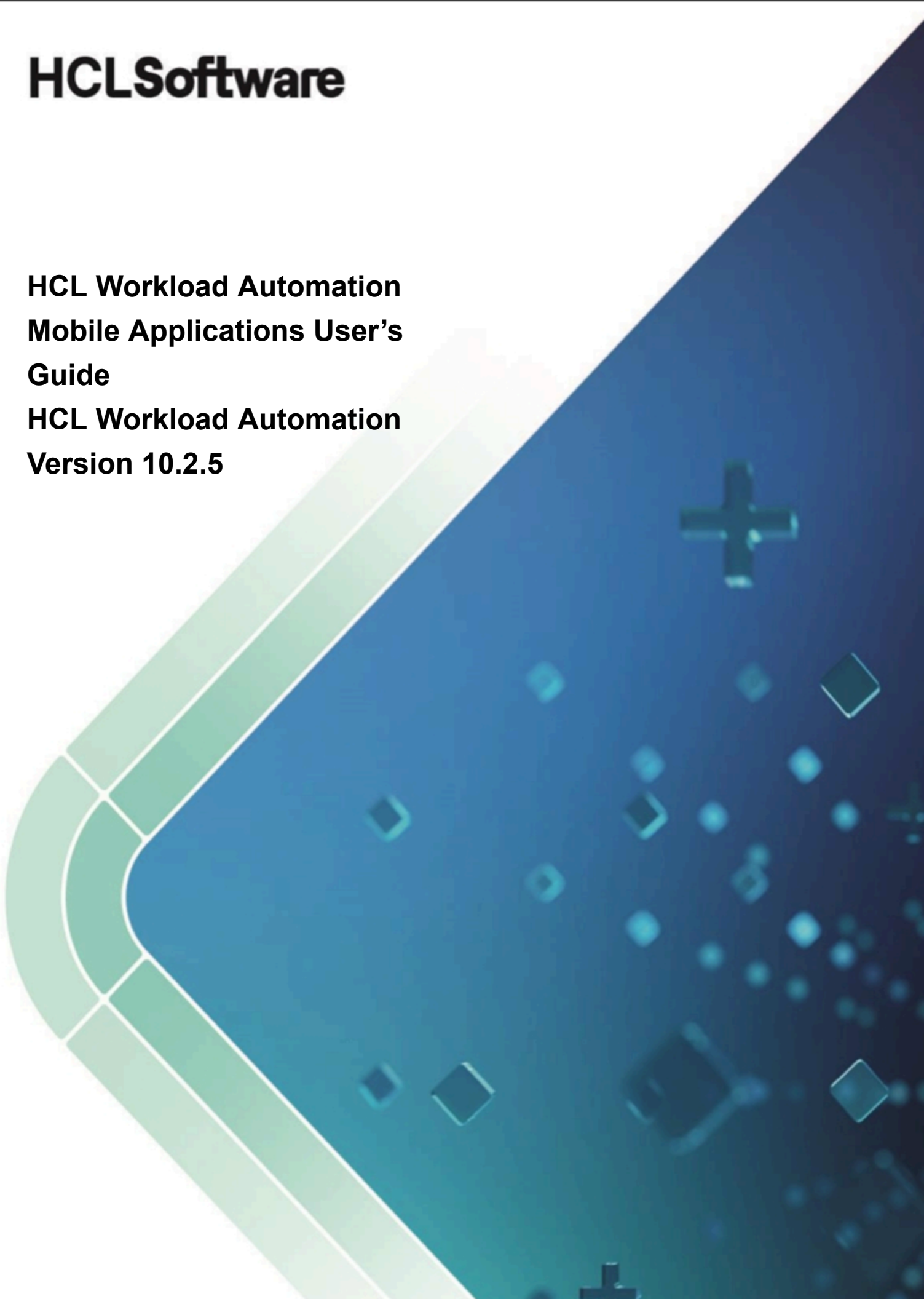# HCLSoftware

HCL Workload Automation
Mobile Applications User's
Guide
HCL Workload Automation
Version 10.2.5

Note

Before using this information and the product it supports, read the information in Notices on page xxxv.

This edition applies to version 10, release 2, modification level 5 of HCL Workload Automation (program number 5698-T09) and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Running HCL Workload Automation from a mobile device

Use your mobile device to easily and quickly interact with your HCL Workload Automation environment.

The IT market is moving towards mobile devices, which help you perform a large number of tasks, such as manage your sales workforce, read your email, check your accounting system, or attend a web conference. Applications designed for mobile devices must be intuitive and user-friendly while remaining robust and reliable, and providing instant access to business and client data wherever they are.

You can interact with HCL Workload Automation by using the Self-Service Catalog and Self-Service Dashboards applications.

> **Note:** To use an engine connection from a mobile device, you must enable the checkbox in the Engine Connection Properties page, and configure the Dynamic Workload Console to use the Single Sign-On. For more information, see the section about configuring the Dynamic Workload Console to use Single Sign-On in the *Administration Guide*.

Self-Service Catalog

The scheduler or application designer creates job streams in the Dynamic Workload Console and marks them as services, so that they are available for managing from the Self-Service Catalog interface. Services correspond to HCL Workload Automation job streams, which you can submit from your mobile, even if you do not have any experience with HCL Workload Automation.

Launch the Self-Service Catalog from your mobile device by connecting to the following URL:

```
https://host_name:port_number/console/ssc
```

where *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console you are connecting to.

Mobile User is the minimum role required to access Self-Service Catalog. Users with this role can view services to which they are authorized and submit service requests. Associate at least one entity to this role to allow other roles access to the Self-Service Catalog.

Self-Service Dashboards

By defining filter criteria to be applied to your jobs and workstations, you can view dashboards and drill down to more detailed information about the jobs and workstations that match the criteria. You can also perform recovery actions on the jobs and workstations.

Launch the Self-Service Dashboards app from your mobile device by connecting to the following URL:

```
https://host_name:port_number/dwc/addOns/devices/ssmanagement/ssmanagement.jsp
```

where *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console you are connecting to.

Mobile User is the minimum role required to access Self-Service Catalog. Users with this role can view services to which they are authorized and submit service requests. Associate at least one entity to this role to allow other roles access to the Self-Service Catalog.

You can open the applications also from the Single Entry Point page. For more information, see HCL Workload Automation user interfaces.

