Dashboard 2.5.0.102

User guide



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Welcome to the SoftThinks Dashboard User Guide!

SoftThinks Dashboard centralizes the statistics from all your sites, view the activity in real-time, and allows you to generate reports.

WARNING: This product, being scalable and customizable, some features described in this document may not be available in your version of the product and the screenshots may not exactly match your workflow. Also, some customizations of your product version may not be described in this document.



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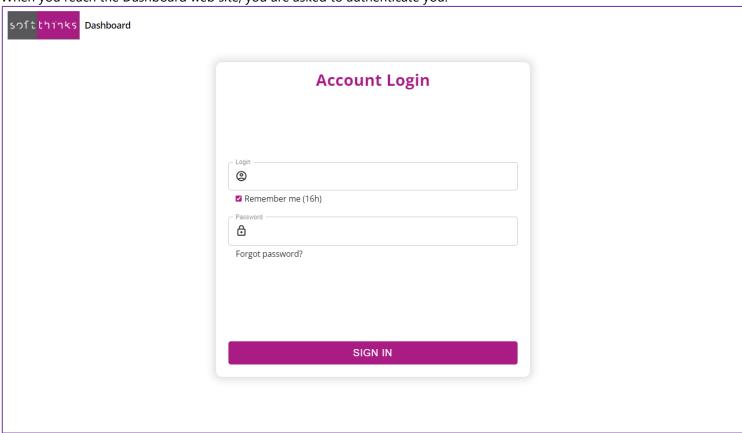


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Connection

When you reach the Dashboard web site, you are asked to authenticate you:



For users of the previous version, your credentials are the same.



On first connection you might be asked to enter a contact email address which is required to reset your password, and for future functionalities (as reports sent automatically to this email address on customized schedule).



If you have forgotten your password, you can click on "Forgot password?" and a link will be sent to your contact email address to reset your password:



If you didn't receive your credentials, please ask your contact at Softthinks.

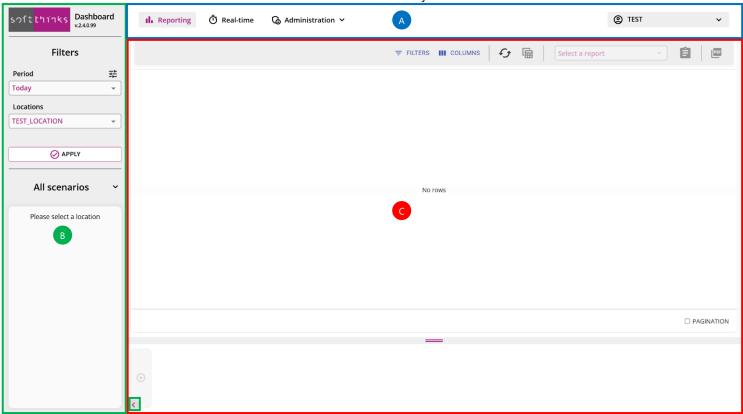
With this version, you have now the possibility to stay connected for 16 hours, preventing you to enter your credentials again during this period.



Reporting view

Once you're logged in, you arrive to the main view.

This screen shows all the devices related activities made on all the sites you have selected:



The navigation bar on the top allows you to navigate through the current "Reporting" view, the "Real-time" view, and the "Administration" tools (you might not see this last one depending on your account type). On the right, the dropdown menu on provides you access to your user settings and allows you to log out.

The left panel allows you to select your main filters and scenario in this Reporting view. In order to increase the amount of data you can view in the main area, you can hide this left panel by clicking on the button at the bottom left. To show it again, just click on the button which is displayed then on the bottom left of the data area.

The data area contains all SDS data matching the main filters and scenario you have chosen.



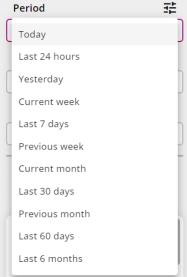
Filters

The left panel includes the most common filters that you will use.

Period

This filter defines the period of time for which you need statistics.

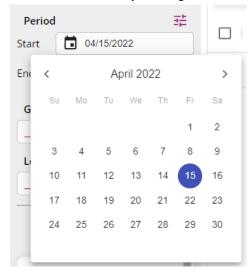
In order to avoid you changing the dates each time you use the Dashboard, you can use relative periods.



The 1st time you will connect, you will have a daily view but you can change to a weekly / a monthly (other filters will be added based on your needs). This filter will be kept for your future connections.

Anyway, if you need to define specific dates, you can enter them as in SDS Dashboard 1.0, by clicking on the $\stackrel{\text{def}}{=}$ button, and type the dates in your regional format (MM/DD/YYYY here) or use a calendar to choose them by clicking on $\stackrel{\text{def}}{=}$ icon:

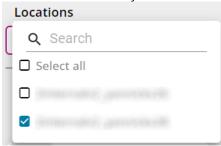






Locations (administrators only)

If you are an administrator, you will be able to select the locations you want to manage:



By default, all the locations will be preselected. As for the groups filter above, you can search for locations and select/unselect multiple locations. Your selection will be saved so that you will not need to reselect them the next time you will use the Dashboard.

Else, this filter will be hidden and you will see the data from the location you are linked to.

Once you have changed the period and locations, click on "Apply" button to refresh the reporting view contents.



Scenarios

The scenarios are workflows which usually match your different processes (subscripts). They are defined by a sequence of actions (« modules » in SDS vocabulary) for which you can filter on any data generated by those actions (as their result for example). By default, we provide the most common scenarios, which are shared with you as indicated by the pictogram, and the first time you will log into SDS Dashboard the « All activities » scenario will be preselected:



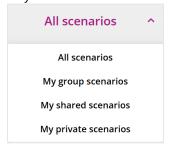
- display all activities whatever the process failed or passed (1 line per device)
- → display all processes where the disks have been wiped and an image deployed (1 line per device)
- display all processes where the disks have been wiped and no image deployed (1 line per device)
- → display all disks wipe process unitary (1 line per disk)
- → display all disks diagnostics unitary (1 line per disk)
- display all image captures (1 line per device)
- display all image deployments (1 line per device)
- → display all image deployments with SBAR installation and activation (1 line per device)
- → display all mobiles activities (1 line per mobile)

When you select a scenario, it is highlighted as « All activities » one in the screenshot above, and the data are filtered as defined by this scenario. The columns are also adapted to the scenario chosen.

For the predefined scenarios, we already set the columns which make sense for each of them. For example, for Disk wipe scenario we will display all data relative to the disks and wipe process but not the wiping station information. Compared to Device wipe w/o deployment, Device wipe w/ deployment will add the data relative to the deployment... Of course, you can decide to add/remove and reorder the columns and they will be restored when you will access the Dashboard the next time and when you switch between scenarios.

You can use those predefined scenarios as they are, or use them as templates to customize to you needs. For example, if you want to see only the successful disk wipes. Instead of creating the scenario from scratch, you can duplicate the predefined one and just add a condition on the wipe process result.

