Lab 10: Sharing, Scheduling and Organizing Reports

In this lab, you export, email, and schedule exported and emailed reports and dashboards. You also, view, manage, and share reports, dashboards and folders and set up alerts for tabular reports.

Lab Exercises

This lab contains the following exercises:

- Exercise A: Exporting and Emailing Reports and Dashboards
- Exercise B: Scheduling Exported and Emailed Reports and Dashboards
- Exercise C: Viewing and Managing Scheduled Reports
- Exercise D: Sharing Reports, Dashboards and Folders
- Exercise E: Setting up Alerts for Tabular Reports

⚠ It is recommended to use **Google Chrome** to perform the lab exercises. After launching the lab, zoom out the lab browser window to 80% to fit the **APTARE Portal** interface optimally and view all the tabs within the window.

Exercise A: Exporting and Emailing Reports and Dashboards

You can export reports to make them available to external applications, such as Microsoft Excel or if you need to generate a hardcopy, you can export them to a file such as a PDF.

In this exercise, you export reports and dashboards to a PDF file.

Exporting Reports and Dashboards

☐ 1. Sign in to the 🖥 console system using the following credentials.

User name	T **EXAMPLE\Administrator**
Password	T **P@ssw0rd**

☐ 2. Double-click the **Aptare Portal** shortcut, located on the desktop of the **console.example.com** system, to launch the **APTARE IT Analytics Portal**.

☐ 3. When the **APTARE IT Analytics Portal** login page is displayed, login using the following credentials.

| User name	T **admin@example.com**
Password	T **P@ssw0rd**

☐ 4. In the **APTARE IT Analytics Portal**, navigate to **Reports>System Administration Reports**. The available **System Administration Reports** are displayed in the **Reports** page.

☐ 5. In the **Reports** page, double-click the **Data Collection Status Details** report.

☐ 6. In the **Data Collection Status Details Scope Selector** dialog box that is displayed, click **Generate** without making any changes to generate the report.

The contents of the **Data Collection Status Details** report are displayed in a new tab.

☐ 7. On the **Data Collection Status Details** tab that displays the content of the report, click **Actions > Export**. The **Export Report** dialog box is displayed.

☐ 8. In the **Export Report** dialog box, select **PDF** in the **Export as** drop-down list and click **Export Now**.

The **Data Collection Status Details** report is exported to a **PDF** file and is saved in **C:\Users\Administrator\Downloads** directory on the **console.example.com** system.

📄 Not all export types are available for all report types.

☐ 9. Minimize the **Google Chrome** Browser window to view the desktop of the **console.example.com** system.

☐ 10. Double-click the **File Explorer** shortcut, located on the desktop of the **console.example.com** system, to launch **File Explorer**.

☐ 11. In the **File Explorer** window, click the **Downloads** shortcut as illustrated in the following figure.
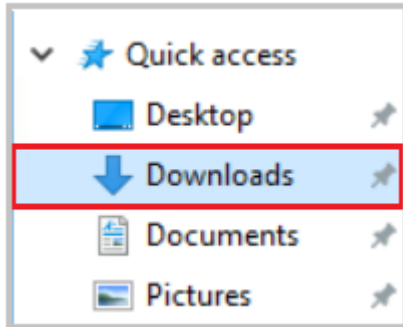
The files in the **Downloads** directory are displayed in the right pane of the **File Explorer** window.

☐ 12. In the right pane of the **File Explorer** window, double-click the **Data Collection Status Details.pdf** file.

The contents of the **Data Collection Status Details.pdf** file are displayed in the **Adobe Acrobat Reader DC** application.

☐ 13. Close the **Adobe Acrobat Reader DC** application after reviewing the contents of the **Data Collection Status Details.pdf** file.

☐ 14. Close the **File Explorer** window on the **console.example.com** system.

☐ 15. On the **taskbar**, click the **Google Chrome** icon to return to the **APTARE IT Analytics Portal**.

Emailing Reports and Dashboards

☐ 16. In the **APTARE IT Analytics Portal**, On the **Data Collection Status Details** tab that displays the content of the report, click **Actions > Email**. The **Email Report** dialog box is displayed.

☐ 17. In the **Email Report** dialog box, select **PDF** in the **Email as** drop-down list and enter ⊤ **administrator@example.com** in the **Email to** field.

☐ 18. In the **Email Report** dialog box, click **Email Now** without making any other changes.

