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Working with Monitor Administration

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Mercury Business Availability Center

Working with Monitor Administration

Version 6.1

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Working with Monitor Administration

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Welcome to Working with Monitor Administration

This guide provides information on how to work with the Monitor Administration interface. This includes working with the enterprise tree, navigating the tabs, creating filters that customize monitoring information, and changing and updating configurations across the entire monitoring infrastructure.

How This Guide Is Organized

The guide contains the following chapters:

Chapter 1 Using Monitor Administration

Describes how to perform all your monitor configuration and administration activities with the enterprise tree as the starting point.

Chapter 2 Setting Views and Defining Categories

Describes how to define categories and create filters that customize the monitoring information displayed in the enterprise tree.

Chapter 3 Using Global Replace

Describes how to change and update SiteScope configurations across the SiteScope monitoring enterprise.

Who Should Read This Guide

This guide is intended for the following users of Mercury Business Availability Center:

- Mercury Business Availability Center administrators
- Mercury Business Availability Center data collector administrators

Readers of this guide should be knowledgeable about enterprise system administration, infrastructure monitoring systems, and Mercury Business Availability Center data collectors, and have familiarity with the systems being set up for monitoring.

Getting More Information

For information on using and updating the Mercury Business Availability Center Documentation Library, reference information on additional documentation resources, typographical conventions used in the Documentation Library, and quick reference information on deploying, administering, and using Mercury Business Availability Center, refer to *Getting Started with Mercury Business Availability Center*.

1

Using Monitor Administration

Monitor Administration enables you to reduce the time spent managing your monitoring environment by providing a convenient, Web-enabled interface for viewing and administering all the various monitor types supported by Mercury Business Availability Center. These include SiteScope, Business Process, Client Monitor, and Real User Monitor profiles and monitors.

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About Using Monitor Administration and the Monitor Tree

Your monitor deployment is presented in Monitor Administration as a dynamic hierarchy in the form of a user-defined, monitor tree. You use the monitor tree as the starting point for all your monitor configuration and administration activities.

You create and customize the monitor tree in Monitor Administration to reflect your monitoring enterprise. For details, see "Monitor Administration Overview" on page 2. You begin with the enterprise node which is the default, top level of every monitor tree and contains all the other objects in the monitoring environment. For details, see "Understanding Monitor Tree Objects" on page 4.

You can access the pages for adding and editing different objects in the monitor tree by navigating through the monitor tree itself and its menus, or within the Contents tab. For details, see "Navigating and Performing Actions in the Contents Tab and the Monitor Tree" on page 8.

Adding user-defined containers to the monitor tree helps you organize your data collector, profile, and monitor configurations. For details, see "Managing Containers in the Monitor Tree" on page 11.

Monitor Administration Overview

Monitor Administration is a Web-based, centralized solution for configuring the various monitor types that collect performance data for Mercury Business Availability Center. It provides an intuitive and customizable interface with multiple view options, based on a hierarchical tree view. The hierarchy can be built to reflect the monitoring structure of your Mercury Business Availability Center deployment.

You use Monitor Administration and the monitor tree to:

- organize performance monitoring data for your entire enterprise – for details on the various monitor tree objects, see "Understanding Monitor Tree Objects" on page 4

- navigate across multiple monitors and profiles and drill down to monitor configuration details – for details, see "Navigating and Performing Actions in the Contents Tab and the Monitor Tree" on page 8
- create relationships with existing configuration items in the CMDB – for details, see "Configuration Items and Monitor Objects" on page 9
- create user-defined containers to organize monitoring objects – for details, see "Managing Containers in the Monitor Tree" on page 11
- configure monitors and preferences for multiple SiteScopes – for details, see "Working with SiteScope Monitors" in *Configuring SiteScope Monitors* and "Introducing SiteScope Preferences" in *Managing SiteScope*
- define SiteScope alert schemes and reports – for details, refer to *Configuring SiteScope Alerts* and *Configuring SiteScope Reports*
- create and manage Business Process and Client Monitor profiles and transactions – for details, see "Managing Business Process Profiles and Creating Client Monitor Profiles" in *End User Management Data Collector Configuration*
- manage Real User Monitor engine settings and probes, define server names and host aliases, and configure the Real User Monitor to report specific page, transaction, event, and end-user data – for details, see "Configuring the Real User Monitor" in *End User Management Data Collector Configuration*
- customize the display of monitor information with filter settings and categories – for details, see "Setting Views and Defining Categories" on page 17
- make changes to multiple SiteScope monitor configurations across multiple servers with a single action using global search and replace – for details, see "Using Global Replace" on page 27
- rapidly deploy multiple SiteScope monitors based on configurations defined in templates you create – for details, see "Using Templates to Deploy Monitors" and "Introducing SiteScope Solution Templates" in *Configuring SiteScope Monitors*
- configure SiteScope monitors based on configuration items already defined in your IT Universe using the Monitor What Matters wizard – for details, see "Monitor Deployment Wizard" in *Configuring SiteScope Monitors*.

Working with Monitor Administration

The Monitor Administration interface displays a number of elements that you use to manage the monitoring objects in your environment and customize the display of monitoring information. The interface is divided vertically into two main areas:

- the monitor tree – for details, see "Understanding Monitor Tree Objects" on page 4
- the contents area – for details, see "Navigating and Performing Actions in the Contents Tab and the Monitor Tree" on page 8

The controls and action menus in these two areas of the Monitor Administration interface provide you with multiple paths for managing objects in your monitoring environment.

