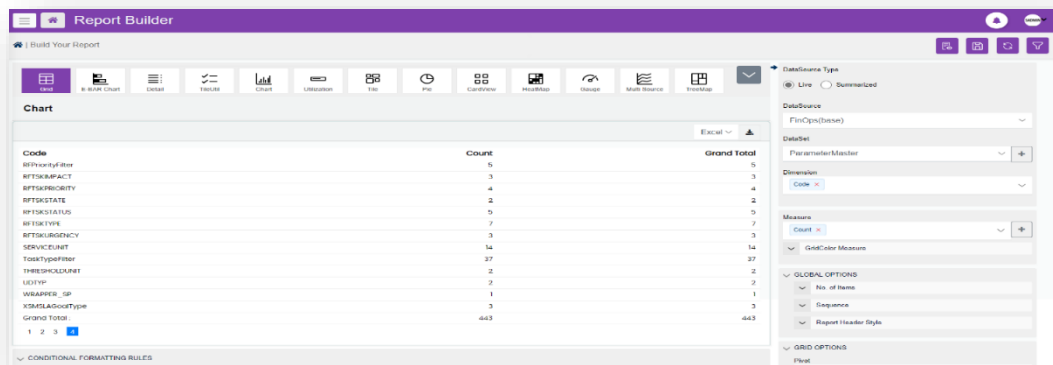


Figure 463 – Enable or Disable – Row and Column

Data Source	DataSet	Group By	Export to
FinOps(base)	ParameterMaster	Details	Excel

Item Auto Id	Active	Service Sub Type ID	Code	Parent Id	Name	Unit
1	Y	0	UDTYP		INTEGER	
2	Y	0	UDTYP		DECIMAL	
3	Y	0	MEASUREUNIT		#	
4	Y	0	MEASUREUNIT		%	
5	Y	0	CUDTYP		INTEGER(#)	
6	Y	0	CUDTYP		DECIMAL(%)	
7	Y		JOINCOLSEP		.	
8	Y		EMPTYCODE		(empty)	
9	Y		DISPLAY_FORMAT		NUMERIC(16,0)	
10	Y		DISPLAY_FORMAT		NUMERIC(16,3)	
11	Y		WRAPPER_SP		ConvertIDToKPIData_VR02	
12	Y	1	DRILLOWN_PAGE_URL		ITSMKpiDrillDown_New.aspx?ReportId=BR006	
13	Y	20	DRILLOWN_PAGE_URL		PerformanceViewDrillDown.aspx?ReportId=BR044	

Figure 464 – Enable or Disable – Row and Column (Cont.)

Data Source	DataSet	Group By	Export to
FinOps(base)	ParameterMaster	Details	Excel

Item Auto Id	Active	Service Sub Type ID	Code	Parent Id	Name	Unit
95	Y		TaskTypeFilter		Action Item	
96	Y		TaskTypeFilter		Audit Set	
97	Y		TaskTypeFilter		Availability	
98	Y		TaskTypeFilter		Availability Task	
99	Y		TaskTypeFilter		Catalog Task	
100	Y		TaskTypeFilter		Change Task	
101	Y		TaskTypeFilter		Chat Queue Entry	
102	Y		TaskTypeFilter		Critical Incident Task	
103	Y		TaskTypeFilter		Defect	
104	Y		TaskTypeFilter		Epic	
105	Y		TaskTypeFilter		Feature	
106	Y		TaskTypeFilter		Group approval	
107	Y		TaskTypeFilter		Incident	

Figure 465 – Added grand total on both Row and Column in Grid in Report Builder.

28 Scheduler Functionality

Users can schedule the generation of these reports at regular intervals by using Puppetter (library). This report can be scheduled in different formats such as Excel, PDF, and PowerPoint, ensuring flexibility and ease of sharing.

The exported files will include both the visual charts and the underlying data in Attached files or in email body by providing a complete view of the trends and supporting data analysis.

28.1 Screenshots in Email body:

Each screenshot should have Title and x-axis, and y-axis should show clearly without cropping.

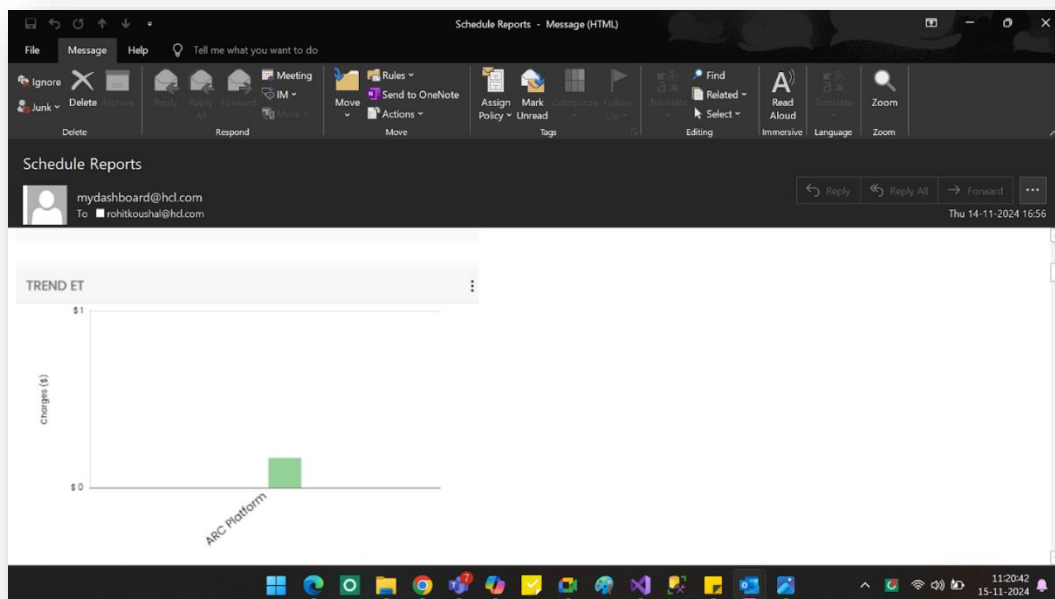


Figure 466 – Email Body (Chart)

- Data in Email Body:

Schedule Reports - Message (HTML)

File Message Help Tell me what you want to do

Ignore Delete Reply Forward IM Meeting Move Send to OneNote Rules Assign Mark Unread Follow Up Find Related Select Read Aloud Translate Zoom

Schedule Reports

mydashboard@hcl.com
To: rohitkoushal@hcl.com

Thu 14-11-2024 16:55

Account	Charge Type	Charges
(empty)	regular	\$4680.70
ARC Platform	Usage	\$0.17
Cloud Platform Sandbox	Usage	\$156.81
commerce-on-gcp	regular	\$26.73
Commerce-product	regular	\$5462.55
Digi Non-Prod	Usage	\$36.76
Digi Prod	Usage	\$0.01
Energy Customer Portal	Usage	\$264.87
Energy Regulated	Usage	\$1297.55
EUS Production Subscription	Usage	\$0.07
EUS Testing Subscription	Usage	\$3.65
EUS WebServices	Usage	\$76.49
Forest	Usage	\$1442.08
HCL GCP HCISW	regular	\$1392.91
HCL GCP L2COM SOFY	regular	\$2249.70

11:24:48
15-11-2024

Figure 467 - Email Body (Data)

29 Network Performance Dashboard

This Section will be applicable only to NPS configured environments.

29.1 Dashboard Overview

The Network Performance Dashboard provides a comprehensive view of network performance across different brands, locations, and business units. It helps users monitor, Analyze, and improve network quality based on the displayed performance scores.

29.2 Dashboard Path

- This manual explains the components and functionalities of the Network Performance Dashboard shown in the screenshot below.
- Reporting --> Build your reports --> NPS Scorecard

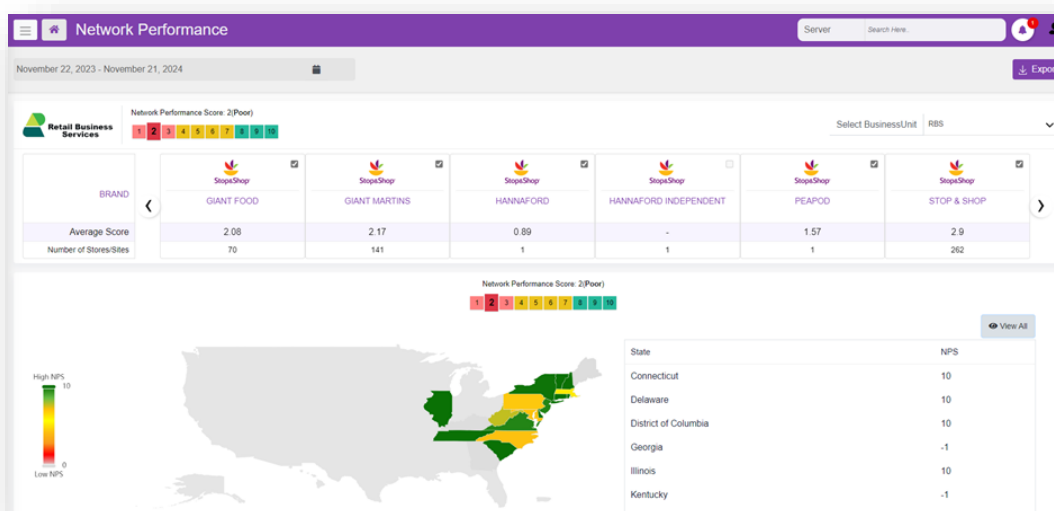


Figure 468 - State wise Score Representation

29.3 Components and Features

29.3.1 Header Bar

- **Title:** *Network Performance* – Identifies the current dashboard section.
- **Date Range Selector:** Located under the title, this allows you to select a date range (e.g., "November 22, 2023 – November 21, 2024") for the performance data displayed.
- **Search Box:** In the top-right corner, enables searching for specific data or stores/sites.
- **Notifications & User Menu:** Access notifications or user account settings using the icons in the top-right corner.

29.4 Performance Metrics

- Network Performance Score
 - The score is based on a scale from 1 to 10:
 - **1-2 (Red):** Poor performance

- **3-4 (Orange):** Fair performance
 - **5-6 (Yellow):** Good performance
 - **7-8 (Light Green):** Very good performance
 - **9-10 (Dark Green):** Excellent performance
- The dashboard provides an overall average performance score.
- Brand Performance
 - The dashboard displays performance metrics for specific brands, including:
 - **Brand Name:** Located in the "BRAND" row.
 - **Average Score:** A numerical value representing the average network performance.
 - **Number of Stores/Sites:** Indicates the number of locations contributing to the score.
- Map Visualization
 - **Heat Map:** Displays the network performance by state. The colors correspond to the Network Performance Score scale (Red = Poor, Green = Excellent).
 - State Breakdown Table:
 - Lists individual states with corresponding **NPS (Net Promoter Score)** values.
 - Helps pinpoint areas with strong or weak performance.

29.5 Interaction Options

- Filters
 - **Brand Selection:** Use checkboxes above the table to filter data by brand.
 - **Business Unit Dropdown:** A dropdown in the top-right corner allows users to select specific business units (e.g., "RBS").
- Export Option
 - The "Export" button in the upper-right corner allows users to download the performance data in Excel format.
- View Details
 - The "View All" button in the map section enables users to see detailed performance data for all states.

29.6 Common Use Cases

- Monitor Performance Across Locations:
 - Identify states with the lowest performance (red zones on the map) for immediate attention.
- analyze Brand-Specific Performance:
 - Use brand filters to focus on performance for specific business entities.
- Export Data for Reporting:
 - Export data for meetings or deeper analysis in external tools.

29.7 Site wise/Second Dashboard

This section explains the functionalities and components visible in the detailed table view of the Network Performance Dashboard.

- After clicking on any state which has data, the screen will redirect to the screen below.

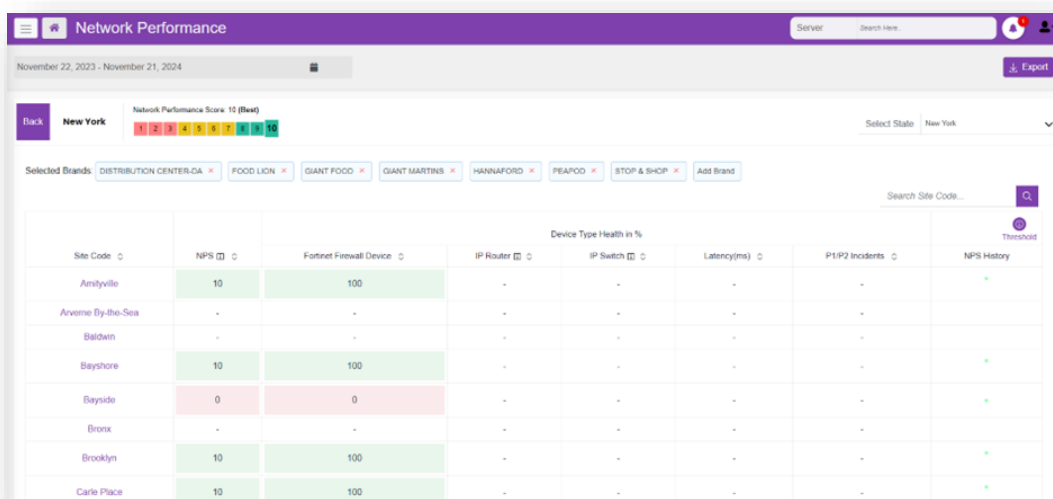


Figure 469 - Site wise Score Representation

29.7.1 Overview

The detailed table displays network performance metrics for specific sites in a selected state or region. It includes performance scores, device health statistics, and incident details for a granular view of network status.

29.7.2 Key Components

- Header
 - Back Button:** Returns to the main Network Performance view.
 - Network Performance Score:** Displays the overall score (e.g., "10 (Best)") for the selected state.
 - Select State:** Displays the network performance dashboard for different states.
 - Filters:** The section "Selected Brands" allows users to add or remove brands to filter the displayed data.
 - Date Range Selector:** (Top) Adjust the date range for data analysis.
 - Search Bar:** Search for specific site codes or locations.
 - Export Option:** Allows exporting detailed data to a file format (e.g., Excel).
- Performance Table

The table provides specific data points for each site or location:

Table 4 – Site Wise Score Components Column

Column	Description
Site Code	Unique identifier for each location.
NPS (Net Promoter Score)	Performance score for each site, with colour coding (Green = High, Red = Low, Blank = No Data).
Fortinet Firewall Device (%)	Health of firewall devices at the site in percentage (Green for 100%, Red for low values).
IP Router (%)	Health status of routers in percentage.
IP Switch (%)	Health status of network switches in percentage.
Latency (Ms)	Average network latency in milliseconds (lower is better).
P1/P2 Incidents	Number of Priority 1 or Priority 2 incidents recorded at the site.
NPS History	Historical trend of NPS scores for the last 6 weeks

- Pagination

Navigate through multiple pages of site data by clicking the page numbers.

29.7.3 Key Features and Actions

- Search and Filter
 - Use the *Search Site Code* bar to quickly locate specific sites or regions.
 - Filter by brand using the "Selected Brands" dropdown to focus on relevant locations.
- Analyze Device Health
 - View device health percentages (firewalls, routers, switches) to assess equipment performance at each site.
- Export Data
 - Click the "Export" button to download the displayed data for further analysis or reporting.

29.7.4 Use Cases

- **Identify Underperforming Sites:** Use the NPS column and latency data to pinpoint sites requiring attention.
- **Device Health Monitoring:** Focus on columns like "Firewall Device" or "IP Router" to check for equipment requiring maintenance.
- **Incident Analysis:** Review of the "P1/P2 Incidents" column to address critical issues impacting site performance.

29.8 Device type Dashboard/ Third Dashboard

This dashboard displays the network performance metrics for a specific site (Bloomsburg in this case). The metrics include availability, latency, CPU utilization, and memory utilization for network devices, as well as P1/P2 incidents.

- After clicking on any site, the screen will redirect to the screen below.