When you create or duplicate a scenario, the new one is private (only you can see it) by default and will appear without the pictogram. You can decide later to share with the other group administrator, if any, or with all other people of your group, and you can filter the scenarios by clicking on the label above the scenarios list:



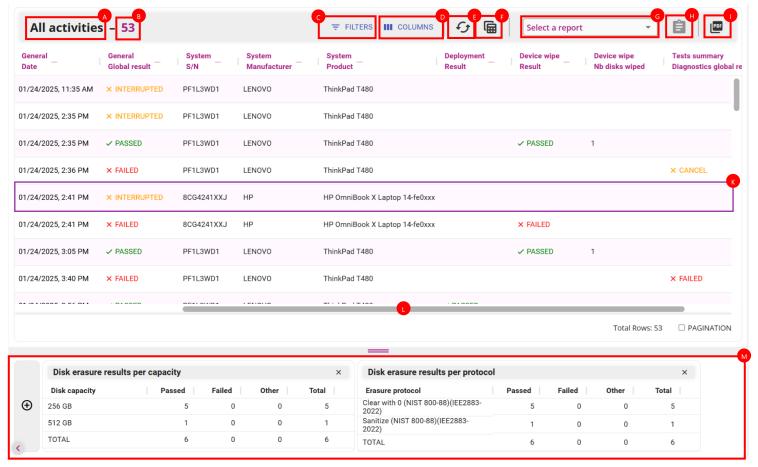
- display all scenarios
- → display the scenarios that have been created and shared with your group
- → display the scenarios that you created and shared
- → display the scenarios that you created only for yourself

For more details on scenarios' creation, edition and management, please consult the dedicated chapter.



Data

One you have selected your scenario, the data matching this scenario are displayed with the columns predefined or customized by you:



All the data stored in SDS SQL database are accessible through the Dashboard v2 and are interpreted and colored for better readability.

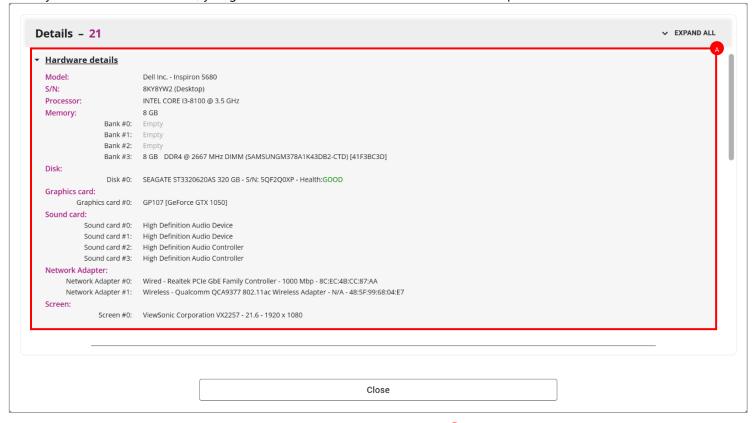
You can also add columns which are not linked to a specific database attribute but to several ones to provide synthesis. For example, if you are using SDS diagnostics you have the possibility to display individually the result of each test as they are stored in the database, and/or you can add a column "Tests failed list" that lists directly all the tests which failed, allowing you to quickly get his list instead of checking one by one all tests' result. In the same way you can add "Nb tests run", "Nb tests passed" and "Nb test failed" columns allowing you to quickly obtain statistics on the diagnostics through filters.

You will see on next chapter how to add / remove and reorder the columns. When the number of columns is important, a horizontal scrollbar will appear, allowing you to see all those data, and you can click on a row to highlight it for an easier navigation.

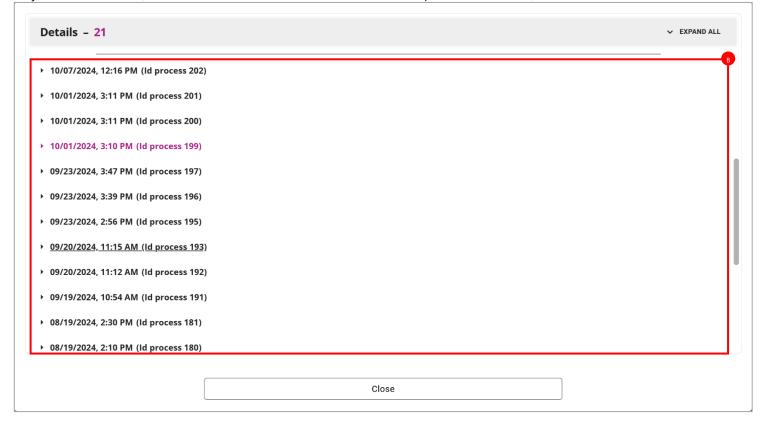
At the bottom, you have a resizable area with common statistics [™]. You can reduce this area if you don't need those and increase it only when needed.



When you double-click on a line, you get the same hardware details 4 than in the reports:

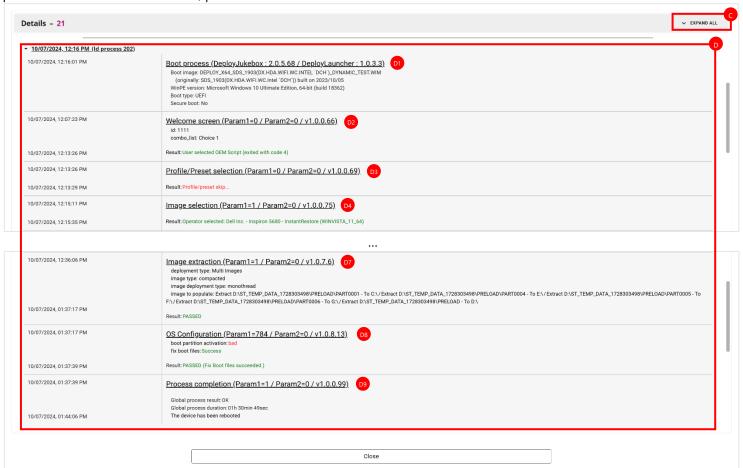


... and if you scroll down, you see all the interventions made on this device (from the newest to the oldest one) wherever they have been done (in lab with SDS, on site with Nomad Disk, in shop with SDS kiosk...):





Click on any date (or use the 'Expand all' button to expand all interventions in one step) to obtain all the steps of the process with the modules version, parameters and results :



- In the example above, the device has been booted through the boot image DEPLOY_X64_SDS_1903(DX.HDA.WIFI.WC.INTEL 'DCH')_DYNAMIC_TEST.WIM, which was originally named SDS_1903(DX.HDA.WIFI.WC.INTEL 'DCH').WIM and built on 2023/10/05.
- The operator entered '1111' in the 'id' field, chose 'Choice 1' in the 'combo_list' dropdown list, and then selected OEM Script in the welcome screen
- o Then, he skipped the profile/preset selection
- Me selected the image 'Dell Inc. Inspiron 5680 Instant Restore (WINVISTA_11_64)'
- The image selected has been extracted successfully
- Boot files have been updated successfully
- Description The whole process completed successfully after 1h 30min 49s and the device has been rebooted



Toolbar



In the toolbar on the top, the scenario selected is indicated, as well as the number of records which are matching the current date / location filters and scenario.

On the right you have the FILTERS and III COLUMNS buttons allowing you to apply filters and manage the columns respectively. Then, you have the button to refresh the data.