> 📄 The SMTP settings are preconfigured in this lab environment and can be viewed by navigating to **Admin > Advanced > System Configuration > Portal** in the **APTARE IT Analytics Portal**.

☐ 19. Minimize the **Google Chrome** Browser window to view the desktop of the **console.example.com** system.

☐ 20. Double-click the **Mozilla Thunderbird** shortcut, located on the desktop of the **console.example.com** system, to launch the **Mozilla Thunderbird** application.

☐ 21. In the **Mozilla Thunderbird** application, select **Inbox** in the navigation pane. All emails are displayed in the right pane of the **Mozilla Thunderbird** application.

☐ 22. Select the email with **Data Collection Status Details** as the **Subject**. The email attachments are displayed in the reading pane.

☐ 23. Double-click the email attachment. The **Opening Data_Collection_Status_Details.pdf** dialog box is displayed.

☐ 24. In the **Opening Data_Collection_Status_Details.pdf** dialog box, click **OK** without making any changes.

The contents of the **Data_Collection_Status_Details.pdf** file are displayed in the **Adobe Acrobat Reader DC** application.

☐ 25. Close the **Adobe Acrobat Reader DC** application after reviewing the contents of the **Data_Collection_Status_Details.pdf** file.

☐ 26. Close the **Mozilla Thunderbird** application.

☐ 27. On the **taskbar**, click the **Google Chrome** icon to return to the **APTARE IT Analytics Portal**.

☐ 28. Close the **Data Collection Status Details** tab.

> 📄 You can export and email a dashboard as well by following the described procedure.

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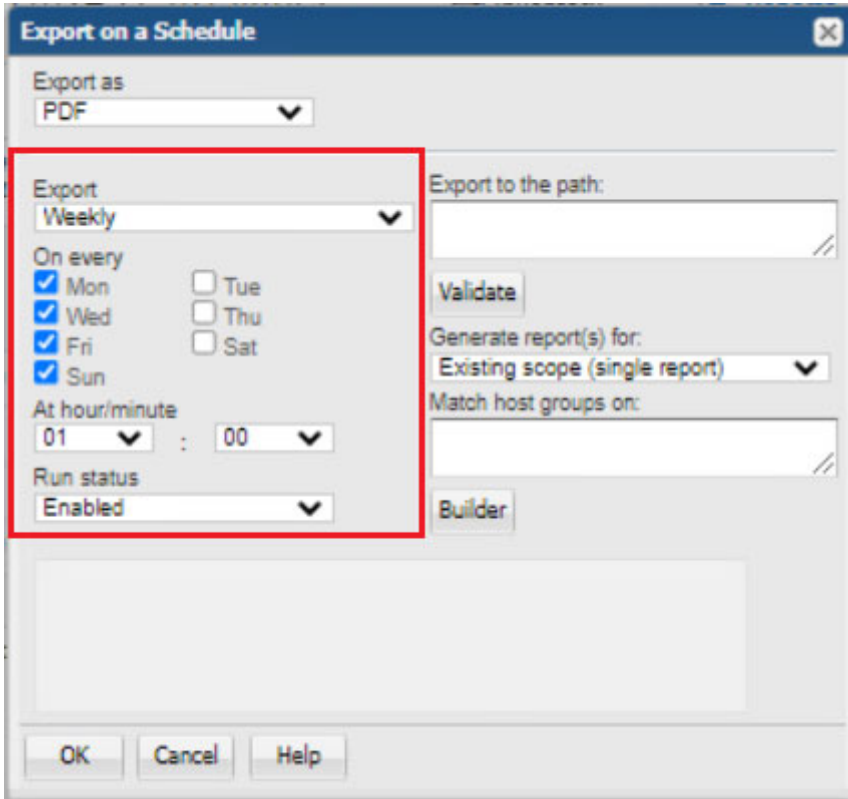# Exercise B: Scheduling Exported and Emailed Reports and Dashboards

In this exercise, you schedule exported and emailed reports and dashboards.

Scheduling Exported Reports and Dashboards

☐ 1. In the **APTARE IT Analytics Portal**, navigate to **Reports > My Reports > upBac_Storage Utilization Reports**. The available reports are displayed in the **Reports** page.

☐ 2. In the **Reports** page, double-click the **List All DD Systems** report to generate the report.

The contents of the **List All DD Systems** report are displayed in a new tab.

☐ 3. On the **List All DD Systems** tab that displays the content of the **List All DD Systems** report, click **Actions > Export**. The **Export Report** dialog box is displayed.