Understanding Monitor Tree Objects

The monitor tree of Monitor Administration represents the organization of systems and services in your network environment. The root node of the tree is the enterprise container. Only one enterprise node exists in the monitor tree. You add all other elements to the tree under the enterprise node.

There are two classes of elements in the monitor tree. These are:

- Containers
- Objects

Containers

Containers enable you to organize the display of monitor configuration information according to location or organizational relationship. Container elements are user-defined and represent locations, organizations, servers, agents, and other hierarchies within the infrastructure. The containers you create are native to Monitor Administration. Every Monitor Administration tree includes the enterprise container as its default, top-level container, containing all the other objects in the tree.

The following table presents the containers in the monitor tree.

Container	Icon	Description
Enterprise		Each tree has one enterprise container as its root node, representing the entire monitoring infrastructure.
Container		A container used to organize the display of information based on any criteria. For details, see "Managing Containers in the Monitor Tree" on page 11.
Template container		A container used to organize configuration deployment templates. For details, see "Using Templates to Deploy Monitors" in *Configuring SiteScope Monitors*.

With the exception of the enterprise container, multiple instances of these containers can be added to the monitor tree. Each container may be added as a child within another container or directly under the enterprise node.

Objects

Object elements are configuration and control objects in your monitoring infrastructure. Objects can either be created within, or imported to, the monitor tree. Existing objects, such as SiteScope servers or Real User Monitor engines, cannot be created in Monitor Administration but are imported into the monitor tree for configuration.

The following table lists the objects that may appear in the tree. It also lists to which parent item in the tree the object belongs and how the object can be added to the monitor tree.

Icon	Object Description	Parent	Add to Tree by:
SiteScope Objects			
	Represents an individual SiteScope server that has been imported to Monitor Administration	Enterprise node or container	Importing or adding an empty SiteScope profile

Icon	Object Description	Parent	Add to Tree by:
	SiteScope monitor group or subgroup	SiteScope	Creating, or importing with a SiteScope that has groups defined
	SiteScope monitor	SiteScope group or subgroup	Creating, or importing with a SiteScope that has monitors configured
	Preferences representing the collection of SiteScope configuration settings	SiteScope	Creating, or importing with a SiteScope that has preferences defined
	Collection of available health monitors that are deployed to check proper functioning of SiteScope monitors	SiteScope	Automatically added with SiteScope object
	Collection of alert schemes configured for the SiteScope	SiteScope	Automatically added with SiteScope object
	A template configuration for deploying SiteScope objects	Template container	Creating
	Variable used as placeholder to prompt for input when deploying a template	Template	Creating
Business Process and Client Monitor Objects			
	Business Process / Client Monitor Profile	Enterprise or container	Creating

Icon	Object Description	Parent	Add to Tree by:
	Any monitor belonging to a Business Process or Client Monitor profile	Business Process or Client Monitor profile	Creating
Real User Monitor Objects			
	Real User Monitor engine	Enterprise or container	Adding to Monitor Administration
	Real User Monitor settings	Real User Monitor engine	Automatically added with engine object
	Real User Monitor container for Probes, Servers, Host Aliases, Applications, Pages, End Users, and Transactions	Real User Monitor engine or settings directory	Automatically added with engine object
	Real User Monitor Probes, Pages, and End Users	Real User Monitor container	Automatically added with engine object
	Real User Monitor Transactions	Real User Monitor container	Automatically added with engine object
	Global HTTP Error Event	Real User Monitor engine or settings directory	Automatically added with engine object
	Application or Page Event	Real User Monitor application or page directory	Automatically added with engine object

For details on:

- SiteScope objects, refer to *Managing SiteScope* and "Working with SiteScope Monitors" in *Configuring SiteScope Monitors*
- Business Process and Client Monitor objects, see "Managing Business Process Profiles and Creating Client Monitor Profiles" in *End User Management Data Collector Configuration*

➤ Real User Monitor objects, see "Configuring the Real User Monitor" in *End User Management Data Collector Configuration*

Navigating and Performing Actions in the Contents Tab and the Monitor Tree

There are several ways to navigate the monitor tree, perform actions, and edit object properties.

The monitor tree itself enables you to highlight any object within the tree and right-click the object to access a menu of options for that object. For example, if you right-click the enterprise node, you select from a menu listing only those actions that can performed on the enterprise node.

The Contents tab enables you to view all the objects within any of the containers or profiles in the monitor tree, including the enterprise node itself. When an object that includes child objects is highlighted, the Contents tab lists all of the child objects according to their type. For example, if a Business Process profile is highlighted in the monitor tree, the Contents tab lists all the monitors included in that profile, organized according to type of monitor.

Additionally, the Contents tab enables you to select actions for each object type. The actions applicable to the highlighted object appear as optional buttons at the top of the Contents page. The actions applicable to the child objects of the highlighted object appear as optional buttons in the area listing the objects of that type.

Accessing Object Properties for Editing

You can select from the following options when accessing an object's properties for editing:

➤ In the monitor tree, right-click the object and choose **Edit** in the profile's menu.

➤ In the Contents tab you can either:

- highlight the appropriate object in the monitor tree and click the **Edit** button at the top of the Contents page.



