MANAGEFUSION.

How to Create Reports in Notification Server 7.0

Description	Reporting functionality in Notification Server 7.0 is packed with exciting new features. This hands-on lab will review numerous examples of creating new reports, customizing existing reports, changing views, assigning permissions, scoping, and much more.

At the end of this lab, you should be able to	- Create reports - Clone and modify reports. - Add/modify views. - Add dropdown menus. - Save reports for multiple uses: HTML file, Snapshot and Webpart.

Notes	- A brief presentation will introduce this lab session and discuss key concepts. - Feel free to follow the lab using the instructions on the following pages. You can optionally perform this lab at your own pace. - Be sure to ask your instructor any questions you may have. - This lab was created using Notification Server 7.0 SP1 RC2 - Username: **administrator** - Password: **admin** - Thank you for coming to our lab session.

Exercise #1 – How to Create a Computer Report.

In Notification Server 7.0, there are four types of reports: Computer, User, SQL, and Resource reports. For this example, we are going to create a **Computer Report**.

1- Open the Notification Server 7.0 console by going to the **Start Menu > All Programs > Altiris > Altiris Console 7.0.**

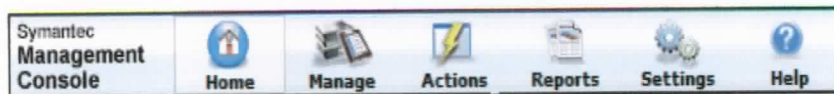2- From the console, click the **Reports icon** located on the top level menu bar.

Figure 1 – Menu Bar

3- Select **All Reports**.

4- On the left navigation pane, right click on the **Reports folder > Click New > Folder.**

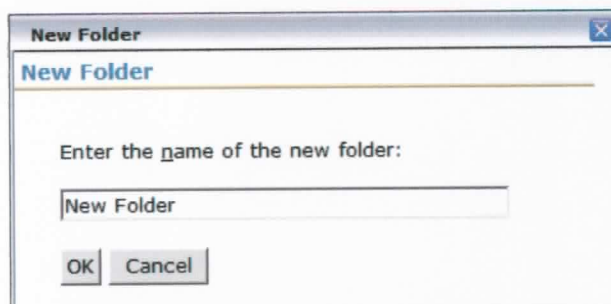5- When the **New Folder** window comes up, name your folder **My Test Reports** and click OK.

Figure 2 – New Folder Window

6- Select the newly created folder, right click on it, and select **New > Report > Computer Report**.

7- The **New Computer Report** wizard opens. This page has all the tools needed to create and edit the data that will be included in your reports.
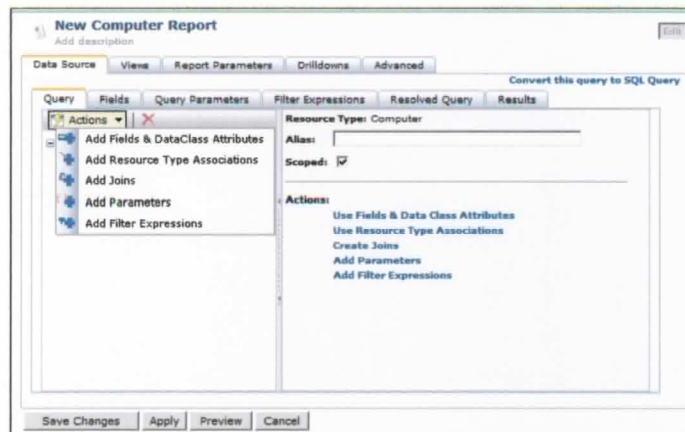
8- On the **New Computer Report** wizard, click on the top section where the name of the report is located (right above **Add description**).
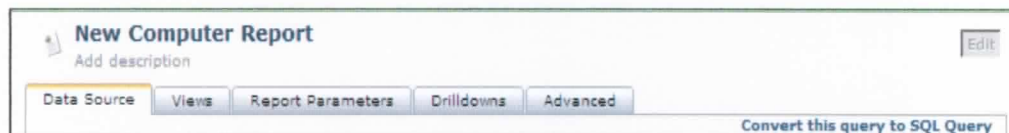
9- Rename the report to **Basic OS and IP Information** and hit **enter**.