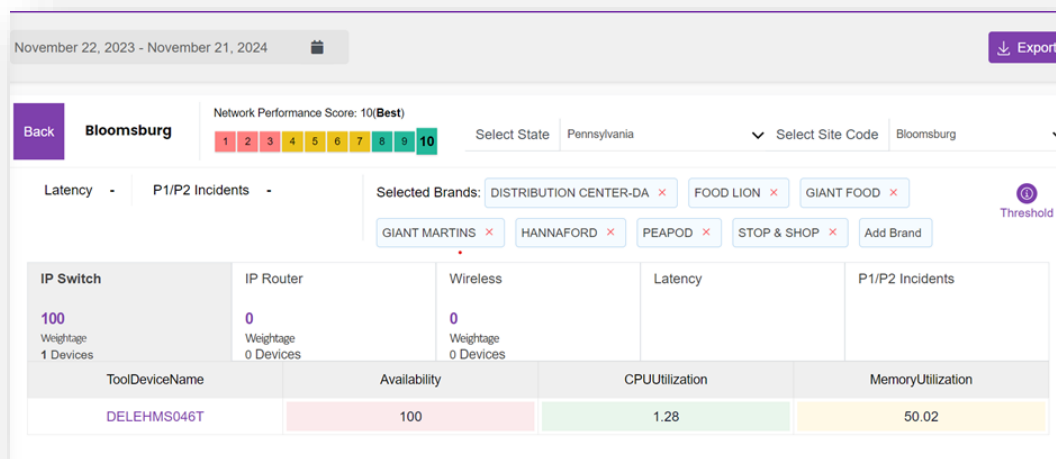


Figure 470 – Performance Metrics for Each Device

29.8.1 Key Components

- Date Range Selection (Top of Dashboard):
 - Use the date range selector to filter data for a specific time.
- Site and Brand Filters:
 - **Select State/Site:** You can filter metrics by selecting a specific state and site (e.g., Pennsylvania > Bloomsburg).
 - **Selected Brands:** Metrics can also be filtered for specific brands (e.g., **Giant Food**, **Food Lion**, etc.). To add/remove brands:

- Use the "Add Brand" option:
 - Click the "X" beside the brand name to remove it.
- Network Performance Score (Top Center)
 - The score is rated from **1 to 10**, with **10 (Best)** indicating excellent network performance.
 - The colored scale helps identify the network's performance briefly.
- Device Type Metrics (IP Switch, IP Router, Wireless)
 - Metrics are categorized by device type:
 - **IP Switch:** Includes switches at the site.
 - **IP Router:** Includes routers if present.
 - **Wireless:** Includes wireless network devices.
- Performance Metrics (Bottom Table)
 - **Availability:** Displays the percentage availability of devices.
 - **CPU Utilization:** Shows the CPU usage (%) for each device.
 - **Memory Utilization:** Displays the memory usage (%) for each device.
 - **Latency:** Indicates the latency of devices (currently not shown in the image).
 - **P1/P2 Incidents:** Critical incidents are listed if any occur.
- Device Details (Bottom Section)
 - The list of devices is displayed below (e.g., DELEHMS046T). For each device:
 - **Availability:** Current availability status (e.g., 100%).
 - **CPU Utilization:** Current CPU usage percentage (e.g., 1.28%).
 - **Memory Utilization:** Current memory usage percentage (e.g., 50.02%).
- Threshold Information (Right)
 - A clickable **Threshold** option allows you to configure or view performance thresholds (e.g., acceptable CPU or memory usage limits).
- Export (Top Right)
 - The **Export** button allows downloading the data into a report for offline analysis.

29.8.2 Dashboard Features

- Filter the Data:
 - Select a specific **State**, **Site**, and **Brand** to narrow down the metrics displayed.
- Analyze the Network Performance Score:
 - Check the **Network Performance Score** to quickly gauge the site's overall health.
- Examine Device Metrics:
 - Review the metrics for IP Switches, IP Routers, and Wireless devices:
 - Look for high **CPU Utilization** (>80%) or **Memory Utilization** (>70%), as these indicate potential issues.
- Note any **P1/P2 incidents** which require immediate attention.
- Drill Down into Device Details:
 - Use the table at the bottom to analyze specific devices.
 - Identify problematic devices based on availability, CPU, or memory metrics.
- Export the Report:
 - Use the **Export** button to generate a report for further analysis or documentation.

29.8.3 Example Use Case

- Scenario:
 - A network engineer notices a performance score of **10 (Best)** for Bloomsburg, indicating no critical issues.
- Action:
 - Confirm all devices have 100% availability and normal utilization levels.
 - Check for any logged **P1/P2 incidents**.
 - If necessary, export the data for management reporting.

30 DME Job Configuration

1. Job Dashboard contains a list of Jobs. From the dashboard we can edit, Clone and Schedule each Job. We can see all the Job logs in Job Logs button exist in Actions column.
2. In Data table we can sort the records. Each page contains 10 records and pagination to show all records.
3. Based on Engagement a list of jobs will be populated. We can search for a job by using the search textbox.

Job ID	Job Name	Last Updated Record	Next Run Time	Job Type	Active	Job Status	Actions
B12711	__AWS_CloudWatch_MemoryPercentage	2024-Apr-22 14:11:18	2024-Jul-14 15:22:14	Performance	N	Fail	
B12704	__AWS_CloudWatch_MemoryPercentage	2024-Apr-22 14:11:18	2024-May-08 10:33:08	Performance	N	Fail	
B12705	__AWS_CloudWatch_MemoryPercentage	2024-Apr-22 15:04:53	2024-May-08 10:33:08	Performance	N	Fail	
B12706	__AWS_CloudWatch_MemoryPercentage	2024-Apr-22 15:07:51	2024-May-08 10:33:09	Performance	N	Fail	
B12707	__AWS_CloudWatch_MemoryPercentage	2024-Apr-22 15:15:16	2024-May-08 10:33:09	Performance	N	Fail	
B12708	__AWS_CloudWatch_MemoryPercentage	2024-Apr-23 06:11:37	2024-May-08 10:33:09	Performance	N	Fail	
B12721	__AWS_CloudWatch_MemoryPercentage	2024-May-07 07:51:42	2024-May-07 08:51:42	Billing	N	Fail	
B12702	__Menu_List	2024-Apr-17 07:46:18	2024-May-07 11:00:49		N	Fail	
C7554	__Moog Alerts DataProcess	2024-Jul-08 09:12:45	2024-Jul-08 09:13:45	Processing	8	Successful	
B12744	__moog_alerts	2024-Jun-20 14:20:04	2024-Jun-26 06:34:53	Event	N	Fail	

Figure 471 – DME Job Configuration Dashboard

4. **Edit Job:** We can configure source, destination input parameters and mapping.

Job Name: __Moog Alerts DataProcess

Job Name: __Moog Alerts DataProcess

Job Description: Moog Alerts DataProcess

Update Frequency: 1

Data Latency: 5

Last Updated Record: 2024-07-08 09:12:45

Next Run Time: 2024-07-08 09:13:45

Job Frequency: Daily

Execution Type: Variable

Data Waiting Time: 1

Chunk Data Duration: 1

Max Retry: 1

Controller: Auto

Additional Delete Condition: AND JobId='C7554'

Pre Execution Data Source: Select

Figure 472 – Edit Job

5. **Configure Job:** In configure job, we can schedule the next runtime.

Figure 473 – Configure Job

6. Added Additional settings button with Information Icon

Figure 474 – Configure Job (Cont.)

7. Feature: Enhanced Additional Settings Panel

Overview:

A new "Additional Settings" button has been introduced in the DMEJobConfig form to allow users to configure the job execution.

8. Key Enhancements:

- Provides access to extended configuration options without cluttering the main interface.
- Includes contextual help (i icon) for user guidance on available settings.
- Improves modularity and usability of job configuration workflows.
- When the Additional Settings button is clicked, a separate modal pop-up opens with the default dropdown pop-up.

30.1 Dropdown for Setting Selection

1. Inline input fields for numeric, for numeric, string, float, Multiselect, and dropdown, check box, Boolean, And Json data types should populate.
2. Add/Remove Buttons (+ / -) to manage multiple custom settings.
3. Submit/Cancel for finalizing changes.
4. Finally, the selected saved in Json format in Additional settings column in Jobmaster table.

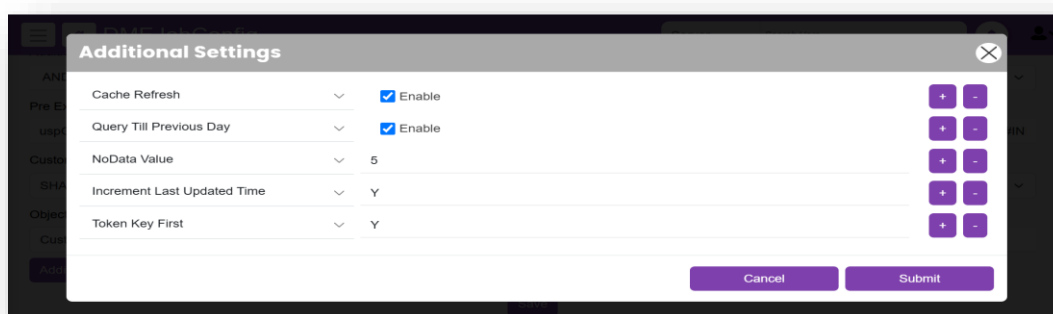


Figure 475 – Configure Job (Cont.)