- click the **Edit** button next to the appropriate object where it appears under object type in the Contents page.



Configuration Items and Monitor Objects

When an object is added to Monitor Administration, that object creates a corresponding configuration item (CI) in the Mercury Universal CMDB. For details on understanding configuration items, see "Introduction to CMDB Administration" in *Working with the CMDB*.

The Monitor Administration objects that populate the CMDB include both actual monitors and the groups or profiles in which they are created. Actual monitors, for example transaction monitors, SiteScope monitors, and Real User Monitor transactions and pages, are represented in the CMDB as monitor CIs. Monitor CIs receive data from the data collectors and use the data to calculate Key Performance Indicator (KPI) status. Profiles and SiteScope groups in Monitor Administration are represented as group CIs in the CMDB and receive KPI status from the monitor CIs created by the monitors they are running.

You can also create relationships between a Monitor Administration object and any existing, logical CI in the CMDB. This relationship enables the monitor or profile to pass KPI status to the CI to which it is attached.

You can create this relationship:

- using the IT Universe tab in CMDB Administration. For details, see "Attaching Existing CIs" in *IT Universe Administration*.
- using Monitor Administration. For details, see below.

Attaching CIs While Creating Objects in Monitor Administration

You can attach an existing CI to the monitor object you are creating. You can attach one or more configuration items to the following types of Monitor Administration objects:

- Business Process profile
- Business Process transaction monitor
- Client Monitor profile
- Client Monitor transaction monitor
- Real User Monitor page
- Real User Monitor transaction
- SiteScope monitor

Note: SiteScope monitors can be deployed onto existing CIs using the Monitor What Matters wizard. If a SiteScope monitor has an attached CI, you cannot use the Monitor What Matters wizard to configure a monitor for the attached CI. For details, see "Monitor Deployment Wizard" in *Configuring SiteScope Monitors*.

To attach a configuration item to a monitor object in Monitor Administration:

1. While adding a monitor object, expand the Configuration Item Attachment Settings area.
2. Click **Select CIs**. The Select CIs dialog box opens.

3 Select a view in the left pane that includes the CI you want to attach to the monitor object. For details on selecting and working with views, see "Using View Explorer" in *Working with the CMDB*.

4 Select a CI from the listed CIs in the view by clicking in the selection box to the left of the CI name.

   To make your selections, you can also use the buttons at the bottom of the pane for **Select All**, **Clear All**, and **Invert Selection**.

5 Click the right-hand arrow button to move the selected CIs from the left pane to the right pane.

6 Click **OK** to attach the selected CIs to the monitor object. The CI name and type are listed in the Configuration Item Attachment Settings area for this monitor object.

   You can view and edit the relationship you created in the IT Universe tab in CMDB Administration.

Note: The monitor CI appears in the views as a child object to the original CI only if, in the original CI's properties, the **Include Related Elements** option is selected. For details, see "Include Child CIs" in *IT Universe Administration*.

Managing Containers in the Monitor Tree

You can organize monitoring information in terms of physical location, operational purpose, line-of-business, organizational unit, or any other classification that is applicable to your enterprise.

For example, you could add three containers named Europe, America, and Asia representing different locations. Within the America location container, you could create four other containers North, East, South, and West. Within each of these container locations, you can add multiple containers, representing different departments in your organization. These containers can then be used to organize your organizations profiles and monitors.

You can add a container directly to the enterprise node or into any container.

When you delete a container, you also delete all the contents of that container. For example, if you have a container into which a SiteScope group has been added, deleting the container also deletes the SiteScope group from the monitor tree.

To add a container to the monitor tree:

1 Access Monitor Administration by selecting **Monitors** in the Admin menu. Select from the following options:

- Right-click the container into which you want to add a container. The container's menu opens. Select **Add Container**.
- Highlight the enterprise container into which you want to add a container and click the **Add Container** button at the top of the Contents page.

The Add Container page opens.

2 Under **Main Settings**, enter the name for the container you want to create.

3 Optionally, if there are any categories defined in the enterprise, you can assign a category to the container under the **Category Settings** section.

For details on defining categories, see "Setting Views and Defining Categories" on page 17.

4 Optionally, you can enter a description for the container in **Advanced Settings**. This description is available only when editing or viewing the properties of the container.

5 Click **Apply**. The new container is added to the monitor tree.

To edit a container:

1 Access the Edit Container page (for details, see "Accessing Object Properties for Editing" on page 9).

2 Edit the fields as required.

3 Click **OK** to apply the changes.

To delete a container:

Select from the following options:

- Right-click the container in the monitor tree and select **Delete** from the menu.
- In the Contents tab, click the **Delete** button next to the container you want to delete.
- With the container you want to delete highlighted, click the **Delete** button at the top of the Contents tab.

Note: When you delete a container, all its contents are also deleted from the monitor tree. This includes SiteScopes that have been added to the tree within the container object.

Synchronizing Profile Data

SiteScope, Business Process, and Client Monitor profile information is stored in the profile database and the management database used by your Mercury Business Availability Center platform. When working with profiles in Monitor Administration, you can synchronize the information stored in the databases with the profile information in your monitor tree. This procedure checks that the data related to profiles in both Monitor Administration and the profile database are consistent.

If you have gotten an error message telling you to synchronize or you think you may be having functionality issues because of a lack of synchronization with the databases, follow the procedure for synchronization.

