

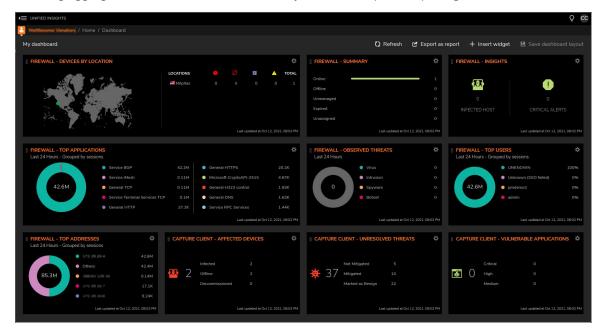


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# Using the Unified Insights Dashboard

The **Unified Insights** Dashboard provides you with our single pane of glass for Unified Security Operations, including aggregated dashboards, customizable layouts, and simplified reporting.



In its default configuration, the **Unified Insights** Dashboard provides you with summary information about firewalls managed by the tenant and Capture Client activity.

To manually refresh the data displayed on the **Unified Insights** Dashboard, click **Refresh** at the upper right of the Dashboard.

Each of the widgets on the **Unified Insights** Dashboard can be customized and widgets can be rearranged, added, or removed.

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### Topics:

- Customizing Widgets on the Unified Insights Dashboard
- Grouping Data on Widgets on the Unified Insights Dashboard
- Moving Widgets on the Unified Insights Dashboard
- Adding Widgets to the Unified Insights Dashboard
- Removing Widgets from the Unified Insights Dashboard
- Saving the Layout of Unified Insights Dashboard
- Exporting the Unified Insights Dashboard as a Report

# Customizing Widgets on the Unified Insights Dashboard

You can customize what data appears for a widget on the Unified Insights Dashboard.

You can also replace a widget with a different widget in its place without having to perform the separate steps of removing a widget and then adding a new one.

#### To customize a widget:

- 1. Click the gear icon located at the top right of the widget.
- 2. Select Edit/Replace Widget. The Edit/Replace Widget dialog displays.
- 3. You can select from these types of widgets:
  - Firewall
  - Capture Client
  - Wireless

The tab associated with the current widget will automatically be displayed. If you are replacing the widget, click the tab for the type of widget you want to add.

- 4. For the widget, you can specify:
  - Scope: Some widget types allow you to specify either All groups or Root Group.
  - Widget: Select the type of widget you want.
  - Title: Enter the title you want displayed for the widget. NOTE: This a required field.
  - **Time Frame**: Select the time frame for which you want the data to be displayed:
    - Last 24 Hours
    - Last 7 Days
  - Refresh Rate (in seconds): Enter how often you want the data updated.
- 5. After you have set all of the options for the widget, click **Save**.

# Grouping Data on Widgets on the Unified Insights Dashboard

Some widgets, particularly those that display "top" data for a category, such as a **Top Users** or **Top Addresses**, allow you to group the data displayed in different ways.

#### To group the data displayed by a widget:

- 1. Click the gear icon located at the top right of the widget.
- 2. From the dropdown menu that appears, select the type of grouping you want for the data displayed by the widget.



(i) **NOTE:** The available ways to group the data depends on the type of the widget and the kind of data that it displays.

## Moving Widgets on the Unified Insights Dashboard

You can change the location of the widgets on the Unified Insights Dashboard to best meet your own needs.

### To move a widget:

- 1. Hover over the icon at the top left of the widget until it becomes a cursors with four arrows.
- Click and drag the widget to the location on the Dashboard where you want the widget to be displayed. Other widgets, depending on the size of the widget you are moving, will adjust their positions to fill in any empty space on the Dashboard.

After you have moved all of the widget to their desired locations, you may want to save the layout of the dashboard.

# Adding Widgets to the Unified Insights Dashboard

You can add widgets to the Unified Insights Dashboard.