To open this home page on your mobile device, access the following URL:

```
https://host_name:port_number/dwc/mobile.jsp
```

where *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console you are connecting to.

You can also open the applications from the welcome page of the Dynamic Workload Console.

For more information, see the section about product user interfaces in *Overview*.

> **Note:** If you are using a Dynamic Workload Console at the latest fix pack level connected to a back-level master domain manager, you must access the previous version of the Self-Service Catalog.

Part I. Self-Service Catalog

Self-Service Catalog is a solution to automate routine business tasks and run them from mobile devices without having to install and learn about the whole HCL Workload Automation product.

By using the Self-Service Catalog you can use your mobile device to submit service requests to HCL Workload Automation without knowing anything about engines, jobs, or job streams.

Even though the Self-Service Catalog has been primarily envisioned to be used from a mobile device, you can efficiently use it also from your computer connected to a web browser.

The application developer or scheduler defines jobs and job streams using the Dynamic Workload Console to automate tasks that Self-Service Catalog users perform routinely.

Some services might need to be approved before they are submitted. For example, a manager may need to approve a new license request for a software to check if such request fits in the budget. The need for an approval can be specified during the definition of a service by the application developer or scheduler. The **Approval Flow** feature leverages the integration with Jira or ServiceNow plug-ins, and the user can monitor the status of the service, which changes according to the status of the ticket on Jira or ServiceNow platforms.

Users can log in to the Self-Service Catalog interface to start the services when needed.

A service is linked to a job stream that runs on a HCL Workload Automation engine. By simply launching the service, you submit the job stream.

To use the Self-Service Catalog, you must enable the checkbox in the Engine Connection Properties page, and configure the Dynamic Workload Console to use the Single Sign-On. Then, you can launch the Self-Service Catalog specifying a URL that contains the host name and port number of the Dynamic Workload Console instance to which you are connecting. .

For more information about configuring the Dynamic Workload Console to use Single Sign-On, see the section about configuring the Dynamic Workload Console for Single Sign-On in *Administration Guide*.

You can also use Self-Service Catalog taking advantage of High Availability configuration so as to have multiple console instances working at the same time without reducing performance. For more information about configuring High Availability, see the Configuring High Availability section in the *Dynamic Workload Console User's Guide*.

Chapter 1. A Self-Service Catalog business scenario

Self-Service Catalog is the right choice to perform business operations even if you or your employees know nothing about engines, jobs and job streams.

This scenario describes how Self-Service Catalog can make your business operations easier and quicker.

Andrew needs to buy a virtual machine to perform a proof of concept on a new project. Jacob, the HCL Workload Automation expert, tells Andrew that virtual machines can be requested using Self-Service Catalog, but the request needs an approval from the director of the business unit.

Andrew is a little worried because has no experience with HCL Workload Automation, but Jacob reassures him about the fact that Self-Service Catalog is really intuitive to use. Jobs and job streams are submitted as services and are created by HCL Workload Automation experts. Self-Service Catalog users only have to submit a specific service. Jacob tells Andrew that he has also created a tag named **VM** to find the service easily.

To submit the service, Andrew accesses Self-Service Catalog. From the **Catalog tags** sidebar menu he selects the **VM** tag, and then clicks on the service named **Request for a new virtual machine**. A pop-up panel appears requesting Andrew to specify the characteristics of the virtual machine, such as the required size, the operating system, and the CPU dimension. After having selected the required properties, Andrew submits the service.

In **My requests** tab, Andrew can monitor the status of his request. The creation of the virtual machine needs to be approved by the director of the business unit, so the status of the service is **Waiting of approval** until the director approves the request on Jira.

When the director of the business unit has approved the request, the creation of the virtual machine can start. When Andrew checks the progression of his request, he sees that the service is **In progress**.

Few minutes later, the virtual machine is finally ready and the service results **Successful** in **My requests** tab. Andrew can now use the new virtual machine and proceed with his proof of concept.

Thanks to Self-Service Catalog, Andrew has obtained the approval for a new virtual machine in just few clicks, without knowing anything about how HCL Workload Automation works.

Chapter 2. Creating a service that requires an approval using the Dynamic Workload Console

You can create a service that must go through an approval process from the Dynamic Workload Console.

The scope of the scenario is to create a service that generates a GitHub license request.

John is a HCL Workload Automation Administrator. John's manager has asked him to find a way to automate the request process of GitHub licenses. When submitting the service, the user must provide a justification for requesting the license, and the request must be approved by the Director of the business unit before the GitHub license can be assigned. The manager has also asked John to assign a high priority to the GitHub license request, so that the ticket can be handled quickly.

To automate the license issuance process, John decides to create a job stream that contains a ServiceNow job. To integrate with the ServiceNow application, John needs a ServiceNow instance name and credentials. After John has obtained the required information, he can start creating the service.

To create the **GitHub_request** service, perform the following steps:

1. Create a job stream named **GitHub_workflow**.
    a. From the **Design** menu, click **Graphical Designer** page.
    b. From the **Blocks** tab, drag a job stream and drop it into the workspace.
    c. In **General info**, in **Workstation**, select a workstation.
    d. In **General info**, in **Name**, type **GitHub_workflow**.
2. Create and publish the service.
    a. In **GitHub_workflow**, click the **Add triggers** icon.
    b. On the right-side panel, click **Add new** and select **Service**.
    c. In the properties panel, in **Name**, type **GitHub_request**.
    d. Click on the **Published** toggle button.
    e. In **Tags**, enter **license**, so that users can filter through services related to licenses.
3. Add variables to the service.
    a. Select **Add variable**.
    b. In **Variable**, in **Name**, type **description**.
    c. In Display name, type **Business justification**.
    d. In **Type**, select **String** from the drop-down menu.
    e. Click on the **Required** toggle button.
    f. In **Placeholder**, type **Motivate your GitHub license request**.
4. Add a ServiceNow job to **GitHub_workflow** and define general information.
    a. In the **Blocks** tab, from the **Human Tasks** category, drag the **ServiceNow** task into **GitHub_workflow**.
    b. In **General info**, in **Workstation**, select a workstation.
    c. In **General info**, in **Name**, type **GitHub_task**.
    d. In **Connection**, in **Host**, type your ServiceNow instance name.
    e. In **Credentials**, select **Basic Authentication**, enter your credentials and perform the **Test connection**.
5. Provide the details for **GitHub_task**.

      a. In **Action**, select **Create**.

      b. In **Table name**, click **Search** and then select **Ticket**.

      c. In **Task details**, click **Get fields** and then select **Description**, **Priority**, and **Short description**.

      d. As **Description** value, type **${var.<description>}**, so that the task can retrieve the variable value defined for the **GitHub_request** service.

      e. As **Priority** value, enter **2**, to assign a high priority to the ticket when the service is submitted.

      f. As **Short_description** value, enter **GitHub license request**.

      g. Check the **Create and monitor** box.