The button exports all the data to an Excel spreadsheet.

The $\stackrel{\textcircled{\blacksquare}}{\blacksquare}$ button $^{\textcircled{\blacksquare}}$ dedicated to the <u>reports generation</u> becomes enabled when you select a report in the dropdown list $^{\textcircled{\blacksquare}}$ on his left and some/all records through the checkbox $^{\square}$ / $^{\bigvee}$ on front of them.

The <u>PDF document with all the data as well as the statistics displayed.</u>

Columns



When you move your mouse over a column header ("General – Date" in our example above), 2 pictograms appear allowing you to interact with the column contents:

- The ↑ pictogram ♠ allows you to invert the sort order of all the data based on this column. In our example, the data are originally sorted from oldest processes to newest ones. If you click on the "General Date" ↑ pictogram, the data sort will be inverted from newest ones to oldest ones and the pictogram will be updated to reflect this change: ↓.
- Clicking on the pictogram raises a pop-up contextual menu:

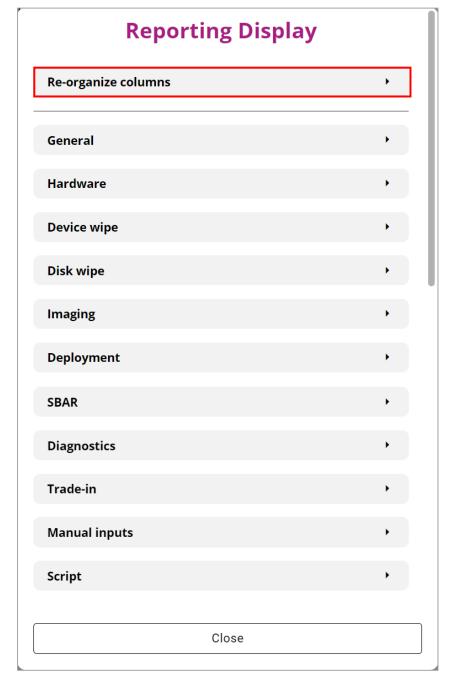


In this menu, you can:

- switch the sort order
- add a filter on this column (see next chapter)
- ➢ hide the column
- decide which columns to show or hide

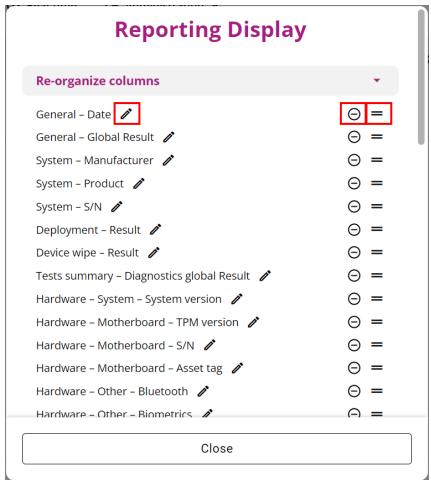


Selecting the item "Show columns" will have the same result than clicking on the COLUMNS button which open the dialog box below:



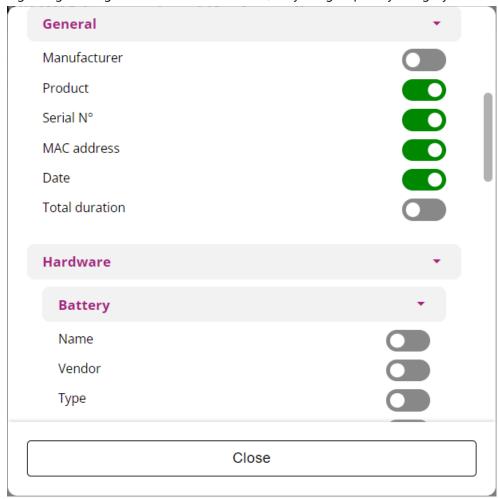


Expand « Re-organize columns » item to list the columns currently displayed, rename them (\checkmark), remove them (\bigcirc) and re-order them (=):





To add data, click on one of the categories (and even sub-categories for the hardware) into which they are grouped to make their selection easier regarding the large amount of data available, they are grouped by category:





Columns list

Here below the detailed list of all categories, sub-categories and columns:

General

Date

Id process

Global result

Server name

Hardware

System

Manufacturer

Product

S/N

UUID

SKU

Chassis

System version

CPU

Total sockets

Free sockets

Manufacturer

Model

Socket

CPUID

Base frequency

Maximum frequency

Cores

Threads

L1 cache

L2 cache

L3 cache

RAM banks

Total amount

Total slots

Free slots

Form factor

Manufacturer

Туре

Speed

Size

S/N

Asset tag

Part number

Rank



Disk

Nb disks

Total size

Manufacturer

Model

Commercial size

Real size

Туре

Firmware

S/N

Connector

Bus

Universal identifier (WWN)

PPID

Health

Reallocated sectors

Bytes per sector

HPA

DCO

RPM

Smart Attributes

Motherboard

Manufacturer

Model

Version

S/N

Asset tag

TPM version

BIOS

Manufacturer

Version

Date

Video card

Model

Driver

Network card

Manufacturer

Model

Туре

PnP

MAC address

Driver

Sound card

Manufacturer

Model

PnP

Driver



Screen

Manufacturer

Model

Size

Resolution

S/N

Touch screen

Driver

Disk Controller

Manufacturer

Model

PnP

Driver

Webcam

Model

PnP

Driver

Battery

Manufacturer

Model

Туре

Designed capacity

Full charge capacity

Rate

Power state

Current capacity

Voltage

Cycle count

Serial number

Wear level

Health level

Optical drive

Manufacturer

Model

Firmware

Media

Other

Bluetooth

Biometrics

Card reader

Device wipe

Result



Disk wipe

Result

Protocol

Eraser rounds

Duration

Disk manufacturer

Disk model

Disk commercial size

Disk S/N

Disk health

Disk health percentage

Disk UUID

Bytes per sector

Customer data

Reallocated sectors

Power on hours

Reported uncorrectable errors

Command timeout

Current pending sector count

Offline uncorrectable

S.M.A.R.T. attributes

Disk RPM

Imaging

Result

Image name

OS version

OS architecture

Used space

Deployment

Result

Image deployed

OS deployed

Duration

SBAR

Activation code

Activation type

Activation result

Image type



Diagnostics

Tests summary

The "Tests summary" subcategory allows you to display, filter and report a synthesis of the tests run:

Diagnostics global result

Nb of tests run

Nb of tests passed

Nb of tests failed

Failed tests list

Nb of tests skipped

Skipped tests list

Common

If you select "Tests comments' in "common" subcategory, a column will be added next to each test result with the test comments

Tests comments

Right after you have 1 subcategory per device, and for each of them the different tests possible:

CPU tests

Full test

General purpose instructions

Floating point unit instructions

...

Memory tests

Storage tests

Mainboard tests

...

Trade-In

The Trade-In category contains data relative to Trade-In module (SDSTradeIn), meaning grading so far:

Code

Manual inputs

Welcome screen

You find in "Welcome screen" subcategory the fields present in the Welcome screen (SDSWelcome module). You can specifically select (and then move) the fields which have a dedicated SQL_ID defines (in SDSWelcome.ini). Other fields will be grouped all together in the "Other manual inputs" item, meaning that all are visible, or else none of them, and, is the same way, you will move those columns all together.