10-   Click **Add Description** and give the report a meaningful description such as **Cool Report**. Hit **enter** when done.

11-   Click **Save Changes**.

12- At this time, there should be a new report under the **My Test Reports** folder called **Basic OS and IP Information**. **Click** on it to see what it looks like.
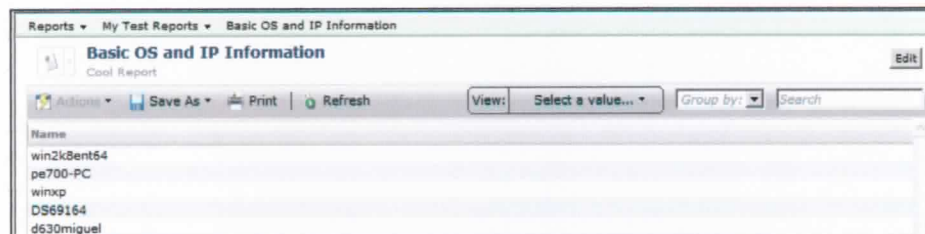
Now that a new report has been created, let's add a couple of more columns from the database.

13- On the left navigation pane, select the newly created report.

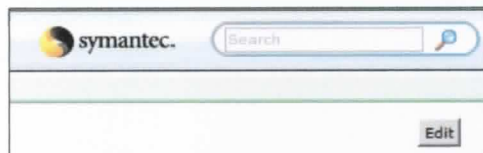14- Click on the **Edit** button located on the top right corner of the screen. (Scroll to the right if needed).

15- On the **Query tab** under **Actions**, click **Use Fields & DataClass Attributes.**

16-   On the **Add Fields & DataClass Attributes** window, click
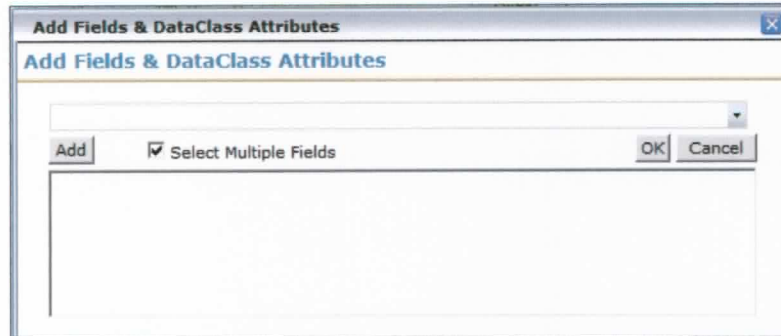
the **Select Multiple Fields** check box.

17-   Click the **dropdown menu** arrow, and scroll down to

select **[AeX AC Identification].[OS Name]**.

18-   Click **Add**.

19-   Repeat **steps 16 and 17** for the following fields

(columns):