5. Configure Source: We can select the data source and the adapter for source configuration.

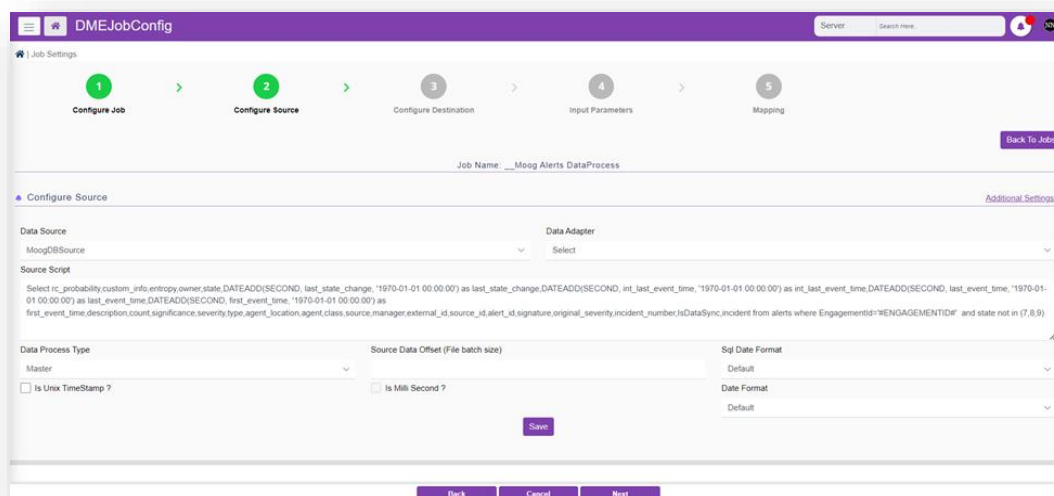


Figure 476 – Configure Source

6. Configure Destination: we can select the destination value for configuration.

Figure 477 – Configure Destination

7. Input Parameters: We can configure the input parameters for this job.

Figure 478 – Input Parameters

8. Mapping: We can add Source and Destination column for the specific job ID.

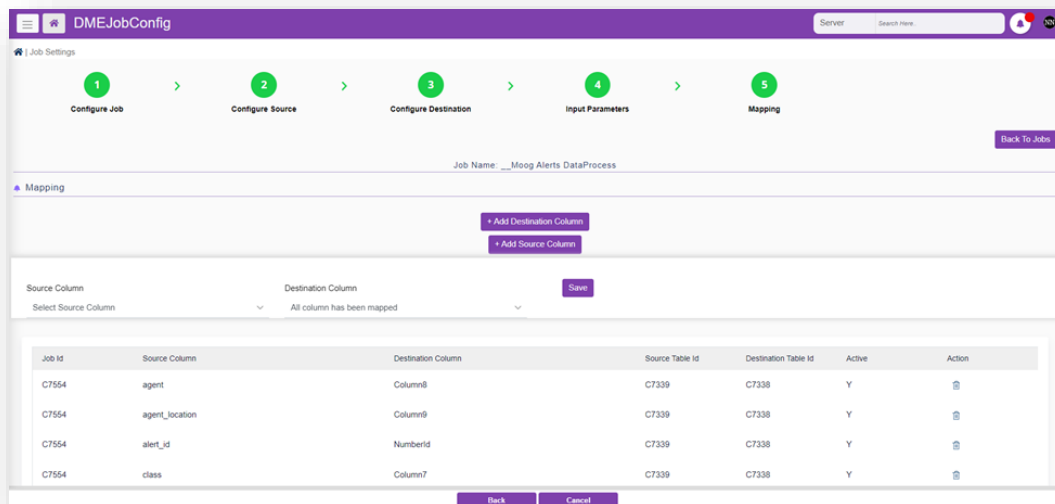


Figure 479 - Mapping

9. Add Source Column:

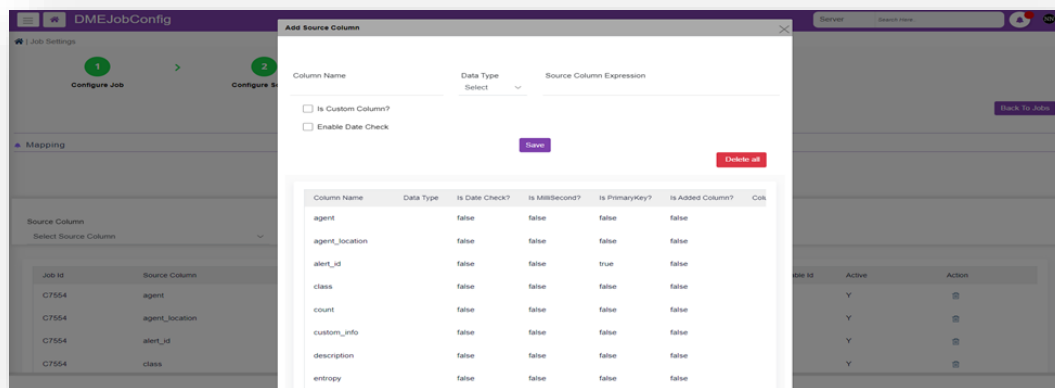


Figure 480 – Add Source Column

10. Add Destination Column:

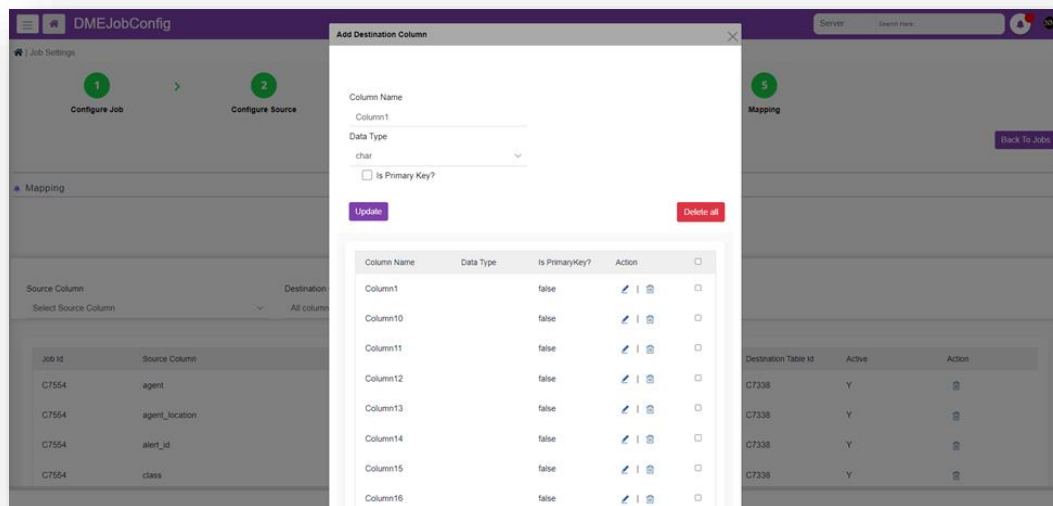


Figure 481 – Add Destination Column

11. Create Data Source Button: In this, we are creating Data Source and Destination.

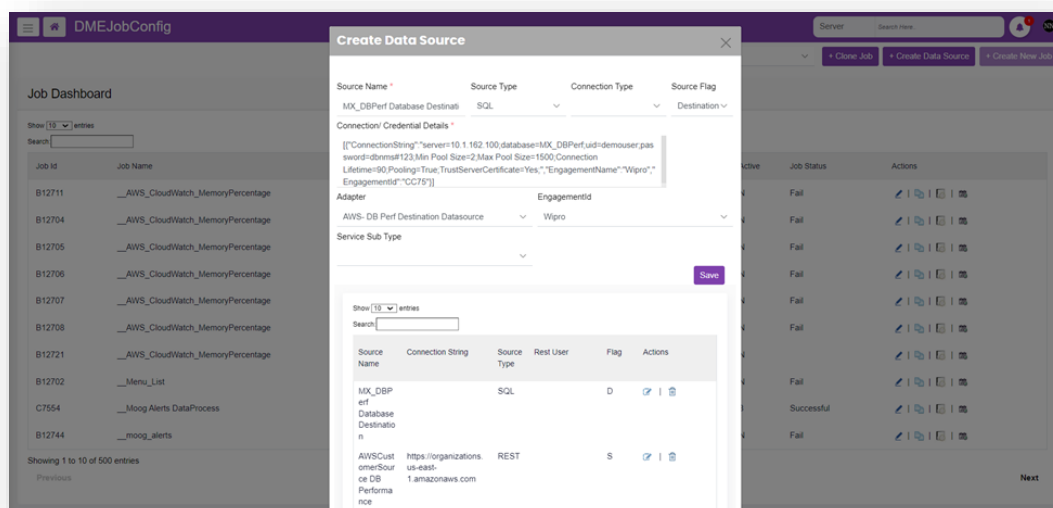


Figure 482 – Create Data Source

12. Clone Job: We can clone the new job by using the existing job.

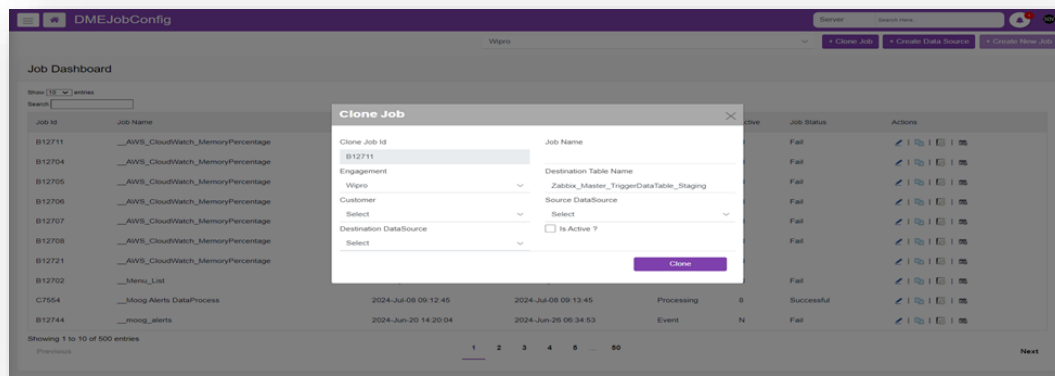


Figure 483 – Clone Job

13. Job Logs: In this, we see the jobs configuration information and any errors occur.

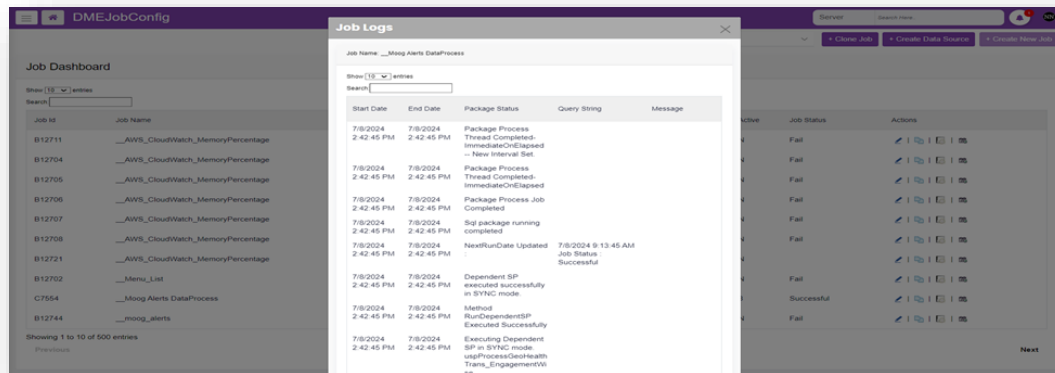


Figure 484 – Job Logs

14. Job Schedule: By Using this, we can schedule a job.

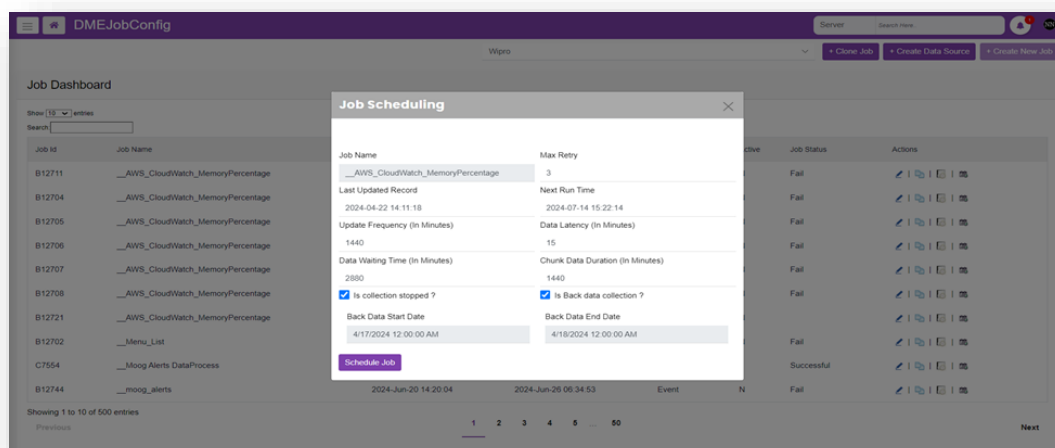


Figure 485 – Job Schedule

31 Grid Template

Custom month selection and comparison with date range for Grid and Ebar Report:

- Comparative property has been enabled on grid and ebar templates.
- Users can compare data across different months and years by selecting comparative options.
- Comparative analysis features enhance reporting capabilities, making it easier for users to generate insightful reports that compare current data with historical data.
- Three comparative options are enabled
 - Previous Period: Compares the current data to the immediately preceding period. For example, if the current period is a month; it compares to the previous month.
 - Previous Year: Compares the current data to the previous year. For example, if the current period is January 2024,
 - it compares to the previous year's data (2023).
 - Previous Year Same Period: Compares the current data to the same period in the previous year for example, if the
 - The current period is Q1 2023, it compares to Q1 2022.

31.1 Grid Report

Account	Category	ExecutedDate	Count
AWS Enterprise	AI & Machine Learning	Jan 2025	9
AWS Enterprise	Compute	Jan 2025	6
AWS Enterprise	Databases	Jan 2025	7
AWS Enterprise	Networking	Jan 2025	8
AWS Enterprise	Security	Jan 2025	8
AWS Enterprise	Storage	Jan 2025	5
Azure Corporate	AI & Machine Learning	Jan 2025	6
Azure Corporate	Compute	Jan 2025	10
Azure Corporate	Databases	Jan 2025	11
Azure Corporate	Networking	Jan 2025	

Figure 486 – Grid Report

- The score is based on a scale from 1 to 10

31.2 Ebar Report

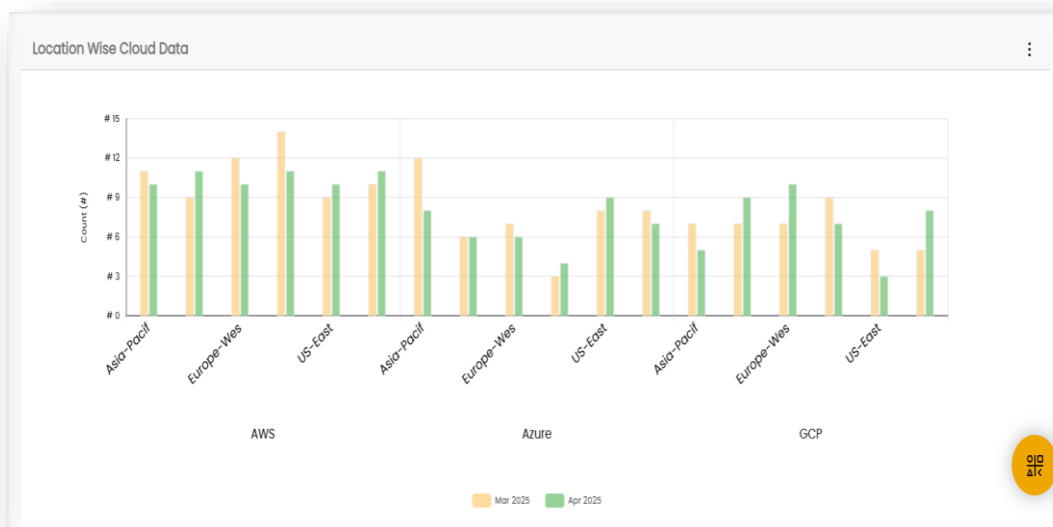


Figure 487 – Ebar Report

- The score is based on a scale from 1 to 10:

31.3 E-bar chart enhancement for 3 Dimension

- Overview
 - The E-Bar chart with 3 Dimensions and Aggregation properties allows for the visualization of data using both Sum and Average values in labels and lines, which are applicable to both two and three dimensions.
 - The chart displays the 1st Dimension as the parent label, the 2nd Dimension as the child label, and the 3rd Dimension within the chart itself, helping to structure the data hierarchically.

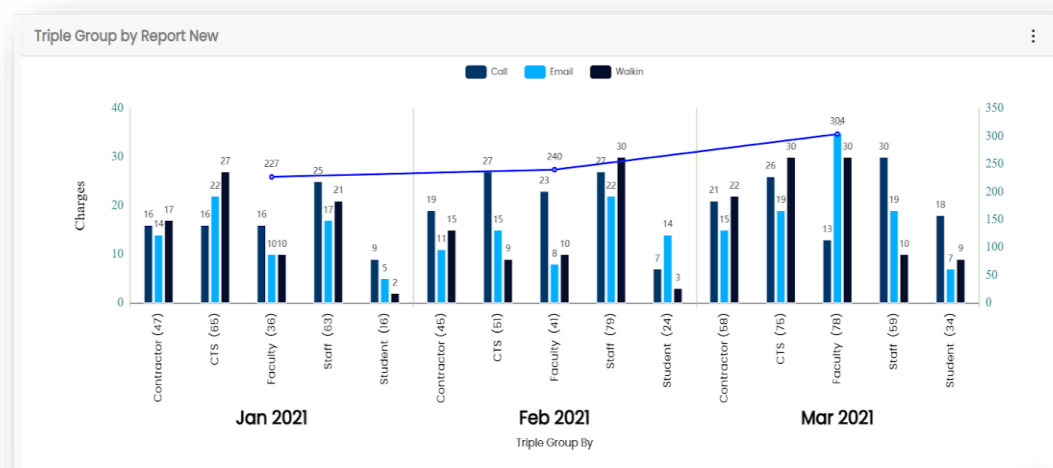


Figure 488 –Three Dimension Widget in Home Page

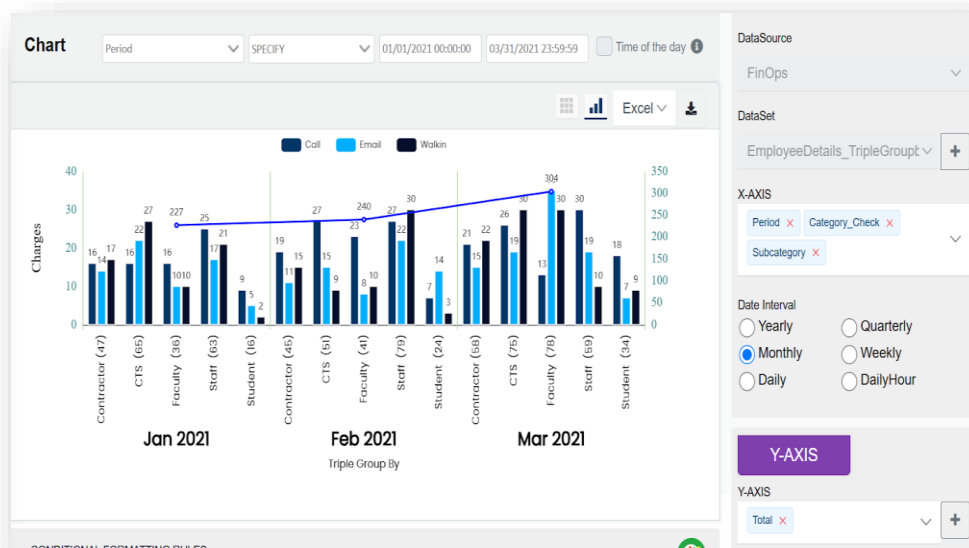


Figure 489 –Three Dimension Report in Report Builder

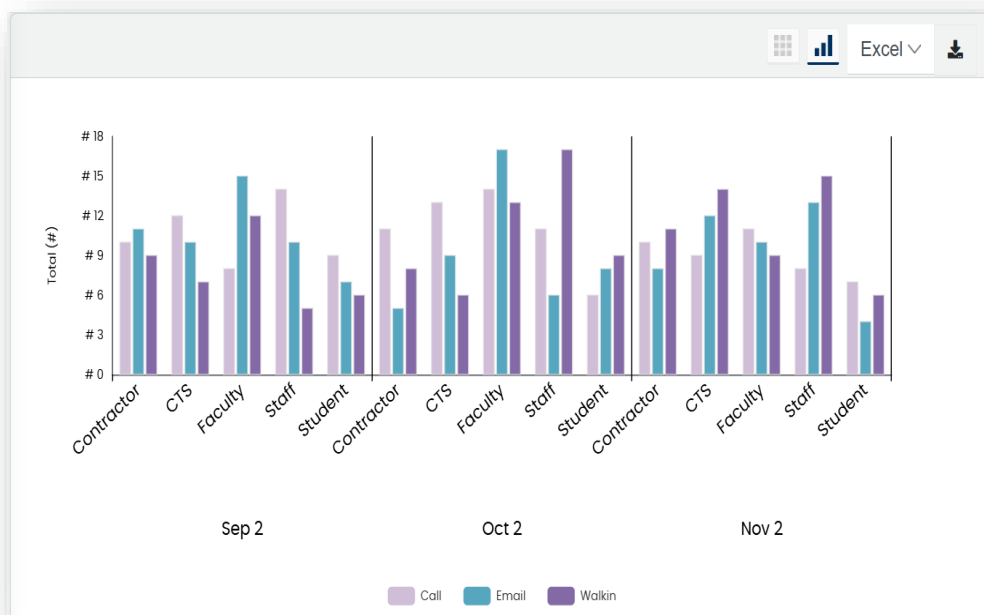


Figure 490 –Three Dimension Report (Cont...)

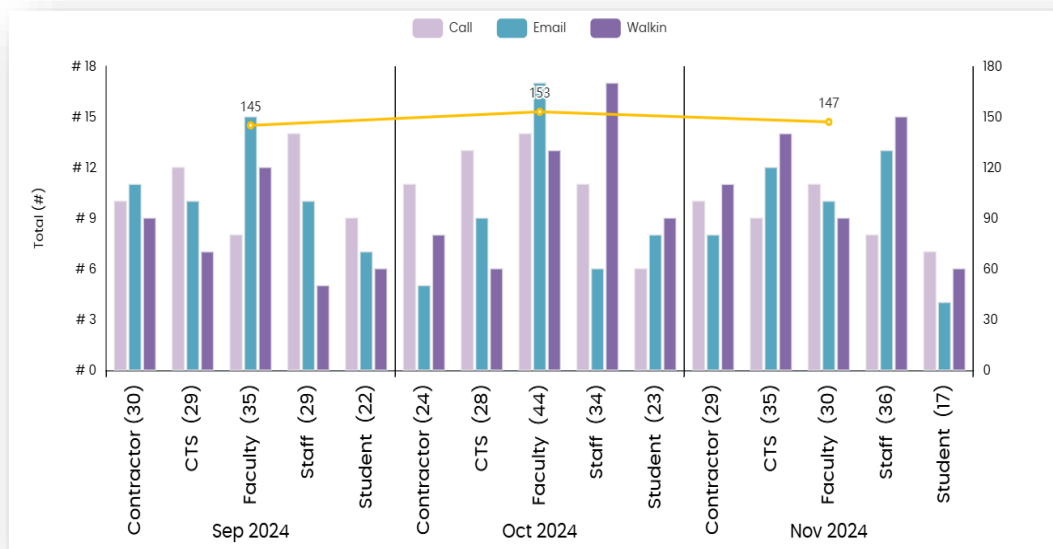


Figure 491 –Three Dimension Report (Cont...)