Note: Synchronization should be performed only by advanced users. If you are not an advanced user, contact Mercury Customer Support before performing the synchronization.

For Business Process and Client Monitor profiles, you can either synchronize at the profile level, the container level, or synchronize all the profiles at once for the whole enterprise. Only containers containing profile settings can be synchronized.

Synchronizing SiteScope Data

You synchronize SiteScope data to ensure that the SiteScope profiles in Monitor Administration are consistent with the profiles in the profile database. If not, the synchronization process resets the profiles settings in Monitor Administration.

There are several ways to perform synchronization on SiteScope elements:

- Synchronize at the monitor tree level. This synchronization process can result in the following scenarios:
  - Profiles in the database that were missing from Monitor Administration are imported into the monitor tree.
  - Profiles in Monitor Administration that are not in the profile database are deleted from the monitor tree.
  - Profiles that are in both Monitor Administration and the profile database are synchronized so that their parameters match. The settings are taken from the profile database and imported into Monitor Administration.
- Synchronize a single profile.
- Synchronize multiple profiles simultaneously.

  If the single profile or any of the multiple profiles are missing from the profile database, the synchronization process deletes the missing profile from the monitor tree in Monitor Administration.

Note: The synchronization process removes a SiteScope profile's configuration data from the monitor tree, and it is displayed as an empty profile. To retrieve SiteScope configuration data for this profile from the SiteScope server, you can perform the **Attach** function. For details, see the procedure for attaching a previously detached SiteScope in "Removing a SiteScope from Monitor Administration" in *Managing SiteScope*.

To synchronize profile settings with the profile database:

1 Access Monitor Administration by selecting **Monitors** in the Admin menu. Select from the following options:

- Right-click the enterprise node, the container, or the selected profile that you want to synchronize. The container action menu is displayed. Select **Synchronize**.
- Alternatively, highlight the enterprise node, the container, or the selected profile that you want to synchronize and select the **Synchronize** button in the Contents tab.

If the object highlighted is a SiteScope profile or a Business Process or Client Monitor profile that has descendant objects, but no direct child objects, that are not synchronized, the synchronization progress bar indicates that synchronization has begun.

If the object highlighted is a Business Process or Client Monitor profile and has direct child objects that are not synchronized with the database, the Synchronize page opens.

2 In the Main Settings area of the Synchronize page, all the profiles and monitors that are not synchronized with your monitor tree are listed by type. You can select from the following options:

- ➤ select individual profiles and/or monitors to synchronize
- ➤ select **Import all** under any object type to synchronize all the profiles or monitors listed for that type
- ➤ select **Synchronize Enterprise children** to synchronize all the objects in the monitor tree with the profile database

3 Click **OK**.

2

Setting Views and Defining Categories

Setting views in Monitor Administration enables you to create views that customize the monitoring information displayed in the monitor tree. These views allow you to select the objects that appear in the monitor tree based on the database information stored for all monitor tree objects. You can also create your own categories to further refine the filtering options.

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About Setting Views and Defining Categories

When administrating monitor deployment, an extensive monitor tree displaying every object added to it could prove difficult to manage. Monitor Administration enables you to select which objects in the tree you want to view, based on various filter criteria. You can define multiple views with different filter conditions that can be applied for varying configuration tasks.

For example, you can create a view to display only SiteScope monitors that are monitoring CPU utilization and Disk Space. The result of this filter displays a tree with all CPU and Disk Space monitor types directly under the enterprise node.

You can also assign categories to any object in the monitor tree and use those categories to filter the view. For example, you define a category for all monitors running on a specific operating system.

For details on views, see the next section.

For details on categories, see "Working with Categories" on page 22.

Defining and Managing View Settings

You define and manage view settings by accessing the Views tab at the top of Monitor Administration.

You can define views:

- based on object type only. For example, you can define a view that includes all Business Process profiles and Client Monitor profiles, regardless of their properties. In this view, the monitor tree lists all the Business Process profiles and Client Monitor profiles defined in the enterprise.
- based on object type and the properties configured for the selected object types. For example, you can define a view that includes all SiteScope monitors with the same host defined, giving you a view of only those monitors monitoring the selected host.
- to appear in a flat list. A flat list lists all objects meeting the view's selection criteria as child objects to the enterprise node, regardless of its parent object.
- to appear as a hierarchy. The hierarchy option lists all objects with their respective parent objects even if the parent object does not meet the view's selection criteria.
- by making your selections recursively to include all child objects of a selected object.
- using regular expressions to represent object properties if basing your selections on an object's properties.

If you have any views defined, they appear in the drop-down list above the monitor tree in the Monitors tab. You select the view from the list and the monitor tree displays only those objects defined in your view selection.

To add a new view filter:

1 Access Monitor Administration by selecting **Monitors** in the Admin menu.

2. Click the **Views** tab at the top of the screen. The Views page opens listing all the views that have been defined for the monitor tree.
3. Click **New View**.
4. In the Main Settings area, enter a view filter name in the **Name** field. This name appears in the list of available views above the monitor tree.
5. Select whether you want your view to appear as a flat list or in a hierarchy.
6. In the Filter by Types area:
   - Select the **Show shared properties** option to display in the Filter by Property Values area only those properties that are shared by all the object types selected in this Filter by Types list.
   - Select the **Show all properties** option to display in the Filter by Property Values area all properties associated with all the object types selected in this Filter by Types list.
7. Select one or more object types by which you want to filter your view. The Filter by Types list presents every object type within its respective hierarchy as they are represented in the monitor tree, including those that may not have been defined or added to your tree.
8. Optionally, select **Recursive Selection** to automatically select all child objects of a selected object.