6. Define approval and rejection states of **GitHub_task**.

      a. In **Approval State**, click **Get state** and then select **Closed Complete**.

      b. In **Rejection State**, click **Get state** and then select **Closed Incomplete**.

7. Define how often **GitHub_task** must check the state of the ticket on ServiceNow and specify a timeout for the job.

      a. In **Polling Interval**, enter **PT30M** to check the state of the ticket every 30 minutes.

      b. In **Polling Timeout**, enter **PT3D** to set a 3 days timeout.

8. Click **Validate input** if you want to verify the correctness of the provided inputs.

9. Deploy the workspace.

The service is now ready and can be launched from the Self-Service Catalog. When someone submits the **GitHub_request** service, the status of the service can be monitored in **My requests** tab. The creation of the GitHub license needs to be approved, so the status of the service is **Waiting for approval** until the Director of the business unit approves the request on ServiceNow.

When the Director of the business unit approves the request by putting the ticket in **Closed Complete** status, the GitHub license is issued. The service then results **Successful** in **My requests** tab.

Part II. Self-Service Dashboards

With the Self-Service Dashboards app, you can use your mobile device to define one or more dashboards to monitor subsets of jobs and workstations.

Chapter 3. Self-Service Dashboards Overview

With the Self-Service Dashboards app, you can use your mobile device to define one or more dashboards to monitor subsets of jobs and workstations.

Self-Service Dashboards is a solution to monitor business tasks right from the mobile user's device, without having to install the full product or when you do not have access to the full product. It also enables some mobile users to perform simple business tasks without the necessity of learning about the complexity of the full product.

The dashboards give an overall picture of your jobs and workstations and allow you to drill down and view more detailed information about jobs, such as critical jobs, risk levels, late jobs, job logs, and other job details, and workstations and their availability. You can also perform some recovery actions on jobs and workstations.

Although the Self-Service Dashboards app is to be used primarily from a mobile device, you can also use it from your computer connected to a web browser.

To use the Self-Service Dashboards app, you launch it by specifying a URL that contains the host name and port number of the Dynamic Workload Console instance to which you are connecting.

If the Dynamic Workload Console instance to which you are connecting is configured for single sign-on, then a user can log in once on the Dynamic Workload Console and then gain access to the Self-Service Dashboards app without being prompted to log in again. . For more information about configuring the Dynamic Workload Console to use Single Sign-On, see the *Administration Guide*

For more information about configuring the Dynamic Workload Console to use Single Sign-On, see the *Administration Guide*

You can also use Self-Service Dashboards taking advantage of High Availability configuration so as to have multiple console instances working at the same time without reducing performance.

Prerequisites

See the Dynamic Workload Console Detailed System Requirements document for the most up-to-date information about supported versions for devices, supported browsers, and operating systems.

Chapter 4. Accessing and exiting Self-Service Dashboards

You can use your mobile device to define and monitor dashboards containing the results of queries on jobs and workstations in your HCL Workload Automation environment.

About this task

You can use your mobile device to open the dashboard and monitor jobs and workstations. Click them to view their details, and send this information using email. For jobs, a link to download the job log is also included in the email.

- To launch the Self-Service Dashboards app from your mobile device or desktop browser, specify the following URL:

  Self-Service Dashboards web address

  ```
  https://host_name:port_number/dwc/mobile
  ```

  where, *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console to which you are connecting.

  Enter the credentials to access the Dynamic Workload Console to which you are connecting.

  You can launch the Self-Service Dashboards also from the Single Entry Point page. For details refer to the topic about the product user interfaces in the *User's Guide and Reference*.

- The first time you log into the Self-Service Dashboards you will see the **Monitor all** screen.

  Note: In the **Monitor all** screen you cannot edit the dashboard name or the description but you can perform all the other actions.

- To log out of the Self-Service Dashboards app, from the home page, tap **User > Logout**, as shown in the following figure, and close the browser:
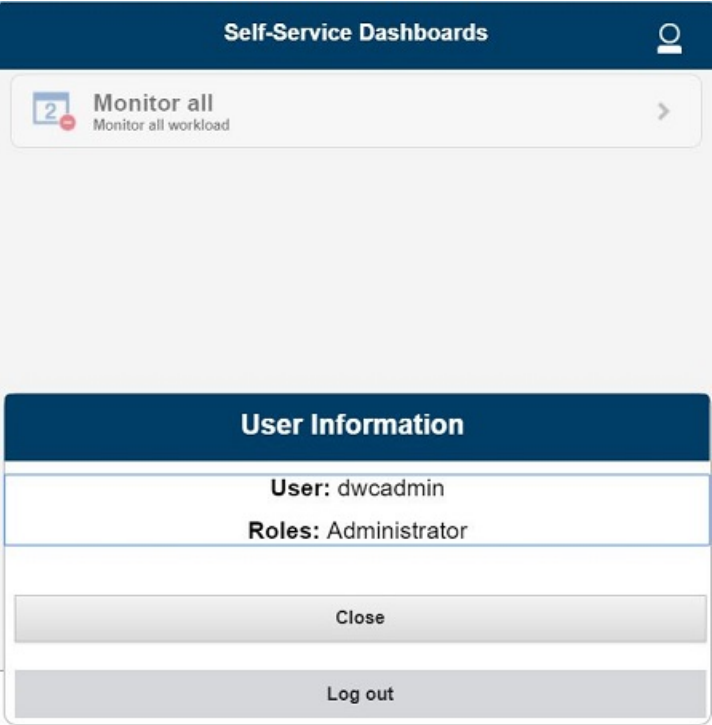
![Note icon] **Note:** With Android devices, after exiting the Self-Service Dashboards, you must also clear the ram memory using the task manager application, otherwise the browser is not actually closed and current Self-Service Dashboards session remains active.