- Properties to Handle
 - X-Axis Options

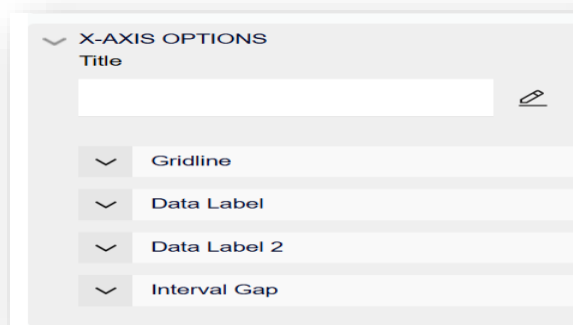


Figure 492 – X-Axis Options

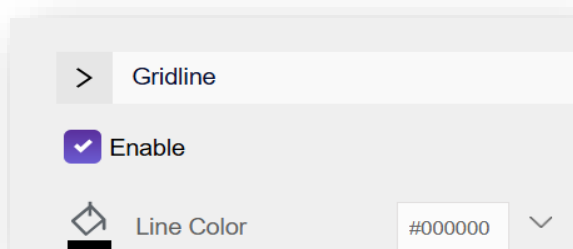


Figure 493 – Gridline X-Axis Options

- Gridline - Is used to manage and display a separating line based on the grouping or relation of data set by the 1st Dimension/X-Axis.
- Enable/Disable, Line Color



Figure 494 – Gridline X-Axis Options (Cont.)

- Data Label - Is used to format the 2nd selected Dimension label.
- Enable/Disable, Font Family, Font Size, Font Color, Font Length, Font Weight, Font Angle

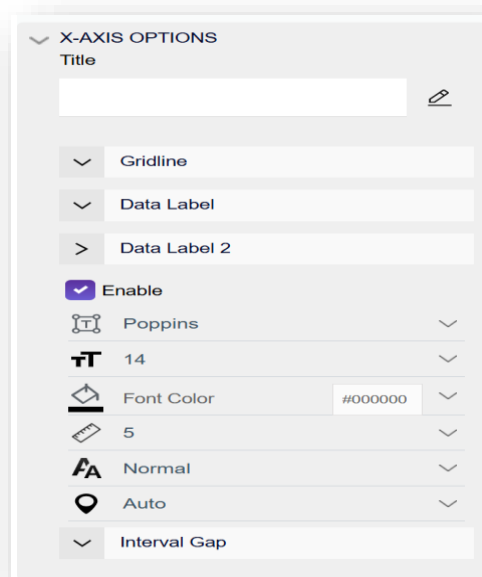


Figure 495 – Gridline X-Axis Options (Cont.)

- Data Label 2 - Is used to format the 1st selected Dimension label.
 - Enable/Disable, Font Family, Font Size, Font Color, Font, Length, Font Weight, Font Interval
- Aggregate Options



Figure 496 –Aggregate Options

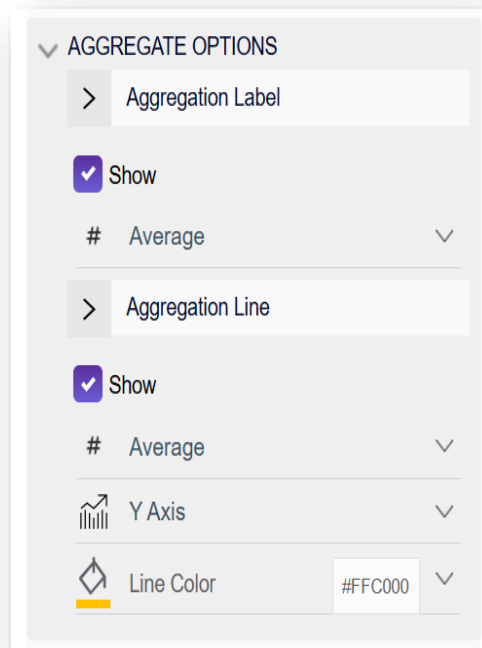


Figure 497 –Aggregate Options
(Cont.)

- Aggregation Label - Is used to display the sum or average value label, which is calculated by grouping each value from the 2nd Dimension/X-Axis selected.
 - show/hide,
 - Average/Sum
- Aggregation Line - Is used to display the Sum or Average value as a line, which is calculated by grouping the data based on the selected 1st Dimension/X-Axis.
 - show/hide,
 - Y Axis/Y1 Axis,
 - Line Color
- Other Chart Options

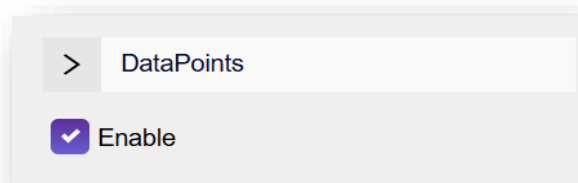


Figure 498 – Gridline X-Axis Options Data Points

- Data Points - Is used to display the corresponding value on top of the chart, which represents the value held by the 3rd Dimension/X-Axis
- Examples/Screenshots for Three Dimension with Aggregation

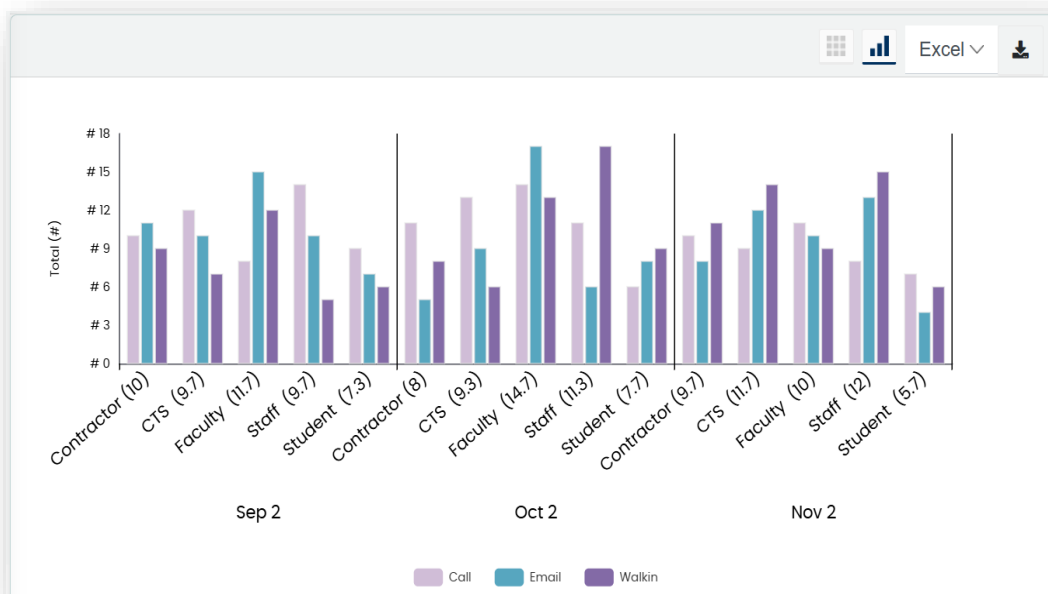


Figure 499 – Gridline X-Axis Options Data Points (Cont.)

- Aggregation Label Average

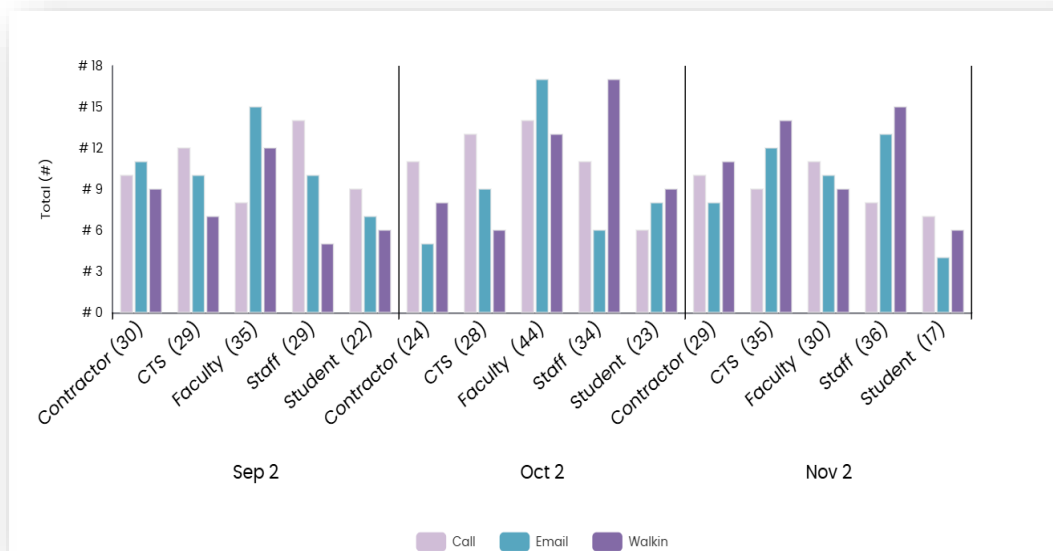


Figure 500 – Aggregation Label Average

– Aggregation Label Sum

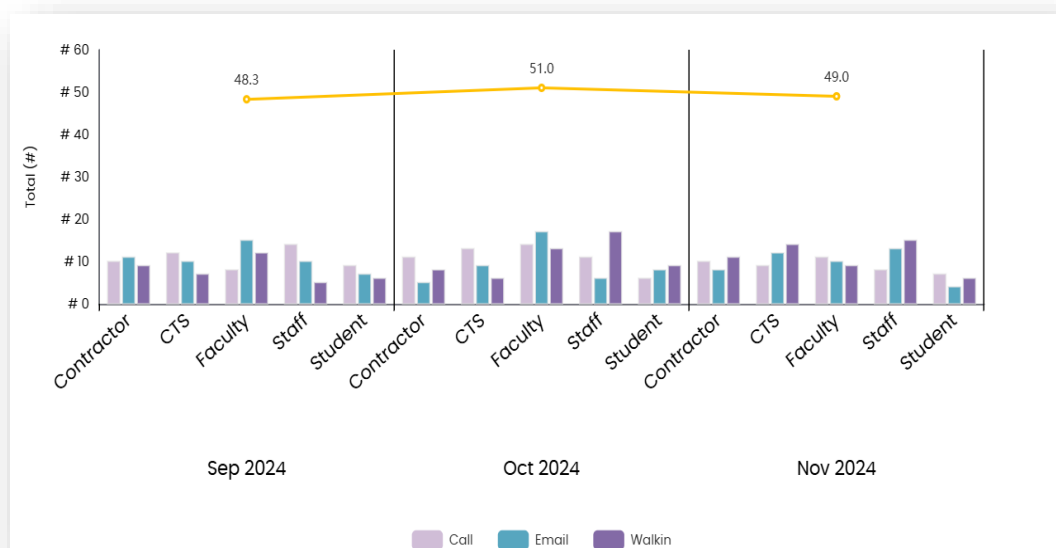


Figure 501 – Aggregation Label Average (Cont.)

– Aggregation Line Average Y Axis

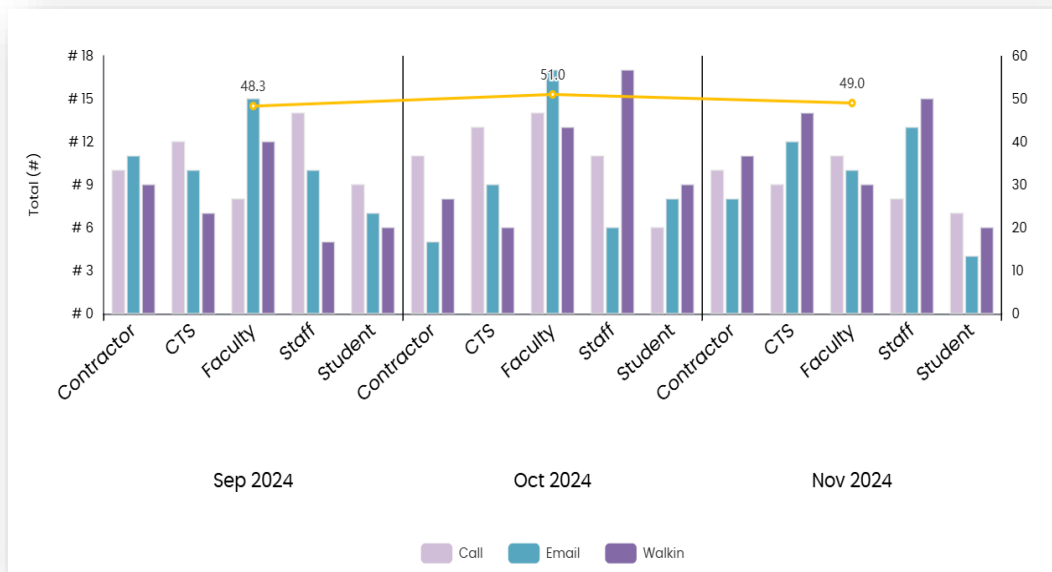


Figure 502 – Aggregation Label Average (Cont.)

– Aggregation Line Average Y1 Axis

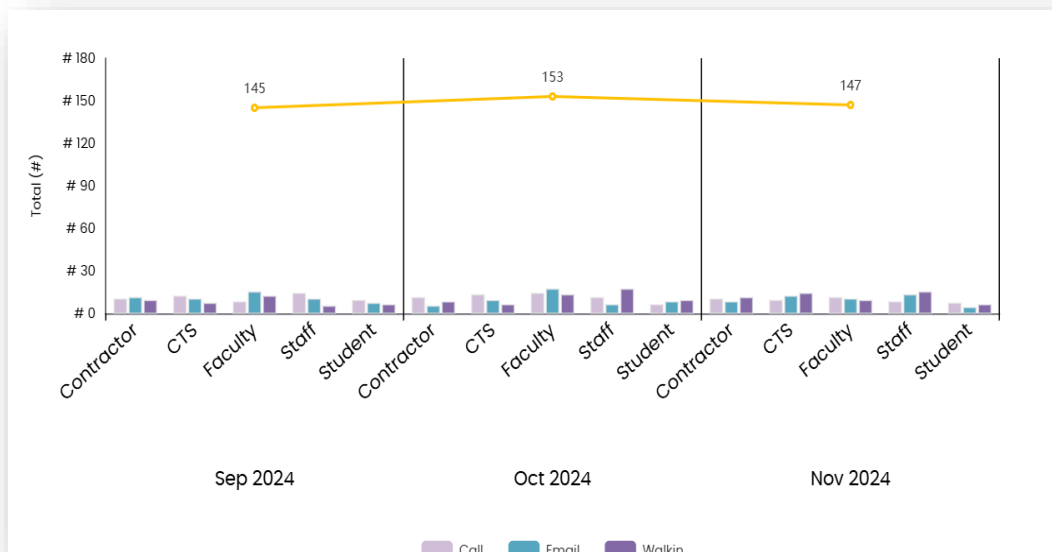


Figure 503 – Aggregation Label Average (Cont.)