Questions form

As for Welcome screen data, the data from the Questions form (SDSQuestion module) can be shown and moved unitary when they are associated to a dedicated SQL_ID in QuestionDefinition.txt, or all grouped together in "Other questions" for the others.

Scrint

Script columns are relative to the data set through the script (through SEND_EVENT keyword), and other data stored in MODULE table.



Boot image

Current filename

Original filename

Creation date

WinPE version

Launcher version

Boot type

Secure boot

T2 security

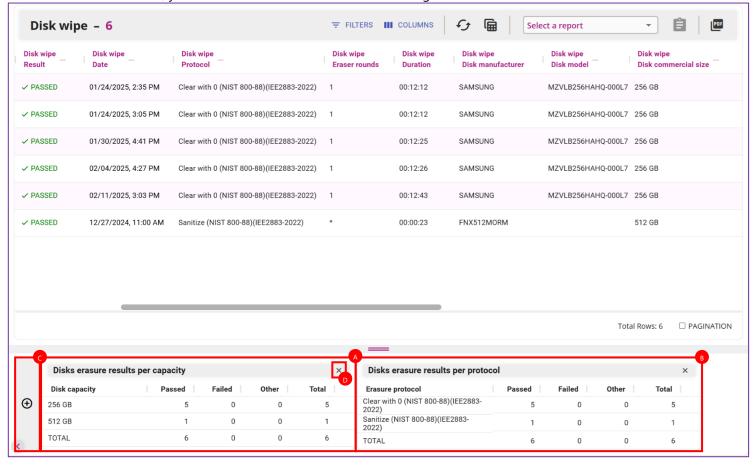
Hexadecimal viewer

This category allows you to include Hexadecimal viewer result and individual disks results.



Statistics

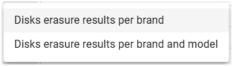
On the bottom of the data, you have a resizable area with statistics widgets:



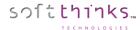
By default, the statistics relative to the data displayed above will be shown.

In our example above, we chose "Disk Wipe" scenario and so Disk erasure statistics are displayed, as "Disk erasure results per capacity" A and "Disk erasure results per protocol" .

You can add another statistic widget by clicking on the \oplus button on the left of the area . A list of the statistics relevant with the current scenario data and not yet present will be displayed. In our case, with "Disk wipe" scenario, we have 2 other statistics available:



You can also remove any widget by clicking on the cross on the top right **o**.



Here below the list of statistics currently available. Please let us know if you need any other one.

Device erasure statistics

• Device erasure results

Disk erasure statistics

- Disk erasure results per capacity
- Disk erasure results per protocol
- Disk erasure results per brand
- Disk erasure results per brand and model

Image deployment statistics

- Image deployment results
- Image deployment results per OS Deployed
- Image deployment results per Image Deployed
- Image deployment results per Image Type (Static vs Dynamic images)

Diagnostics statistics

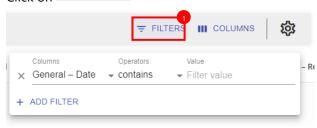
- Diagnostics results
- Diagnostics results per test



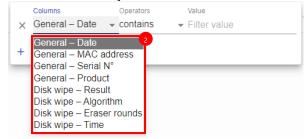
Filters

You can add as many filters as you want to obtain the exact data you are searching for (like in the Search view of SDS Dashboard 1.0):

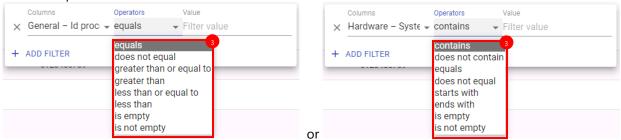
1. Click on FILTERS



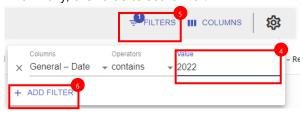
2. Select the column you want to filter:



3. Then the operator which differs if the column value is numeric or not:



4. And finally, the value to search for:

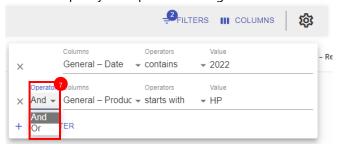


<u>Note</u>: you can specify several values in bulk if you separate them by a pipe '|' character

- 5. The badge indicating the number of filters is refreshed as shown above
- 6. To add another filter, click on + ADD FILTER button and follow the same steps:



7. And then specify the operator linking the new filter to the previous one:

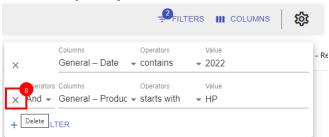


You will notice that the columns for which you created a filter (General – Date and General – Product in our example) will have a dedicated icon **T**:



If you click on this icon, it will open the Filters pop-up as when go though = FILTERS

8. To delete any filter, just click on the \times cross in front of it:

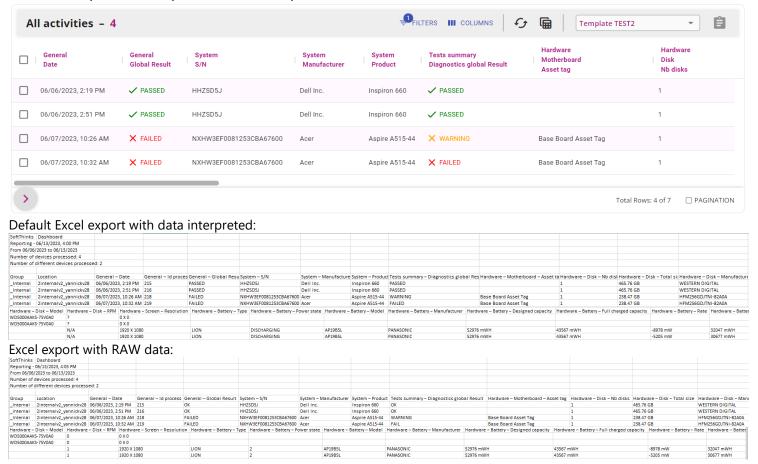




Excel Export

The Excel Export button allows you to export into an Excel spreadsheet all the data that matches your current filters. You can choose in <u>your user settings</u> if you prefer exporting the RAW data as they are stored in the SQL Database, or the data interpreted as they are displayed.

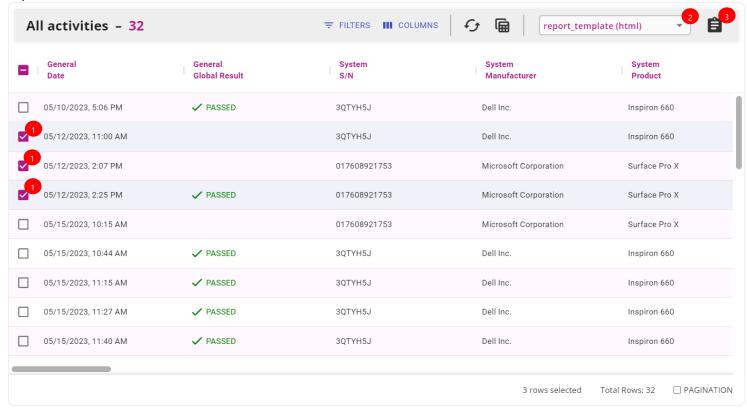
Here an example of both exports with data interpreted or not based on the data shown below:





Reports

The Dashboard allows you to generate the same reports than at the end of any SDS process on site, or manually through ReportGenerator tool.