As you can see, when you tap **User** you can also see your roles and, as a consequence, actions and objects for which you are authorized. For more information about roles, see: Authorizing users to access dashboards on page 15.

Chapter 5. Administrative tasks

Administrative tasks required to work with the Self-Service Dashboards app.

Administrative tasks are those activities required to enable users to create and work with Self-Service Dashboards. Access to the Self-Service Dashboards app is based on roles. Administrators create dashboards for mobile users and associate roles to the dashboards. Users can create, view, and work with the dashboards based on the role assigned to them.

In addition to assigning roles to users, administrators might also choose to implement a high availability configuration. A high availability configuration enables multiple instances to work at the same time without affecting performance. For more information see the section Configuring High Availability in the *Dynamic Workload Console User's Guide*.

Administrators can also configure the Dynamic Workload Console to use single-sign on. This configuration implies that a user can log in once on the Dynamic Workload Console and then gain access to the Self-Service Dashboards app without being prompted to log in again.

To access audit logging information about the operations performed from the Self-Service Dashboards application, Administrators can configure logging information in the Dynamic Workload Console global settings file.

See the information about auditing mobile app activity in the section about customizing your global settings in the *Dynamic Workload Console User's Guide*.

For more information about customizing user interface labels on the Self-Service Dashboards, see "Personalizing UI labels" in the *Administration Guide*.

Defining users and roles

Define and manage users and associate them to security roles.

About this task

Access to Self-Service Dashboards is based on roles and entities. Users associated to entities having a specific role, can access the services assigned to that role.

1. open the `authentication_config.xml` located in `/<INST_DIR>/DWC_DATA/usr/servers/dwcServer/configDropins/overrides`
2. Add the new entity specifying username and password in users or groups.
3. From the Dynamic Workload Console open **> Administration > Manage Roles**.
4. Add the entity created for the role **Mobile Roles**.
5. From the Self-Service Dashboards application on your mobile, associate the required roles to services, as described in .

Authorizing users to access dashboards

Work with roles to authorize users to view or edit dashboards.

Before you begin

Associate roles to dashboards to make them available to users. Users with the roles corresponding to those assigned to the dashboard are able to work with the dashboard as defined by the individual role. Launch the Self-Service Dashboards app using a web browser:

Self-Service Dashboards web address

```
https://host_name:port_number/dwc/mobile
```

where, *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console to which you are connecting.

Required role

Administrator, Mobile User

About this task

You can associate different roles to users to authorize them to perform different tasks. View and edit rights are based on Dashboard Application Services Hub role definition.

The following list shows the available roles, based on which you can authorize users to different actions and objects:

To know what your roles are, from the home page, tap **User**.

Using the following roles you can differentiate between users who can only view dashboards and users who can also create and edit them.

Self-Service Dashboards

By defining filter criteria to be applied to your jobs and workstations, you can view dashboards and drill down to more detailed information about the jobs and workstations that match the criteria. You can also perform recovery actions on the jobs and workstations.

Launch the Self-Service Dashboards app from your mobile device by connecting to the following URL:

```
https://host_name:port_number/dwc/addOns/devices/ssmanagement/ssmanagement.jsp
```

where *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console you are connecting to.

Mobile User is the minimum role required to access Self-Service Catalog. Users with this role can view services to which they are authorized and submit service requests. Associate at least one entity to this role to allow other roles access to the Self-Service Catalog.

You can use all the other available roles to fine tune the authorization mechanism. By associating catalogs and services to required roles, you can authorize only users with at least one of those roles to see and use them. To associate users to specific roles, use the Dynamic Workload Console, as described in Defining users and roles on page 15.

Roles can be associated to dashboards in read-only mode. Users that are assigned roles in the read-only mode will have access to share a dashboard with other users in the read-only mode. These users can view the dashboard, drill down to subsets of the jobs and workstations but cannot perform recovery actions on these jobs or workstations.

To associate a dashboard to a role, perform the following steps:

1. Tap the Self-Service Dashboards section to launch the application.

2. Tap **Roles**. The role icon displays next to each object until you exit the edit role mode by tapping the **Roles** button again.

3. Tap the dashboard for which you want to associate a role.

4. From the displayed list of roles, select the ones you want to associate to the selected service. Double tab the role icon if you want to assign in read-only mode.

5. Save to exit and tap **Roles** again to exit the edit role mode.

Results

Only users who have at least one of the roles associated to a dashboard can view, edit, or use it.

Managing dashboards

Creating, editing and deleting dashboards.

Before you begin

To manage dashboards, you must have the following role:

> **Required role**
>
> > Administrator, Mobile User

About this task

To start working with Self-Service Dashboards, you can define dashboards that are associated to HCL Workload Automation jobs or workstations, or use dashboards created by other users to which you have been given access. Dashboards, in the

context of the Self-Service Dashboards app, correspond to filters that query on jobs and workstations that you want to monitor, to produce a list of results in a dashboard that can be further filtered to display more details.

Dashboards are associated to roles, so that only users having those roles can see and use them. Tap **User**, in the top right corner, to display details about your user name and roles. Complete the following steps to create and manage dashboards:

1. Create dashboards, which are associated to the HCL Workload Automation jobs or workstations, as described in Defining a new dashboard on page 19.
2. Optionally, at any time, you can modify the created dashboards. For example, when editing a dashboards, you can change the engine and job or workstation associated to it.
3. From the Dynamic Workload Console, associate the users who are going to use Self-Service Dashboards to roles to allow them to access the application.
4. To access and display information about the current plan associated with an engine in Self-Service Dashboards UI, ensure you have selected the **Show in dashboard** check box in the Engine Connection Properties in the Manage Engines portlet on the Dynamic Workload Console.
5. From the Manage Engines page on the Dynamic Workload Console, share the engines used to run the dashboards, with the roles associated to those dashboards, to allow these users to actually view the dashboards.
6. Associate dashboards to roles to allow only the required users to see and use them, as described in Defining users and roles on page 15.

Chapter 6. Mobile user tasks

Mobile users can use their mobile devices to connect to the Self-Service Dashboards app and monitor jobs and workstations in an HCL Workload Automation environment.Mobile users can use their mobile devices to connect to the Self-Service Dashboards app and monitor jobs and workstations in a Workload Automation on Cloud environment.