– Aggregation Line Sum Y Axis

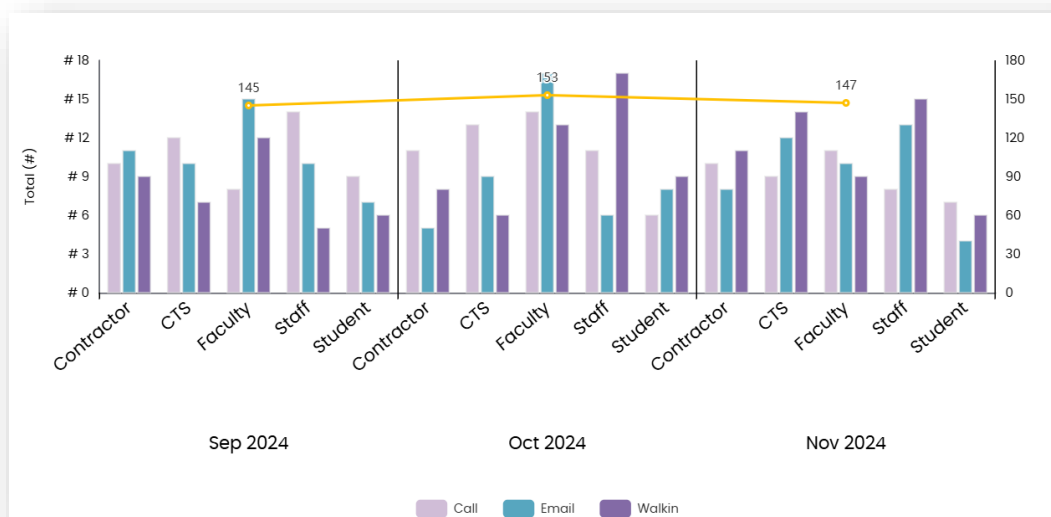


Figure 504 – Aggregation Line Sum Y Axis

- Aggregation Line Sumy1 Axis

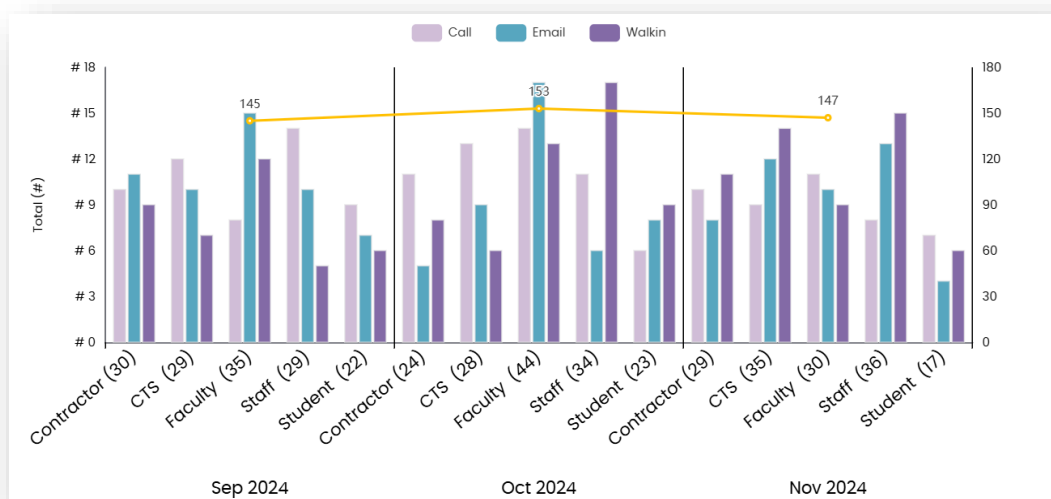


Figure 505 – Aggregation Line Sumy1 Axis

- Both Aggregation Label and Line

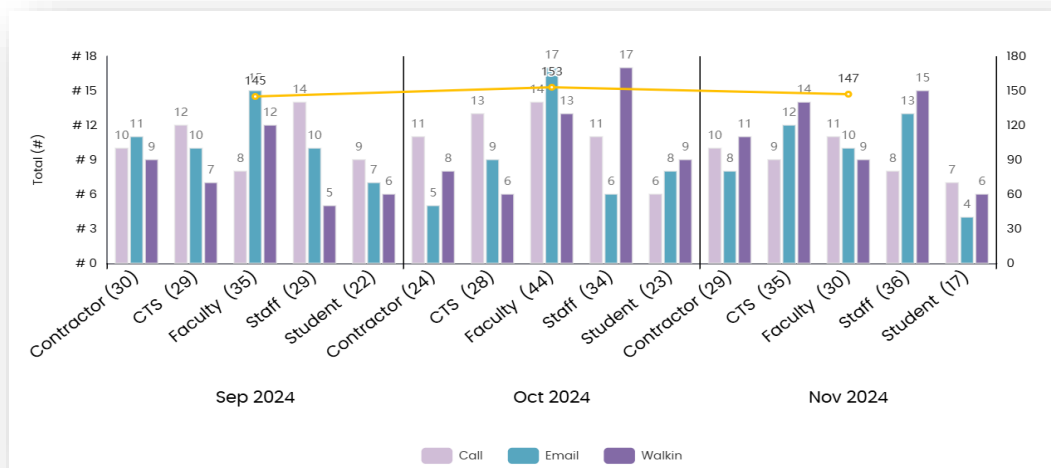


Figure 506 – Aggregation Label and Line

– Data Points

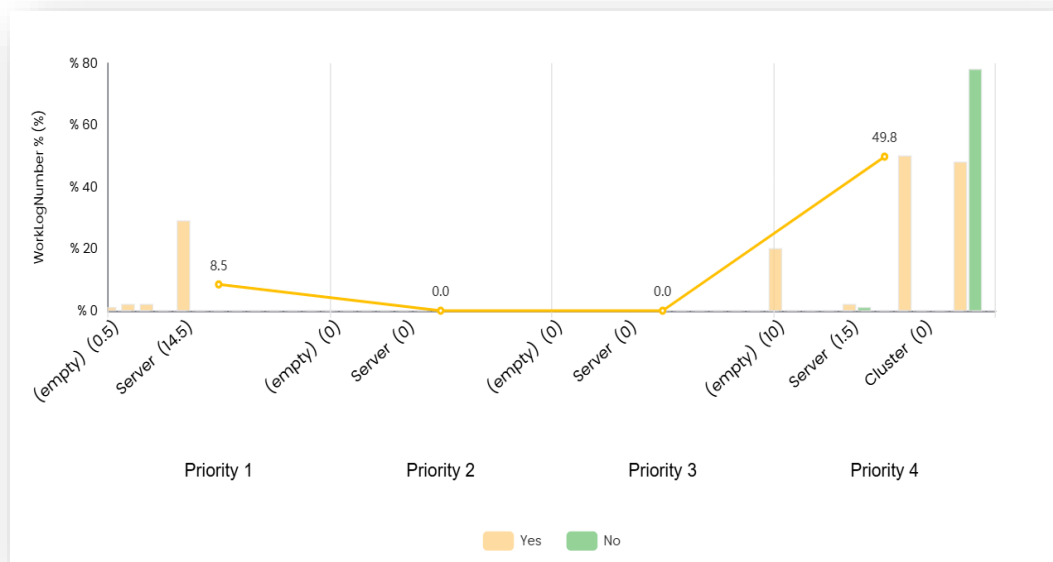


Figure 507 – Data Points

– Percentage Data Example

– Dimension Aggregation

– Limitations and Points to Remember

- When selecting three dimensions, only one measure or Y-axis can be selected.
- You can choose both trendy and non-trend dimensions for the X-axis
- Aggregation properties (like summing, averaging, etc.) are only applicable when 2 dimensions or 3 dimensions are selected on the X-axis. This means you cannot apply aggregation properties when only one dimension is selected.
- When a percentage type measure is selected, the Average option will be automatically chosen in the Aggregation Label Dropdown, Aggregation Line Dropdown, and Y-Axis option under Aggregation Line Type. Users can, however, change these options if necessary to customize the aggregation settings further.

- Currently, only Bar, Line, and Stacked Area chart types are applicable when selecting 3 dimensions. This feature will be expanded in future releases to include additional chart types.
- Sometimes the Divider Line may behave unexpectedly when zooming in at the initial stages or when dealing with large datasets. In these cases, it may not align correctly with the data. To view the correct data, it's recommended to zoom in or select the specific series. For smaller datasets, the Divider Line and data will generally be clearer and more accurate.
- The Aggregation Label values will be automatically formatted when they exceed 999. For example, a value of 1000 will be displayed as 1K. This formatting improves readability, especially with large numbers.
- To achieve the desired outcome, we must maintain a consistent pattern across the different months of data, ensuring that the same number of series are present for each month, regardless of whether the data for each series exists.
 - Example: If the total number of unique series increases (for example, if there are 5 unique series), we adjust the series count for each month/1st Dimension/X-Axis to match this new total, ensuring that each month/1st Dimension/X-Axis has 5 series, even if some series are missing data.
 - These unique series will be displayed via the legend, where each series is labelled to indicate the corresponding data, allowing users to easily identify and differentiate the series across month/1st Dimension/X-Axis.
- All properties related to the E-Bar chart will be applicable and enabled when selecting 3 dimensions, except for cascading.

32 Pie Template with Two Dimensions

32.1 Overview

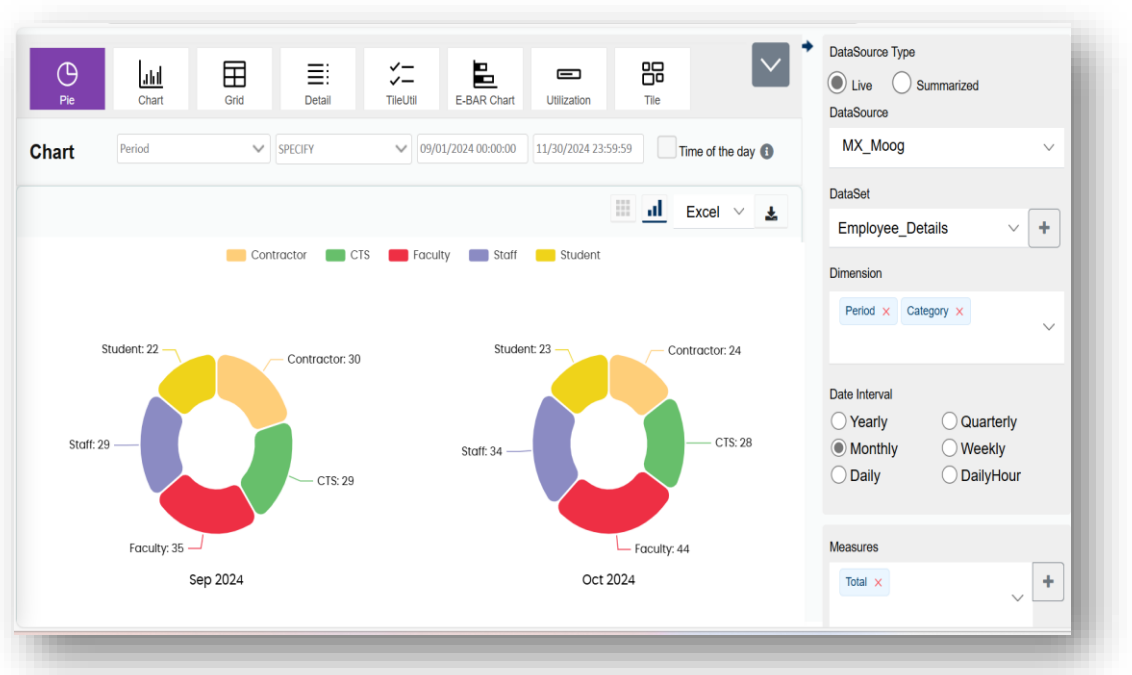


Figure 508 – Pie Template with Two Dimensions

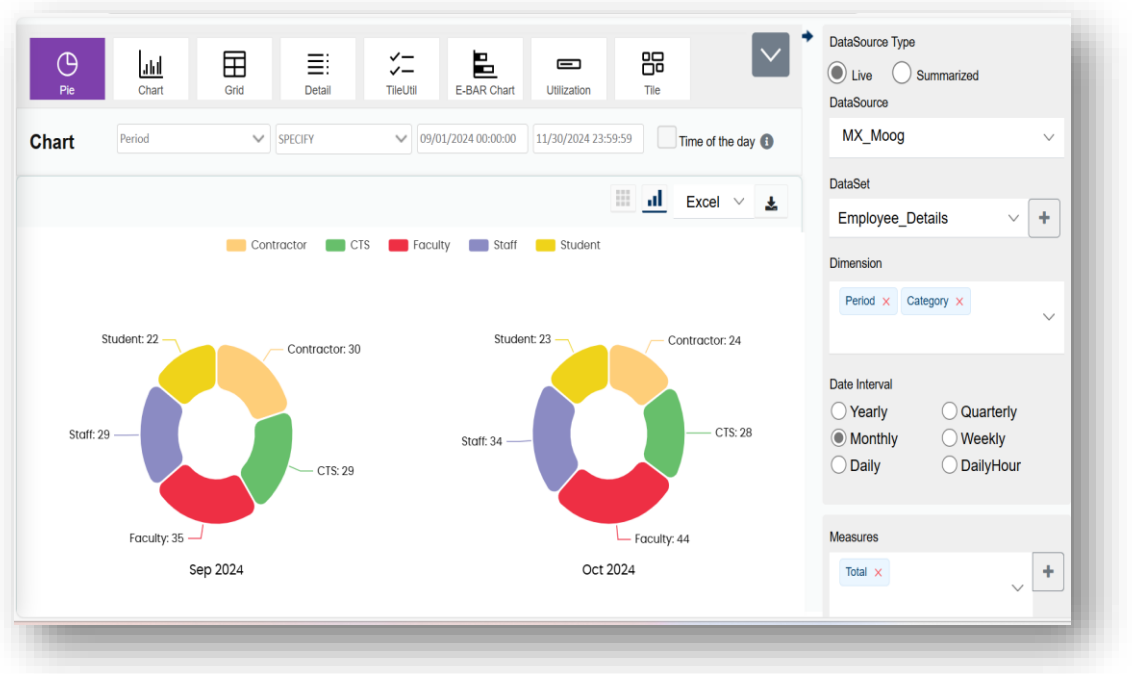


Figure 509 – Pie Template with Two Dimensions (Cont.)

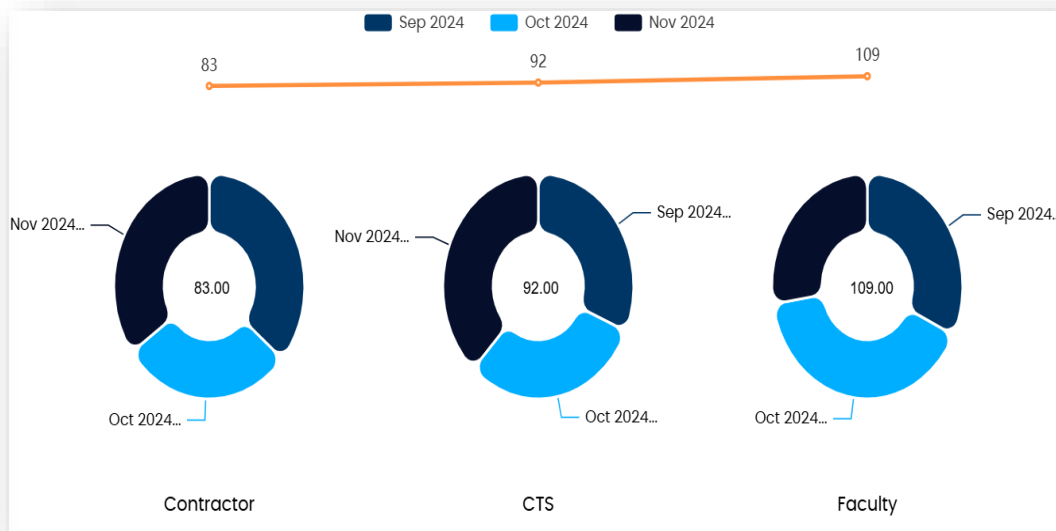


Figure 510 – Pie Template with Two Dimensions (Cont.)

- The Pie template now supports handling two dimensions of data. Previously, the Pie template could only handle a single dimension. With the introduction of this feature, users can select two distinct dimensions.
- The template will automatically generate pies based on the unique data from the first dimension. The second dimension will be used to create slices within each pie.
- Two Dimensions Support
 - Dimension 1: Represents the first set of data. This dimension determines how many pies will be displayed in the chart.
 - Dimension 2: The second data dimension is used to provide a detailed view within each individual pie by creating slices within the pie.

