Customize reports

Active IQ Unified Manager

NetApp
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Customize reports

Customize reports in Active IQ Unified Manager

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.

Starting in Unified Manager 9.8, you can also download the view in Excel to customize it using advanced features. When done, upload the customized Excel file. If you schedule a report using that view, it uses the customized Excel file to create robust reports you can share.

For more information on customizing reports using Excel, see *Sample Microsoft Excel reports*.

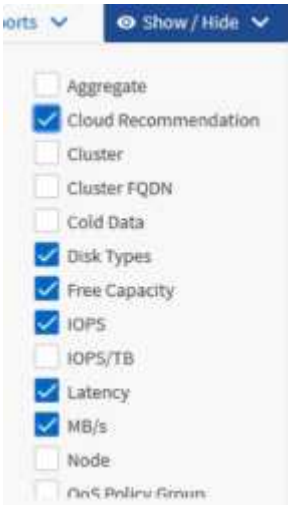
You must have the Application Administrator or Storage Administrator role to manage reports.

Customize columns in a report in Active IQ Unified Manager

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.



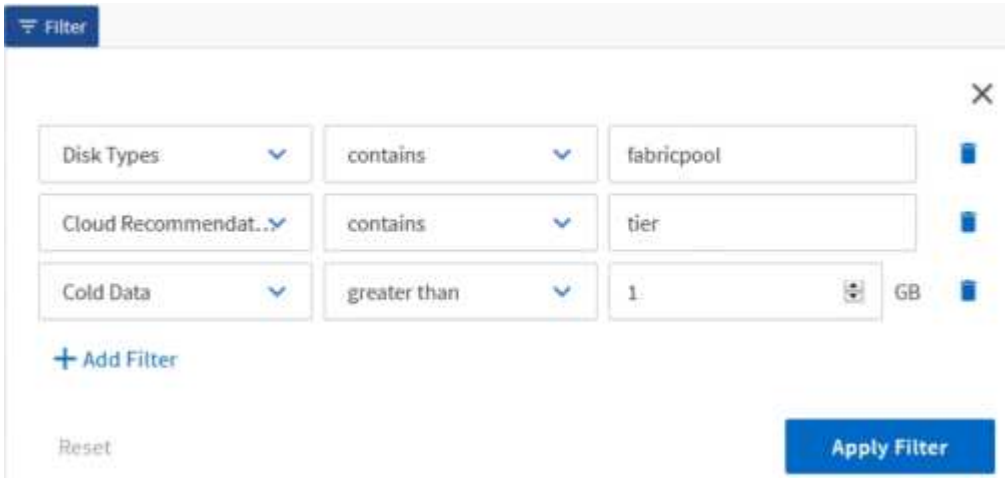
2. On the inventory page, drag columns to rearrange them in the order you want in your report.
3. Name the unsaved view to save your changes.

Filter data in Active IQ Unified Manager

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**.



2. Name the unsaved view to save your changes.

Sort data in Active IQ Unified Manager

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.

Search to refine your view in Active IQ Unified Manager

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.

Use Excel to customize your report in Active IQ Unified Manager

After you have saved the view, you can download it in Excel Workbook format (.xlsx).

When you open the Excel file, you can use advanced Excel features to customize your report.

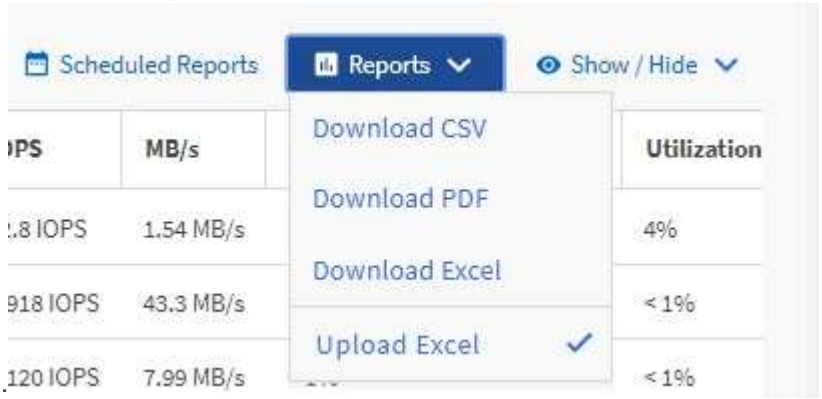
Before you begin

You can only upload an Excel Workbook file with the .xlsx extension.

For example, some advanced Excel features you can use in your report include:

- Multi-column sort
- Complex filtering
- Pivot tables
- Charts

- The downloaded Excel file uses the default file name for the view, not your saved name.
  - The format is `<View Area>-<Day>-<Month>-<Year>-<Hour>-<Minute>-<Second>.xlsx`.
  - For example, a custom saved view named `Volumes-not online` has a file name of `health-volumes-05-May-2020-19-18-00.xlsx` if saved at that day and time.
- You can add sheets to the Excel file, but do not change existing sheets.
  - Do not change the existing sheets, data and info. Instead, copy the data to a new page that you create.
  - One exception to the above rule is that you can create formulas on the “data” page. Use the data page formulas to create charts on new pages.
  - Do not name a new sheet data or info.
- If a customized Excel file exists, there is a check mark beside the **Reports** > **Upload Excel** menu item. When you download the Excel file, the version with the customizations is used.



Steps

1. Open the default, custom, or saved view that you want to use as the basis of your report.
2. Select **Reports** > **Download Excel**.
3. Save the file. The file is saved to your downloads folder.
4. Open the saved file in Excel. Do not move the file to a new location, or if you do your work in another location, save the file back to the original location using the original file name before uploading the file.
5. Customize the file using Excel features, such as complex sorts, layered filters, pivot tables, or charts. For more information, see the Microsoft® Excel documentation.

6. Select **Reports** > **Upload Excel** and select the file that you modified. The most recently downloaded file is uploaded from the same file location.
7. Send yourself a test report using the **Scheduled Reports** feature.

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