   a. **[AeX AC Identification].[Domain]**

   b. **[AeX AC TCPIP].[MAC Address]**

   c. **[AeX AC TCPIP].[IP Address]**

   d. **[AeX AC TCPIP].[Default Gateway]**

20-   Click **OK** and **click Save Changes.**

Reports ▾   My Test Reports ▾   Basic OS and IP Information

Basic OS and IP Information
Cool Report

| Actions ▾ | Save As ▾ | Print | Refresh |

Name	MAC Address	IP Address	Default Gateway	Domain	OS Name
win2k8ent64	00-21-9B-65-C2-6B	192.168.15.14	192.168.15.1	WORKGROUP	Windows Server (R) 2008 Enterprise
win2k8ent64	00-50-56-C0-00-01	192.168.137.1	0.0.0.0	WORKGROUP	Windows Server (R) 2008 Enterprise
win2k8ent64	00-50-56-C0-00-08	192.168.139.1	0.0.0.0	WORKGROUP	Windows Server (R) 2008 Enterprise
pe700-PC				WORKGROUP	Windows 7 Ultimate
winxp	00-0C-29-AE-9B-49	192.168.15.39	192.168.15.1	WORKGROUP	Microsoft Windows XP
DS69164	00-0C-29-E2-B5-97	192.168.15.20	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
d630miguel	00-1C-23-1B-47-C5	192.168.15.47	192.168.15.1	WORKGROUP	Windows Vista (TM) Ultimate
NS7SP1RC2-2	00-0C-29-13-49-C6	192.168.15.37	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
VM-MP2K3				SOLERA	Microsoft Windows Server 2003
NS60				SOLERA	Microsoft Windows Server 2003
t7400miguel	00-1E-4F-D4-C0-CF	192.168.15.49	192.168.15.1	WORKGROUP	Windows (TM) Vista Ultimate
t7400miguel	00-50-56-C0-00-01	192.168.209.1	0.0.0.0	WORKGROUP	Windows (TM) Vista Ultimate
t7400miguel	00-50-56-C0-00-08	192.168.43.1	0.0.0.0	WORKGROUP	Windows (TM) Vista Ultimate
t7400miguel	7A-79-05-51-AF-89	5.81.175.137	5.0.0.1	WORKGROUP	Windows (TM) Vista Ultimate
NS7SP1RC2	00-0C-29-1A-0A-21	192.168.15.35	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
family-whs	00-11-09-8E-4A-B5	192.168.15.11	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
VM2K3-2				SOLERA	Microsoft Windows Server 2003

Figure 8 - Report window

Note: If your report does not fit without scrolling, close the
left pane by clicking on the center of the pane divider.

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Exercise #2 – How to add a dropdown menu.

Note: **This exercise covers Report Parameters, Query Parameters, and Filter Expressions.**

When creating reports, dropdown menus add a way to filter reports by a specific type of information. For example; in a report where the result set is a group of workstations, servers and laptops, a dropdown menu can be used to filter the report to only show the workstation type machines.

Let's try to add a dropdown menu to the report created in exercise #1.

1- Open the Notification Server 7.0 web console.

2- Click the **Reports Icon** located in the top Menu Bar.

3- Select **All Reports**

4- On the left pane, open **My Test Reports** folder and select **Basic OS and IP Information**.

5- On the right pane, click the **Edit** button.

   Note: **If you need to scroll to the right to see the Edit button, close the left pane by clicking in the middle of the pane divider.**

6- On the report wizard, select the **Query Parameters** tab.
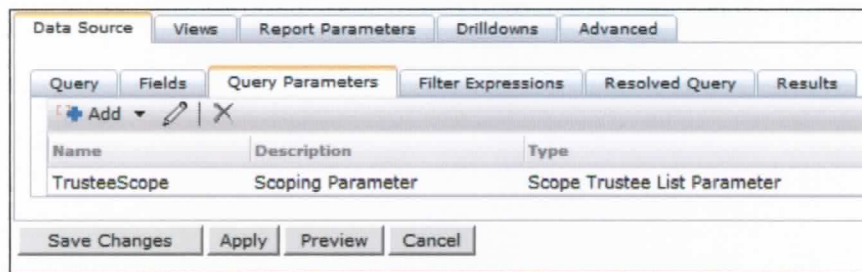
Figure 9 - Query Parameters Tab

7- Select the **Add** button > **New Parameter...**

8- In the **Editing Parameter** window, fill up the following

information:

    a. Name: **OSName**

    b. Description: **OS Name**

    c. Check **Parameter Required** checkbox.

    d. Type: Select **Basic String Parameter**.

    e. Display/Eval Order dropdown: **10**
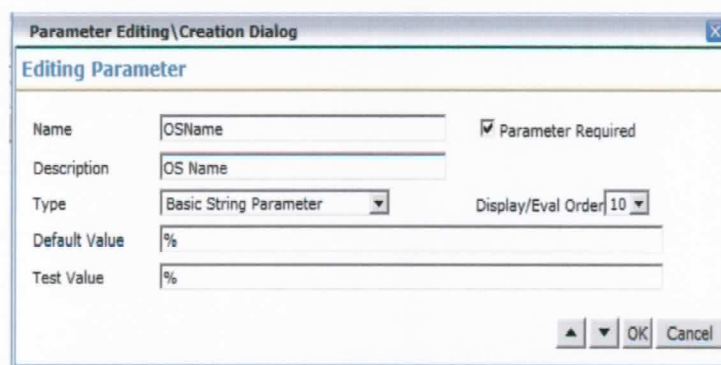
    f. Default Value: **%**

    g. Test Value: **%**

Figure 10 - Editing Parameter window

    h. Click **OK** to close the **Editing Parameter** window.

    i. Click **Apply** to save the changes.