The Self-Service Dashboards app, enables you to use your mobile device to perform one or more of the following tasks:

- Define one or more dashboards filtering on subsets of jobs and workstations.
- From the dashboard, drill down and view more detailed information about jobs and workstations.
- View details and the job log for individual jobs.
- View the availability of workstations and other details about the workstation.
- Perform some recovery actions on jobs and workstations.

Defining a new dashboard

Defining a new dashboard means defining filter criteria for a subset of jobs, workstations, or both, in your environment, that you want to monitor from a mobile device or computer connected to a web browser. The filtered results are displayed in a dashboard from which you can drill down and continue to filter to retrieve more targeted results.

Before you begin

To define new dashboards, launch the Self-Service Dashboards app using a web browser:

Self-Service Dashboards web address

```
https://host_name:port_number/dwc/mobile
```

where, *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console to which you are connecting.

Required role

Administrator, Mobile User

Note: If you define a dashboard to monitor jobs, workstations, or both on z/OS engines, you cannot define filter criteria. You can create a single dashboard that monitors all workstations and all jobs for the specified engines.

About this task

To define a new dashboard, perform the following steps:

1. Tap the Self-Service Dashboards section to launch the application.
2. Tap **Create** to begin defining the new dashboard.
3. Specify information about the dashboard, optionally associating a description to better identify it. Mandatory fields are marked by an asterisk.
4. Optionally, tap **Icon** and select an icon that you can associate to the dashboard from the list of available icons.

5. In **Filter Criteria**, define the criteria to be applied to jobs and workstations.

    a. Tap **Job** to specify filter criteria that determines the subsets of jobs in your environment to be displayed in your dashboard. The filter criteria includes one or more of the following: engine (if more than one engine is available), job stream name, workstation name where the job stream runs, job name, and workstation where the job runs. Add additional criteria such as, multiple engines, by clicking **Add Filter**.
When you are finished specifying the filter criteria, tap **Back**.

    b. Tap **Workstation** to specify filter criteria that determines the subsets of workstations in your environment to be displayed in your dashboard. The filter criteria includes one or more of the following: engine (if more than one engine is available), and workstation name. Add additional criteria such as, multiple engines, by clicking **Add Filter**. The dashboard results are an aggregation of all filter criteria.
When you are finished specifying the filter criteria, tap **Back**.

6. Save the dashboard.

7. On the Self-Service Dashboards page, tap **Roles** and the dashboard name to open the list of roles that can be associated to this dashboard. Select only the roles that you want to authorize to see and use this dashboard:

If the new dashboard is not associated to any role, by default it is only available to users with the TWSWEBUIAdministrator role.

Results

The dashboard you created is displayed in the Self-Service Dashboards page that shows all the dashboards to which you have access.

What to do next

You can now tap the dashboard to display the results that correspond to the filter criteria defined in the dashboard for the engine connections you specified.

Create a dashboard to monitor jobs

Self-Service Dashboards are queries that you can create to display subsets of your jobs and workstations that you want to monitor.

Before you begin

To define new dashboards, launch the Self-Service Dashboards app using a web browser:

Self-Service Dashboards web address

```
https://host_name:port_number/dwc/mobile
```

where, *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console to which you are connecting.

Required role

Administrator, Mobile User

Note: If you define a dashboard to monitor jobs, workstations, or both on z/OS engines, you cannot define filter criteria. You can create a single dashboard that monitors all workstations and all jobs for the specified engines.

About this task

The following dashboard is used to monitor all jobs that are responsible for running reports with a job name that contains the word "Report", which runs on workstations belonging to both the Finance and Marketing departments, where the workstation names begin with either "Fin" or "Mktg".

1. Tap the Self-Service Dashboards section to launch the application.
2. Tap **Create** to begin defining your dashboard.
3. Specify a name, and optionally, specify a description to better identify it.
4. Optionally, tap **Icon** and select an icon that you can associate to the dashboard from the list of available icons.

5. In **Filter Criteria**, tap **Job** to specify filter criteria that determines the subsets of jobs in your environment to be displayed in your dashboard.

   a. In **Engine**, select the engine connection associated to the jobs you want to monitor. You can select a single engine or all engines. The all engines option works for only distributed engines and not for z/OS engines.

   b. In **Job**, type `Report*` to specify a filter to include all jobs beginning with "Rep" to be included in your dashboard.

   c. In **Workstation (Job)**, type `Fin*` to specify a filter to include all workstations where the job runs, beginning with "Fin" to be included in your dashboard.

   d. Click **Add Filter** to add an additional filter on the workstation name. In **Workstation (Job)**, type `Mktg*` to specify a filter to include all workstations beginning with "Mktg" to be included in your dashboard.

6. Click **Back** and save the dashboard.

7. On the Self-Service Dashboards page, tap **Roles** and then the dashboard to open the list of roles that can be associated to this dashboard. Select only the roles that you want to authorize to see and use this dashboard. If the new dashboard is not associated to any role, by default it is only available to users with the Administrator role.

Results

The dashboard you created is displayed in the Self-Service Dashboards page that shows all the dashboards to which you have access.

What to do next

You can now tap the dashboard for which you want to display a dashboard of results that correspond to the filter criteria defined in the dashboard for the engine connection you specified. See Viewing dashboard results on page 26 for information about displaying the dashboard of results. See Monitoring job status and details on page 27 for information about how use the list of results in the dashboard to view more detailed information.

Create a dashboard to monitor workstations

Self-Service Dashboards are queries that you can create to display subsets of your jobs and workstations that you want to monitor in a graphical dashboard view.

Before you begin

To define new dashboards, launch the Self-Service Dashboards app using a web browser:

Self-Service Dashboards web address

```
https://host_name:port_number/dwc/mobile
```

where, *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console to which you are connecting.

Required role

Administrator, Mobile User

Note: If you define a dashboard to monitor jobs, workstations, or both on z/OS engines, you cannot define filter criteria. You can create a single dashboard that monitors all workstations and all jobs for the specified engines.

About this task

The following dashboard is used to monitor all workstations that belong to both the IT and Client Services departments that are identified by departmental codes, IT777 and CS333, at the beginning of the workstation name.