☐ 4. In the **Export Report** dialog box that is displayed, click **Schedule**.

> 📄 The schedule option is available only for custom reports.

☐ 5. In the **Export on a Schedule** dialog box that is displayed, select **PDF** in the **Export as** drop-down list.

☐ 6. Configure the export schedule as illustrated in the following figure.

☐ 7. In the **Export on a Schedule** dialog box, click **OK** to save the export schedule. You are returned to the **List All DD Systems** tab.

> 📄 Since no value was specified in the **Export to the path** field, the default export path will be used.

> The default export path on a Windows portal server is **C:\opt\aptare\export** and on a Linux portal server is **/opt/aptare/export**

☐ 8. Leave the **List All DD Systems** tab open and proceed to the next sub-exercise.

Scheduling Emailed Reports and Dashboards

☐ 9. On the **List All DD Systems** tab, click **Actions > Email**.

☐ 10. In the **Email Report** dialog box that is displayed, click **Schedule**. The **Email on a Schedule** dialog box is displayed.

☐ 11. In the **Email on a Schedule** dialog box, select **PDF** in the **Email as** drop-down list and enter ⊤ **administrator@example.com** in the **Email to** field.

☐ 12. Configure the email schedule as illustrated in the following figure.

☐ 13. In the **Email on a Schedule** dialog box, click **OK** to save the email schedule. You are returned to the **List All DD Systems** tab.

> 📄 As per defined schedule Email will be sent to the Email id mentioned in the **Email to** field.

☐ 14. Close the **List All DD Systems** tab.

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Exercise C: Viewing and Managing Scheduled Reports

In this exercise, you view and manage scheduled reports.

☐ 1. In the **APTARE IT Analytics Portal**, click **System Administrator > My Scheduled Reports** as illustrated in the following figure.
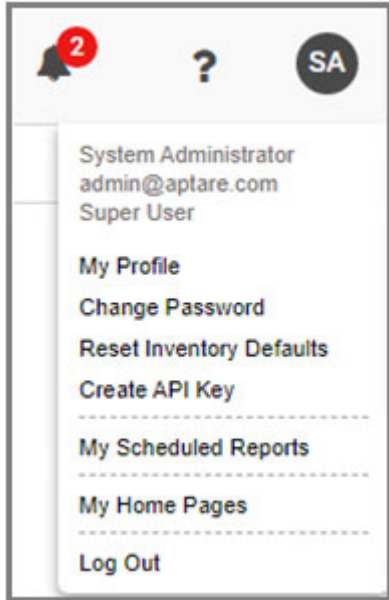
☐ 2. The **Scheduled Reports Administration** dialog box is displayed and lists the reports you have scheduled.

☐ 3. In the **Scheduled Reports Administration** dialog box, select the **List All DD Systems** report where the **Function** is set to **export** and click **Edit**. The **Export on a Schedule** dialog box is displayed.

☐ 4. In the **Export on a Schedule** dialog box, change the export schedule as illustrated in the following figure.

☐ 5. In the **Export on a Schedule** dialog box, click **OK** to save your changes. You are returned to the **Scheduled Reports Administration** dialog box.

☐ 6. In the **Scheduled Reports Administration** dialog box, select the **List All DD Systems** report where the **Function** is set to **email** and click **Delete**.

☐ 7. At the **Are you sure you wish to delete the selected row** browser prompt, click **OK** to delete the email schedule for the **List All DD Systems** report.

You are returned to the **Scheduled Reports Administration** dialog box. Note that the **List All DD Systems** report with **email** as the **Function** is no longer displayed in the **Scheduled Reports Administration** dialog box.

☐ 8. Within the **Scheduled Reports Administration** dialog box, click **OK** to return to the **List All DD Systems** report page.

☐ 9. Close the **List All DD Systems** tab.

