



## **Working with reports**

Active IQ Unified Manager 9.7

NetApp  
April 05, 2024

This PDF was generated from <https://docs.netapp.com/us-en/active-iq-unified-manager-97/reporting/concept-report-work-flow.html> on April 05, 2024. Always check docs.netapp.com for the latest.

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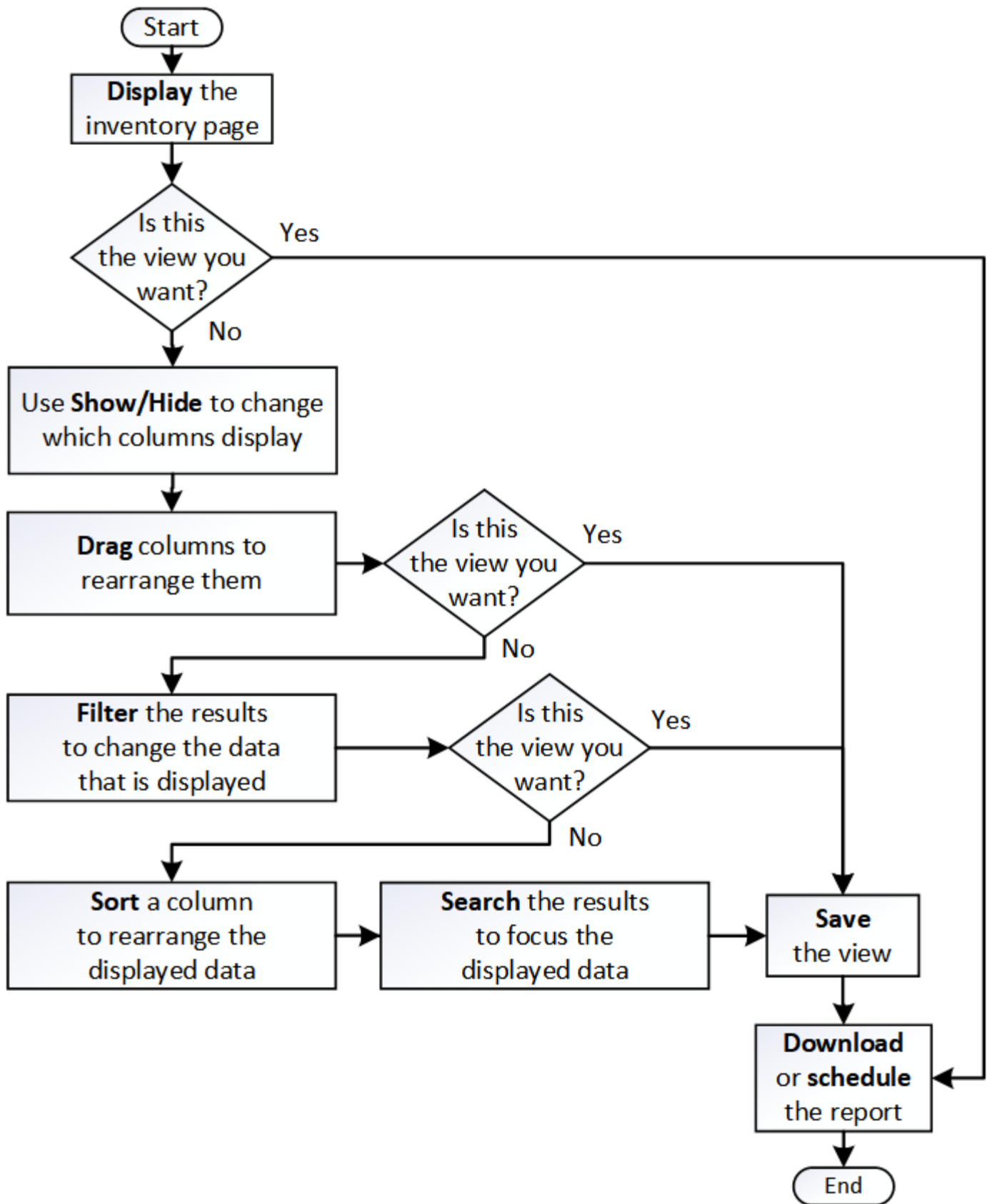
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# Working with reports

Learn how to find and customize inventory page views into shareable scheduled reports.

## Report workflow

Decision tree that describes the report workflow.



## Reporting quick start

Create a sample custom report to experience exploring views and scheduling reports.