Note: **A query parameter is a variable set in SQL code that will be used by the filter expression.**

Let's add a filter.

9- Click on the **Filter Expression** tab.
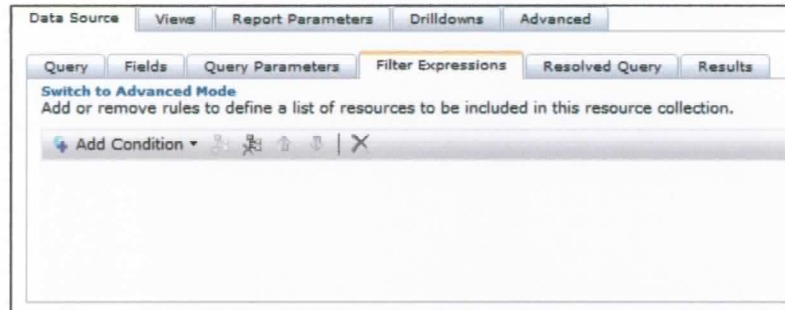
10- Click **Add Condition** and select **AND**.

11- In the **If:** text field, type **identification**.

12- This will bring down a menu with different choices.

Select **[AeX AC Identification].[OS Name]**
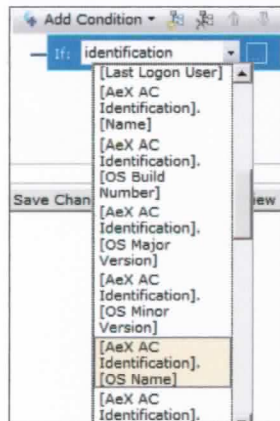
13- On the second dropdown menu, click the arrow and select **LIKE**.

14- On the third text field, click the **field selector** icon

Figure 13- Field Selector icon

15- On the new **Select Field** window, close the **Data Fields** folder and select **OSName** under **Parameters**.
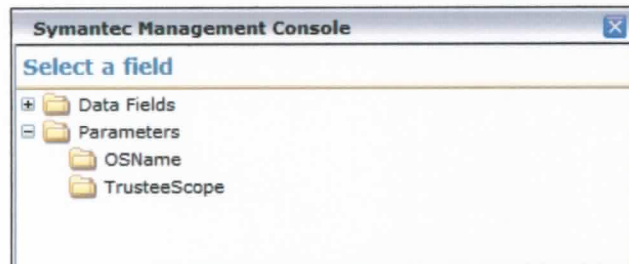
Figure 14 - Select a Field window

16- Click the **Select** button.

17- Click **Apply** to save these changes.
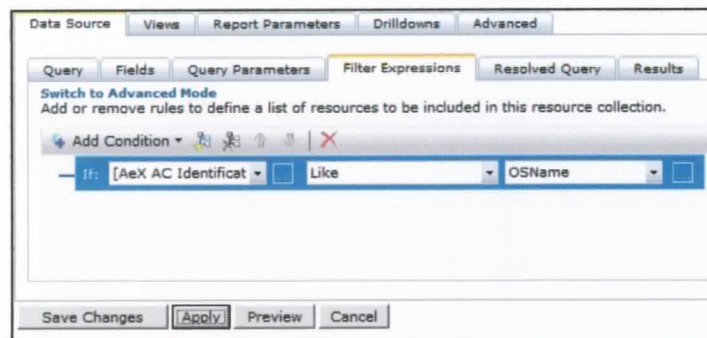
Figure 15 - Filter Expressions tab after making all the changes

Note: **A Filter Expression is the SQL WHERE clause. This WHERE clause will use the variable created by the Query Parameter which is populated by the Report Parameter. This is what filters the report result set.**

18- Click the **Report Parameters** tab.

19- Click **Add** and select **OSName**.

20- Select **OSName** and click the **Edit** icon.

