Scheduling reports

Active IQ Unified Manager 9.9

NetApp
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Scheduling reports

After you have a view you want to reuse and share as a report, you can schedule it using Active IQ Unified Manager. You can manage scheduled reports, changing the recipients and distribution frequency for each report schedule.

You can schedule most views or inventory pages in Unified Manager. Exceptions are events, which are reports you can download as CSV files, but you cannot schedule events for regeneration and sharing. You also cannot download or schedule the dashboards, favorites, or configuration pages.

Starting in Active IQ Unified Manager 9.8, you can download views in Microsoft® Excel format and customize them. You can use advanced Excel features such as complex sorts, layered filters, pivot tables, and charts. When satisfied with the resulting Excel report, you can upload the Excel file for use each time the report is scheduled and shared.

You can schedule the built in views or views you customize. You can choose which file type to send, either CSV, PDF, or XSLX. When you schedule a report for the first time, you can download it and assign yourself as the only recipient to see the report as your recipients will see it.

Scheduling a report

After you have a view or Excel file that you want to schedule for regular generation and distribution, you can schedule the report.

Before you begin

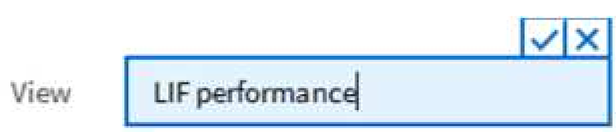
- You must have the Application Administrator or Storage Administrator role.
- You must have configured the SMTP server settings in the **General** > **Notifications** page so that the reporting engine can send reports as email attachments to the list of recipients from the Unified Manager server.
- The email server must be configured to allow attachments to be sent with the generated emails.

About this task

Use the following steps to test and schedule a report to be generated for a view. Select or customize the view you want to use. The following procedure uses a network view that shows the performance of your network interfaces, but you can use any view you want.

Steps

1. Open your view. This example uses the default network view that shows LIF performance. In the left navigation pane, click **Network** > **Network Interfaces**.
2. Customize the view as needed using the built-in Unified Manager features.
3. After you customized the view, you can provide a unique name in the **View** field and click the check mark to save it.



4. You can use the advanced features of Microsoft® Excel to customize your report. For details, see Using Excel to customize your report.
5. To see the output before you schedule or share it:

If you used Excel to customize the report	View the existing downloaded Excel file.
If you did not use Excel to customize the report	Download the report as a **CSV**, **PDF** or **XLSX** file.

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

1. If you are satisfied with the report, click **Scheduled Reports**.
2. In the **Report Schedules** page, click **Add Schedule**.
3. Accept the default name, which is a combination of the view name and the frequency, or customize the **schedule name**.
4. To test the scheduled report the first time, only add yourself as the **recipient**. When satisfied, add the email addresses for all report recipients.
5. Specify how frequently the report will be generated and sent to the recipients. You can choose **Daily**, **Weekly**, or **Monthly**.
6. Select the format, either **PDF**, **CSV**, or **XSLX**.

   For reports where you used Excel to customize the content, always select **XSLX**.

7. Click the checkmark ( ) to save the report schedule.

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

Scheduling imported .rptdesign reports

You can schedule existing reports that were created and imported in an earlier release of Unified Manager.

About this task

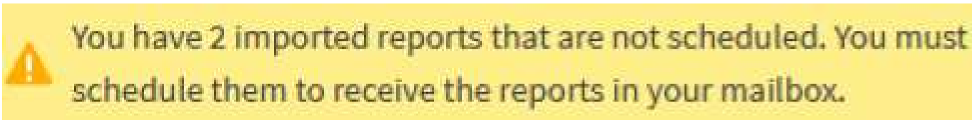
Scheduling imported reports requires the following:

- imported BIRT designed .rptdesign file reports in an earlier Unified Manager release
- applicable when upgrading to Unified Manager 9.6 GA or later