### To add a widget:

- 1. Click Insert widget on the upper right of the Dashboard. The New Widget dialog displays.
- 2. You can select from these types of widgets:
  - Firewall
  - Capture Client
  - Wireless
- 3. For the widget, you can specify:
  - Scope: Some widget types allow you to specify either All groups or Root Group.
  - Widget: Select the type of widget you want.
  - Title: Enter the title you want displayed for the widget. NOTE: This a required field.
  - **Time Frame**: Select the time frame for which you want the data to be displayed:
    - Last 24 Hours
    - Last 7 Days
  - Refresh Rate (in seconds): Enter how often you want the data updated.
- 4. After you have set all of the options for widget, click **Save**.
- (i) **NOTE:** The new widget will be added to the Dashboard in the first empty location where it will fit. You can move the new widget to new a location on the Dashboard. Refer to Moving Widgets on the Unified Insights Dashboard for more information.

# Removing Widgets from the Unified Insights Dashboard

You can remove widgets from the **Unified Insights** Dashboard if you are not interested in the data it provides or to make room for other widgets.

### To remove a widget:

- 1. Click the gear icon located at the top right of the widget.
- 2. Select Remove Widget.
- 3. When prompted, select **Proceed** to remove the widget from the Dashboard.

(i) **NOTE:** Removing a widget from the **Unified Insights** Dashboard does not delete it from the system, but makes it no longer visible on the Dashboard. You can add the widget again at any time.

# Saving the Layout of Unified Insights Dashboard

You can save your layout of the Unified Insights Dashboard.

#### To save your dashboard layout:

- Click Save dashboard layout at the top right of the Unified Insights Dashboard. A status message will be displayed when the layout has been successfully saved.
- (i) NOTE: The saved layout is associated with the user who saved it.

# Exporting the Unified Insights Dashboard as a Report

You can export a snapshot of the current Unified Insights Dashboard data as a report in PDF format.

The report consists of two pages:

- a graphical title page
- a page containing an image of the **Unified Insights** Dashboard at the time at which the report was generated.

### To export the dashboard as a report:

- 1. Click Export as report at the upper right of the Dashboard.
- 2. A status message displays, informing you to wait until the report has been generated.
- 3. After the report has been generated, it will available you to open or save. (The immediate actions available to you will depend on which web browser you are using.)

# **Generating Unified Insights Reports**

Select the **Unified Insights** tile to access the **Unified Insights** Reports, providing access to simplified reporting. To refresh the list of available reports, click **Refresh** in the upper right area of the page.

#### **Topics:**

- Creating Unified Insights Reports
- Downloading Unified Insights Reports
- Deleting Unified Insights Reports

## **Creating Unified Insights Reports**

Existing reports for the devices managed by your tenant will automatically be imported into the Unified Insights Reports list.

You can create new Unified Insights reports for:

- Creating Unified Insights Reports for Firewalls
- Creating Unified Insights Reports for Capture Client
- Creating Unified Insights Reports for Wireless Devices

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## Creating Unified Insights Reports for Firewalls

Create Report Tas	k	
Firewall Capture Client	Wireless	
CONFIGURATION		
Report Name	Enter report name	
Report Description	Enter report description	
Scope	Methodens I All groups 👻 🛛	
Report Type	On-demand Report	
	Scheduled Report	
Frequency	Daily 💌 Time 04:00 PM - 05:00 PM 💌	
Delivery Type	Archive Email	
Share via Email		
CONTENT Select All		
Flow Report	Live Reports @	Applications
Management Report	Users 🙆	Sources
	Destinations 🚳	Viruses 🚳
	Intrusions 🚳	Spyware 🚳
	Source Locations @	Destination Locations 🕘
	Web Categories 🚳	Botnet 🚳
	Blocked	Threats 🚳
	Source VPN @	Destination VPN @
		Cancel

To create an Unified Insights report:

- 1. Select the **Unified Insights** tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click **Create Report Task** in the upper right area of the page.
- 4. In the **Report Name** field, enter a name for the report. This is the name that will be displayed in the list of reports.
- 5. In the **Report Description** field, enter an optional description for the report.
- 6. From the **Scope** list, for the specified tenant, select:
  - All groups to include devices from all groups in the report.
  - Root Group to include only devices from the Root Group in the report.

To select other groups or devices, use Network Security Manager.