21- In the **Editing Parameter** window, change the following parameters and fields:

    a. Under **Value Provider** section:

        i. Name field: Arrow down and select **Dropdown List Value Edit Control**.

        ii. Label Text: **Select Operating System**.

    b. Under **Manually Add/Edit Dropdown Values** section:

       (Click the down arrow icon if the section is closed)

        i. Display field: **ALL**

        ii. Value field: **%**

        iii. Click **Add**.

    c. Under the **Add Dropdown Values From A Report** section:

       (Click the down arrow icon if the section is closed)

        i. Click **Select Value** link.

        ii. In the search text field, type **OS Types**. This will populate the grid below.

        iii. **Select Chart (Pie) – OS Types** and click the **OK** button

        iv. In the **Report Field to Display** field, click the dropdown menu and select **OS Name**

v. In the **Report Field to Use as Value** field, click the dropdown menu and select **OS Name**.

vi. Uncheck the **Include "Select a Value" Item** checkbox.

vii. Click **OK**.

Figure 16 - Editing Parameter window

22- Click the **Apply** button in the report wizard to save these changes.

23- Click **Save Changes**.

Congratulations, the report has a dropdown menu.

Note: In this exercise a Report Parameter is the actual dropdown menu. This report parameter take the user selected option and populates the Query Expression which in turns validates the Filter Expression.

Exercise #3 - How to Change a Report View.

By default, most of Notification Server reports are displayed in Grid mode. This exercise covers changing a report view from Grid to Chart. Also, this exercise covers cloning and moving reports.

1- From the **All Report** page, open the **Discover and Inventory** folder under the **Reports** folder.

2- Open **Inventory > Cross-platform > Operating System** folders.

3- Select **Count of Computers by Operating System** report.

4- Right click on the report and select **Clone**.

5- In the **Clone Item** window, rename the report (or leave the default name) and click **OK**.
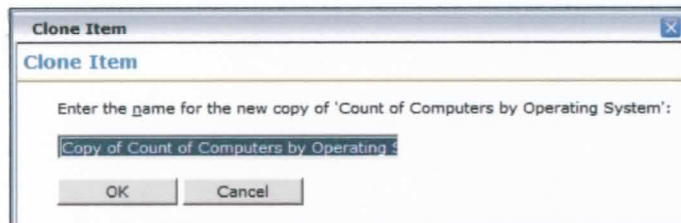
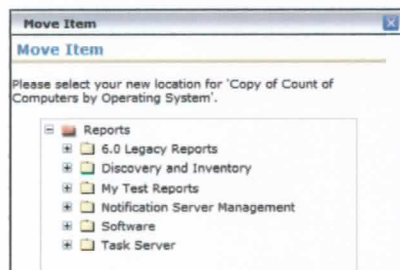6- **Select and right click** the cloned report.

7- Select **Move** from the menu.

8- In the **Move Item** window, select the **My Test Reports** folder.

9- Click **OK.**

10-   From the cloned report page, click the **Edit** button.

11-   From the report wizard page, click the **Views** tab.

12-   Click the **Remove** button to remove the default view.

13-   Click the **Add** button to add a new view.

14-   In the **Type:** dropdown menu, arrow down and select **Chart.**

15-   In the **Chart Type** dropdown menu, arrow down and select **Pie.**

16-   Under the **Title tab** section, type a new title for this chart report. (**Count of Computers**).

17-   Click the **Apply** button to save these changes.

Figure 20 - Title Tab

18-   Click the **X Axis** tab.

19-   In the **Title** text field, type **Operating System**.

20-   Under the **Attributes** section, check the **Visible**

checkbox.

Figure 21 - X Axis Tab

21-   Click **Apply** to save these changes.

22-   Click the **Y Axis** tab.

23-   In the **Title:** text field, type **# of Computers**.

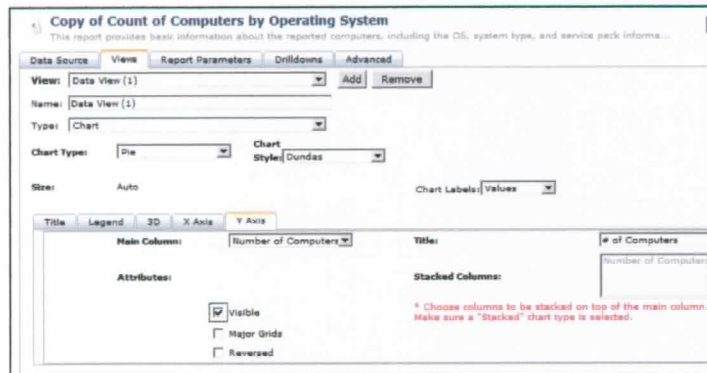24-   Under the **Attributes**: section, select the **Visible**

checkbox.