Note: If you have selected **Recursive Selection** and want to remove a selected object from the selection, you must clear the selection of the object which you do not want to appear in the view and clear **Recursive Selection**. If you do not clear **Recursive Selection**, all objects within that parent object appear in the view even if you have cleared that object from the selection.

For example, to configure a view displaying all SiteScope monitors except the CPU monitor type, select **Recursive Selection**, select the SiteScope monitor object type, clear the selection for CPU monitors, and then clear **Recursive Selection**.

---

9 Click **Apply Selection**. A scroll bar opens on the right-hand side of the page. Use the scroll bar to scroll down to view the Advanced Settings and Filter by Property Values area.

10 Optionally, expand the Advanced Settings area and enter a description for this view. This description is available only in the Views page and when editing the view.

11 Optionally, expand the Filter by Property Values area to further refine your view by selecting properties for the object type(s) selected in the Filter by Types area.

- If you selected the **Show shared properties** option in the Filter by Types area (step 6), only those properties that are common to all of the selected object types are listed in the Filter by Properties area.
- If you selected the **Show all properties** option in the Filter by Types area (step 6), all of the properties that are associated with all of the selected object types are listed in the Filter by Properties area.

12 Select the check box to the left of the property by which you want to filter your view and enter or select a value for the property. You can select multiple properties.

For example, if you want to filter the view using a category setting, expand the **Category Settings** area. All the categories defined in the enterprise are listed in the **Assigned categories** list. Select the category and expand it to see whether there are any values defined for the category that you can also select for the view.

You can use regular expressions to represent a set of property values to select for the view. For details, see "Using Regular Expressions" in *Advanced Monitor Options*.

Note: There are properties that cannot be used for filtering a view. These are listed in the Filter by Properties area but with a message indicating that they are unavailable.

---

13 Click **OK** to save the view setting. The name of the view filter is added to the view list on the Views page and to the available views at the top of the monitor tree.

To select a view by which to filter the monitor tree:

1 Access Monitor Administration by selecting **Monitors** in the Admin menu.

2 Click the **Monitors** tab at the top of the screen. The Monitors page opens.

3 From the View list, select the view you want to use to filter the monitor tree.

Note: If a view is selected and you are adding a new object to the tree, the new object appears only if the object's type is included in the view filter selection. Even if the object type is listed as a parent object because one of its child objects is selected, a new object of the same type does not appear in the tree if its object type is not in the selection.

To edit a view setting:

1 Access Monitor Administration by selecting **Monitors** in the Admin menu.

2 Click the **Views** tab at the top of the screen. The Views page opens listing all the views that have been defined for the monitor tree.

3 Select the check box next to the name of the view filter you want to edit from the views list.

To make your selections, you can also use the buttons at the bottom of the area for **Select All**, **Clear All**, and **Invert Selection**.

4 Click the **Edit** button.

5 Edit as required the Main Settings to edit the name of the view, Filter by Types area to change the object types selected for the view, and Filter by Properties area to edit the properties of the objects selected in the view. For details on how to edit these fields, see the procedures for adding a view on page 18.

6 Click **OK** to save the changes to the view.

To delete a view setting:

1. Access Monitor Administration by selecting **Monitors** in the Admin menu.
2. Click the **Views** tab at the top of the screen. The Views page opens listing all the views that have been defined for the monitor tree.
3. Select the check box next to the name of the view filter you want to delete from the views list.

   To make your selections, you can also use the buttons at the bottom of the area for **Select All**, **Clear All**, and **Invert Selection**.
4. Click the **Delete** button. The view is removed from the list of views on the Views page and in the list of views to select above the monitor tree.

Working with Categories

You create custom categories for use in filtering the display of the monitor tree for your monitor deployment. You define the categories and their values, and assign these to the different elements in your enterprise.

For example, you define a category called Priority with the possible values of Critical, High, Medium, and Low. You assign these category values to different elements in the infrastructure. Monitors of Web servers and databases that support 24x7 customer access could be assigned a category value of Priority: Critical. While adding a new view setting, you select **category** in the **Object** field and Priority=Critical as the **Attribute** value of the object. This filter displays only those elements to which you assigned this category and value.

Another example for using categories is to assign the type of operating system on which monitors are running. The category Operating System would have values such as Windows 2000, Windows XP, Solaris, Linux, and so forth. Using this new category, you could define a view setting for the monitor tree to display only those monitors running on Linux machines.

Note: A category called **Monitor What Matters** appears by default in the list of categories and in the Category Settings area. It is used by the Monitor What Matters wizard to deploy SiteScope monitors onto configuration items. This category and its values should not be edited or deleted. For details, see "Monitor Deployment Wizard" in *Configuring SiteScope Monitors*.