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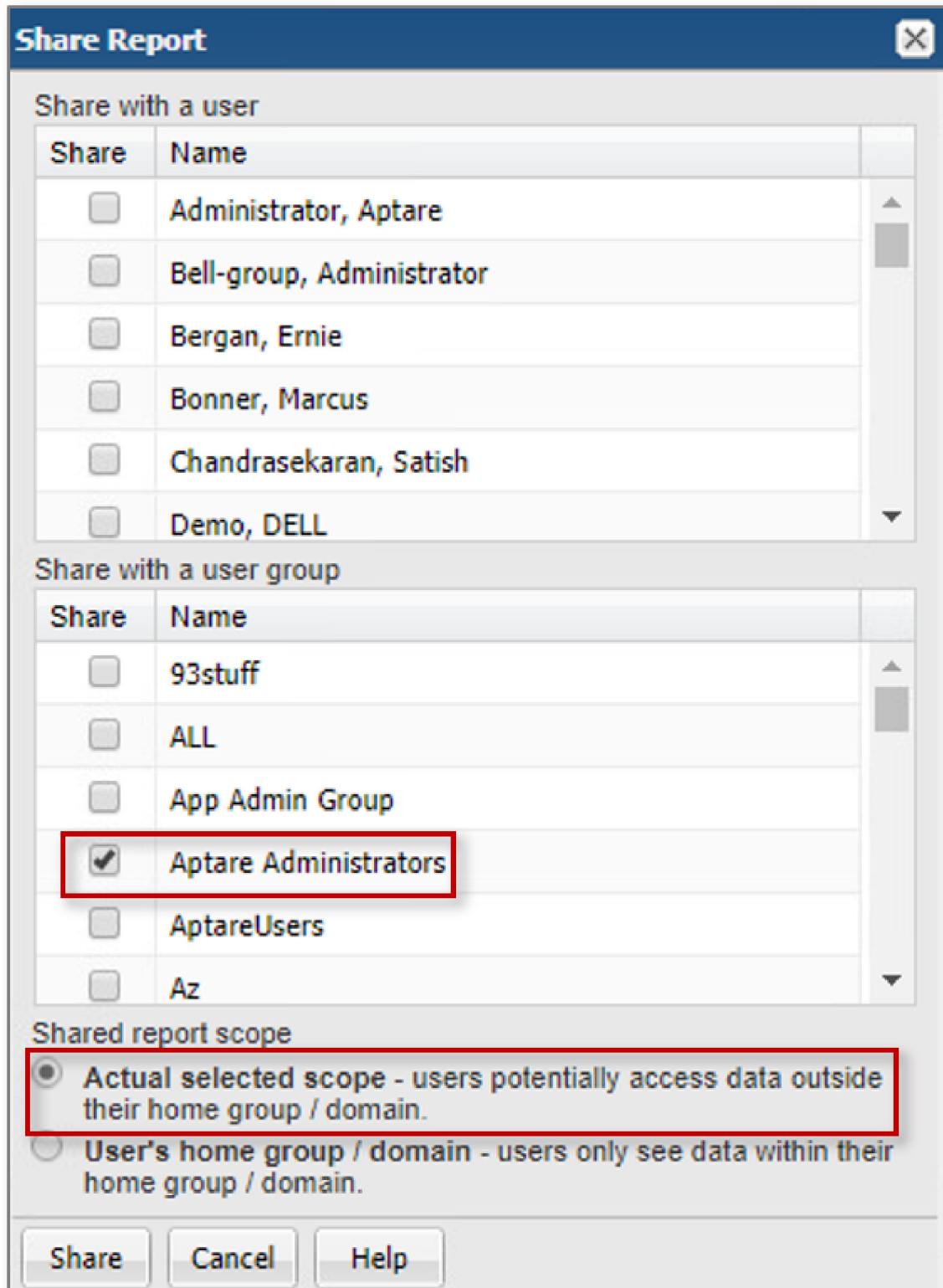
Exercise D: Sharing Reports, Dashboards and Folders

In this exercise, you share, add users or groups to shared reports, dashboards, and folders.

Sharing Reports and Dashboards

☐ 1. In the **APTARE IT Analytics Portal**, navigate to **Reports > My Reports > upBac_Storage Utilization Reports**. The available reports are displayed in the **Reports** page.

☐ 2. In the **Reports** page, select the **List All DD Systems** report and click **Share** located on the action bar.

☐ 3. In the **Share Report** dialog box that is displayed, select the **Aptare Administrators** user group as illustrated in the following figure.

☐   4. Verify that the scope is set to **Actual selected scope** as illustrated in the figure above.

📄   ○ **Actual selected scope** - When this option is selected, users may be able to access
         data that is not in their home group.
       ○ **User's home group/domain** - This option limits access to data within the user's
         home group and domain.
         For example, a Managed Services Provider may create a report and share it with
         multiple clients in different home groups. These users will only be able to access
         the data for their specific home group.

☐   5. In the **Share Report** dialog box, click **Share**.

You are returned to the **upBac_Storage Utilization Reports** page tha now lists the **Aptare Administrators** user group in the **Shared with** column for the **List All DD Systems** report.