25-   Click **Apply** to save these changes.

26-   Click **Save Changes** to view the report.

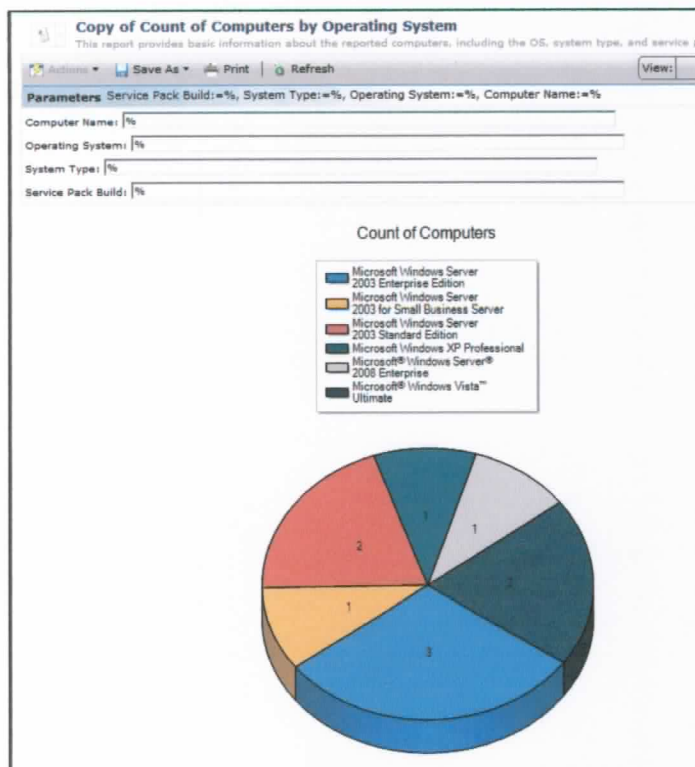**Congratulation, your new report has been changed to a Pie Chart.**

Exercise #4 - How to Save a Report.

There are six ways to save reports; **webparts, snapshots, spreadsheets, HTML and XML files, and static filters.** This exercise covers saving to snapshots and HTML files.

Snapshots are essential when data has to be analyzed and compared frequently. As the data changes, snapshots are created for comparison purposes. If you require trending, set up snapshots to occur on an interval by using the task server **Run Report task.**

Saving a report as a HTML file, have many values. For example, FrankAdmin needs management to see the latest numbers on applied software patches. Most of the audience that needs to see this data does not have access to the Notification Server console. FrankAdmin saves the report as a HTML file and attaches it to an email message.

Let's try to save a report.

1. On the report page in the left side pane, open the **Reports** folder > open **My Test Reports.**
2. Select the report created in exercise #1 (**Basic OS and IP Information**).

3. In the top navigation menu, right under the report name, click **Save As**.
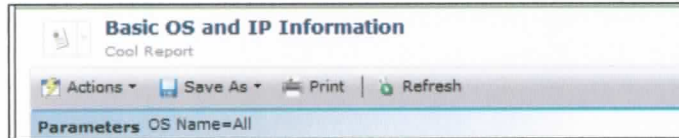
4. Select **Snapshot**.

5. A **snapshot** of the current result set has been created in the format of **<snapshot date time>**.

6. All snapshots are accessible from the **View** dropdown menu.
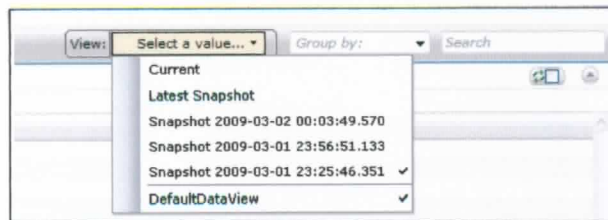
Let's save the same report as a HTML file.

