



Schedule a report

Active IQ Unified Manager

NetApp

January 15, 2026

This PDF was generated from https://docs.netapp.com/us-en/active-iq-unified-manager/reporting/task_schedule_an_imported_report.html on January 15, 2026. Always check docs.netapp.com for the latest.

Table of Contents

Schedule a report	1
Schedule imported .rptdesign reports	2

Schedule 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.

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
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).

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.

LIFs - Scheduled Reports [View all Scheduled Reports](#)

[Add Schedule](#)

Schedule Name	View	Recipients	Frequency	Format
Weekly / LIF performar	Performance / LIF pe ▼	test@netapp.com	Weekly ▼ Thursda ▼ 4:30 PM ▼	PDF ▼

✓ ✕

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.

Schedule 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.




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



Imported Report

This report is generated using following database 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 .

Copyright information

Copyright © 2026 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.