- 1 Select the processes for which you want to generate reports by checking the check box in front of them
- Select the type of report in the dedicated dropdown list (only reports compatible with the devices associated to the current scenario will appear, such as mobile reports if the scenario selected is "Mobiles Activities")
- 3 Click on is icon to generate the reports and you will be notified of the progress of this task:

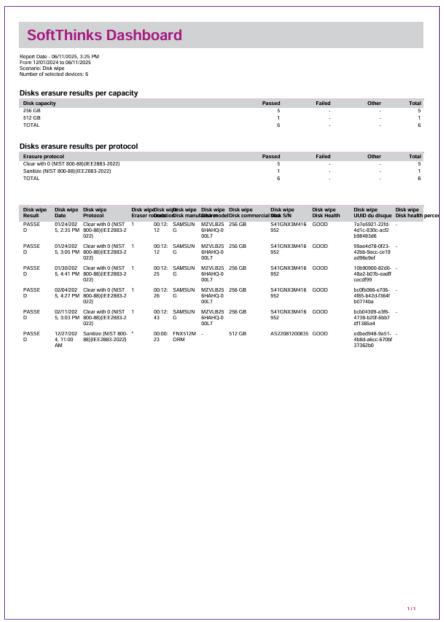


If you want to customize, edit or add new reports, please refer to Reports administration.



Multi-devices PDF export with statistics

Next to Report generation button, you have a button allowing you to export the data displayed (as for Excel export) as well as the statistics selected:



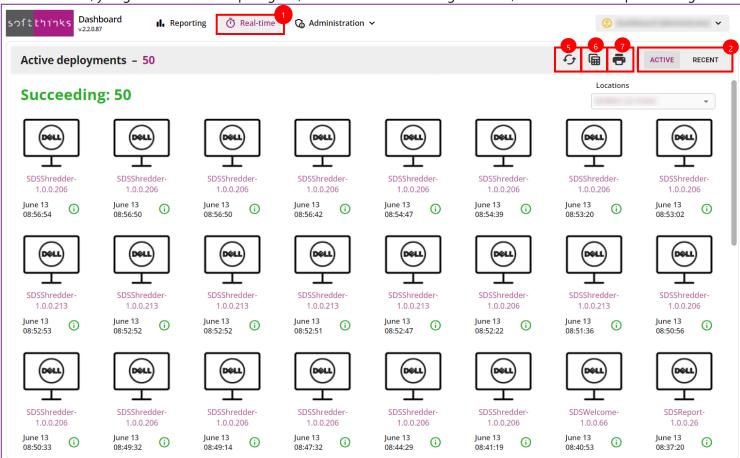


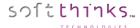
Real Time view

1 Click on "Real Time" in the toolbar to view the activity on your site(s).

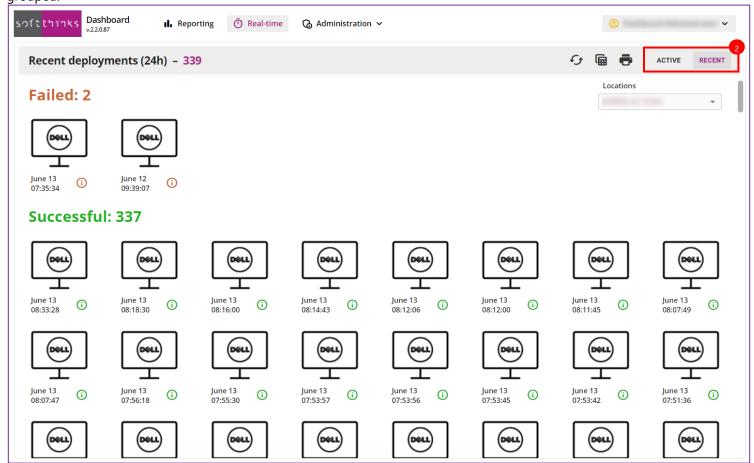
By default, you will see the activity in real time ("Active)" with all the devices currently being processed (meaning that they have been booted to SDS server less than 6h ago and have still not reached SDSEnd module).

For each device, you get its brand in the pictogram, the current module being executed, and the when the process began:





2 You can switch to "Recent" in order to see the during the last 24 hours activities where successful and failed process are grouped.

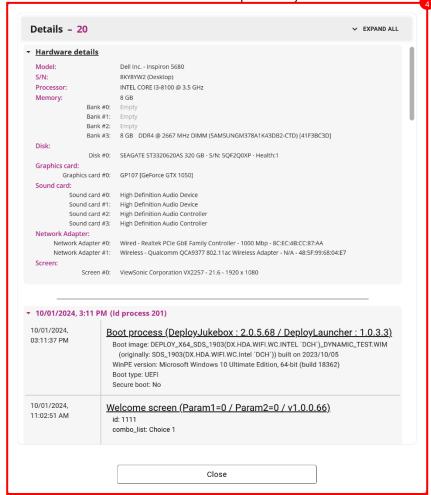




Move your mouse over the i icon to get a quick summary:



4 and double-click to get extended hardware information and steps already done:

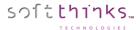




5 Click on the 5 button to refresh the view

6 Click on the icon to generate an Excel spreadsheet (named sds_dashboard_realtime_recent_YYYYMMDD-HHMMSS.xlsx) with all the devices listed in the view:

	Α	В	С	D	E
1	SoftThinks	Dashboard			
2					
3					
4	Location:	XXXXXXXXX			
5	View:	Recent deplo	yments (last	24h)	
6	Successful de	337			
7	Failed deploy	2			
8					
9					
10	_				0.40
11	Date		Brand	Model	S/N
12	13/06/2001		Dell	Inspiron 388	XXXXXXXX
13	13/06/2001		Dell	Latitude 5310 2-in-	XXXXXXXX
14	13/06/2001		Dell	OptiPlex 308	XXXXXXXX
15	13/06/2001		Dell	Latitude 7220 Rugged Extreme Table	XXXXXXXX
16	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
17	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
18	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
19	13/06/2001		Dell	Inspiron 379	XXXXXXXX
20	13/06/2001		Dell	Latitude 541	XXXXXXXX
21	13/06/2001		Dell	Precision 344	XXXXXXXX
22	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
23	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
24	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
25	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
26	13/06/2001		Dell	OptiPlex 705	XXXXXXXX
27	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
28	13/06/2001		Dell	OptiPlex 706	XXXXXXXX
29	13/06/2001		Dell	OptiPlex 706	XXXXXXXX