32.2 New Properties

32.2.1 Aggregation Options

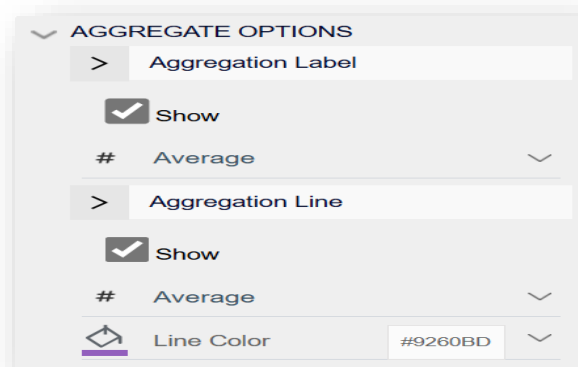


Figure 511 – Aggregation Options

- A new property section called Aggregation Options has been added when selecting two dimensions.
- Aggregation Label:

- In the center of each pie, an aggregation label will display the calculated average or sum for the selected data of that pie.
- The user can select which type of aggregation (average or sum) they want to apply

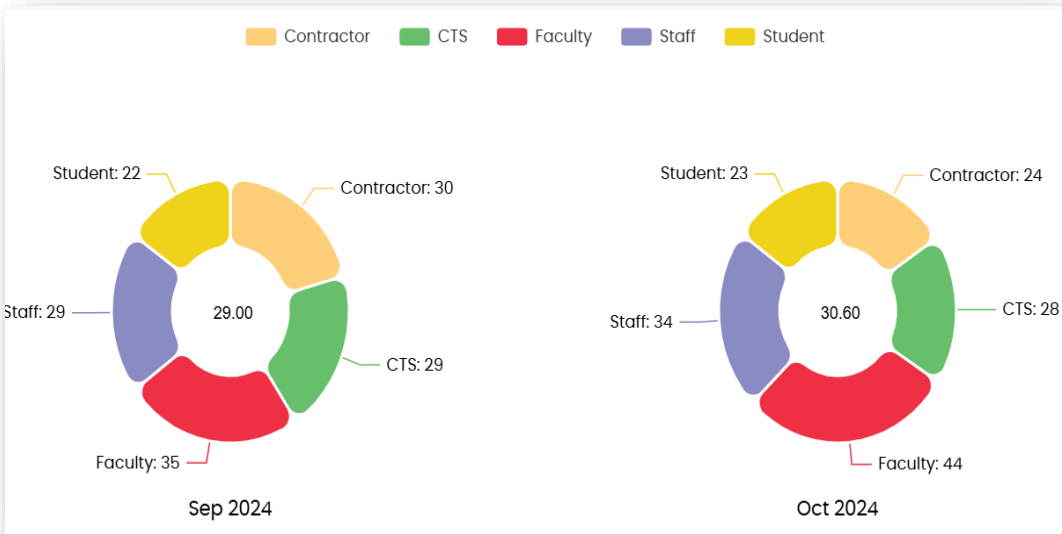


Figure 512 – Average

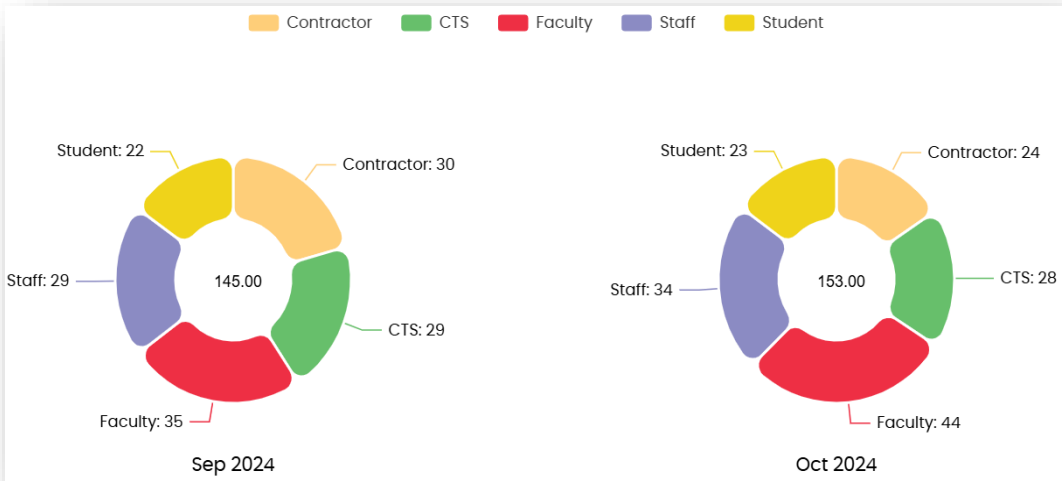


Figure 513 – Sum

- Aggregation Line:
 - A line will appear above all pies, showing the average or sum for the selected aggregation type across top of all pies.
 - Also, users can choose the color of that line in the property panel.

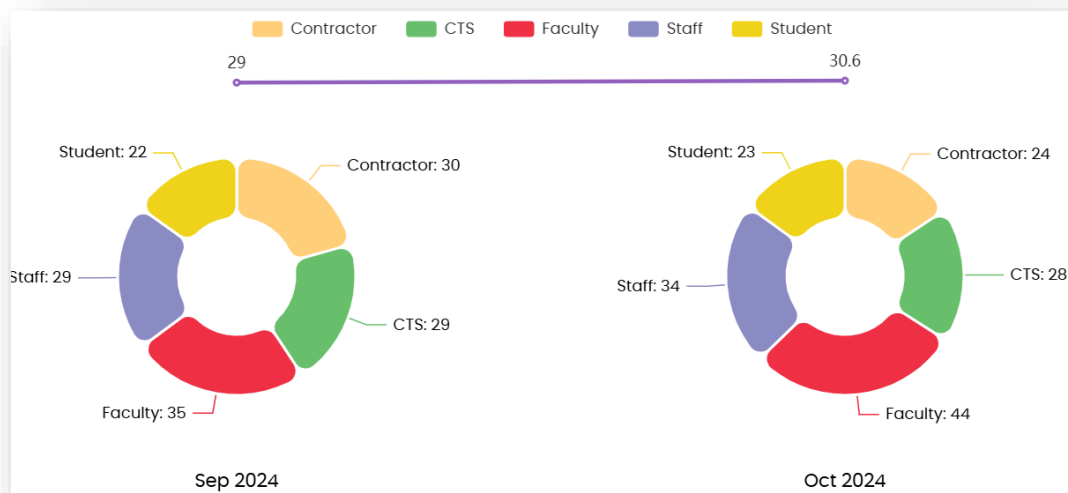


Figure 514 – Average

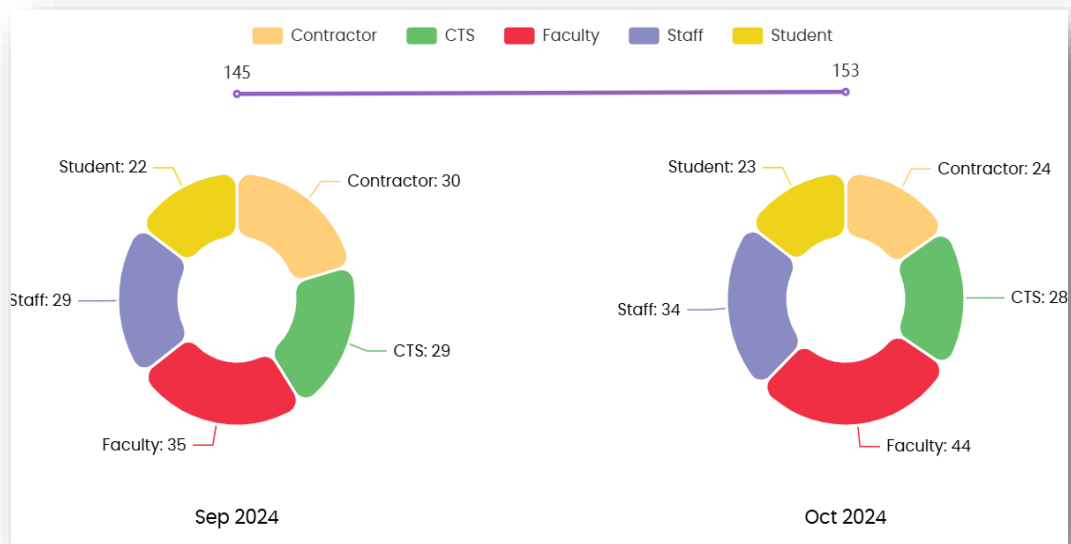


Figure 515 – Sum

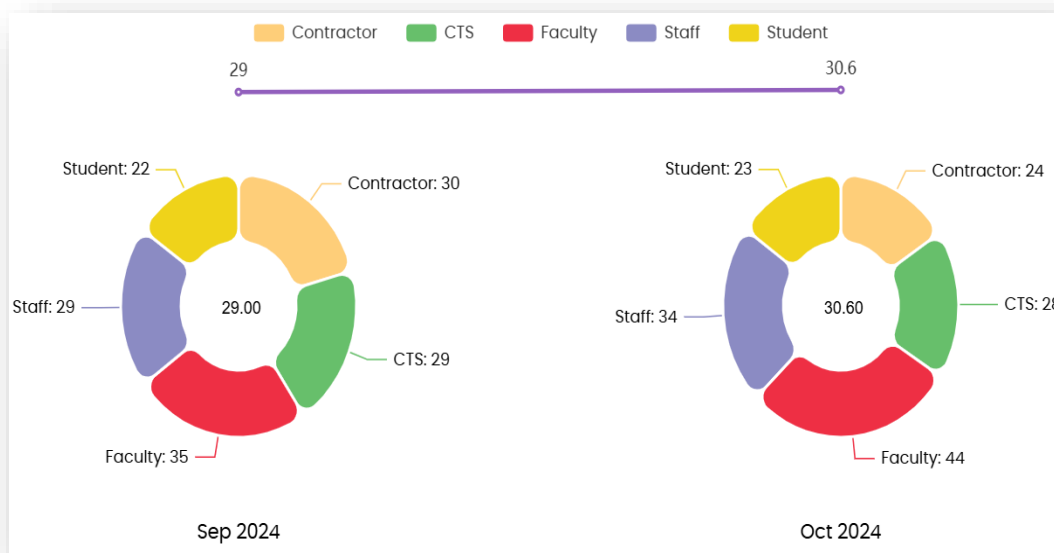


Figure 516 – Average of Aggregation Label and Aggregation Line

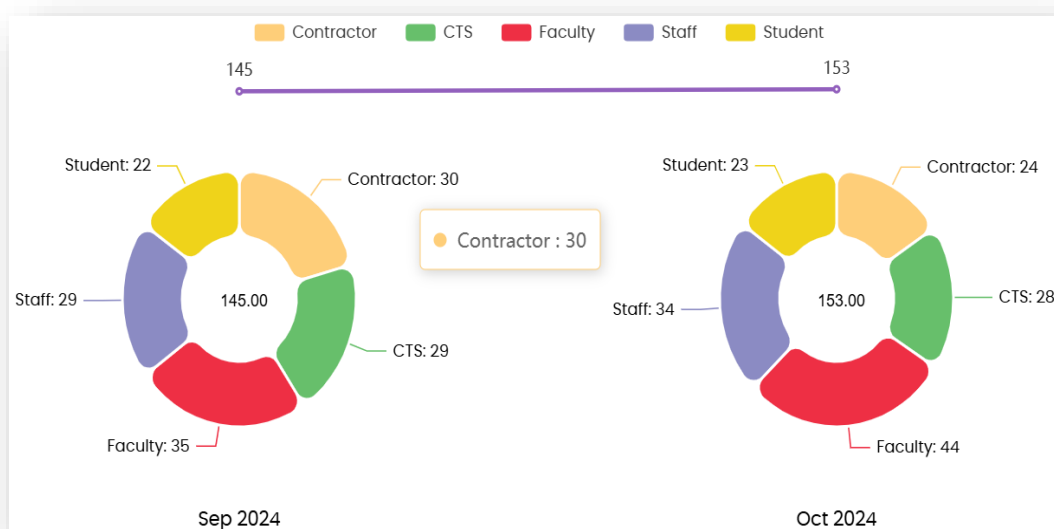


Figure 517 – Sum of Aggregation Label and Aggregation Line

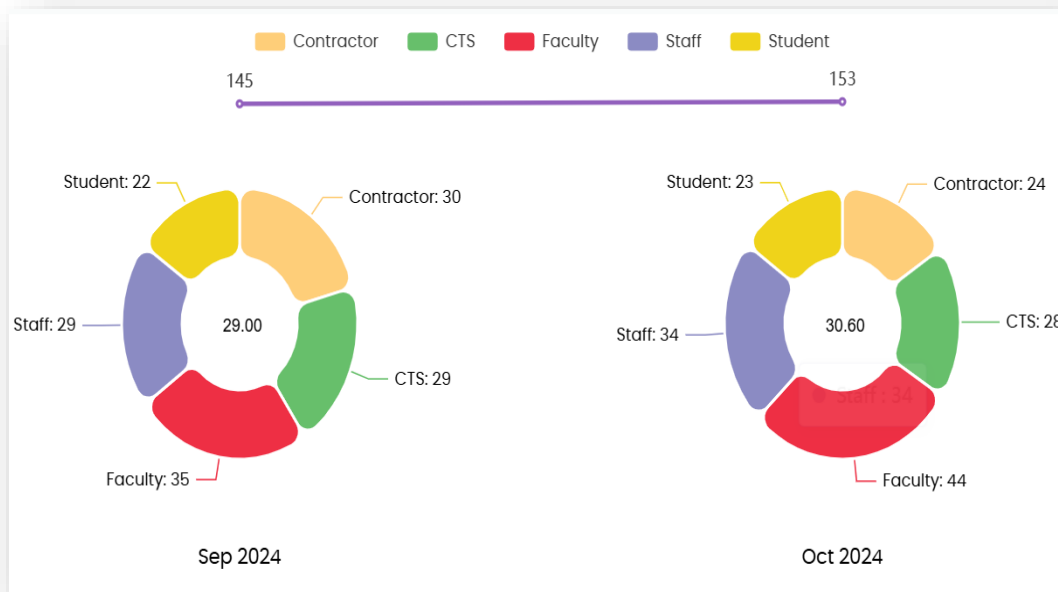


Figure 518 – Average of Aggregation Label and Sum of Aggregation Line

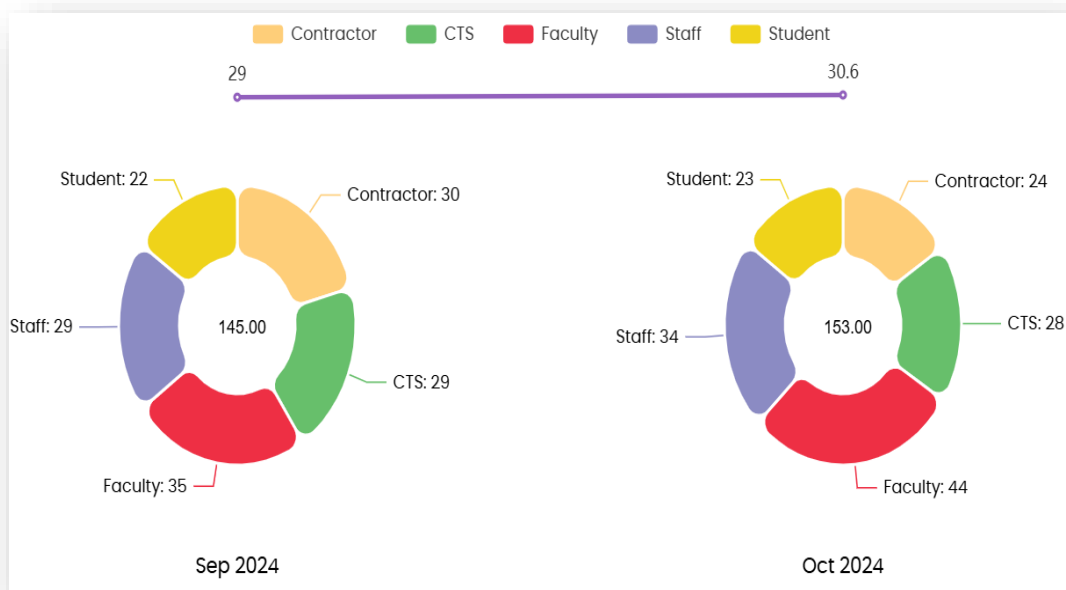


Figure 519 – Sum of Aggregation Label and Average of Aggregation Line

32.2.2 Pie Options

- Data Label

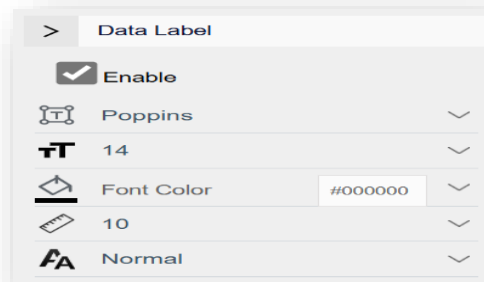


Figure 520 – Data Label

- Under Pie Options, users can customize the label of the 1st Dimension to control how the data is displayed.