- 7. For Report Type, select:
  - On-demand Report
    - From the Interval list, select:
      - Last 24 Hours
      - Last 7 days

- Last 30 days (NOTE: This option is only available with Network Security Manager Advanced licenses.)
- Scheduled Report
  - From the **Frequency** list, select:
    - Daily
    - Weekly
    - Monthly
- From the **Time** list, select the one-hour time period during which the report should be generated.
- From the Scheduled On list:
  - If you selected **Weekly**from the **Frequency** list ,select the day of the week on which you want the report to be run.
  - If you selected **Monthly**from the **Frequency** list, select the numbered day of the month on which you want the report to be run.
- 8. For **Delivery Type**, select:
  - Archive to save the report.
  - Email to send the report by email.
    - In the **Share via Email** field, enter the email address(es) to where you want the report to be sent.
    - In the **Email subject** field, enter the Subject line for the email message that will include the report.
    - In the **Email body** field, enter the content for the body of the email message that will include the report.
- 9. Click **Select All** to generate all of the reports, or select the specific type of reports you want generated for this report task:
  - Select Flow Report to generate the flow reports, then select the flow reports you want generated.
     (i) NOTE: Flow Reports are only available with Network Security Manager Advanced licenses.
    - Live Reports
    - Users
    - Destinations
    - Intrusions
    - Source Locations
    - Web Categories
    - Blocked
    - Source VPN
    - Applications
    - Sources
    - Viruses
    - Spyware
    - Destination Locations
    - Botnet
    - Threats

- Destination VPN
- Select Management Report to generate reports for:
  - Expiring Reports
  - Expiring Reports (Free Trial)
  - Expired Reports
  - Firewall Inventory
- 10. Click Save.

## Creating Unified Insights Reports for Capture Client

Create Re	eport Tas	k		
Firewall	Capture Client	Wireless		
CONFIGURATION	Report Name	Enter report name		
	Scope	citter report name		
	Report Type	On-demand Report		
	Frequency	Scheduled Report     Weekly      Time     04:00 PM - 05:00 PM     Scheduled On     Monday		
	Share via Email			
CONTENT	Select All			
🗌 Threats 🚇		Capture ATP Events (	Devices 🕲	
Activities @		Web Protection ()	Applications @	
🗌 Tenants 🚳				
				Cancel

(i) **NOTE:** Capture Client reports are archived for a maximum of 5 days.

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click Create Report Task in the upper right area of the page.
- 4. In the **Report Name** field, enter a name for the report. This is the name that will be displayed in the list of reports.
- 5. The **Scope** displays the name of the current tenant for which the reports will be generated.
- 6. For **Report Type**, select:
  - On-demand Report
    - From the Interval list, select:
      - Last Week
      - Last 15 days
      - Last 30 days

- Scheduled Report
  - From the **Frequency** list, select:
    - Daily
    - Weekly
    - Monthly
- From the **Time** list, select the one-hour time period during which the report should be generated.
- From the Scheduled On list:
  - If you selected **Weekly**from the **Frequency** list ,select the day of the week on which you want the report to be run.
  - If you selected **Monthly**from the **Frequency** list, select the numbered day of the month on which you want the report to be run.
- 7. For Delivery Type, select:
  - Archive to save the report.
  - Email to send the report by email.
    - In the **Share via Email** field, enter the email address(es) to where you want the report to be sent.
- 8. Click **Select All** to generate all of the reports, or select the specific type of reports you want generated for this report task:
  - Threats
    - Basic
    - Detailed
      - Threat-History
      - Threat-List
  - Capture ATP Events
    - Basic
      - ATP-History
      - ATP-List
  - Devices
    - Basic
      - Device-History
      - Device-List
  - Activities
    - Basic
    - Detailed
  - Web Protection
    - Basic
    - Detailed

- Applications
  - Basic
    - Risky-Device-List
    - Risky-App-List
- Tenants
  - Basic
    - Tenant-List
- 9. Click Save.