1. With the **Basic OS and IP Information** report selected, click **Save As** on the **navigation menu**.

2. Select **HTML File**.

3. When the **Save as HTML** window opens up, check the **Include Parameters** check box and click **Save**…

Save as HTML
Parameters
☑ Include parameters
Data range
⦿ Save All
○ Save 0 selected rows
[Save…] [Cancel]

Figure 26 - Save as HTML

4. When the **Save Report** window opens up, save the report to the **Desktop**.

5. Minimize the browser and double click the html file.

Basic OS and IP Information

Monday, March 02, 2009

Report parameters

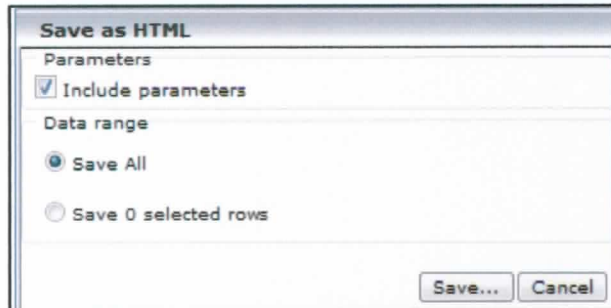|	
TrusteeScope :	NULL
_culture :	NULL
_neutralculture :	NULL
OSName :	%
_ParameterAutoRefresh :	False

Name	MAC Address	IP Address	Default Gateway	Domain	OS Name
win2k8ent64	00-21-9B-65-C2-6B	192.168.15.14	192.168.15.1	WORKGROUP	Windows Server (R) 2008 Enterprise
win2k8ent64	00-50-56-C0-00-01	192.168.137.1	0.0.0.0	WORKGROUP	Windows Server (R) 2008 Enterprise
win2k8ent64	00-50-56-C0-00-08	192.168.139.1	0.0.0.0	WORKGROUP	Windows Server (R) 2008 Enterprise
winxp	00-0C-29-AE-9B-49	192.168.15.39	192.168.15.1	WORKGROUP	Microsoft Windows XP
DS69164	00-0C-29-E2-B5-97	192.168.15.20	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
d630miguel	00-1C-23-1B-47-C5	192.168.15.47	192.168.15.1	WORKGROUP	Windows Vista (TM) Ultimate
NS7SP1RC2-2	00-0C-29-13-49-C6	192.168.15.37	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
VM-MP2K3				SOLERA	Microsoft Windows Server 2003
NS60				SOLERA	Microsoft Windows Server 2003
t7400miguel	00-1E-4F-D4-C0-CF	192.168.15.49	192.168.15.1	WORKGROUP	Windows (TM) Vista Ultimate
t7400miguel	00-50-56-C0-00-01	192.168.209.1	0.0.0.0	WORKGROUP	Windows (TM) Vista Ultimate
t7400miguel	00-50-56-C0-00-08	192.168.43.1	0.0.0.0	WORKGROUP	Windows (TM) Vista Ultimate
t7400miguel	7A-79-05-51-AF-89	5.81.175.137	5.0.0.1	WORKGROUP	Windows (TM) Vista Ultimate
NS7SP1RC2	00-0C-29-1A-0A-21	192.168.15.35	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
family-whs	00-11-09-8E-4A-B5	192.168.15.11	192.168.15.1	WORKGROUP	Microsoft Windows Server 2003
VM2K3-2				SOLERA	Microsoft Windows Server 2003

*There were 16
records in this report*

Figure 27 - Save As HTML File Report

Exercise #5 - How to Create a Report Webpart.

Report webparts are an exciting new feature in Notification Server 7.0. When a report webpart is created, the webpart can be use in pages like **My Portal** for easy and convenient access.

1. In the **All Reports** page, open the **Reports** folder.

2. Open **My Test Reports** and select **Basic OS and IP Information** report.

3. click **Save As** and select **Webpart**.

4. In the **Save as Webpart** window, select **Large** from the **Choose a Webpart Size**: dropdown menu.
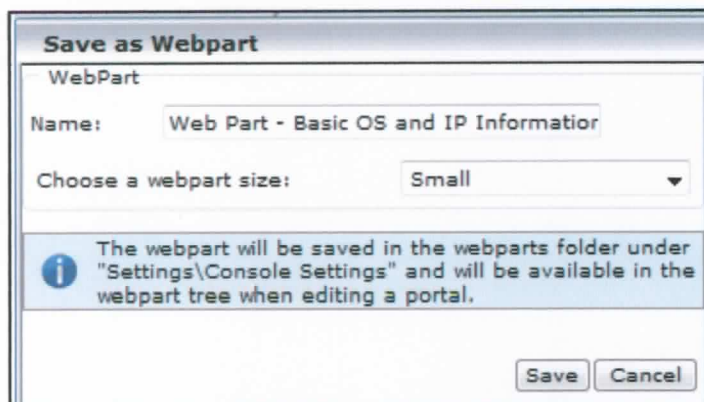

Figure 28 - Save As Webpart Window.