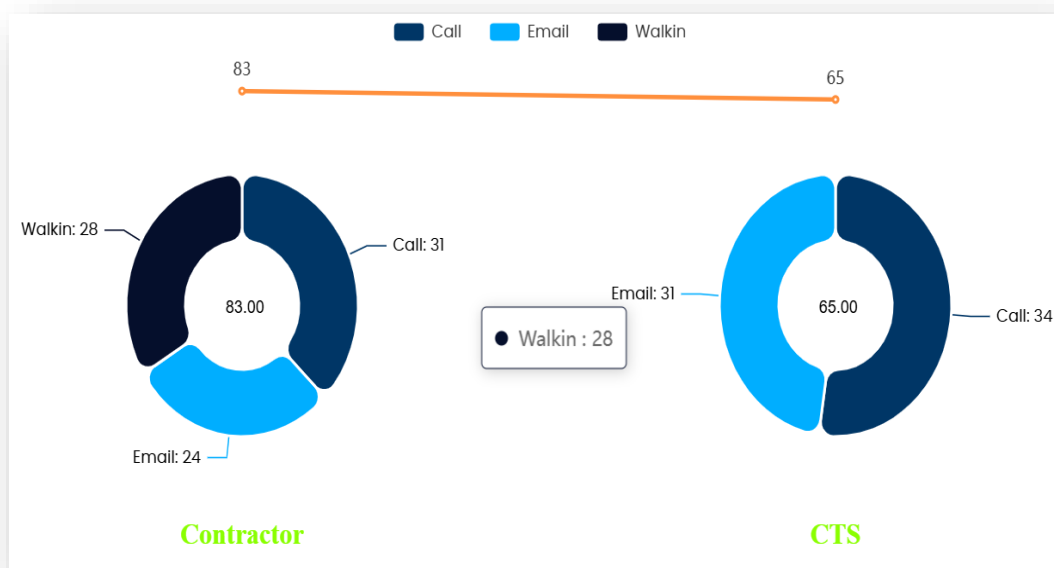


Figure 521 – Pie Options 1st Dimension

- No Pies

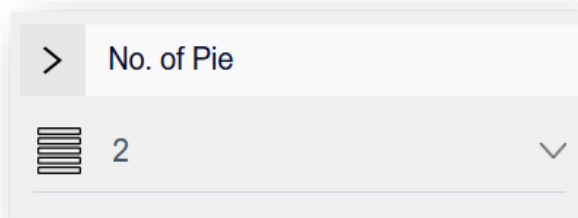


Figure 522 – No of Pies

- Under PIE OPTIONS, users can restrict or limit the number of pies displayed on the screen. By default, two pies are displayed, users can choose up to 7.

32.3 Points to Remember

- Users can select both Trend and Non-Trend dimensions in any order.
- When Trend Type is selected as the first dimension, it is mandatory to select a second dimension for the chart to function properly.
- When a Percentage-type Measure is selected:
 - The "Average" option is automatically selected in both:
 - Aggregation Label Dropdown
 - Aggregation Line Dropdown
 - Users can manually change these options to customize aggregation settings further, if needed.
 - When Two Dimension is selected,
 - Aggregation Label and Line values are automatically formatted for large numbers:
 - Example: 1000 will be displayed as 1K
 - This improves readability, especially when dealing with large datasets.
 - For a single Dimension the formatting properties are located under,
 - Other chart options → show title → formatting, for 2 dimensions it will be hidden. And cascading will be hidden.
- And all other existing functionalities of the Pie template remain unchanged and continue to work as before.

32.4 Event Rule

This module helps in configuring rules for Compliance for generating alerts and sending emails based on defined ranges.

Rules can be defined for:

- Compliance

Steps to configure the rule:

1. Go to Configuration tab -> FinOps -> Compliance -> Event Rule:

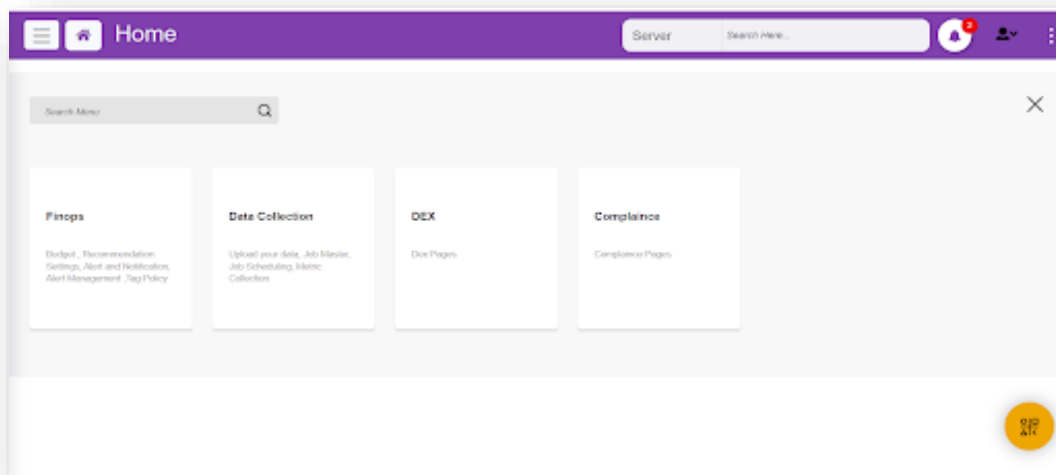


Figure 523 – Event Rule

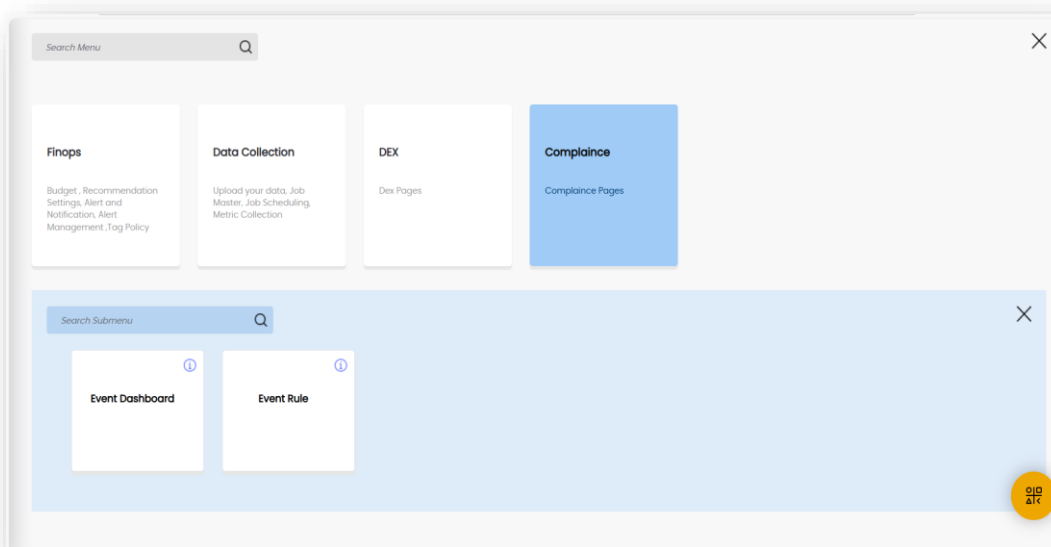


Figure 524 – Event Rule (Cont.)

2. Click on the Create New Rule button on top right.

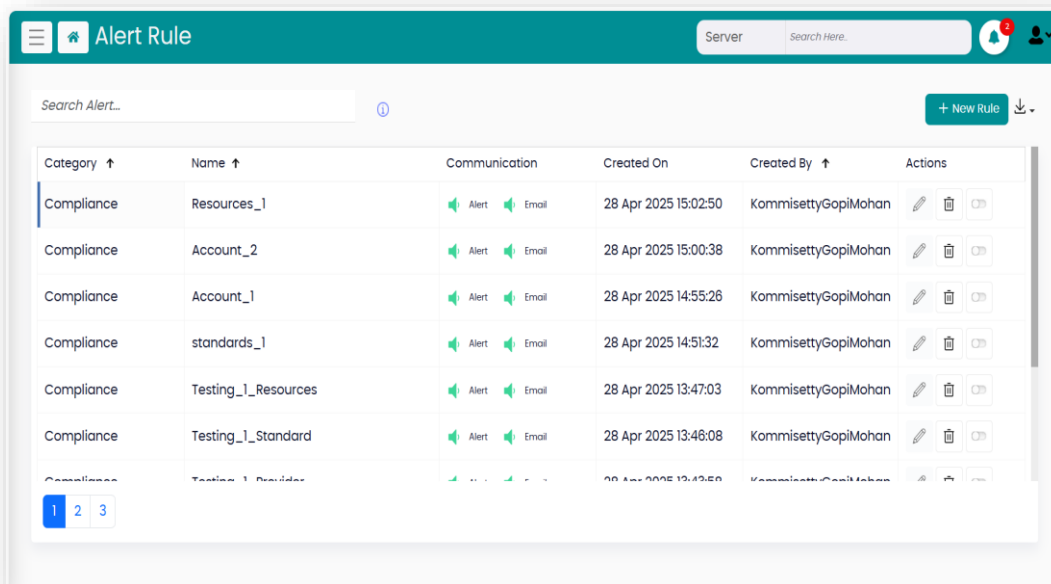


Figure 525 – Alert Rule

3. In the below page, following fields should be filled in:
 - Alert Name: Enter a name for the alert rule.
 - Alert Category: Configuration to be done for which category: Compliance

Alert Rule

Server Search Here.

Back to List

Alert Name

Alert Name

Enter Alert Name...

Alert Category

Compliance

Applicable on

Dimension

Overall

Figure 526 – Alert Rule (Cont.)

Applicable on

Dimension

Overall

Actions

Criticality	Operator	Condition (Score)		Communication
		Min	Max	
☐ Low		%	- %	☐ Email ☐ Alert
☐ Medium		%	- %	☐ Email ☐ Alert
☐ Critical	Between	%	- %	☐ Email ☐ Alert

Save

Figure 527 – Alert Rule (Cont.)

- **Applicable on:** Dimension for which the rule will be applicable. Options are Overall, Account, Provider, Standards, Resources.

Alert Category

Compliance

Applicable on

Dimension
Overall

Account
Overall
Provider
Resources
Standards

(Score)

Min Max

☐ Low % - % ☐ Email ☐ Alert

☐ Medium % - % ☐ Email ☐ Alert

☐ Critical % - % ☐ Email ☐ Alert

Figure 528 – Alert Parameters

- **Lookback Period:** This is by default: This Month
- **Actions:** User needs to define the ranges and severity for which he wants the email or/and alerts.

Alert Actions

Criticality	Operator	Condition (Score)		Communication
		Min	Max	
☐ Low		%	- %	☐ Email ☐ Alert
☐ Medium		%	- %	☐ Email ☐ Alert
☐ Critical	Between	%	- %	☐ Email ☐ Alert

Figure 529 – Alert Actions

- The email address to which mail should be sent should be configured by clicking on Email/ Alert links under Actions.

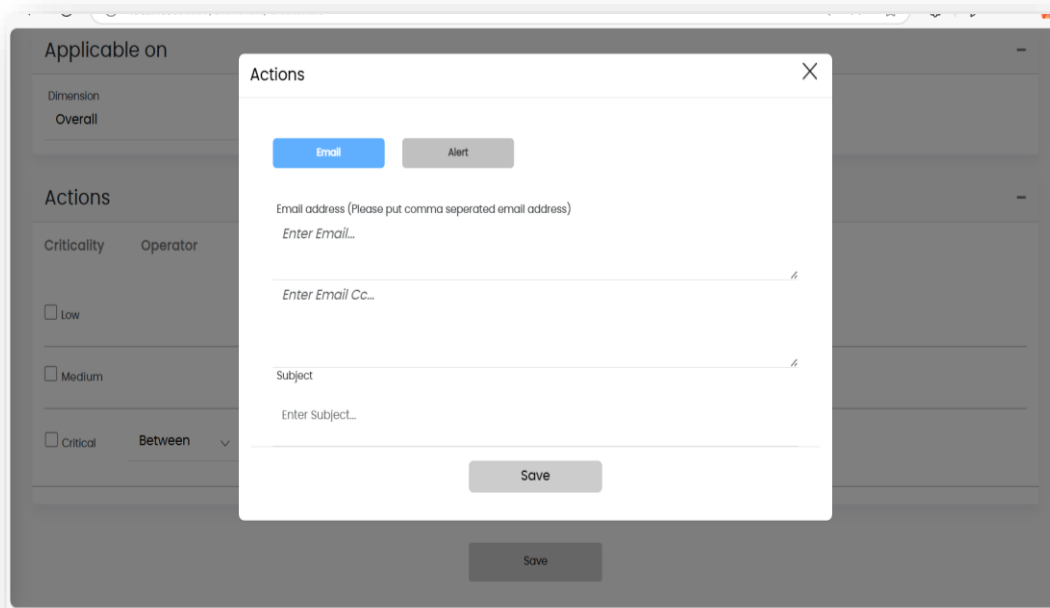


Figure 530 – Alert Rule Actions

5. Click on the Save button to save the configuration.
6. The listing page enables user to Edit, Delete and Enable/ Disable a rule.

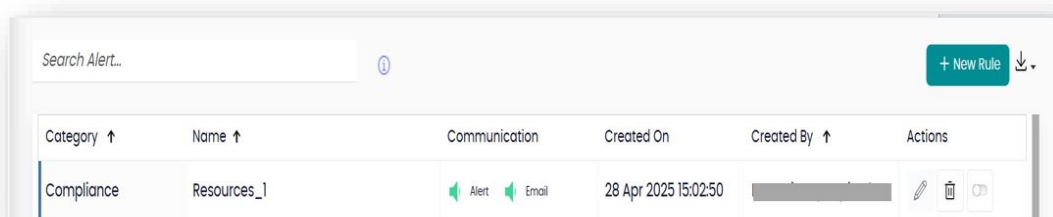


Figure 531 – Edit Alerts

Here we can see different tabs technique wise. Each tab shows savings per resource. These can be assigned to assignees with severity. As soon as a line item is assigned to someone, an alert is generated. The alerts can be seen on Event Dashboards.

32.5 Event Dashboard

Users can go to Event dashboard by following below path:

1. Menu -> Configuration -> FinOps -> Compliance -> Event Dashboard

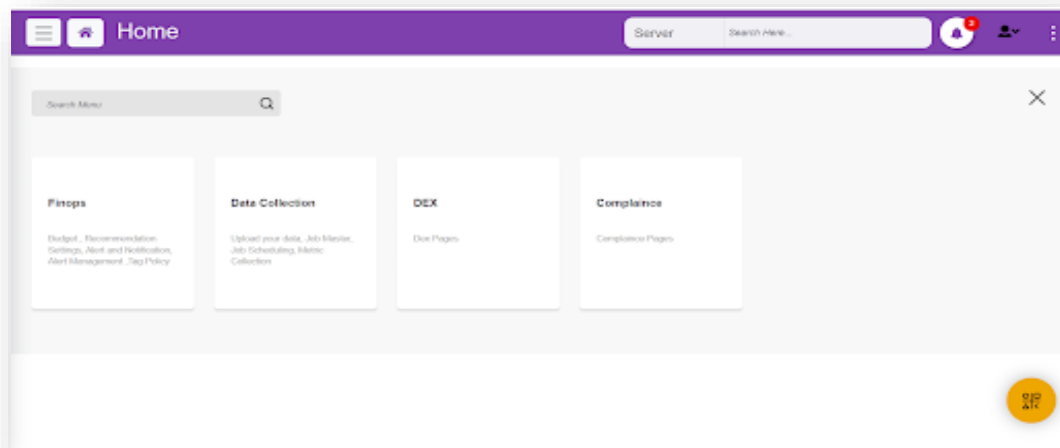


Figure 532 – Event Dashboard

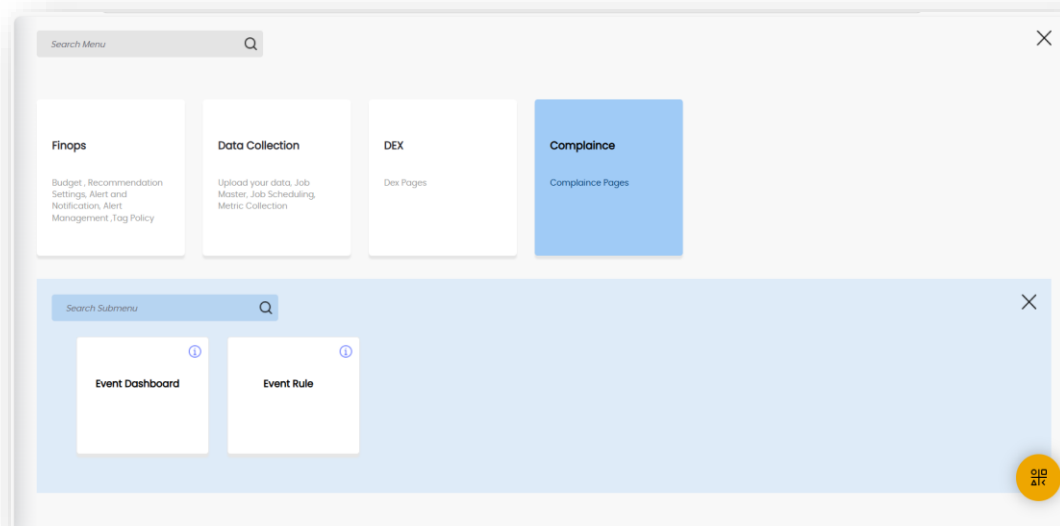


Figure 533 – Event Dashboard (Cont.)