## Creating Unified Insights Reports for Wireless Devices

Create Report Tas	k		
Firewall Capture Client	Wireless		
CONFIGURATION			
Report Name	Enter report name		
Scope	Mettlesome Venators		
Report Type	<ul> <li>On-demand Report</li> </ul>		
	Scheduled Report		
Frequency	Daily Time 04:00 PM - 05:00 PM -		
Share via Email			
CONTENT Select All			
Executive Summary (		Inventory	
Recommendations @		Security (Client Security Service Details)	
Statistics @		Topology 🚳	
			Cancel Save

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click Create Report Task in the upper right area of the page.
- 4. In the **Report Name** field, enter a name for the report. This is the name that will be displayed in the list of reports.
- 5. The **Scope** displays the name of the current tenant for which the reports will be generated.
- 6. For **Report Type**, select:
  - On-demand Report
    - From the Interval list, select:
      - Day
      - Week
      - Month

- Scheduled Report
  - From the Frequency list, select:
    - Daily
    - Weekly
- From the **Time** list, select the one-hour time period during which the report should be generated.
- From the Scheduled On list:
  - If you selected **Weekly**from the **Frequency** list ,select the day of the week on which you want the report to be run.
  - If you selected **Monthly**from the **Frequency** list, select the numbered day of the month on which you want the report to be run.
- 7. In the Share via Email field, enter the email address(es) to where you want the report to be sent.
- 8. Click **Select All** to generate all of the reports, or select the specific type of reports you want generated for this report task:
  - Executive Summary
  - Recommendations
  - Statistics
  - Inventory
  - Security (Client Security Service Details)
  - Topology
- 9. Click Save.

## **Downloading Unified Insights Reports**

You can download the generated reports as needed for distribution.

## Topics:

- Downloading Individual Unified Insights Reports
- Downloading Multiple Unified Insights Reports

## Downloading Individual Unified Insights Reports

### To download a single report:

- 1. Select the **Unified Insights** tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click the three dots (...) on the far right of the line for the report in the list.
- 4. Click Download.

A status message is displayed that indicates whether the download of the report was successful.

## Downloading Multiple Unified Insights Reports

#### To download multiple reports:

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- Select the reports you want to download by selecting checkbox to the left of the name of the report. To download all of the reports, select the checkbox at the top of the list.
- Click Download at the top right of the page.
   As each report is downloaded, a status message is displayed that indicates whether the download of the report was successful.

## **Deleting Unified Insights Reports**

You can delete reports and report tasks when you no longer need them.

(i) **NOTE:** Reports generated for Capture Client cannot be manually deleted. They will be automatically deleted.

#### To delete a report or report task:

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- Select the reports you want to delete by selecting checkbox to the left of the name of the report. To delete all of the reports, select the checkbox at the top of the list.
- 4. Click **Delete** at the top right of the page. A confirmation dialog displays.
- 5. Click **Proceed** to delete the selected reports.

## **Generating Unified Insights Reports**

Select the Unified Insights tile to access the Unified Insights Reports, providing access to simplified reporting.

To refresh the list of available reports, click **Refresh** in the upper right area of the page.

### **Topics:**

- Creating Unified Insights Reports
- Downloading Unified Insights Reports
- Deleting Unified Insights Reports

## **Creating Unified Insights Reports**

Existing reports for the devices managed by your tenant will automatically be imported into the Unified Insights Reports list.

You can create new Unified Insights reports for:

- Creating Unified Insights Reports for Firewalls
- Creating Unified Insights Reports for Capture Client
- Creating Unified Insights Reports for Wireless Devices

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## Creating Unified Insights Reports for Firewalls

Create Danart Ta			
Create Report Ta	SK		
Firewall Capture Client	Wireless		
CONFIGURATION			
Report Name	Enter report name		
Report Description	Enter report description		
Scope	All groups 🔻 🖲		
Report Type	On-demand Report		
	Scheduled Report		
Frequency	Daily V Time 04:00 PM - 05:00 PM V		
Delivery Type	Archive Email		
Share via Email			
CONTENT Select All			
Flow Report	Live Reports @	Applications 🚳	
Management Report	Users 🙆	Sources @	
	Destinations I	Viruses 🕲	
	Intrusions 🚳	Spyware 🚳	
	Source Locations 🚳	Destination Locations	
	Web Categories 🚳	Botnet 🚱	
	Blocked @	Threats 🚳	
	Source VPN @	Destination VPN @	
			Cancel

To create an Unified Insights report:

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click Create Report Task in the upper right area of the page.
- 4. In the **Report Name** field, enter a name for the report. This is the name that will be displayed in the list of reports.
- 5. In the **Report Description** field, enter an optional description for the report.
- 6. From the **Scope** list, for the specified tenant, select:
  - All groups to include devices from all groups in the report.
  - Root Group to include only devices from the Root Group in the report.