1. Tap the Self-Service Dashboards section to launch the application.
2. Tap **Create** to begin defining the dashboard.
3. Specify a name, and optionally, specify a description to better identify it.
4. Optionally, tap **Icon** and select an icon that you want to associate to the dashboard from the list of available icons.

5. In **Filter Criteria**, tap **Workstation** to specify filter criteria that determines the subsets of workstations in your environment to be displayed in your dashboard.

   a. In **Engine**, select the engine connection associated to the workstations you want to monitor.

   b. In **Workstation**, type `IT777*` to specify a filter to include all workstations belonging to the IT department to be included in your dashboard.

      > **Note:** For z/OS engines, you cannot define filter criteria for the workstation name. All workstations for the specified engine are considered.

   c. Click **Add Filter** to add an additional filter on the workstation name. In **Workstation**, type `CS333*` to specify a filter to include all workstations in the Client Services department to be included in your dashboard.

6. Click **Back** and save the dashboard.

7. On the Self-Service Dashboards page, tap **Roles** and then the dashboard name to open the list of roles that can be associated to this dashboard. Select only the roles that you want to authorize to see and use this dashboard. If the new dashboard is not associated to any role, by default it is only available to users with the Administrator role.

Results

The dashboard that you created is displayed in theSelf-Service Dashboards page that shows all the dashboards to which you have access.

What to do next

You can now tap the dashboard for which you want to display a graphical dashboard of results corresponding to the filter criteria defined in the dashboard for the engine connection you specified. For information about displaying the dashboard of results, see Viewing dashboard results on page 26. For information about how to use the list of results in the dashboard to view more detailed information, see Monitoring job status and details on page 27.

Viewing dashboard results

You can use your mobile device to display a dashboard of results. The results can be filtered further to monitor more targeted results, view details about the results, and perform recovery actions.

Before you begin

To run the query defined for a dashboard and display the results in a graphical dashboard view, you must launch the Self-Service Dashboards app using a web browser:

Self-Service Dashboards web address

```
https://host_name:port_number/dwc/mobile
```

where, *host_name* and *port_number* are the host name and port number of the Dynamic Workload Console to which you are connecting.

Required role

To run the query defined for a dashboard on the engine specified, you must have at least one role that is associated to the group to which the engine is shared on the Dynamic Workload Console. For example: *user1* with *role1* can view dashboard results for *engine1* which, on the Dynamic Workload Console, is shared to *group1*, to which *role1* is associated.

For more information, see Defining users and roles on page 15.

About this task

To run the query defined for a dashboard and display the results in a graphical dashboard view, perform the following steps:

1. Tap the Self-Service Dashboards section to launch the application.

2. Tap the dashboard you want to view.

3. The results corresponding to the filter criteria defined in the dashboard are displayed in graphical form.
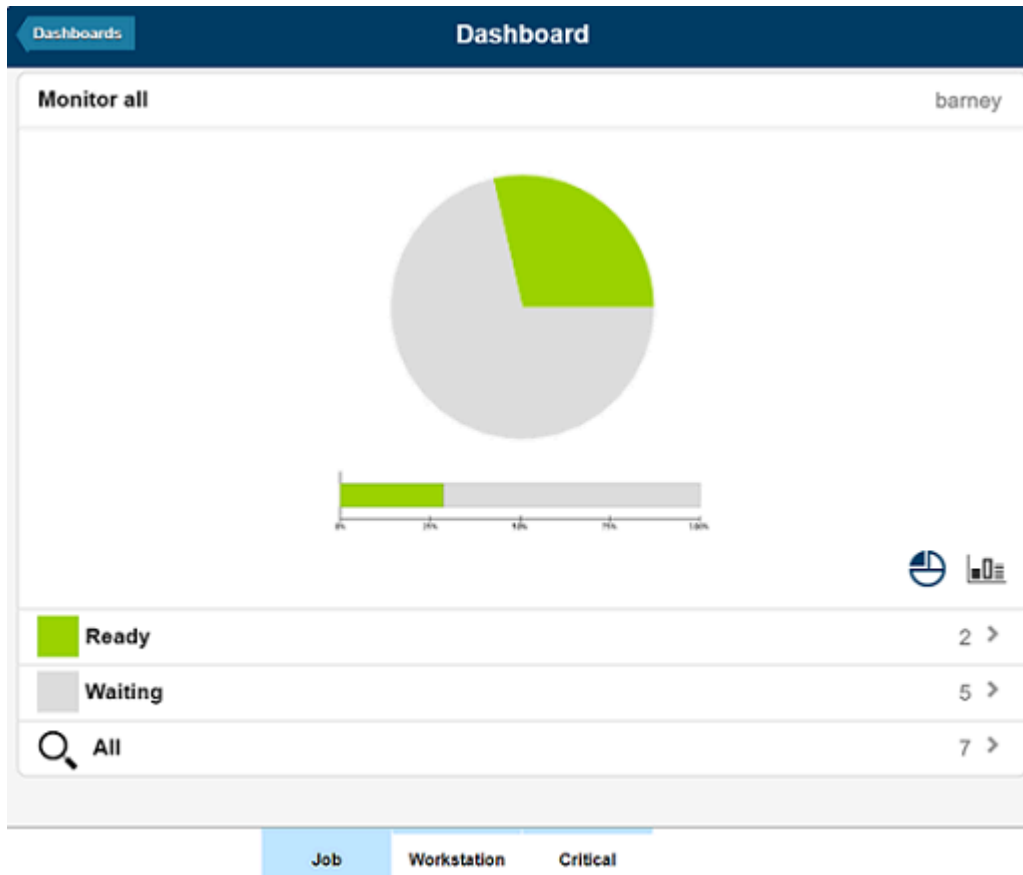
Results

The dashboard displays the results that correspond to the filter criteria defined in the dashboard categorized by their state. Optionally you can transform the pie chart view to a bar chart view by tapping the related icon.

What to do next

You can zoom in on the results by tapping any one of the categories displayed below the dashboard. If the dashboard contains filter criteria for both jobs and workstations, then you can toggle between the results for jobs and workstations by tapping either **Jobs** or **Workstations**. To see only critical jobs that correspond to the job filter criteria, tap **Critical**. See for information about how use the list of results in the dashboard to view more detailed information.

Monitoring job status and details

You can use the results displayed in the dashboard to drill down to more detailed information about the results and perform some recovery actions. You can also send the details of a job or workstation to an email recipient. For jobs, the email includes a link to download the job log if available.