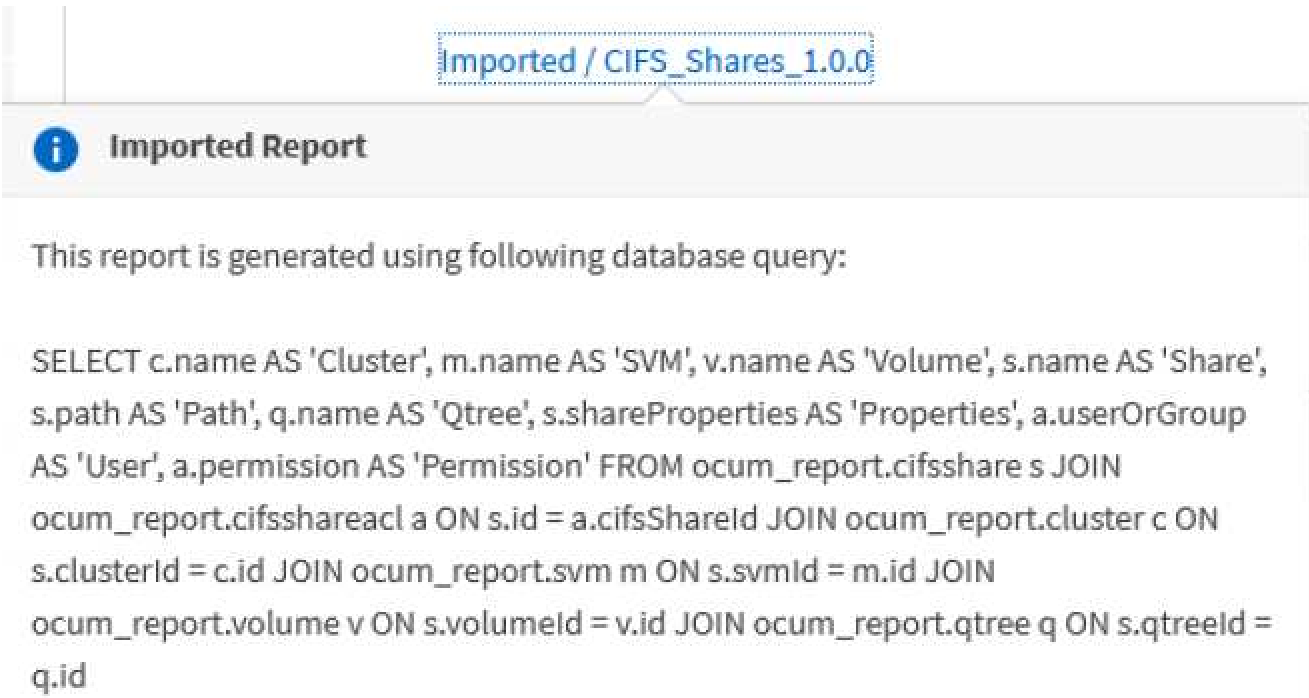
After upgrading to Unified Manager 9.6 GA or later, the Report Schedules page lists the imported reports. You can edit the schedule for these reports to specify the recipient email addresses, frequency, and format (PDF or CSV). Otherwise these reports cannot be edited or viewed in the Unified Manager UI.

Steps

1. Open the **Report Schedules** page. If you have imported reports, a message appears.



2. Click the **View** name to display the SQL query that is being used to generate the report.



3. Click the more icon ⋮ , click **Edit**, define the report schedule details, and save the report.

   > You can also delete any unwanted reports from the more icon ⋮ .

Managing report schedules

You can manage your report schedules from the Report Schedules page. You can view, modify, or delete existing schedules.

Before you begin

> You cannot schedule new reports from the Report Schedules page. You can only add scheduled reports from the object inventory pages.

- You must have the Application Administrator or Storage Administrator role.

Steps

1. In the left navigation pane, click **Storage Management** > **Report Schedules**.
2. On the **Report Schedules** page:

If you want to…	Then…
View an existing schedule	Scroll through the list of existing reports using the scroll bars and page controls.
Edit an existing schedule	a. Click the more icon for the schedule you want to use. b. Click **Edit**. c. Make the necessary changes. d. Click the check mark to save your changes.
Delete an existing schedule	a. Click the more icon for the schedule you want to use. b. Click **Delete**. c. Confirm your decision.

