



## **Scheduling reports**

### **Active IQ Unified Manager 9.14**

NetApp

November 11, 2024

This PDF was generated from [https://docs.netapp.com/us-en/active-iq-unified-manager-914/reporting/task\\_schedule\\_an\\_imported\\_report.html](https://docs.netapp.com/us-en/active-iq-unified-manager-914/reporting/task_schedule_an_imported_report.html) on November 11, 2024. Always check [docs.netapp.com](https://docs.netapp.com) for the latest.

# Table of Contents

- Scheduling reports ..... 1
  - Scheduling a report ..... 1
  - Managing report schedules ..... 3

# 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.

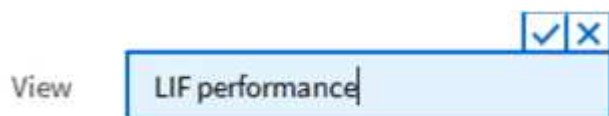
### What you'll need

- 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.

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:

Option	Description
<b>If you used Excel to customize the report</b>	View the existing downloaded Excel file.
<b>If you did not use Excel to customize the report</b>	Download the report as a <b>CSV</b> , <b>PDF</b> or <b>XLSX</b> file.

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

6. If you are satisfied with the report, click **Scheduled Reports**.

7. In the Report Schedules page, click **Add Schedule**.

8. Accept the default name, which is a combination of the view name and the frequency, or customize the **schedule name**.

9. To test the scheduled report the first time, only add yourself as the **recipient**. When satisfied, add the email addresses for all report recipients.

10. Specify how frequently the report will be generated and sent to the recipients. You can choose **Daily**, **Weekly**, or **Monthly**.

11. Select the format, either **PDF**, **CSV**, or **XSLX**.



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

12. 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.


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

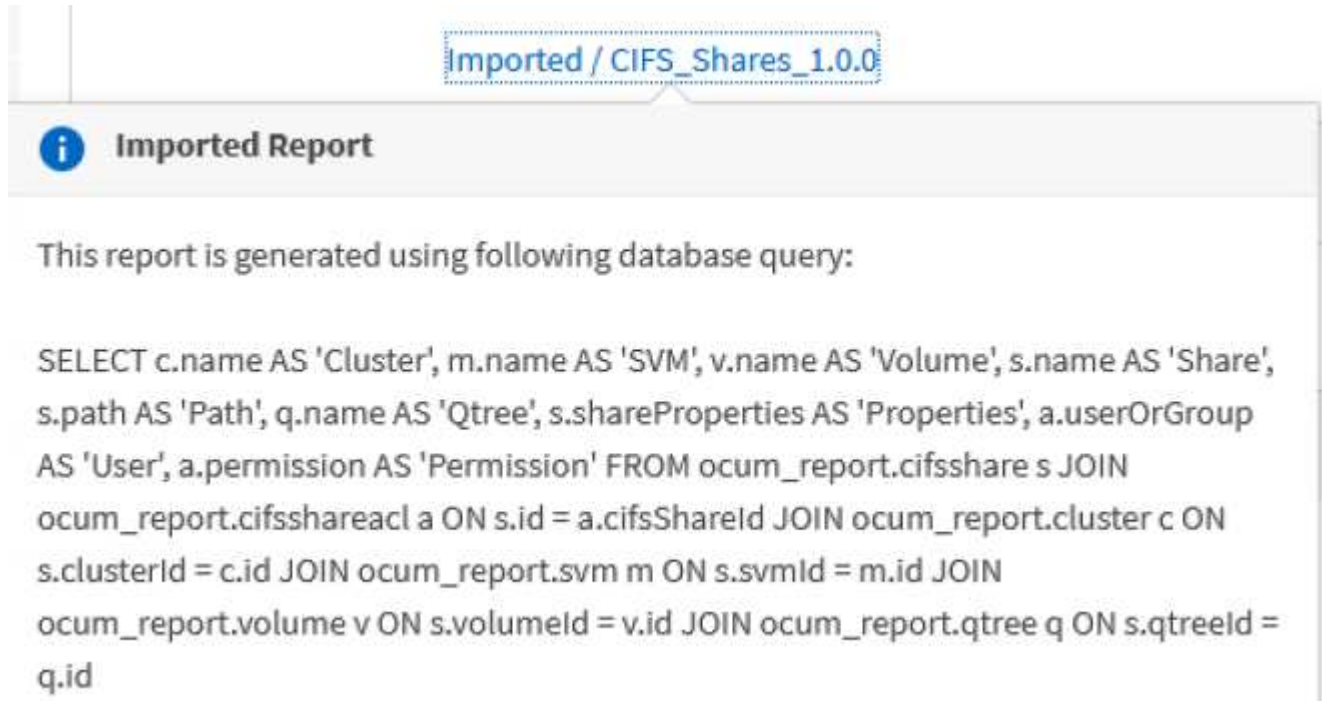
After upgrading to Unified Manager 9.6 GA or later, the Report Schedules page lists the imported reports. You can edit the schedule for these reports to specify the recipient email addresses, frequency, and format (PDF or CSV). Otherwise these reports cannot be edited or viewed in the Unified Manager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

## Steps

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

 You have 2 imported reports that are not scheduled. You must schedule them to receive the reports in your mailbox.