To select other groups or devices, use Network Security Manager.

- 7. For **Report Type**, select:
  - On-demand Report
    - From the Interval list, select:
      - Last 24 Hours
      - Last 7 days
      - Last 30 days (NOTE: This option is only available with Network Security Manager Advanced licenses.)

- Scheduled Report
  - From the Frequency list, select:
    - Daily
    - Weekly
    - Monthly
- From the **Time** list, select the one-hour time period during which the report should be generated.
- From the **Scheduled On** list:
  - If you selected **Weekly**from the **Frequency** list ,select the day of the week on which you want the report to be run.
  - If you selected **Monthly**from the **Frequency** list, select the numbered day of the month on which you want the report to be run.
- 8. For Delivery Type, select:
  - Archive to save the report.
  - Email to send the report by email.
    - In the **Share via Email** field, enter the email address(es) to where you want the report to be sent.
    - In the **Email subject** field, enter the Subject line for the email message that will include the report.
    - In the **Email body** field, enter the content for the body of the email message that will include the report.
- 9. Click **Select All** to generate all of the reports, or select the specific type of reports you want generated for this report task:
  - Select Flow Report to generate the flow reports, then select the flow reports you want generated.
     (i) | NOTE: Flow Reports are only available with Network Security Manager Advanced licenses.
    - Live Reports
    - Users
    - Destinations
    - Intrusions
    - Source Locations
    - Web Categories
    - Blocked
    - Source VPN
    - Applications
    - Sources
    - Viruses
    - Spyware
    - Destination Locations
    - Botnet
    - Threats
    - Destination VPN

- Select Management Report to generate reports for:
  - Expiring Reports
  - Expiring Reports (Free Trial)
  - Expired Reports
  - Firewall Inventory
- 10. Click Save.

## Creating Unified Insights Reports for Capture Client

Create Re	eport Tas	k		
Firewall	Capture Client	Wireless		
CONFIGURATION				
	Report Name	Enter report name		
	Scope	Mattlessome Venators		
	Report Type	On-demand Report		
		<ul> <li>Scheduled Report</li> </ul>		
	Frequency	Weekly View O4:00 PM - 05:00 PM View Scheduled On M	onday 👻	
	Share via Email			
	Select All			
🗌 Threats 🕲		Capture ATP Events 🚳	Devices @	
Activities @		Web Protection	Applications	
🗌 Tenants 🝘				
				Cancel Save

(i) **NOTE:** Capture Client reports are archived for a maximum of 5 days.

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click **Create Report Task** in the upper right area of the page.
- 4. In the **Report Name** field, enter a name for the report. This is the name that will be displayed in the list of reports.
- 5. The **Scope** displays the name of the current tenant for which the reports will be generated.
- 6. For **Report Type**, select:
  - On-demand Report
    - From the Interval list, select:
      - Last Week
      - Last 15 days
      - Last 30 days

- Scheduled Report
  - From the **Frequency** list, select:
    - Daily
    - Weekly
    - Monthly
- From the **Time** list, select the one-hour time period during which the report should be generated.
- From the Scheduled On list:
  - If you selected **Weekly**from the **Frequency** list ,select the day of the week on which you want the report to be run.
  - If you selected **Monthly**from the **Frequency** list, select the numbered day of the month on which you want the report to be run.
- 7. For **Delivery Type**, select:
  - Archive to save the report.
  - Email to send the report by email.
    - In the **Share via Email** field, enter the email address(es) to where you want the report to be sent.
- 8. Click **Select All** to generate all of the reports, or select the specific type of reports you want generated for this report task:
  - Threats
    - Basic
    - Detailed
      - Threat-History
      - Threat-List
  - Capture ATP Events
    - Basic
      - ATP-History
      - ATP-List
  - Devices
    - Basic
      - Device-History
      - Device-List
  - Activities
    - Basic
    - Detailed
  - Web Protection
    - Basic
    - Detailed

- Applications
  - Basic
    - Risky-Device-List
    - Risky-App-List
- Tenants
  - Basic
    - Tenant-List
- 9. Click Save.