The process for using categories in view settings is as follows and the procedures for each are detailed below:

- create a named category with at least one value – for details, see the next section
- assign the category to elements in the monitor tree – for details, see "Assigning Categories to Monitor Tree Elements" on page 24
- create a filter view to filter on the category and its value(s) – for details, see "Defining a Category for a View Setting" on page 25

Creating a Category

You use the Categories area of Monitor Administration to add categories. When you click the **Categories** tab at the top of the screen, the category list opens and displays a list of categories currently defined.

To define a new category:

1. Access Monitor Administration by selecting **Monitors** in the Admin menu.
2. Click the **Categories** tab at the top of the screen. The Categories page opens listing all the categories that have been defined for the monitor tree.
3. Click **New Category**.
4. In the Main Settings area, enter a new category name in the **Name** field. This name appears as the display name in the Categories page, and when defining or editing category settings for all objects in the monitor tree.
5. Click **New Value**. In the **Values** field, enter a name for the value to be included in the category. Each category must include at least one value. Each value appears as a child object of the category name when defining or editing category settings for all objects in the monitor tree.

6 In the **Description** field, add an optional description for each value. This description appears only when editing the category.

7 Repeat steps 5 and 6 for each value to add to this category.

8 Optionally, expand the Advanced Settings area and enter a description for the category. This description appears only when editing the category.

9 Click **OK**. The category is listed in the Categories page and the category and its values appear when defining or editing category settings for all objects in the monitor tree.

Assigning Categories to Monitor Tree Elements

Before you can use a category as part of a view filter, you must assign the category to one or more elements in the monitor tree. You can assign categories to any item in the tree, including any container, monitor, group, alert, profile, or preference.

You assign categories while adding, importing, or editing objects in the monitor tree. **Category Settings** are included as properties for every type of object in the monitor tree.

Note: By default, there are several pre-defined categories for the Monitor What Matters wizard. Do not edit or delete these categories.

To assign a category:

1 In the monitor tree, access the page for editing the object (for details, see "Accessing Object Properties for Editing" on page 9).

2 Expand the Category Settings area. The categories that are currently defined in Monitor Administration appear in the **Assigned categories** field.

3 Select the check box next to the category you want to assign to the object.

4 Expand the category node to list all the values defined for the category. By default, all the values defined for that category are selected when the category is selected. Clear the check box for those values that you do not want assigned to the object.

5 Click **OK** to save the object with the new category setting.

Note: You can use **Global Replace** to assign a category to multiple items in the tree at one time. For details, see "Using Global Replace" on page 27.

Defining a Category for a View Setting

Once you have assigned the category to one or more items in the monitor tree, you can use the category as an object for a view filter.

To apply a category to a view filter:

1 Access Monitor Administration by selecting **Monitors** in the Admin menu.

2 Click the **Views** tab at the top of the screen. The Views page opens listing all the views that have been defined for the monitor tree.

3 Click the **Edit** button beside the view to which you want to apply a category. For details on creating a new view, see "Defining and Managing View Settings" on page 18.

4 In the Filter by Property Values area, expand the Category Settings area. Note that the Category Settings area will not appear if the object types associated with the view do not have Category Settings as a common configuration property.

5 Select the check box to the left of the **Assigned categories** list.

6 Select the categories to include in the view. Selecting the category automatically selects all its values. To apply a specific category value to the view filter, expand the category and select or clear category values from the list as required.

7 Click **OK** to save the view.

3

Using Global Replace

Global Replace enables you to change and update configurations across the entire monitoring infrastructure. In one action, you can update any combination of settings and properties in the monitor tree.

This chapter describes:	On page:
About Global Replace	27
Working with Global Replace	28
Performing a Global Replace Operation	33

About Global Replace

Global Replace is a search and replace function for changing monitor, alert, group, and other configuration settings and properties. You determine the scope of the search and replace operation by selections made in the following control features:

- Monitor tree and current view
- **Select by Type** object list
- **Selected Objects** tree menu

The current node selected in the monitor tree and any view filter determine the types of objects available for selection by the other two controls. The **Select by Type** controls the objects available to the **Selected Objects** controls. Both these are features displayed in the content area when the **Global Replace** tab is selected.

You can refine your selection by applying a view to the monitor tree before performing the Global Replace. The objects appearing in the current view are then the only objects from which you can select while working with Global Replace. For details about creating and applying views, see Chapter 2, "Setting Views and Defining Categories."

You can also use Global Replace to assign a category to any group of objects in the monitor tree without having to edit the properties of each. This is useful for when you have defined a new category and must apply it across many different objects in the tree. For details on defining categories, see "Working with Categories" on page 22. For details on how to apply a category using Global Replace, see "Performing a Global Replace Operation" on page 33.

Global Replace is also useful for enabling or disabling groups of monitors or alerts associated with multiple monitors.

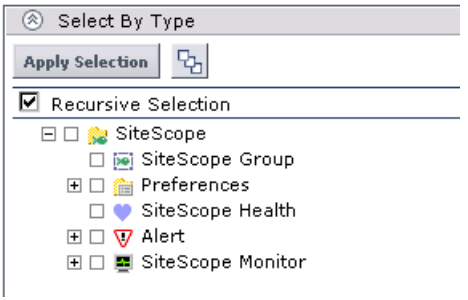
Working with Global Replace

The Global Replace contents area displays two sections by default, with a third section displayed when one or more classes of objects are selected. These sections are:

- **Select by Type** – an expandable menu tree you use to select the class or type of objects that will be targets for the replace operation. This menu tree mirrors the current view setting and selection in the monitor tree.
- **Selected Objects** – an expandable menu tree you use to select the specific objects for the Global Replace. This menu tree mirrors the current view setting and selection in the monitor tree.
- **Configuration Settings** – the configuration settings for objects selected in the **Selected Objects** tree. The default category is the **Main Settings**. Other settings are included in the area below Main Settings. The available settings in each section depend on the current **Property Selection** and **Replace Mode** options.