Sharing Folders

☐   6. In the **APTARE IT Analytics Portal**, navigate to **Reports > My Reports > upBac_Administration Reports**. The available reports are displayed.

☐   7. In the **Reports** page, select **Share**. The **Share User Folder** dialog box is displayed.

☐   8. In the **Share User Folder** dialog box, select the **Administrator, Aptare** user as illustrated in the following figure.
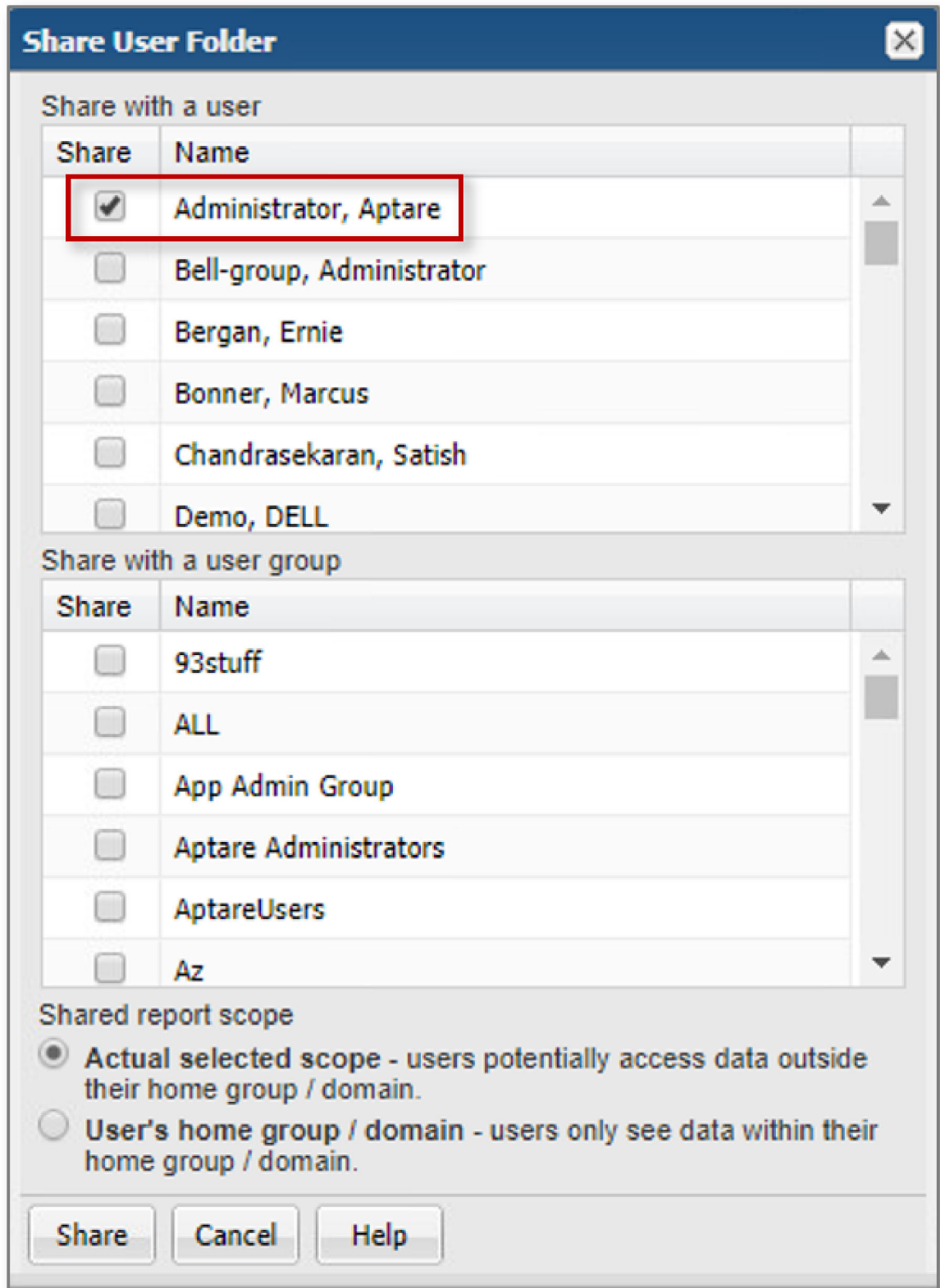
9. In the **Share User Folder** dialog box, click **Share** to share all reports in the
upBac_Administration Reports folder with the **aptare@example.com** (Administrator,Aptare)
user.