5. Click **Save**.

6. On the top **Menu Bar**, Click the **Home** icon and select **My Portal**.

7. In the **My Portal** page, click the **Edit** button located on the top right side of the console.

8. Delete the **Getting Started** webpart by clicking on the **X**.

9. From the **Web Parts** left menu, select **Web Part - Basic OS and IP Information**.

10.   Select the **Add** button.

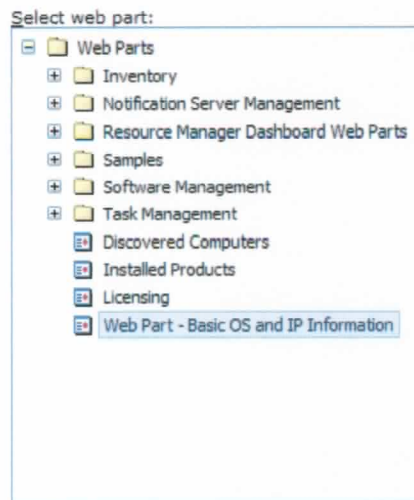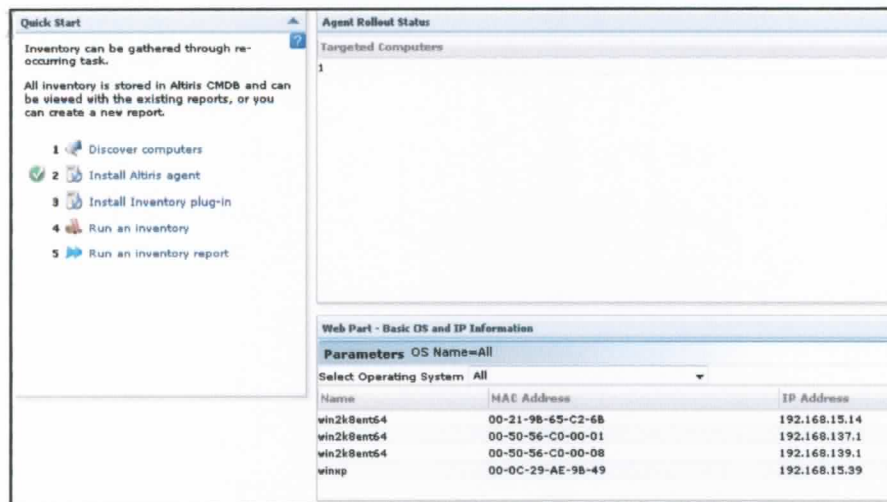11.   Click the Apply button to save changes.

12.   Refresh the page to see the **webpart**.

Exercise #6 – New Out of the Box Reports in Notification Server 7.0.

For this ManageFusion lab, we have compiled a list of new and exciting reports included out of the box in Notification Server 7.0. This is **not** an exercise.

1- Click on the **Reports Icon** in the top **Menu Bar**.

2- Select **All Report**.

3- From the Report Page, go to the left pane and open the

   Reports > **Notification Server Management** > **Server** folders.

4- From this level, review the following reports:

   a. **Resource not in a Group or View**

   b. **Security Privilege Report**

   c. **Site Report**

5- From the **Server** folder, open the Hierarchy folder.

6- Review the following reports:

   a. **Hierarchy Server Replication History**

   b. **Objects Marked for Replication**

7- From the **Server** folder, open the **Replication** folder.

8- Review the following reports:

   a. **Current Replication Activity**

   b. **Server Replication History**

9- Back from the **Server** folder, open the b Reports folder.

10-   Review all the reports in this folder.

Thanks you very much for coming to this lab. I hope you have enjoyed the exercises as much as I enjoyed creating them.

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