Working with the Select by Type Panel

The Select by Type panel includes an expandable Select by Type object menu tree that presents a hierarchy of object types. You expand the object menu tree to access specific object types such as groups and monitors. You expand the menu tree by clicking the plus icon to the left of an object name. The following figure shows an example of the Select by Type object menu tree for the SiteScope node expanded to the first level of object types.



The **Recursive Selection** option enables the automatic selection of all child nodes when a parent node is selected in the Select by Type tree menu. You use this to include all objects within an object type hierarchy. For example, to perform a global find and replace operation on all monitor types, the Recursive Selection option recursively selects all monitor types when you check the box to the left of the **SiteScope Monitor** object type in the menu tree.

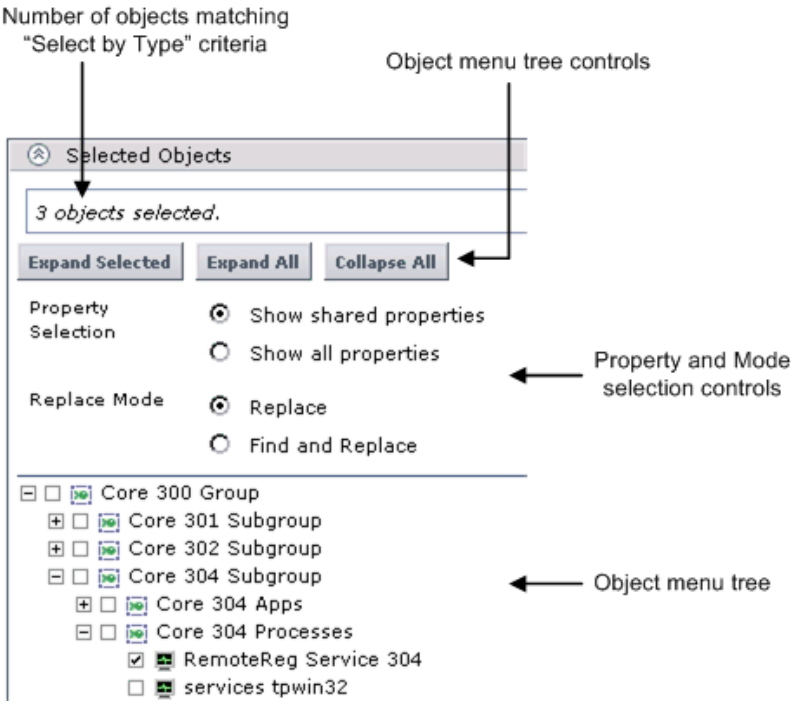
The first step in performing a global replace operation is to select the type of objects that you want as targets. For example, if you want to change the names of some monitor groups to reflect name changes in your IT system infrastructure, the target object type for the replace operation would be **SiteScope Group**. You would select the **SiteScope Monitor** object type if you want to replace a host address with an updated address in every monitor that currently uses the superseded host address.

You select more specific target objects by expanding the applicable node in the menu tree. For example, to replace a setting for only CPU monitors, expand the **SiteScope Monitor** object node and check the box next to the **CPU SiteScope Monitor**.

Once you have selected the object types you want as targets for the replace operation, you click the **Apply Selection** button to locate all objects of that type that are currently configured. The objects are then available for review in the Selected Objects panel.

Working with the Selected Objects Panel

The Selected Objects panel displays information and controls that you use to verify the targets of the replace operation and refine the selection of target objects and properties. The following figure describes an example of the Selected Objects area.



The text area at the top of the panel displays the number of objects in the current context match the criteria. The object menu tree displays the specific objects and names as they are configured in SiteScope.

Note: The Selected Objects panel is only populated after you make selections in the Select by Type area and apply the selection. If a message "0 objects selected" is shown, you should review your selections in the Select by Type section and click the **Apply Selection** button.

The following describes the controls and options in the Selected Object panel.

Object Tree Controls

The Selected Object panel includes three buttons you use to control the object selection tree. The following describes these controls.

- **Expand Selected** - expands the tree to show currently selected objects. The object nodes will be those that match the criteria of the Select by Type and those objects that have not be deselected previously. This option is useful if there are a large number of objects in the tree but you have deselected several of them. Using the **Collapse All** button followed by the **Expand Selected** button will re-display the tree with only the updated selection of objects displayed.
- **Expand All** - expands the tree to show all object types matching the criteria selected in the Select by Type panel.
- **Collapse All** - collapses the Selected Objects tree

Property Selection

The Property Selection options provide a basic selection of which object properties will be available for a replace operation. This is applicable when more than one type of object is selected for the replace operation. The options are:

- **Show shared properties** - include only those properties which are shared or common to all of the selected object types.
- **Show all properties** - include all properties for the selected object types

Replace Mode

You use the Replace Mode options to select the type of replace action to be performed. The two modes have important differences that are described here.