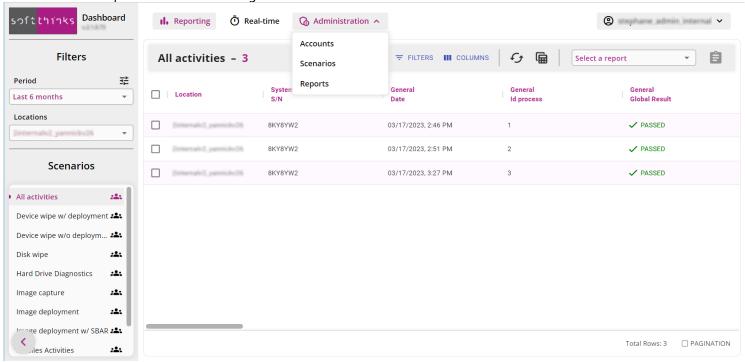
7 You can also directly print the real time report, or export it to PDF, by clicking on the 🗖 icon :

softthi	ıks	Pashboard						
		Dasiiboara						
Location:								
View: Successful deployments: Failed deployments:		Recent deployments (last 24h)						
		337						
		2						
Date	Brand	Model	S/N	Failure date	Failure details			
June 13, 08:33:28	Dell	Inspiron 388						
June 13, 08:18:30	Dell	Latitude 5310 2-in-						
June 13, 08:16:00	Dell	OptiPlex 308						
June 13, 08:14:43	Dell	Latitude 7220 Rugged Extreme Table						
June 13, 08:12:06	Dell	OptiPlex 706						
June 13, 08:12:00	Dell	OptiPlex 706						
June 13, 08:11:45	Dell	OptiPlex 706						
June 13, 08:07:49	Dell	Inspiron 379						
June 13, 08:07:47	Dell	Latitude 541						
June 13, 07:56:18	Dell	Precision 344						
June 13, 07:55:30	Dell	OptiPlex 706						
June 13, 07:53:57	Dell	OptiPlex 706						
June 13, 07:53:56	Dell	OptiPlex 706						
June 13, 07:53:45	Dell	OptiPlex 706						
June 13, 07:53:42	Dell	OptiPlex 705						
June 13, 07:51:36	Dell	OptiPlex 706						



Administration

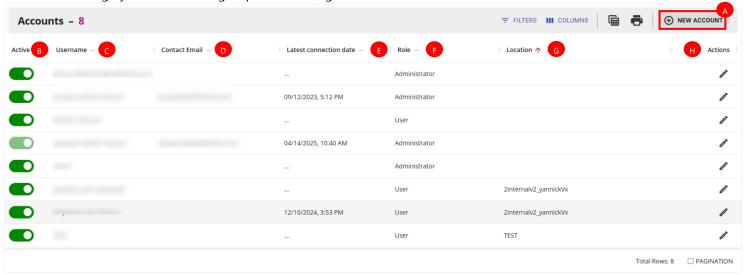
When you click on Administration \checkmark menu in the navigation bar on the top, you have access to different Dashboard elements that you can manage, depending on your account type. In the example below, as a group administrator, you can manage your group's accounts, scenarios and reports, whereas a user will only see Scenarios and Reports, and Softthinks administrators will have also the Groups and Locations management.





Accounts (administrators only)

In order to manage your Dashboard group's accounts, go to Administration > Accounts:



This view lists all your group's accounts with for which of them:

- its username name
- the email address associated with (this is required to allow the user to reset its account password if needed)
- the date when this user connected to the Dashboard for the last time
- ts role (either Administrator or User)
- the location(s) to which its associated for a User account

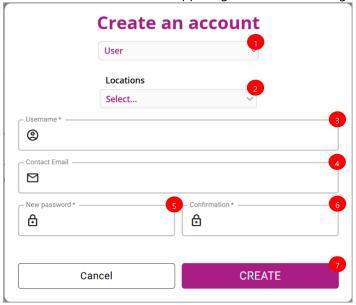
You can individually activate or inactivate at any moment an account through the dedicated slider (when an account is inactive, the user can no longer connect to its Dashboard account).

You can also create a new account lacktriangle and edit any account you created lacktriangle.



Creating a new account

To create a new account, click on hew account button in the upper right and fill the dialog which appears:



- Select either User or Administrator account type
- 2 If you selected a User type account, choose which locations this user will see.
- Enter the user's name which will be required to log into the Dashboard
- Enter his email address to allow him to reset his password if needed
- Choose a password
- 6 And confirm it
- Olick on 'Create' button to create this user

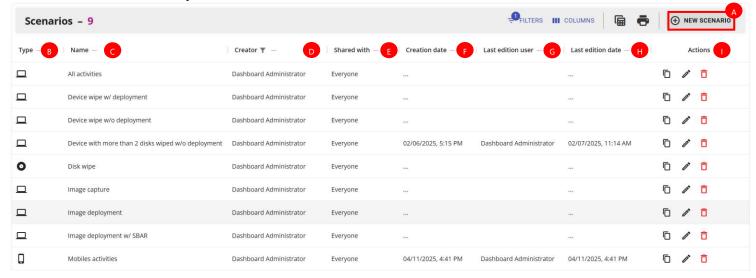
Editing an account

To edit a user account, double-click on it, or click on the pictogram, and you will get a similar dialog box than for account creation with the possibility to change any of the account attributes.



Scenarios

When you select Administration > Scenarios, you see all the scenarios which are available for you, meaning the predefined scenarios created and shared by the Dashboard Administrator, the ones you might have created, or that other users might have created and shared with you:



You can directly see for which type of hardware each scenario has been designed **B**:

- ☐ for a PC, whatever it's a desktop, a laptop, a server..., running Windows, Linux, macOS, chromeOS
- for a disk
- ☐ for an iOS or Android device

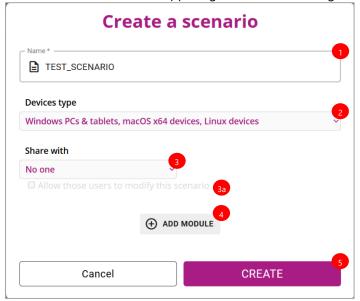
Then, you see its name , its creator and creation date , with who it's shared , who modified it for the last time and when .

The 'Actions' column \bigcirc allows you to duplicate $(\bigcirc$) any scenario, edit (\nearrow) a scenario you created or that has been shared with you with edition right, and delete $(\bigcirc$ those you created.