2. The Event Dashboard lists the alerts created for **Event rule** configured for Compliance.
3. As soon as the user clicks on Event Dashboard, the user can see the screen below:

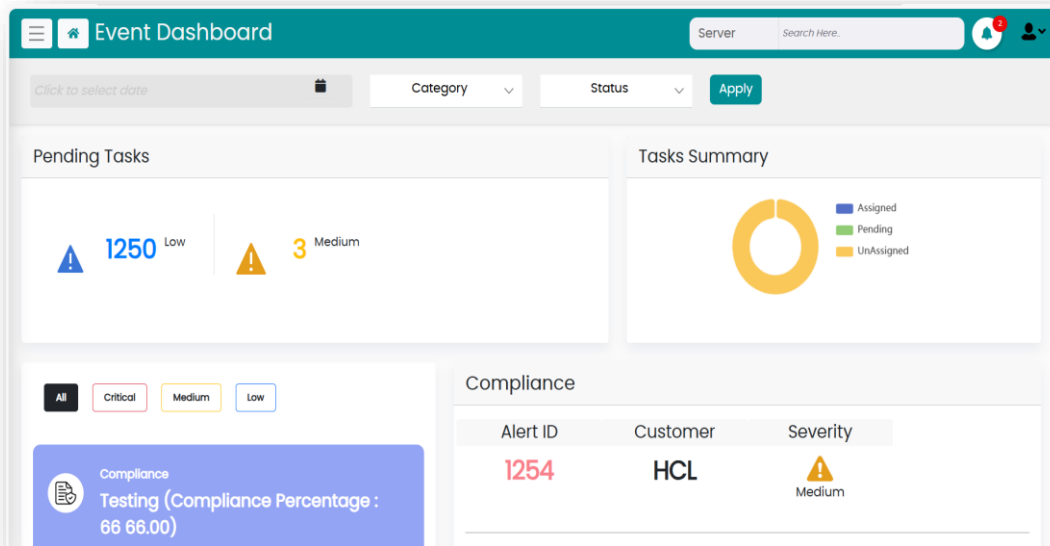


Figure 534 – Event Dashboard (Cont.)

4. In this dashboard, you can have a look at the alerts which are in:
 - a. Pending status severity wise.
 - b. Count of alerts status wise.
5. Users can filter alerts based on creation date and category:

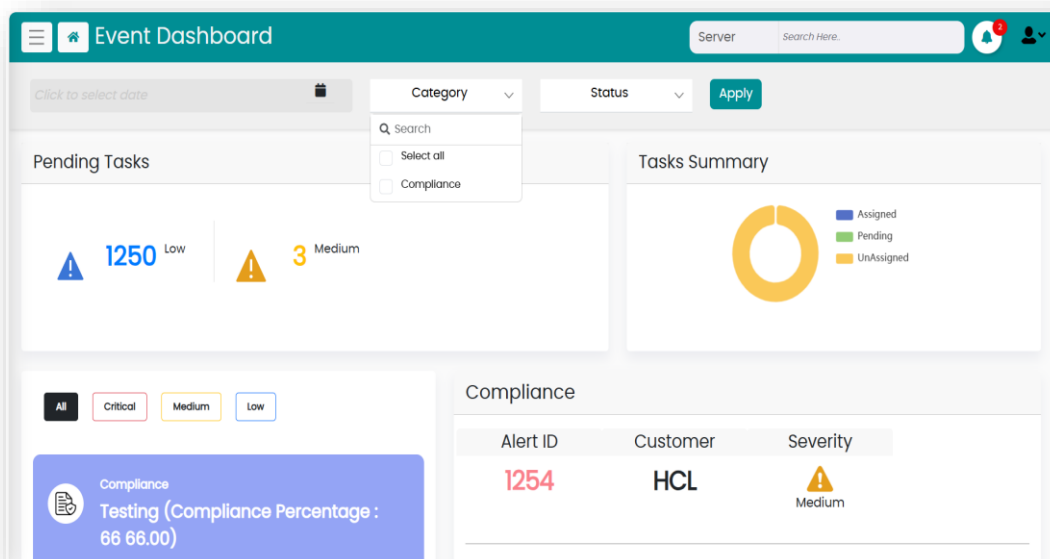


Figure 535 – Pending Status Event Dashboard (Cont.)

32.6 Compliance Dashboard

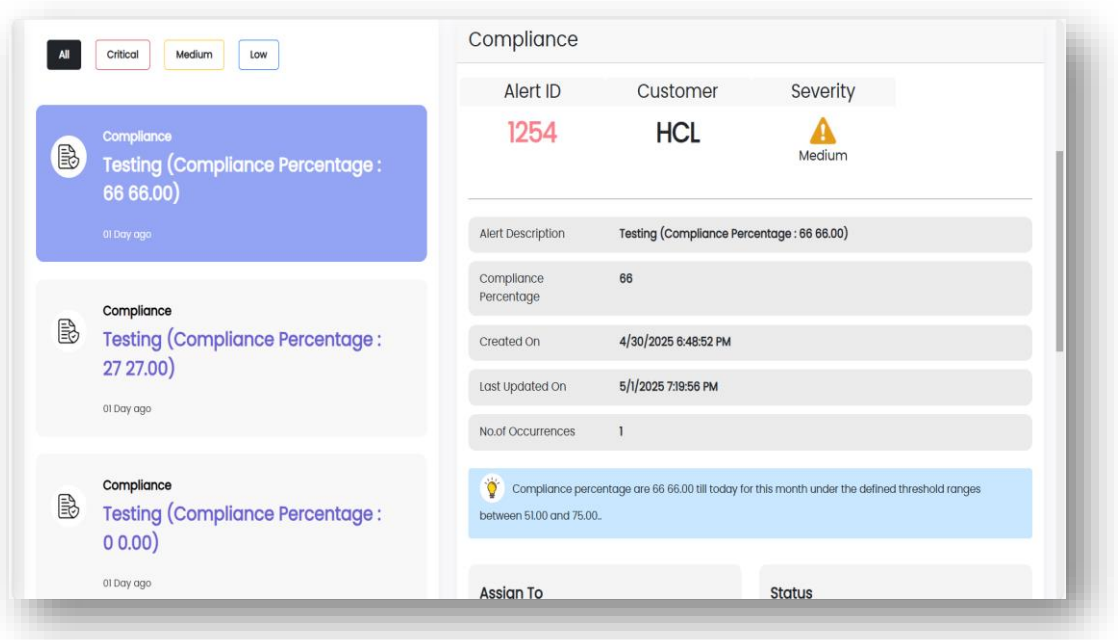


Figure 536 – Compliance Dashboard

- 1. By clicking on any alert on the left side, the details for that alert can be seen on the right-hand side as shown in the above figure.
- 2. In the detailed view the alert can be assigned to any assignee putting some remarks.

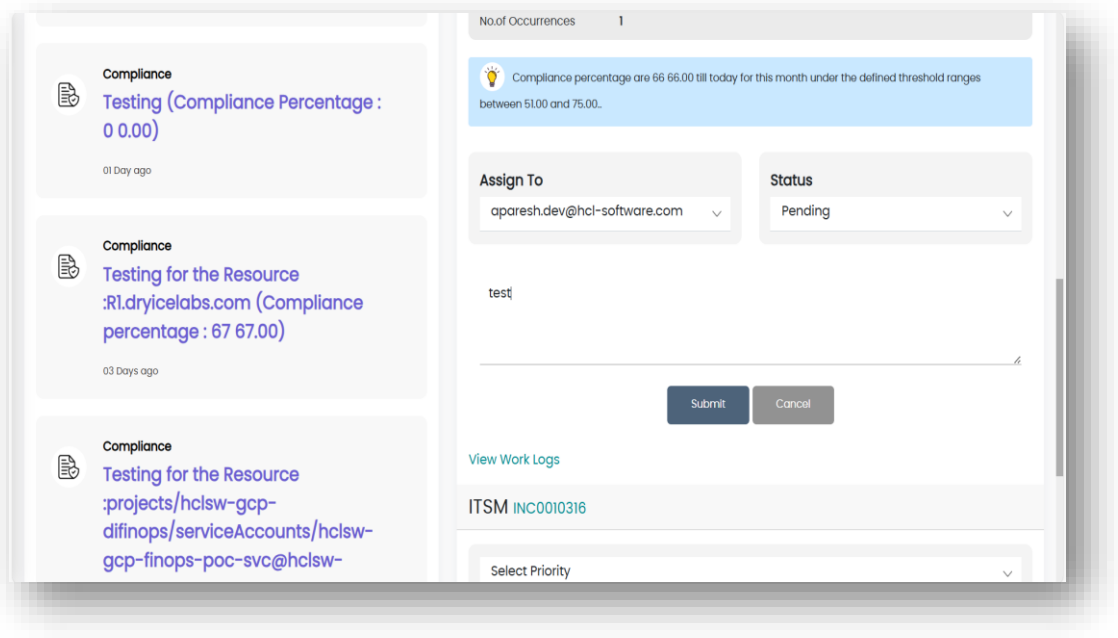


Figure 537 – Compliance Assigning

- 3. In the detailed view, there is a link View Work logs. This can be used to view the work logs done till date on the alert.

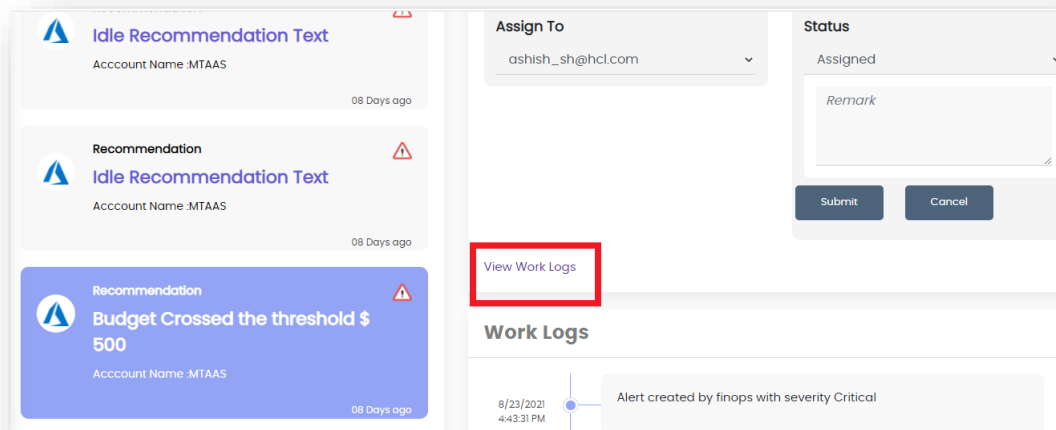


Figure 538 – Compliance Work logs

4. In the ITSM section, User can create the ServiceNow ticket based on priority. Select the Priority and click on Create button.

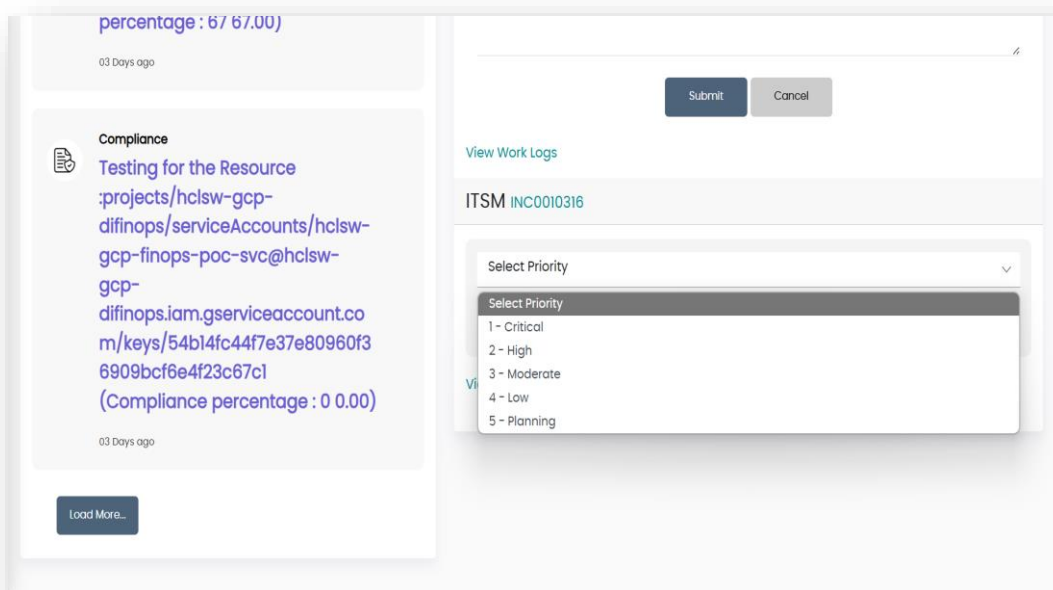


Figure 539 – Compliance Dashboard (Cont.)

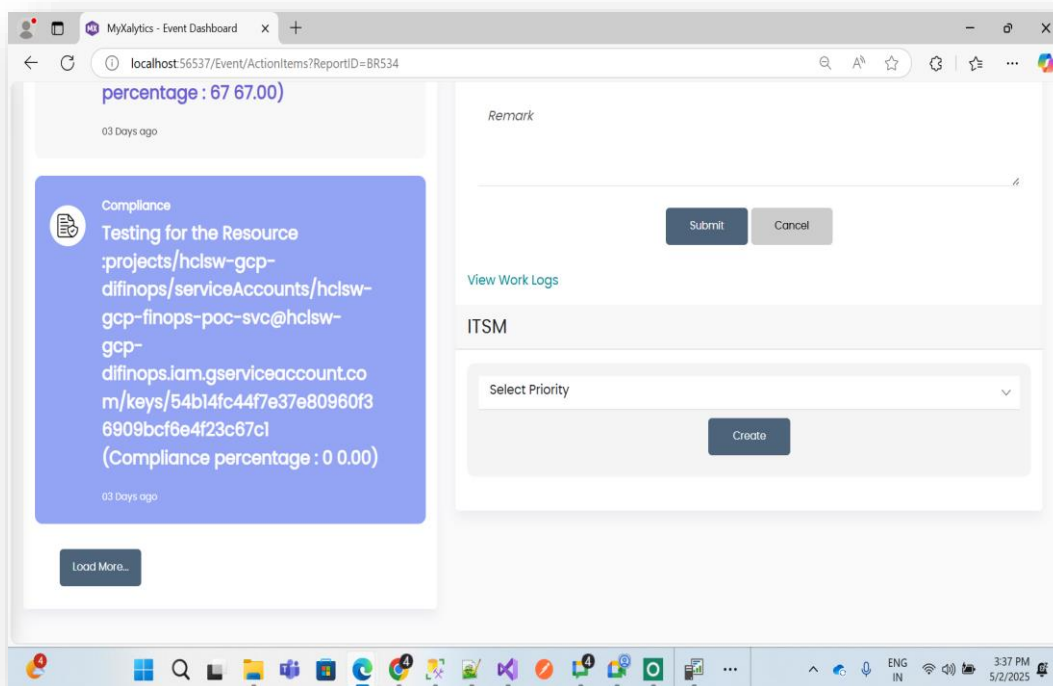


Figure 540 – ITSM

33 Signing Out of MyXalytics

1. Do not exit an application by closing the browser.
2. To ensure that the connection between your User interface and the MyXalytics server is severe, always use the Logout link in the main menu to exit MyXalytics before closing the browser.
3. To sign out of MyXalytics, click the Username and then select Logout.
4. All sessions opened under MyXalytics will be closed, the current user will be logged out, and the application will automatically show the login page.

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