Replace - search the target objects and replace the selected properties with the values entered in the configuration settings fields. Existing configuration properties are completely replaced with the values entered in the Global Replace tab.

Find and Replace - search the target objects for properties that match a string or regular expression and replace only the matching pattern with the replacement value. When this option is selected, two input boxes are added to the top of the configuration settings display area. These fields become the only text entry fields.

Note: The **Find and Replace** mode does not support changing all configuration property types. Changing Threshold, Mercury BAC Logging, and Category settings is not supported by this mode. In addition, some configuration settings that use predefined selection menus (for example, Frequency settings) are generally not supported by this replace mode.

Selected Object Menu Tree

You use the Selected Object menu tree to further refine and control which objects will be included as targets for the replace operation. By default, all objects that match the applied **Select by Type** criteria are selected in the Selected Objects tree.

In some cases, you may want to exclude some of the selected objects from the replace operation. To exclude an object in the **Selected Objects** tree from the replace operation, clear the box next to the object. To include an object that previously excluded in the **Selected Objects** tree, you select the check box to the left of the object name. You may need to click the Expand All button to display deselected objects.

Working with Configuration Settings in Global Replace

You can use Global Replace to select any combination of objects in the hierarchy of containers and objects available in the monitor tree. Configuration settings can be changed for virtually every object type in the monitor tree. These include containers, profiles, SiteScopes, monitors, groups, containers, alerts, and categories.

Note: Global Replace works best if you select objects that share the configuration setting you want to replace or modify.

Each object type in the monitor tree has properties or attributes assigned to that object type. When you select objects in the **Selected Objects** tree, Global Replace automatically compares the objects for settings and properties that are common among all of the selected objects. The common configuration settings are then listed. Depending on the degree of commonality, the common settings are organized into subsections with **Main Settings** listed first.

Performing a Global Replace Operation

Performing a global replace operation requires several steps. The following is an overview of the steps you use to change configuration settings using Global Replace:

1. Decide what settings you want to change and to which class or type of objects these settings apply.
2. Select the node in the monitor tree that encompasses the scope you want to include in the replace operation. You may also create a view to filter object types in the monitor tree.
3. In the Global Replace tab, select the applicable object type or types in the Select by Type panel and apply the selection.
4. Review the Selected Objects and select the appropriate Property Selection and Replacement Mode options.

5 Check the configuration settings to be replaced, enter the applicable values for the settings, and apply the changes.

The two key variations of a global replace operation are determined by the Replace Mode option. The following describe the steps to perform a global replace operation and a find and replace operation.

Using the Replace Mode

Use the following steps to change configuration settings for multiple objects with Global Replace using the Replace mode.

To replace configuration settings for multiple objects:

1 Highlight the monitor tree element that includes the objects you want to include in the global replace operation. To limit the operation to a single group of monitors, select the parent group container for the monitors. To access all objects, select the SiteScope node.

2 Select the **Global Replace** tab. The Global Replace screen is displayed.

3 Select the type or types of objects you want to modify from the **Select by Type** menu.

4 Click **Apply Selection** to register the selection. The **Selected Objects** tree is populated with all matching objects.

5 Expand the **Selected Objects** tree and review the objects targeted for the replace operation. Clear objects you want to exclude from the replace operation, if necessary.

6 Choose the applicable **Property Selection** mode and verify that the **Replace** mode is selected. The configuration settings entry fields are updated below the **Selected Objects** tree.

7 Select the check box to the left of the configuration setting or settings that you want to change. Enter the new configuration settings in the text box for the selected setting.

For example, to change a URL address used by the selected monitors, you expand the **Main Settings** section (if necessary), check the box to the left of the **URL** setting field and enter the new URL into the text field to the right of that setting.

8 Click **Apply** to start the global replace operation. A Global Replace screen is displayed with information about the success of the replace operation or any errors that were encountered. The monitor tree is updated after a short delay.

Using the Find and Replace Mode

Use the following steps to change configuration settings for multiple objects using the Find and Replace option.

To change configuration settings using Find and Replace:

1 Highlight the monitor tree element that includes all of the objects that you want to include in the global replace operation. To limit the operation to a single group of monitors, select the parent group container for the monitors. To access all objects, select the SiteScope node.

2 Select the **Global Replace** tab. The Global Replace screen is displayed.

3 Select the type or types of objects you want to modify from the **Select by Type** menu.

4 Click **Apply Selection** to register the selection. The **Selected Objects** tree is populated with all matching objects.

5 Expand the Selected Objects tree and review the objects targeted for the replace operation. Clear objects you want to exclude from the replace operation.

6 Choose the applicable **Property Selection** mode and verify that the **Find and Replace** mode is selected. The configuration settings entry fields are updated below the **Selected Objects** tree.

7 Enter the search string, value or regular expression pattern for the configuration properties you want to replace in the **Find** text box.

8 Enter the string or value to which you want all matching patterns to be changed in the **and replace with** text box.

9 Select the check box to the left of the configuration setting or settings that you want to change.

For example, to change the host name in an URL address used by the selected monitors, you expand the **Main Settings** section (if necessary), check the box to the left of the **URL** setting field. You enter the new host name into the **and replace with** text box.

10 Click **Apply** to complete the global search and replace operation. A Global Replace dialogue screen is displayed with information about the success of the replace operation or any errors that were encountered. The monitor tree is updated after a short delay.

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