Editing scheduled reports

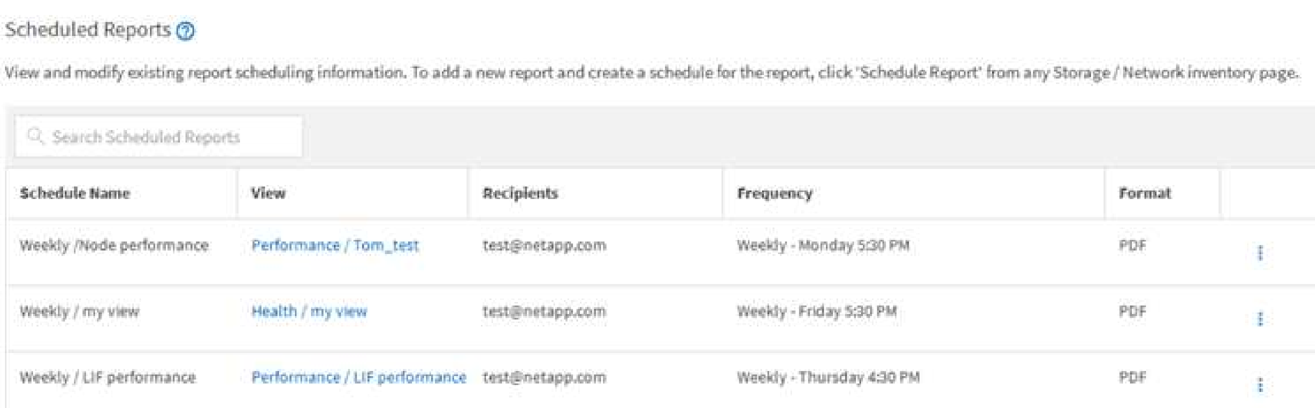
After reports are scheduled, you can edit them on the Report Schedules page.

Before you begin

- You must have the Application Administrator or Storage Administrator role.

Steps

1. In the left navigation pane, click **Storage Management** > **Report Schedules**.



If you have the appropriate permissions you can alter any report and its schedule in the system.

2. Click the more icon for the schedule you want to change.
3. Click **Edit**.
4. You can change the **Schedule Name**, **Recipient** list, **Frequency**, and **Format** for the report schedule.
5. When done, click the check mark to save your changes.

Deleting scheduled reports

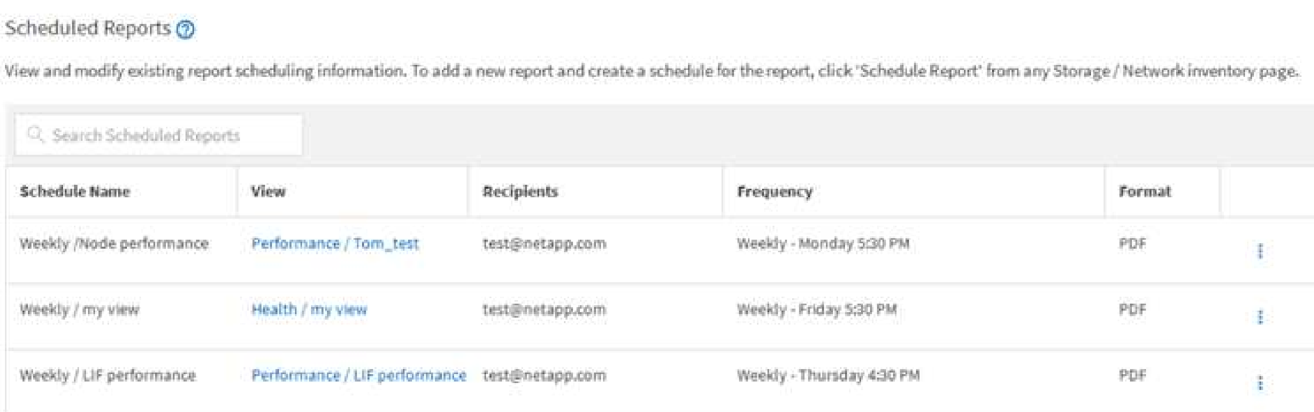
After reports are scheduled, you can delete them from the Report Schedules page.

Before you begin

- You must have the Application Administrator or Storage Administrator role.

Steps

1. In the left navigation pane, click **Storage Management** > **Report Schedules**.



> If you have the appropriate permissions you can remove any report and its schedule in the system.

2. Click the more icon for the schedule you want to remove.
3. Click **Delete**.
4. Confirm your decision.

   The scheduled report is removed from the list and will no longer be generated and distributed on the set schedule.

> If you delete a custom view from the inventory page, any custom Excel files or scheduled reports that use that view are also deleted.