Before you begin

In general, the dashboard displays the jobs that match the filter criteria and the engines defined in the dashboard query, categorized by their current status. From the dashboard you can filter further by drilling down on jobs in a particular status,

on particular workstations, or jobs defined as critical in the network. For each job, you can view details such as the job name, the job number, the internal status, the associated job stream name, the risk level for critical jobs, the workstation name of the workstation where the job runs, and the workstation name of the workstation where the job stream runs, to name a few. You can also view the job log for each job and trigger a number of actions on the job depending on its status and whether it is a job in a distributed or z/OS environment.

About this task

To view details about a job in the "Error" state, including the job log:

1. From the dashboard containing the results of the monitoring service, scroll down to view the breakdown of jobs by status and tap the jobs in **Error** state.
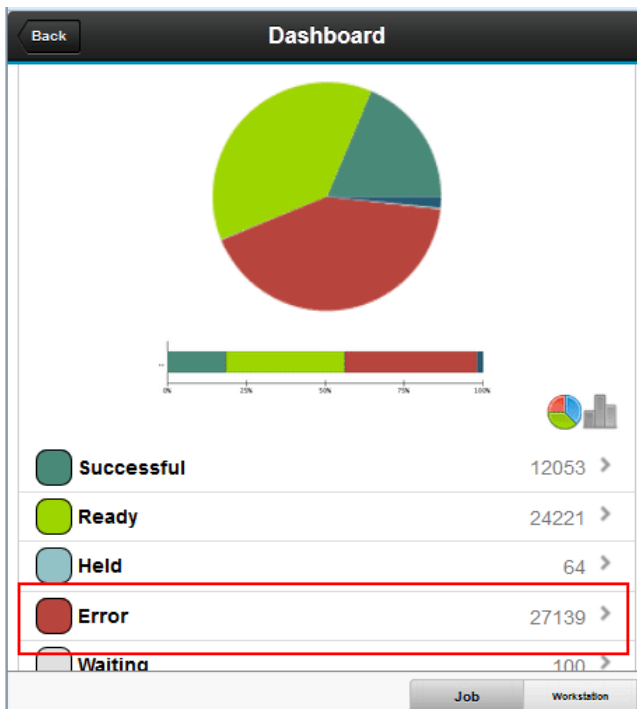
2. A list of jobs, each containing some minimal information about the job such as the workstation name, job type, job stream name, scheduled time, and job number is listed. You can search for a specific job by entering a keyword in the **Search** field, or scroll to locate a job.

   Note: On z/OS engines, specify up to a maximum of 6 characters in your keyword search.

3. Tap a job in the list to display details about the job.

Results

You are able to view the job log for each job in the **Error** state to help you determine the problem encountered by the job.

Optionally, you can email the details of the job and the job log by clicking the **Share** icon .

What to do next

You can select to perform actions on the job for which you displayed the details. You can also download and browse the job log if available. See Performing recovery actions on jobs on page 31.

Monitoring workstation status

You can use the results displayed in the dashboard to drill down to more detailed information and perform some recovery actions.

Before you begin

From the dashboard view displaying the results of the query defined for the dashboard, you can drill down to display more detailed information. In general, the dashboard results display the number of available and unavailable workstations for the engines defined for the dashboard. For these workstations, you can view details about each individual workstation such as: the workstation name, internal status, the type of agent workstation, and the link status, to name a few.

About this task

To view the workstation details for an unavailable workstation:

1. From the dashboard containing the results of the monitoring service, scroll down to view the breakdown of workstations by status and tap the workstations in the **Unavailable** state.
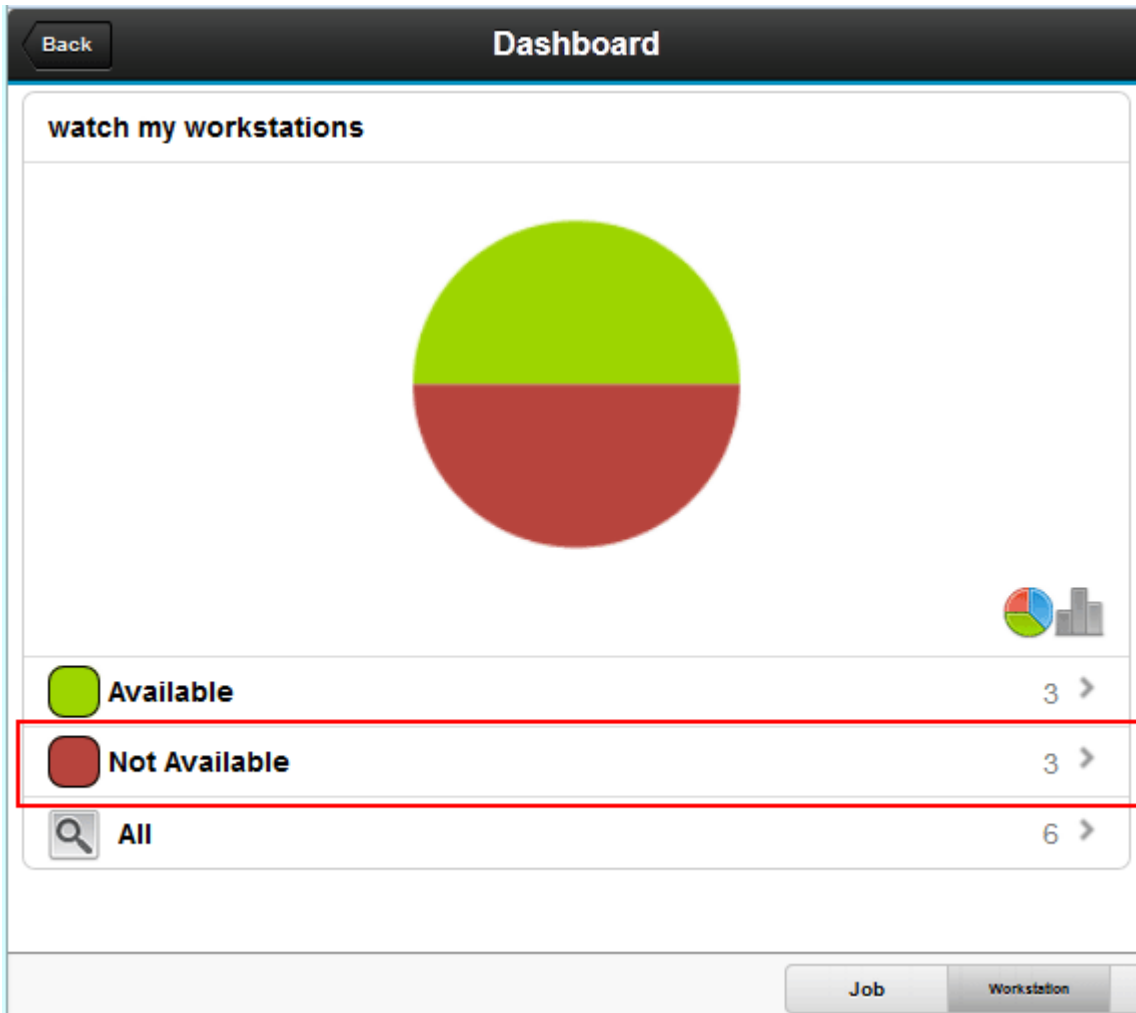
2. A list of workstations in the unavailable state are displayed. You can search for a specific workstation name by entering a keyword in the **Search** field, or scroll to locate a workstation.
3. Tap the workstation for which you want to display further details.