## Creating Unified Insights Reports for Wireless Devices

Create Report Tas	k
Firewall Capture Client	Wireless
CONFIGURATION	
Report Name	Enter report name
Scope	Mettlesone Venators
Report Type	On-demand Report
	Scheduled Report
Frequency	Daily 💌 Time 04:00 PM - 05:00 PM 💌
Share via Email	
CONTENT Select All	
Executive Summary @	Inventory
Recommendations (	Security (Client Security Service Details)
Statistics @	Topology
	Cancel

- 1. Select the **Unified Insights** tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click **Create Report Task** in the upper right area of the page.
- 4. In the **Report Name** field, enter a name for the report. This is the name that will be displayed in the list of reports.
- 5. The **Scope** displays the name of the current tenant for which the reports will be generated.
- 6. For **Report Type**, select:
  - On-demand Report
    - From the Interval list, select:
      - Day
      - Week
      - Month

- Scheduled Report
  - From the Frequency list, select:
    - Daily
    - Weekly
- From the **Time** list, select the one-hour time period during which the report should be generated.
- From the Scheduled On list:
  - If you selected **Weekly**from the **Frequency** list ,select the day of the week on which you want the report to be run.
  - If you selected **Monthly**from the **Frequency** list, select the numbered day of the month on which you want the report to be run.
- 7. In the Share via Email field, enter the email address(es) to where you want the report to be sent.
- 8. Click **Select All** to generate all of the reports, or select the specific type of reports you want generated for this report task:
  - Executive Summary
  - Recommendations
  - Statistics
  - Inventory
  - Security (Client Security Service Details)
  - Topology
- 9. Click Save.

## Downloading Unified Insights Reports

You can download the generated reports as needed for distribution.

## Topics:

- Downloading Individual Unified Insights Reports
- Downloading Multiple Unified Insights Reports

## Downloading Individual Unified Insights Reports

### To download a single report:

- 1. Select the **Unified Insights** tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Click the three dots (...) on the far right of the line for the report in the list.
- 4. Click Download.

A status message is displayed that indicates whether the download of the report was successful.

## Downloading Multiple Unified Insights Reports

### To download multiple reports:

- 1. Select the Unified Insights tile.
- 2. Select **Reports** on the left navigation pane.
- 3. Select the reports you want to download by selecting checkbox to the left of the name of the report. To download all of the reports, select the checkbox at the top of the list.
- Click **Download** at the top right of the page.
   As each report is downloaded, a status message is displayed that indicates whether the download of the report was successful.

## **Deleting Unified Insights Reports**

You can delete reports and report tasks when you no longer need them.

(i) **NOTE:** Reports generated for Capture Client cannot be manually deleted. They will be automatically deleted.

#### To delete a report or report task:

- 1. Select the **Unified Insights** tile.
- 2. Select **Reports** on the left navigation pane.
- Select the reports you want to delete by selecting checkbox to the left of the name of the report. To delete all of the reports, select the checkbox at the top of the list.
- 4. Click **Delete** at the top right of the page. A confirmation dialog displays.
- 5. Click **Proceed** to delete the selected reports.

SonicWall Support

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Technical support is available to customers who have purchased SonicWall products with a valid maintenance contract.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. To access the Support Portal, go to https://www.sonicwall.com/support.

The Support Portal enables you to:

- View knowledge base articles and technical documentation
- View and participate in the Community forum discussions at https://community.sonicwall.com/technology-and-support.
- View video tutorials
- Access https://mysonicwall.com
- Learn about SonicWall professional services
- Review SonicWall Support services and warranty information
- Register for training and certification
- Request technical support or customer service

To contact SonicWall Support, visit https://www.sonicwall.com/support/contact-support.

SonicWall Support

## About This Document

(i) | NOTE: A NOTE icon indicates supporting information.

- (i) | IMPORTANT: An IMPORTANT icon indicates supporting information.
- (i) | TIP: A TIP icon indicates helpful information.
- CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

#### M WARNING: A WARNING icon indicates a potential for property damage, personal injury, or death.

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