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



The screenshot shows a web interface for an 'Imported Report'. At the top, there is a breadcrumb trail: 'Imported / CIFS\_Shares\_1.0.0'. Below this is a header with an information icon and the text 'Imported Report'. The main content area states: 'This report is generated using following database query:'. Below this is a SQL query:

```
SELECT c.name AS 'Cluster', m.name AS 'SVM', v.name AS 'Volume', s.name AS 'Share',  
s.path AS 'Path', q.name AS 'Qtree', s.shareProperties AS 'Properties', a.userOrGroup  
AS 'User', a.permission AS 'Permission' FROM ocum_report.cifsshare s JOIN  
ocum_report.cifsshareacl a ON s.id = a.cifsShareId JOIN ocum_report.cluster c ON  
s.clusterId = c.id JOIN ocum_report.svm m ON s.svmId = m.id JOIN  
ocum_report.volume v ON s.volumeId = v.id JOIN ocum_report.qtree q ON s.qtreeId =  
q.id
```

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.

### What you'll need





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	<ol style="list-style-type: none"> <li>Click the more icon  for the schedule you want to use.</li> <li>Click <b>Edit</b>.</li> <li>Make the necessary changes.</li> <li>Click the check mark to save your changes.</li> </ol>
Delete an existing schedule	<ol style="list-style-type: none"> <li>Click the more icon  for the schedule you want to use.</li> <li>Click <b>Delete</b>.</li> <li>Confirm your decision.</li> </ol>

## Editing scheduled reports

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

### What you'll need



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

### Steps

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


#### Scheduled Reports

View and modify existing report scheduling information. To add a new report and create a schedule for the report, click 'Schedule Report' from any Storage / Network inventory page.

Search Scheduled Reports					
Schedule Name	View	Recipients	Frequency	Format	
Weekly /Node performance	<a href="#">Performance / Tom_test</a>	test@netapp.com	Weekly - Monday 5:30 PM	PDF	
Weekly / my view	<a href="#">Health / my view</a>	test@netapp.com	Weekly - Friday 5:30 PM	PDF	
Weekly / LIF performance	<a href="#">Performance / LIF performance</a>	test@netapp.com	Weekly - Thursday 4:30 PM	PDF	



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

- Click the more icon  for the schedule you want to change.
- Click **Edit**.
- 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.

### What you'll need

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

### Steps

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


#### Scheduled Reports

View and modify existing report scheduling information. To add a new report and create a schedule for the report, click 'Schedule Report' from any Storage / Network inventory page.

Schedule Name	View	Recipients	Frequency	Format	
Weekly /Node performance	<a href="#">Performance / Tom_test</a>	test@netapp.com	Weekly - Monday 5:30 PM	PDF	
Weekly / my view	<a href="#">Health / my view</a>	test@netapp.com	Weekly - Friday 5:30 PM	PDF	
Weekly / LIF performance	<a href="#">Performance / LIF performance</a>	test@netapp.com	Weekly - Thursday 4:30 PM	PDF	



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.

## Copyright information

Copyright © 2024 NetApp, Inc. All Rights Reserved. Printed in the U.S. No part of this document covered by copyright may be reproduced in any form or by any means—graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system—without prior written permission of the copyright owner.

Software derived from copyrighted NetApp material is subject to the following license and disclaimer:

THIS SOFTWARE IS PROVIDED BY NETAPP “AS IS” AND WITHOUT ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WHICH ARE HEREBY DISCLAIMED. IN NO EVENT SHALL NETAPP BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NetApp reserves the right to change any products described herein at any time, and without notice. NetApp assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by NetApp. The use or purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of NetApp.

The product described in this manual may be protected by one or more U.S. patents, foreign patents, or pending applications.

LIMITED RIGHTS LEGEND: Use, duplication, or disclosure by the government is subject to restrictions as set forth in subparagraph (b)(3) of the Rights in Technical Data -Noncommercial Items at DFARS 252.227-7013 (FEB 2014) and FAR 52.227-19 (DEC 2007).

Data contained herein pertains to a commercial product and/or commercial service (as defined in FAR 2.101) and is proprietary to NetApp, Inc. All NetApp technical data and computer software provided under this Agreement is commercial in nature and developed solely at private expense. The U.S. Government has a non-exclusive, non-transferrable, nonsublicensable, worldwide, limited irrevocable license to use the Data only in connection with and in support of the U.S. Government contract under which the Data was delivered. Except as provided herein, the Data may not be used, disclosed, reproduced, modified, performed, or displayed without the prior written approval of NetApp, Inc. United States Government license rights for the Department of Defense are limited to those rights identified in DFARS clause 252.227-7015(b) (FEB 2014).

## Trademark information

NETAPP, the NETAPP logo, and the marks listed at <http://www.netapp.com/TM> are trademarks of NetApp, Inc. Other company and product names may be trademarks of their respective owners.