Creating a new scenario

To create a new report, click on hewscenario button in the upper right and fill the dialog which appears:



- 1 Enter a name for your new scenario.
- 2 Choose the devices type for which you want to generate this scenario:

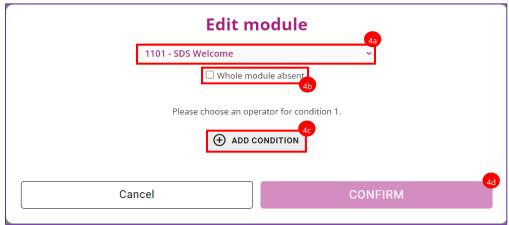


- Windows PCs & tablets, macOS x64devices, Linux devices: this is the most common devices type and it includes
 - Windows devices (x86/x64 & ARM64): desktops, laptops, servers, barebones, All-In-One, Windows tablets...
 - macOS devices: MacBook air, MacBook pro, Mac mini, iMac (with or without T2 security chip), except the Apple Silicon devices (with M1, M2 chips)
 - o Linux devices: desktops, laptops...
- iOS/Android mobiles & tablets
- Disks
- Decide with who you want to share eventually your scenario. By default, the new scenarios will be visible only by you but you can decide to share them with other group administrators, or all your group users through the "Share with" field.
 - ³³ If you decided to share your new scenario, you can "Allow those users to modify this scenario"
 - As a Softthinks administrator, if you decided to share your scenario with "All group administrators" or "All group users", you will be asked to select the group through the new dropdown list which appeared dynamically:





4 Click on button, to add a condition on a module (you need to define at least one condition to create a scenario):



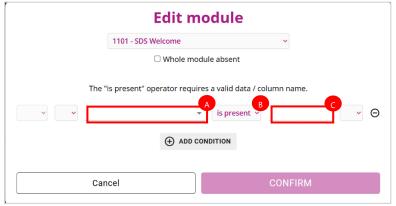
49 Here you can change the module though the dropdown list:



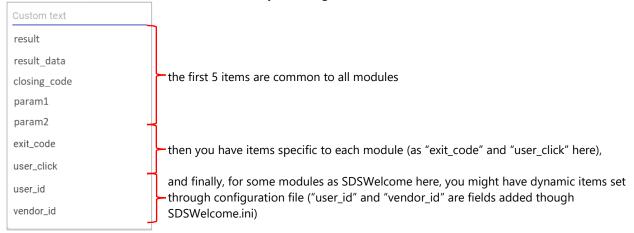
If you want to exclude the module selected from the flow, just click on the "Whole module absent" checkbox. This is useful, for example, if you to distinguish wipe flows without deployments (in this case you will add the module "SDSRestore" and check this "Whole module absent" option) from wipe flows with deployment.



Once the module selected, you can now define a condition by clicking on button which will insert a new "blank" condition as below:



A You have first to select this value through the left dropdown list. Its contents are dependent on the module selected and will be refreshed when you change the module:



^{*} In addition, you can have in this list expressions which are not SQL DB values but which can be useful, as for example, the "Nb Disk wiped" allowing you to distinguish servers and wipe stations from consumers' desktops and laptops when reporting devices data sanitization.

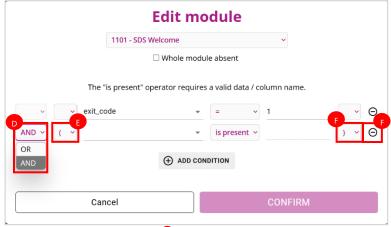
B Then, you select the operator:



• And the value to match (depending on the operator you chose) in the free text field on the right

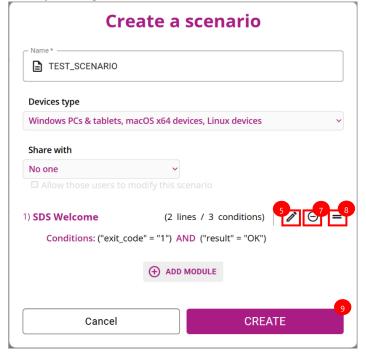


49 You can add other conditions by clicking on the 4 ADD CONDITION button and, once done, you will be able to specify if all conditions have to be met or not through AND/OR operators 10 and parenthesis 15:



You can delete a condition though the Θ pictogram $oldsymbol{\mathfrak{g}}$

- 40 Once you have defined all the conditions on the module, click on the CONFIRM button
- \bullet Now you can add another module by clicking on the \bullet ADD MODULE button and customize it as in previous step 5:



- \bullet If you want to remove a module from your scenario, just click on the Θ pictogram on the right of this module.
- $^{\circ}$ You can also reorder the modules thanks to the pictogram =.
- ⁹ When your scenario is complete, just click on the create button on the upper right



Duplicating a scenario

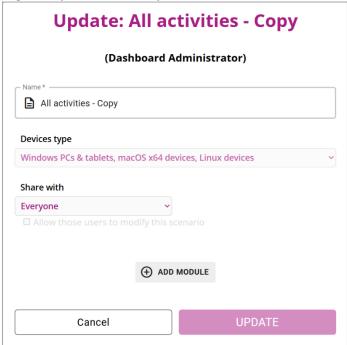
Instead of creating a scenario from scratch, you have the possibility to duplicate an existing one and customize it.



- \bullet Click on the \Box bouton of the scenario you want to duplicate
- 2 A new scenario will be added to the list with "- Copy" suffix in its name, with you as creator, shared with other users of the same level in your group, and with the same modules and conditions than the original scenario
- ullet You can now customize edit by double-clicking on it, or clicking on the $oldsymbol{\ell}$

Editing a scenario

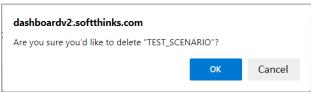
To edit a scenario, double-click on it, or click on the pictogram (you can only edit scenario that you created or shared with you), and you arrive on the same page that you reach when you create a scenario (see dedicated chapter for details):



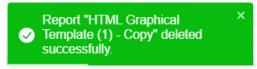


Deleting a scenario

To delete a scenario, click on button and confirm the deletion of the scenario:



You will be notified once the scenario deleted:

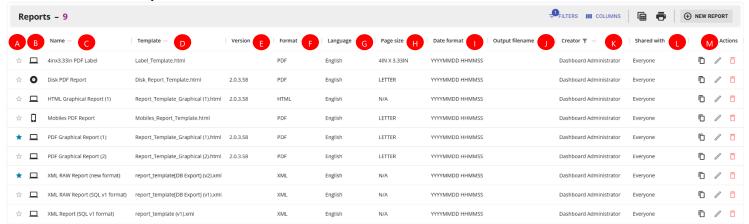


NOTE: You can only delete a scenario that you created. Please contact the creator of the report if you absolutely need to delete it.



Reports (administrators only)

When you select Administration > Reports, you see all the reports which are available for you, meaning the predefined reports created and shared by the Dashboard Administrator, the ones you might have created, or that other users might have created and shared with you:



Each report is identified by a 'Name' o as they will appear in the main reporting view top header reports dropdown list:



You can add/remove a report to/from your favorites by clicking on \(\frac{1}{2}\)/\(\frac{1}{2}\). The favorites will appear on top of the list above.

Each report is specific to the device type indicated in the dedicated column 6:

- ☐ for a PC, whatever it's a desktop, a laptop, a server..., running Windows, Linux, macOS, chromeOS
- for a disk
- ☐ for an iOS or Android device

The 'Template' and 'Version' columns indicate respectively the template file used to generate the report and its version. The template file has to be text based as HTML, XML, CSV, TXT... By default, the format of the output file will be the same than the template, expect for PDF reports which are generated from HTML templates and for which you can see their page size. You can also customize the report output filename (default: <Location>_<General Id Process>_(<timestamp>)).

Each report can be generated in any language supported (the RAW data from SQL database are kept as they are, whereas the labels from the templates, as well as the data interpreted are localized). In the same way, the date format can also be customized for each report.