This quick start report finds a list of volumes that you might want to move to the cloud tier because there is a fair amount of inactive (cold) data. You will open the Performance: All Volumes view, customize the view using filters and columns, save the custom view as a report, and schedule the report to share once a week.

## Before you begin

- You must have the Application Administrator or Storage Administrator role.
- You must have configured FabricPool aggregates and have volumes on those aggregates.

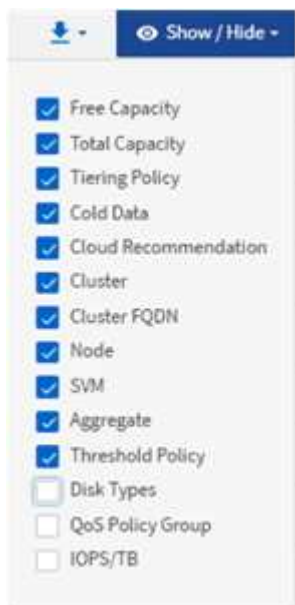
## About this task

Follow the steps below to:

- Open the default view
- Customize the columns by filtering and sorting the data
- Save the view
- Schedule a report to be generated for the custom view

## Steps

1. In the left navigation pane, click **Storage > Volumes**.
2. In the View menu, select **Performance > All Volumes**.
3. Click **Show/Hide** to make sure the “Disk Types” column appears in the view.



Add or remove other columns to create a view that contains the fields that are important for your report.

4. Drag the “Disk Types” column next to the “Cloud Recommendation” column.
5. Click the filter icon to add the following three filters, and then click **Apply Filter**:
  - Disk Types contains fabricpool

- Cloud Recommendation contains tier
- Cold Data greater than 10 GB

The filter configuration interface displays three filter rules stacked vertically. Each rule consists of a field dropdown, an operator dropdown, a value input, and a delete icon. The first rule is 'Disk Types' contains 'fabricpool'. The second rule is 'Cloud Recommendation' contains 'tier'. The third rule is 'Cold Data' greater than '10' GB. Below the rules is a '+ Add Filter' button. At the bottom are 'Reset', 'Cancel', and 'Apply Filter' buttons.

Note that each filter is joined with a logical AND so that all volumes returned must meet all the criteria. You can add a maximum of 5 filters.

- Click the top of the **Cold Data** column to sort the results so that the volumes with the most cold data appear at the top of the view.
- When the view is customized, the view name is Unsaved View. Name the view to reflect what the view is showing, for example “Vols change tiering policy”. When done, click the check mark or press Enter to save the view with the new name.

Volumes - Performance / Vols change tiering policy

Last updated: Feb 8, 2019, 12:26 PM

Latency, IOPS, MBps are based on hourly samples averaged over the previous 72 hours.

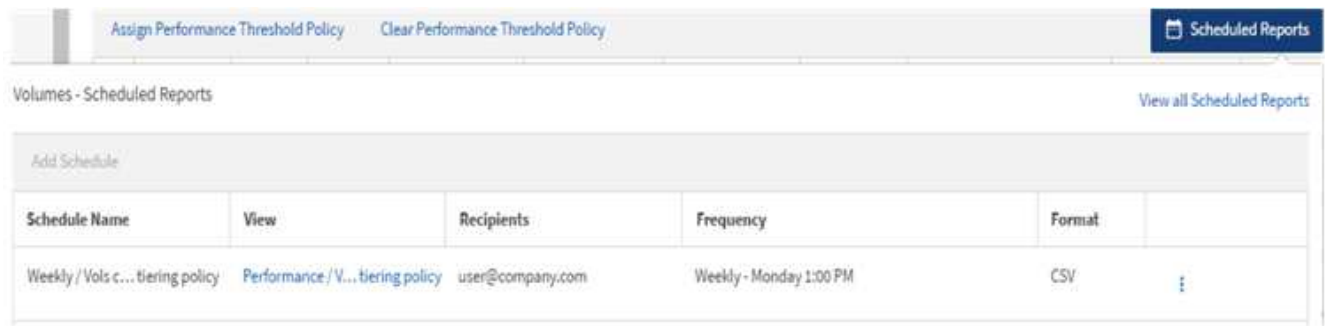
View Vols change tiering policy Search Volumes 3

<a href="#">Assign Performance Threshold Policy</a>		<a href="#">Clear Performance Threshold Policy</a>		<a href="#">Schedule Report</a>		
Volume	Cold Data	Tiering Policy	Disk Types	Cloud Recommendation	Free Capacity	Total Capacity
<a href="#">nfs_vol4</a>	38 GB	Snapshot Only	SSD (FabricPool)	<a href="#">Tier</a>	2.62 TB	3 TB
<a href="#">kjagnfsdst</a>	28 GB	Snapshot Only	SSD (FabricPool)	<a href="#">Tier</a>	121 GB	150 GB

- Download the report as a **CSV** or **PDF** file to see the output before you schedule or share it.