> 📄 You can view a list of all reports, dashboards, and folders that you have shared by
> accessing the **My Shared** folder.

Adding users or groups to Shared Reports, Dashboards or Folders

☐ 10. In the **APTARE IT Analytics Portal**, navigate to **Reports > My Reports > upBac_Storage Utilization Reports**. The available reports are displayed in the **Reports** page.

☐ 11. In the **Reports** page, select the **List All DD Systems** report and click **Share**. The **Share Report** dialog box is displayed.

> 📄 The **List All DD Systems** report is already shared with the **Aptare Administrators** user group.

> 📄 You cannot edit the list of who the report/dashboard/folder is shared with, only append to it.

☐ 12. In the **Share Report** dialog box, locate and select the **Veritas** user group.

☐ 13. In the **Share Report** dialog box, click **Share**.

You are returned to the **Reports** page, note that the **List All DD Systems** report is now shared with all the users in the **Aptare Administrators** and the **Veritas** user groups.

Removing Shared Folders

☐ 14. In the **APTARE IT Analytics Portal**, navigate to **Reports > My Shared** folder. The available reports/folders are displayed in the **Reports** page.

☐ 15. In the **Reports** page, select the **upBac_Administration Reports** folder and click **Stop Sharing** located on the action bar.

☐ 16. In the **Stop Sharing** dialog box that is displayed, click **Yes** to stop sharing the **upBac_Administration Reports** folder.

You are returned to the **My Shared folder page**, note that the **upBac_Administration Reports** report is no longer available in the **My Shared** folder.

> 📄 If a report or folder has been shared with multiple users, when you stop sharing, all users are removed. You cannot stop sharing with individual users.

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Exercise E: Setting up Alerts for Tabular Reports

In this exercise, you set up and manage alerts for tabular reports.

Configuring an Alert

☐   1. In the **APTARE IT Analytics Portal**, navigate to **Reports > My Reports > upSystem_System Administration Reports**. The available reports are displayed in the **Reports** page.

☐   2. In the **Reports** page, double-click the **db errors** report to run the report.

   The contents of the **db errors** report are displayed in a new tab.

☐   3. On the **db errors** tab that displays the content of the report, click **Actions > Alert**. The **Alerting** dialog box is displayed.

☐   4. In the **Alerting** dialog box, configure the alert as illustrated in the following figure.

☐   5. In the **Alerting** dialog box, click **OK** to save the alert. You are returned to the **db errors** tab.

☐   6. In the **APTARE IT Analytics Portal**, click **System Administrator > My Scheduled Reports**. The **Scheduled Reports Administration** dialog box is displayed.
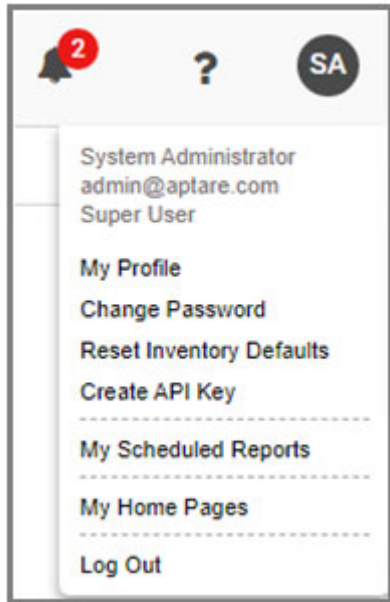
Note that the new alert for the **Database Error Summary** Template is listed in the **Scheduled Reports Administration** dialog box and is scheduled to execute every hour.

Deleting an Alert

☐   7. In the **Scheduled Reports Administration** dialog box, select the **Database Error Summary** Template and click **Delete**.

☐   8. At the **Are you sure you wish to delete the selected row** browser prompt, click **OK** to delete the alert.

       Note that the **Database Error Summary** Template is no longer visible in the **Scheduled Reports Administration** dialog box.

☐   9. In the **Scheduled Reports Administration** dialog box, click **OK**. You are returned to the **db errors** tab.

☐   10. Close the **db errors** tab.

☐   11. In the **APTARE IT Analytics Portal**, click **System Administrator > Log Out** to log out of the **APTARE IT Analytics Portal**.

☐   12. Close the **Google Chrome** Browser window and log out of the **console.example.com** system.

> 🗎   Use the report-based alerting feature to notify you when a tabular report has been populated with data. For example, save a Job Summary report for Failed Events and then configure an alert for this report.

End of Lab