Results

Details about the workstation are displayed and a set of actions you can perform on the workstation are available at the end of the list.

What to do next

You can select to perform an action on the workstation, as well as send the details about the workstation to a recipient by email. See Performing recovery actions on workstations on page 32.

Performing recovery actions on jobs

Monitor the status of your jobs using the Self-Service Dashboards app and perform recovery actions from your mobile device.

About this task

You can access jobs in an HCL Workload Automation environment and monitor their status and perform recovery actions on them. You can choose to perform any of the following actions. The actions available depend on the current status of the job, if the job is a critical job, and whether the job runs on a workstation in a distributed or z/OS environment:

Kill

To kill a job, the job must either in Started or Running state.

Confirm SUCC

Confirms that the job ended successfully and changes the status accordingly.

Confirm ABEND

Confirms that the job failed.

Hot List (critical job)

Displays a list of predecessors of the job that are in late, fence, suppressssed, long running, or error state. This list can contain jobs that are outside the critical path of the job but that, if they do not complete successfully on time, can prevent the critical job from completing successfully.

Critial Path (critical job)

Displays a list of predecessors included in the critical path of the job.

All not completed predecessors (critical job)

Displays a list of the predecessors that are not in the Complete state.

Rerun

Rerun the job.

Cancel

Cancels the job.

Cancel Pending

Cancels a job that has not yet been launched after all the dependencies are resolved. Any jobs or job streams that are dependent on the cancelled job are released from the dependency. For jobs already launched, the job is cancelled when it completes and is moved to the final status.

Job Log

Download and browse the job log.

Hold

Puts a job in hold status so it cannot run until it is released.

Release

> Release a job that is in Hold status so that it can run according to its regular schedule.

Delete

> Deletes a job so it does not run.

Execute

> Runs the job immediately, if it is ready to run, ignoring scheduling rules except dependencies.

Set Status

> Change the status of the job. Depending on the current state of the job, you can change the status one of the following: **Started**, **Ready**, **Interrupted**, **Error**, **Complete**.

Optionally, you can email details about the job by clicking the **Share** icon . The email contains also a link to the job log if available.

To perform a recovery action on a job:

1. From the list of dashboards, tap a dashboard name to produce a dashboard of results in a pie chart graphical view.
2. Select the category of jobs in a specific state below the dashboard.
3. Tap a specific job or search for and then tap a job.
4. Details are displayed for the selected job. Select one of the actions by clicking the **Action** icon .

Results

A message displays either prompting you for more information or communicating the result of the action selected.

Performing recovery actions on workstations

Monitor the status of your workstations using the Self-Service Dashboards app and perform recovery actions from your mobile device.

About this task

You can access workstations in an HCL Workload Automation environment and monitor their status and perform recovery actions on them. You can choose to perform any of the following actions depending on the current status of the workstation and whether the workstation is in a distributed or z/OS environment:

Link

> Connects the workstation to the HCL Workload Automation network.

Unlink

> Disconnects the workstation from the HCL Workload Automation network.

Set Status

Change the status of the workstation. You can set the status to one of the following depending on the current state of the workstation: **Active**, **Offline**, **Failed**.

> **Note:** If you use the default browser of Samsung Tab tablet, this action might not work properly. Use a different browser to set the status of the workstation.

Start

Starts all scheduling processing on the workstation.

Stop

Stops all scheduling processing on the workstation.

Set Limit

The maximum number of jobs that can run simultaneously on a workstation.

Set Fence

The fence setting for a workstation defines whether or not a job is launched on a workstation based on the priority setting. If the priority setting is less than or equal to the fence setting, then jobs are not launched on the workstation.

To perform a recovery action on a workstation:

1. From the list of dashboards, tap a dashboard name to produce a dashboard of results in a pie chart graphical view.
2. Tap a category of workstations in either the Available or Unavailable state.
3. Tap a specific workstation or search for and then tap a workstation.

4. Details are displayed for the selected workstation. Select one of the actions by clicking the **Action** icon .

Results

A message displays communicating the result of the action selected.

Personalizing the login page

You can now customize the login page of the Self-Service Catalog by personalizing labels according to your preferences and adding a logo.

Before you begin

Before personalizing the login page, you must complete the following steps:

• Go to the following path:

On Windows:

```
<DWC_home>\usr\servers\dwcServer\registry
```

On UNIX:

```
<DWC_home>/usr/servers/dwcServer/registry
```

• Create a folder named `Customization` and create the following files inside:
   ◦ A property file named `custom.properties`.
   ◦ A folder named **custom logo** and put your logo inside. The folder name must be lower case.

About this task

To customize the logo and the labels of the login page, perform the following steps:

1. Open the `custom.properties` file and customize the following parameters:

   ◦ productName = Company Name

   ◦ productLogo = Company Logo.png (.png, .jpeg, and .svg formats are supported)

   ◦ productNameLimit = Character Limit (character limit is 200)

   > **Note:** If you do not provide the product name or logo, or if the properties file is missing, the application loads the default logo and name.

2. Save.
   Result
   You have now successfully customized the labels in the login page.

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