Open the file with an installed application, such as Microsoft Excel (CSV) or Adobe Acrobat (PDF), or save the file.

- Click the **Scheduled Reports** button on the inventory page. All scheduled reports relating to the object, in this case volumes, appear in the list.



10. Click **Add Schedule** to add a new row to the **Report Schedules** page so you can define the schedule characteristics for the new report.
11. Enter a name for the report and complete the other report fields, then click the checkmark (✓) at the end of the row.

The report is sent immediately as a test. After that, the report generates and is sent by email to the recipients listed using the specified frequency.

The following sample report is in CSV format:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Report: Performance - Vols change tiering policy (Latency, IOPS, MBps are based on hourly samples averaged over March 24, 2019, 11:52 PM - March 28, 2019, 12:52 PM)																
2	Generated At: March 28, 2019, 12:52 PM																
3																	
4	Status	Volume	Volume Ic	Tiering Po	Cold Data	Free Capa	Total Capa	Cluster	Cluster Id	Node	Node Id	Aggregate	Aggregate Id				
5	Ok	kjagnfsds1	101510	Snapshot	28.01	121.32	150	ocum-mo	99001	ocum-mo	99018	aggr5_vs	99040				
6	Ok	nfs_vol4	102294	Snapshot	379.64	2676.57	3072	ocum-mo	99001	ocum-mo	99113	aggr4	99141				

The following sample report is in PDF format:

Report: Performance - Vols change tiering policy (Latency, IOPS, MBps are based on hourly samples averaged over March 24, 2019, 11:51 PM - March 28, 2019, 12:51 PM)  
Generated At: March 28, 2019, 12:51 PM

Status	Volume	Tiering Policy	Cold Data (GB)	Free Capacity (GB)	Total Capacity (GB)	Cluster	Node	Aggregate
Ok	kjagnfsds1	Snapshot Only	28.01	121.32	150	ocum-mo	99001	aggr5_vs
Ok	nfs_vol4	Snapshot Only	379.64	2676.57	3072	ocum-mo	99001	aggr4

## After you finish

Based on the results shown in the report, you may want to use ONTAP System Manager or the ONTAP CLI to change the tiering policy to “auto” or “all” for certain volumes to offload more cold data to the cloud tier.

## Searching for a scheduled report

You can search for scheduled reports by name, view name, object type, or recipients.

### Steps

1. In the left navigation pane, click **Storage Management > Report Schedules**.
2. Use the **Search Scheduled Reports** text field.

To find reports by ...	Try ...
Schedule name	Type part of the report schedule name.

To find reports by ...	Try ...
View name	Type part of the report view name. Default views and custom views appear in the view list.
Recipient	Type part of the email address.
File type	Type "PDF" or "CSV".

3. You can click a column heading to sort reports in ascending or descending order by that column, such as schedule name or format.

## Customizing reports

There are many ways you can customize views so that you can create a report that contains all the information you need to manage your ONTAP clusters.

Start with a default inventory page or a custom view, then customize it by adding or removing columns, changing the column order, filtering the data, or sorting on a specific column in ascending or descending order.



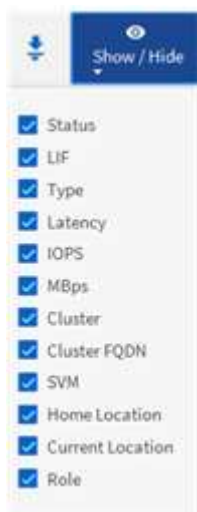
You must have the Application Administrator or Storage Administrator role to manage reports.

### Customizing columns

Use **Show/Hide** to choose the columns you want to use in your report. Drag the columns on the inventory page to rearrange them.

#### Steps

1. Click **Show/Hide** to add or remove columns.



2. On the inventory page, drag columns to rearrange them in the order you want in your report.
3. Name the unsaved view to save your changes.

