Scheduling a report

Active IQ Unified Manager 9.9

NetApp
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Table of Contents

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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

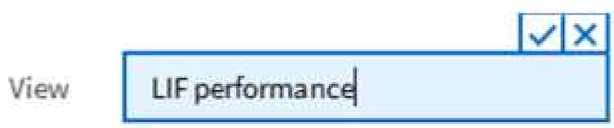
- You must have the Application Administrator or Storage Administrator role.
- You must have configured the SMTP server settings in the **General** > **Notifications** page so that the reporting engine can send reports as email attachments to the list of recipients from the Unified Manager server.
-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

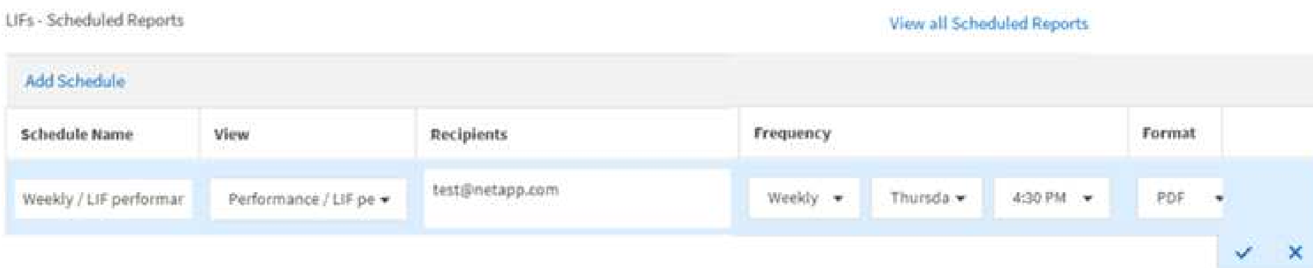
Open the file with an installed application, such as Microsoft Excel (CSV/XSLX) or Adobe Acrobat (PDF).

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:

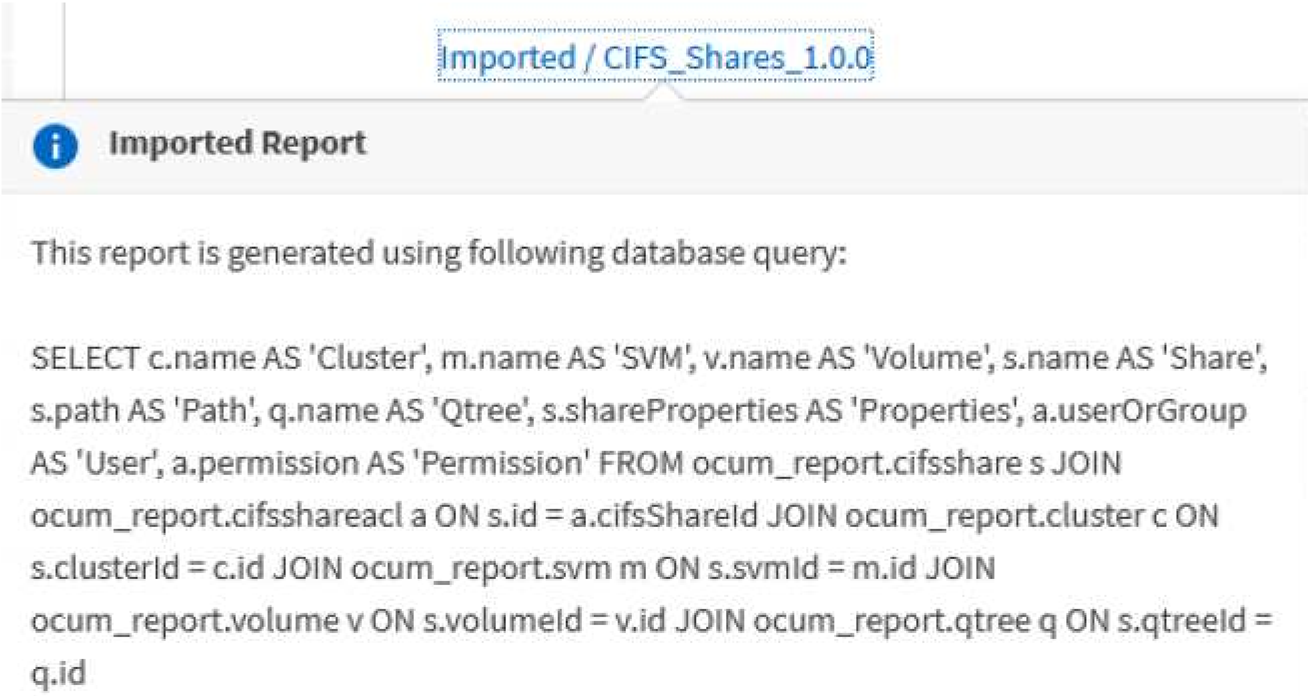
- imported BIRT designed .rptdesign file reports in an earlier Unified Manager release
- applicable when upgrading to Unified Manager 9.6 GA or later

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.