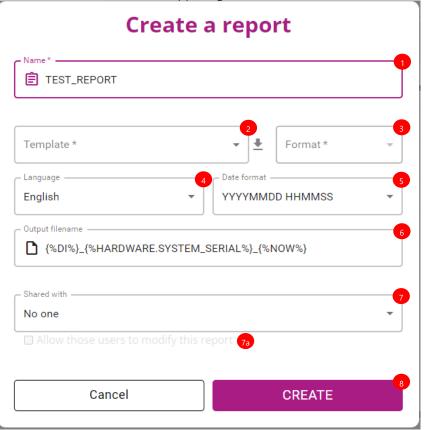
The column 'Creator' indicates who created the report, and the next column 'Shared with' shows with who he decided to share this report. The last 'Actions' column allows you to duplicate (\Box) a report (for example to customize a predefined one), and edit (\nearrow) / delete \Box a report if you are its creator, or if its creator allowed you to do so.

As for all most of the views of the Dashboard, you can hide/show columns and reorder them to your convenience. You can also apply filters and export the list to an Excel spreadsheet.

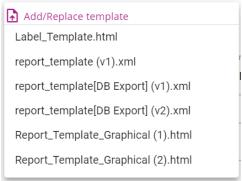


Creating a new report

To create a new report, click on button in the upper right and fill the form below:



- 1 You first need to enter a name for your new report.
- Then, you choose the template you want to use by either selecting an existing one in the list, or adding a new one though "Add/Replace template" which opens a file selection dialog and will upload the local template file you will have selected:





Once the Template field filled, the format field on its right will be updated accordingly based on the file extension of the template. For HTML template, you have the possibility to generate either a HTML or a PDF report:



If you select PDF format as above, a new "Page size" dropdown list appears to select one of the standard PDF document's page sizes, or a custom one (added through \bigoplus Add custom size button to the bottom of the list):



- $oldsymbol{4}$ If you want to generate a report in another language than English, please set it in Language field.
- You can also change the date format if needed.
- By default, the reports generated are named "<Location>_<DeploymentID>_<Date>_<Time>.<Format>". If you want another filename, just specify it in the "Output filename" field. You can use the predefined keywords and grammar used inside the reports' templates to insert any SDS SQL database value into this filename (see Reports templates keywords and grammar).
- The new reports you create will be visible only by you by default but you can decide to share them with other group administrators, or all your group users through the "Share with" field.
 - Just below, the option "Allow those users to modify this report", allows the other users with who you share your report to modify it.
 - As a Softthinks administrator, if you decided to share your report with "All group administrators" or "All group users", you will be asked to select the group through the new dropdown list which appeared dynamically:



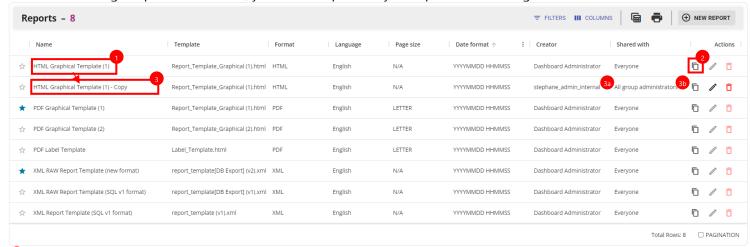
8 Click on CREATE button to finalize the report creation

You are notified that the report is successfully created:



Duplicating a report

Instead of creating a report from scratch, you have the possibility to duplicate an existing one and customize it.

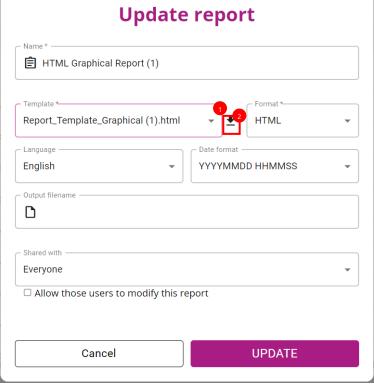


- Select the report you want to duplicate
- 🖸 Click on 🗖 bouton
- 3 A new report will be added to the list with "- Copy" suffix in its name and the same settings, but
 - 33 with you as creator
 - 3b shared with other users of the same level



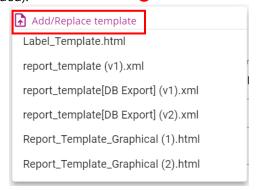
Editing a report

To edit a scenario, click on the pictogram (you can only edit scenario that you created or shared with you):



If you want to edit an existing template,

- select it in the "Template" dropdown list
- click on the button to download it
- once you have modified the template, go back here and, click on "Template" field again and this time choose "Add/Replace template" and then select your local template file modified (you have to keep the same filename if you want to replace the existing one, else it will be added):

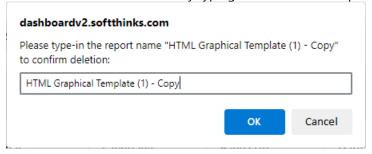


For the other settings, see Creating a new report.

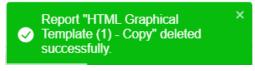


Deleting a report

To delete a report, click on button and confirm the deletion by typing the name of the report:



You will be notified once the report deleted:

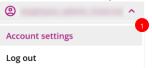


NOTE: You can only delete a report that you created. Please contact the creator of the report if you absolutely need to delete it.

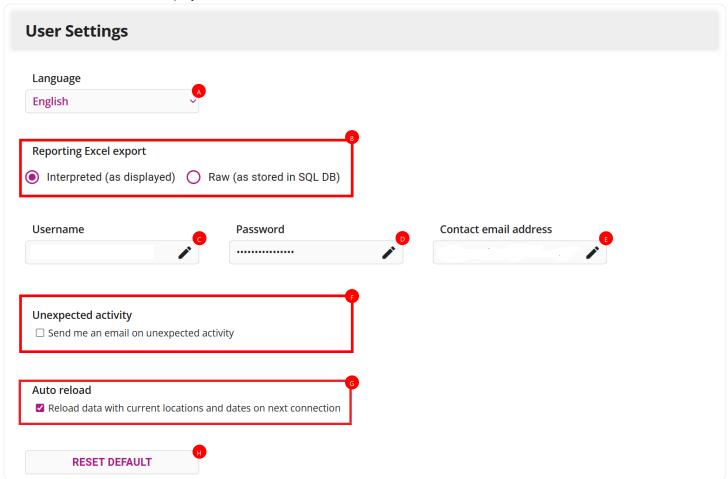


User Settings

You can customize your settings when you click on your account name in the upper right and select "Account settings" 👤



The window below will be displayed:



Here you can select the language of the Dashboard UI (it will not impact the language of the data, exports and reports), change your Username and Password password in the case you would lose it.

For the Excel export feature , you can also decide if you want the data interpreted as they are displayed (for example "Success/Failure/Skipped" instead of numeric values which can vary depending on the module launched), or the RAW data as they are stored in the SQL database.

You can be notified buy email in the case of unexpected activity in your favorite locations , for example if no activity recorded for a specified amount of time (this option is for the moment reserved internally).

By default, we you reconnect to the dashboard, the previous date and location filters are applied, but you can choose to not execute the query automatically to save time if you usually change those filters by unchecking the "Auto reload" option 6.

The "RESET DEFAULT" button • allows you to revert back all the settings to the default ones.