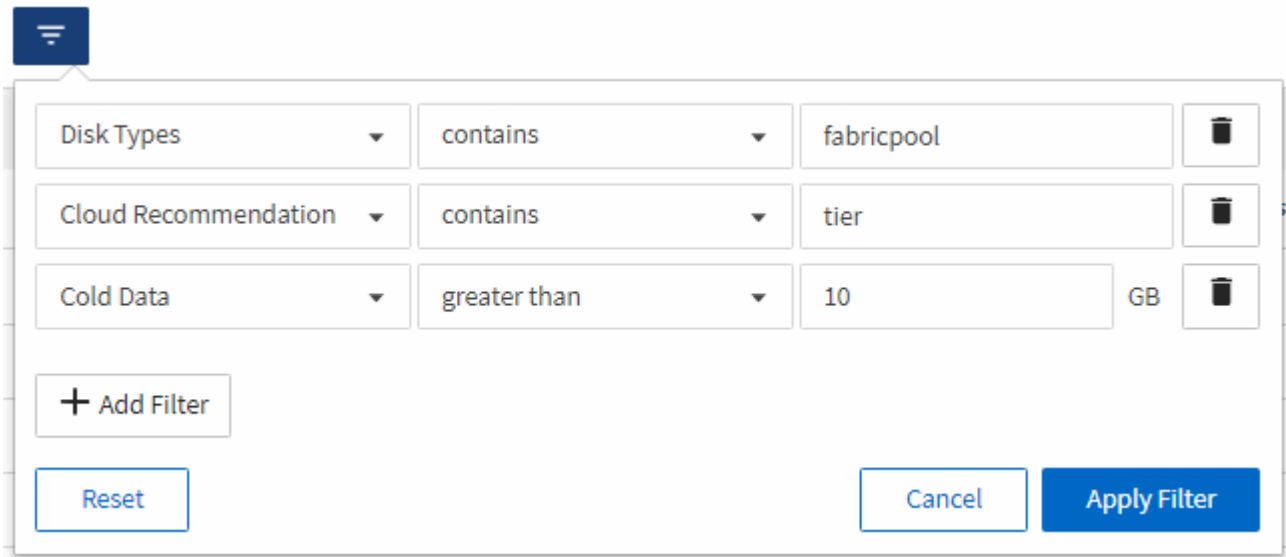


## Filtering data

Filter the data to make sure the results match your report requirements. Filtering enables you to display only the data in which you are interested.

### Steps

1. Click the filter icon to add filters to focus the results you want to view, and then click **Apply Filter**.



The screenshot shows a filtering interface with a blue filter icon in the top left. Below it, a panel contains three filter rows. Each row has a dropdown menu for the field, a dropdown for the operator, a text input for the value, and a trash icon. The first row is 'Disk Types' with operator 'contains' and value 'fabricpool'. The second row is 'Cloud Recommendation' with operator 'contains' and value 'tier'. The third row is 'Cold Data' with operator 'greater than' and value '10' followed by 'GB'. Below these rows is a '+ Add Filter' button. At the bottom of the panel are three buttons: 'Reset', 'Cancel', and 'Apply Filter'.

Disk Types	contains	fabricpool	
Cloud Recommendation	contains	tier	
Cold Data	greater than	10	GB

+ Add Filter

Reset Cancel Apply Filter

2. Name the unsaved view to save your changes.

## Sorting data

To sort the results, click a column and indicate ascending or descending order. Sorting data prioritizes the information you need for the report.

### Steps

1. Click the top of a column to sort the results so that the most important information appears at the top of the view.
2. Name the unsaved view to save your changes.

## Using search to refine your view

After you have the view you want, you can further refine the results using the Search field to focus on the results that you want to include in the report.

### Steps

1. Open the custom or default view that you want to use as the basis of your report.
2. Type in the Search field to refine the data listed in the view. You can enter partial data in any of the displayed columns. For example, if you want to search for nodes that include "US\_East" in the name, you can refine the full list of nodes.


The results of your search are saved in the custom view and used in the resulting scheduled report.

3. Name the unsaved view to save your changes.

## Downloading reports

You can download reports and save the data to a local or network drive as a comma-separated values (CSV) file, or a PDF file. You can open CSV files with spreadsheet applications, such as Microsoft Excel, and PDF files with readers such as Adobe Acrobat.

### Steps

1. Click  to download the report as one of the following:

Choose	To...
CSV	Save the report as a comma-separated values (CSV) file to a local or network drive.
PDF	Save the report as a .pdf file to a local or network drive.

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